

EXECUTIVE SUMMARY

Meeting Date: November 14, 2011 (Briefing)

Agenda Item: Economic Development Area Strategy Study

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Action Necessary: No

SUMMARY

Staff will brief the Planning Commission on the findings of the Economic Development Area Strategy Study conducted to identify areas most desirable, suitable and with the capacity to attract 'targeted' industries and businesses associated with strong economic growth. The study includes a countywide locational assessment and a recommended strategic plan for economic growth.

BACKGROUND

Taking a countywide approach, the Planning Commission staff initiated a number of inter-related studies intended to develop a competitive economic development strategy. This study is intended to complement various public and private economic development efforts, with the common goal of aggressive economic growth and prosperity. This study identifies and delineates potential Economic Development Areas (EDAs) based on the needs and characteristics of targeted industries and businesses. These targeted industries and businesses were previously identified by the County, and other entities that are pursuing economic initiatives.

The EDAs were identified and defined based on an evaluation of factors influencing suitability, attractiveness, and readiness for investment. Nine (9) areas were identified and mapped. Following this briefing, this project and other related projects will be presented to the Hillsborough County Board of County Commissioners, Tampa City Council, the Plant City City Commission, the Temple Terrace City Council, and other interested groups.

RECOMMENDATION

This item is for your information only. No action is required.

Attachments: Economic Development Area Strategy Study

Date Prepared: October 25, 2011

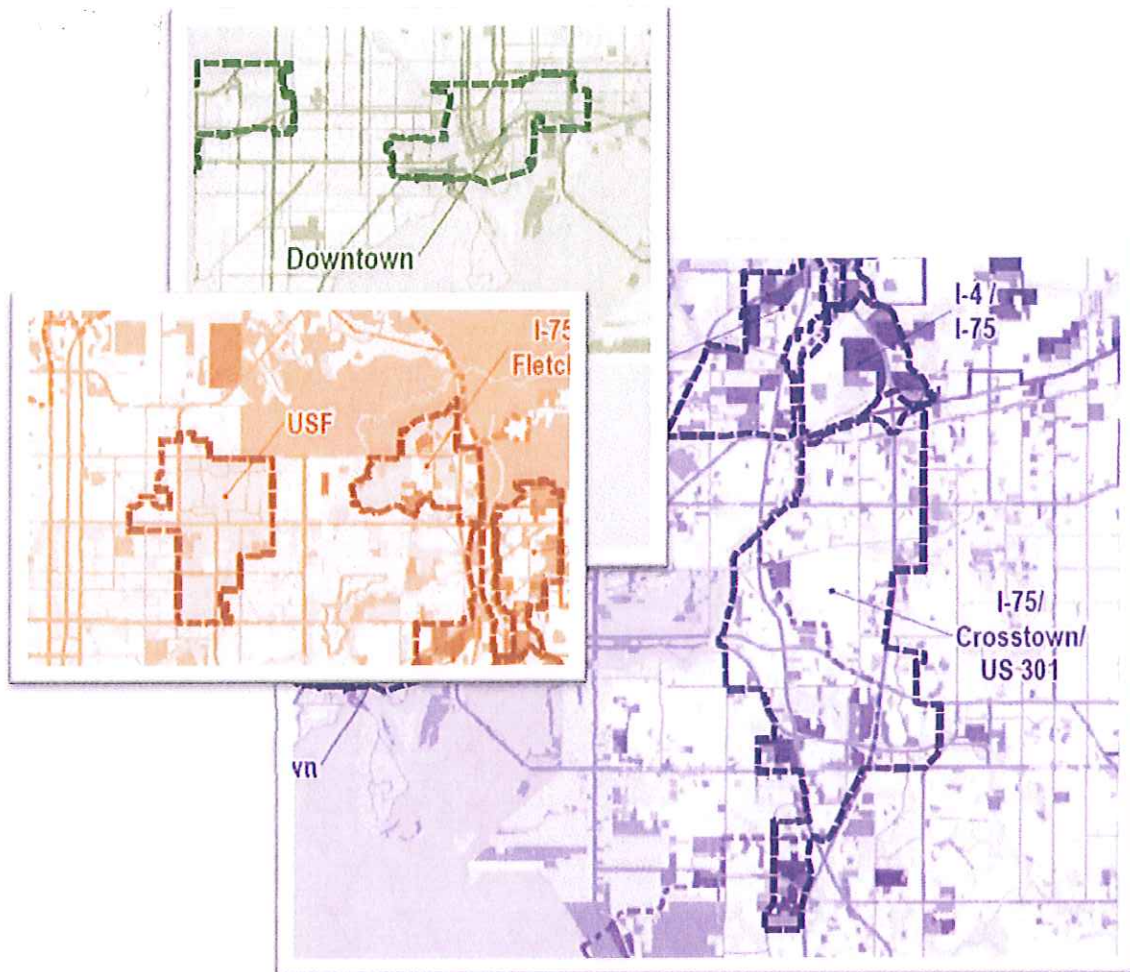




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Economic Development Area Analysis & Mapping

Supporting Target Industries Investment
in Hillsborough County





1. INTRODUCTION

This report provides a review of recently completed studies and analyses designed to identify target industries to support the region's economic development; a summary of methods used to identify Economic Development Areas (EDAs) within Hillsborough County with potential to support targeted industry investment; and maps and text describing the EDAs, defining their suitability for investment, and identifying policies and strategies to improve their competitive position.

2. TARGET INDUSTRY DEFINITION

In recent years, regional leaders have focused resources on identifying a core list of businesses and industries with the potential to meet local economic development goals and bring quality employment opportunities to Hillsborough County. Several recently completed economic studies, sponsored by the Tampa Hillsborough County Economic Development Council, the Tampa Bay Partnership, and other organizations, provide the basis for identifying targeted industries. A brief description of these studies follows.

Locational Assessment and Recommended Strategic Plan for Economic Growth

A detailed assessment of the economic development climate and industry base in Hillsborough County was prepared for the Tampa Hillsborough Economic Development Corporation (EDC). The assessment provides a comparative analysis of how Tampa-Hillsborough County performs relative to other locations that compete for similar types of investments, such as the Charlotte and Indianapolis metro areas; a synopsis of the region's strengths, weaknesses, opportunities, and threats; a review of barriers that may inhibit development efforts; and a summary of positive attributes that could may be leveraged to attract investment.

The recommended strategic plan resulted in the identification of five target industries: Cross-Business Functions; Biotechnology & Medical Devices; Defense & Security; Financial Services; and Medicine and Medical Management. These industries were recognized as those best suited to promote the development, attraction, and retention of



quality jobs for the County's residents. Strategic recommendations for best positioning Tampa-Hillsborough County, its constituent communities and citizens for sustainable economic growth are also provided.

*A Regional Business Plan for Economic Development in the Tampa Bay Region,
Executive Summary*

This report was prepared for the Tampa Bay Regional Planning Council and the Tampa Bay Partnership in May 2011. Foundational, workforce, and target sector initiatives were identified in the report. The report concluded that the following sectors should be the focus of business recruitment efforts:

- **Applied Medicine & Human Performance.** Efforts should be made to ensure that the Tampa Bay region becomes a recognized center of excellence for specific areas of biomedical research that leverage the region's unique assets, particularly with respect to senior wellness and human performance. High-quality clinical trials and destination medicine are envisioned as part of this targeted effort.
- **High-Tech Electronics & Instruments.** The goal is for the Tampa Bay region to become a national research and commercialization leader for technologies in marine, medical and defense/aerospace electronics and instruments niches.
- **Business, Financial & Data Services.** There are four key niches in the Tampa Bay region that are included in this industry: business process outsourcing and shared services; financial transactions processing; data centers, disaster recovery, and data management; and health IT and bioinformatics. Promoting the region as a premier location for shared services organizations and financial management/transactions processing is one goal. Supporting and promoting business process outsourcing companies in the region is also an element of this targeted strategy.
- **Marine & Environmental Activities.** The goal of this target sector is to develop commercial and business applications that build upon existing assets and research capabilities in this area. Opportunities related to inland aquaculture, algae-based and other biofuels, energy conservation and efficiency will be pursued.



Economic Stimulus Task Force Report

A twelve person Task Force consisting of economic development experts and representatives of targeted industries was formed to make recommendations to stimulate business activity, job creation, and government revenues in Hillsborough County. The task force determined that critical to the success of the economic strategy are the following key elements:


- Genuine strategic partnerships at the local, regional, and state levels.
- Provide for immediate job impacts, retain existing jobs and expand existing businesses as a key priority.
- Enable sustainable and diverse job growth over the long term with focus and commitment on targeted industries.
- Provide for clarity of mission and an actionable framework for our economic development agenda.
- Embrace the New Economy in our jobs creation strategy.

Specific recommendations providing the framework to help Hillsborough County return to job creation and provide for long term, high quality, and sustainable growth were also provided in the report.

I-4 Economic Corridor Study

The study was prepared by the Hillsborough County Planning Commission with a goal of evaluating the potential for locating target industries along the entire length of I-4 within the County. A thorough assessment of the conditions along the Corridor was undertaken, and it included a review of existing and proposed Community Plans, environmental features, existing land use and zoning, parcel sizes, utility needs, transportation conditions, and other factors. It describes the region's assets and how they relate to economic growth in the region. It also provides economic impact estimates by industry to help quantify the importance of businesses in the region.

The study concludes that the economic development of the I-4 Corridor provides opportunities for Hillsborough County to attract specific industrial sectors to



employment centers at appropriate locations. It also indicates that certain land use strategies must be implemented as a catalyst for new development to ensure that this development takes place.

Battelle/BIO State Bioscience Initiatives 2010

The Battelle/BIO State Bioscience Initiatives report provides a detailed assessment of bioscience businesses in the Tampa Bay region. The report offers a review of the range of existing bioscience businesses in the region, a report on the scale of businesses based on facility sizes, and an analysis of location by business type.

The studies described above highlight the region's comparative economic development advantages. Key among these is the presence of a skilled workforce and the quality and competitiveness of prominent institutional anchors like the University of South Florida. In addition, air travel access and other transportation strengths bolster the region's attractiveness to targeted industry investment.

3. HILLSBOROUGH COUNTY TARGETED INDUSTRIES

Targeted Industries

The *Locational Assessment* described above describes five key industries to target for economic development. These industries were also highlighted as preferred targets in other studies as well. For example, the Regional Business Plan prepared by the Tampa Bay Regional Planning Council and the Tampa Bay Partnership identified many of these same targets. While the Tampa Hillsborough EDC lists more than five industries as suitable targets on their website, their focus is on these key industries:

- Cross-Business Functions
- Biotechnology & Medical Devices
- Defense & Security
- Financial Services
- Medicine and Medical Management



Facility Needs

Guidance is available to help determine the facility requirements of specific industries, including those targeted by Hillsborough County. The table below provides general estimates of the space requirements by building type. As shown in the table, light manufacturing would require 500 square feet of space per employee. The requirements for heavy manufacturing are four times that space. In contrast, office space would provide 300 square feet of space per employee.

Building Type	Square Footage per Employee
Light Manufacturing	500
Heavy Manufacturing	2,000
Warehouse Distribution	2,000
Flex	500
Data Switch Center	2,000
Office	300
Retail (in-line or pad)	500
Vertical Mixed Use	500

Source: Land/Building Needs Analysis For Targeted Industries, URS in Association with Development Research Partners, Inc., October 2009.

The *I-4 Economic Corridor Study* estimated that on average 20,000 square feet of development would provide space for 100 employees. This translates to 200 square feet per employee.¹ More specific guidance is available for some industries that are being targeted by Hillsborough County. For example, companies in bioscience require larger buildings and more space per employee, 1,000 square feet. In contrast, companies specializing in software development may require no more than 300 square feet per employee.²

General facility requirements for businesses in the five targeted industries are provided below.

¹ *I-4 Economic Corridor Study*, Prepared by the Hillsborough County Planning Commission.

² Land/Building Needs Analysis For Targeted Industries, URS in Association with Development Research Partners, Inc., October 2009.

Cross-Business Functions

Cross-business functions include: shared services; business analytics; information technology; and headquarters enabling functions. The facility requirements for these buildings will vary depending on the technological equipment required and the number of employees.

Using the more general information provided above, as well as the office-specific recommendations provided in the table below, the expected square footage required for different elements of a standard business can be calculated.

Office Area	Square Footage Requirements ³	
	Small Space	Large Space
Reception	150 SF; 2 people	400 SF; 5 people
Conference Room	225 SF; 6 people	450 SF; 14 people
Kitchen Break Area	120 SF; 6 people	300 SF; 12 people
Computer Server Room	24 SF	120 SF
File/Storage Area	120 SF	300 SF
Work Room	120 SF	300 SF
Private Offices	120 SF	150 SF
CEO/Director Office	225 SF	300 SF
Cubicle Space	36 SF	64 SF

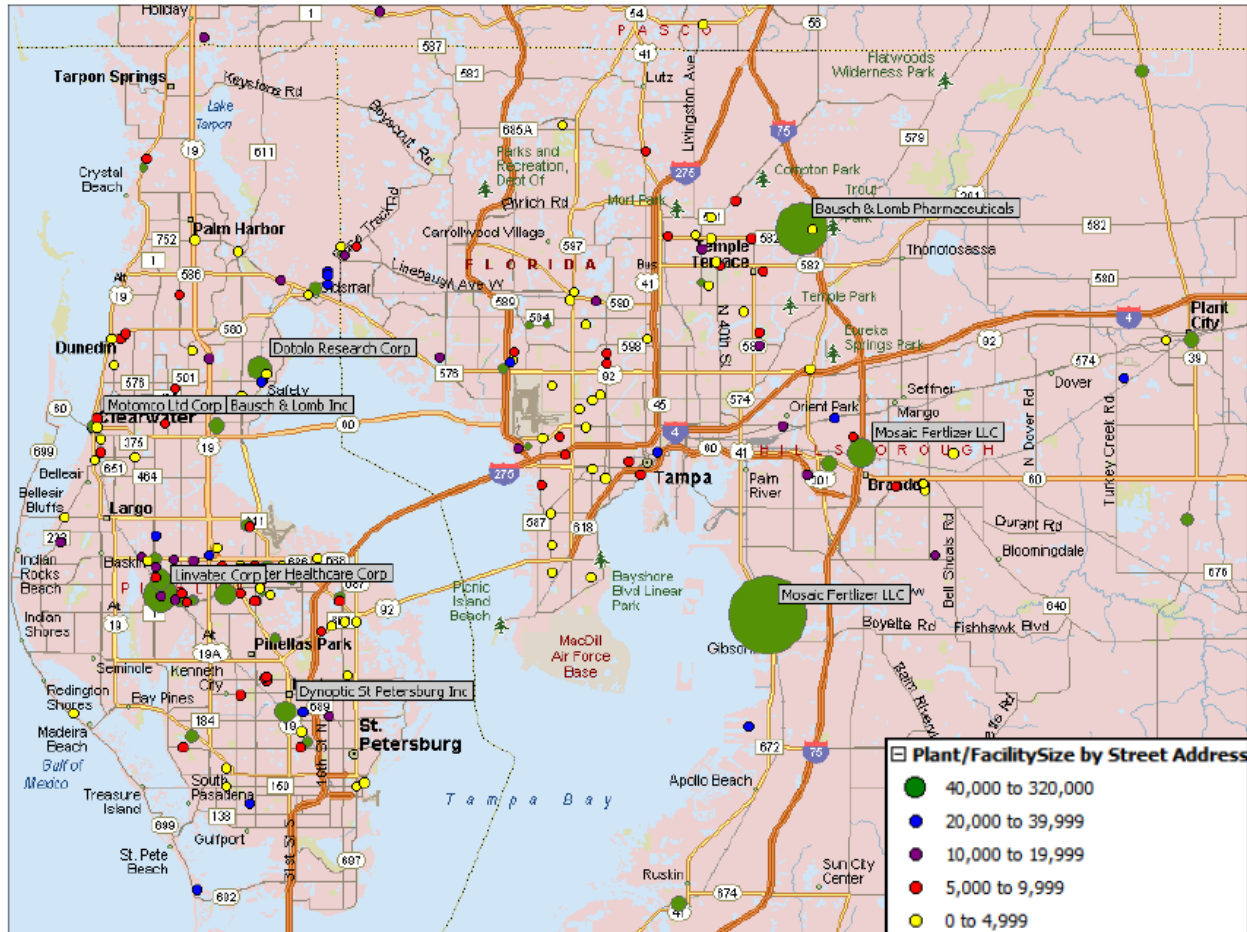
Source: Corporate Realty Advisors

A circulation factor is also generally applied to calculate the space required to circulate between rooms. It ranges between 35 and 40 percent of the total square footage required. A common area factor of approximately 15 percent may also be estimated to account for space that is shared by all tenants in a building (e.g., restrooms, shared hallways, lobby).

³ Corporate Realty Advisors,
http://www.guidancebrokers.com/Tool1/office_space_square_footage_calculator.php

Biotechnology and Medical Devices

Nearly four million square feet of space in the Tampa Bay region is currently occupied by 250 bioscience companies. This equates to an average of 16,000 square feet per facility, but many of these companies are relatively small in size. The map below shows where these companies are located in the region and the size of their facility.

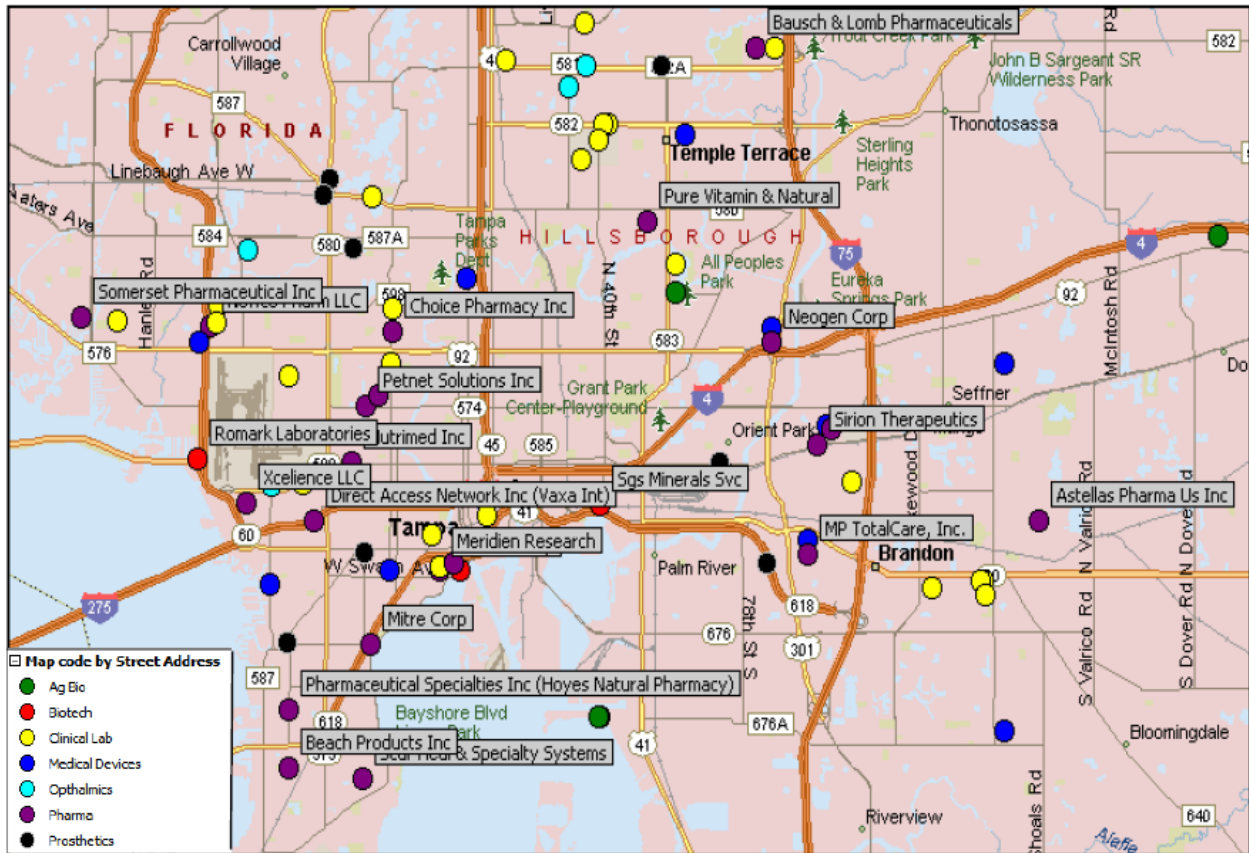


Source: Battelle/BIO State Bioscience Initiatives 2010

While the presence of biotech and device manufacturers is relatively thin in the County (as shown in the map below), there is a strong concentration of institutional drivers located near the USF campus.⁴ Studies indicate that there may be opportunities for expansion of this sector based on the activities of the Moffitt Cancer Center, USF, and

⁴ Battelle/BIO State Bioscience Initiatives 2010.

the USF College of Medicine. Targeted businesses in this industry include: biotechnology and informatics; and medical devices.



Source: Battelle/BIO State Bioscience Initiatives 2010

Businesses in this sector tend to require extensive mechanical and electrical space, thus increasing the gross square footage (GSF) over conventional office building requirements. Based on facility studies, it takes 0.8 square feet of non-assignable space for every square foot of assignable space for a biotech building. Parking demand, however, is less than required for a typical office use—parking demand for laboratory buildings ranges from one space for every 600 square feet to as low as one space for every 800 square feet.⁵

⁵ University of Colorado at Boulder, Department of Facilities Management, Office of Facilities Planning, *Feasibility Study for the Biotechnology Building*, November 9, 2005.



Among all U.S. metropolitan areas, the Tampa-St. Petersburg region ranks 13th in medical device employment in 2008, and medical device companies in the Tampa Bay region employ more than 6,200 people.⁶ Although companies in this industry tend to cluster geographically and occupy larger, specialized manufacturing facilities, medical device manufacturers in the Tampa Bay area are widely dispersed and many occupy relatively small space and employ 25 or fewer people.

As manufacturing and research are important functions in this sector, space requirements per employee are relatively high. For example, for many biosciences companies, 1,000 square feet of space per employee⁷ is used as a planning target.

Defense and Security

The Tampa Bay region has major defense and security industry assets, not the least of which is MacDill Air Force Base (AFB), which is the largest employer in Hillsborough County. Other local defense and security companies exist in the County but generally maintain a quiet presence in the market.

According to economic development professionals, most of the existing businesses in this industry tend to be small- to medium-sized. Many of the functions are office related and have a preference for locations in relatively close proximity to MacDill AFB. Targeted businesses in this industry include: security technology; and security and technology intelligence consulting.


Financial Services

There is a core of globally significant financial companies with mid-office and technology functions located in Hillsborough County. Targeted businesses in this industry include middle- and back-office functions.

Available information regarding space requirements and preferences indicates that some larger companies in this industry may demand a campus-type office environment or significant space in existing buildings or complexes. Small- to medium-sized

⁶ Battelle/BIO State Bioscience Initiatives 2010.

⁷ Land/Building Needs Analysis For Targeted Industries, URS in Association with Development Research Partners, Inc., October 2009.



financial services businesses, however, that could be targeted by the county, require smaller spaces and may be willing to consider infill opportunities in existing space.

Medicine and Medical Management

Digitizing medical records has the potential to save time, money and patients lives and may also impact the drug discovery and clinical development sectors. Tampa Bay and University of South Florida view this industry as an opportunity. Targeted businesses in this industry include: electronic health records; medical simulation and training; and specialized medicine.


Each of the types of businesses included in this industry requires different facilities. Medical simulation and training facilities will require significantly more space than electronic health records businesses. While it may be appropriate to use the guidance related to office space to estimate the facility requirements for electronic health records businesses, facility requirements for medical simulation and specialized medicine vary widely. In most cases, medical simulation and specialized medicine uses occupy single tenant buildings designed to meet the unique needs of the individual business – space in existing multi-tenant office or light industrial buildings would generally not meet the requirements of such uses.

4. SITE SELECTION CONSIDERATIONS

Based on a number of reports and data sources, as well as limited interviews, general facility requirements for the targeted industries have been established. The following section describes the overall facility requirements for each of the targeted industries.

Cross-Business Functions

Activities that occur within this industry are primarily office related with some data processing and programming elements. Businesses in this sector tend to locate in office buildings, either high-rise or low- to mid-rise, and tend to be flexible on office environment. For example, one establishment may locate in an urban central business district and another may prefer a business park or campus environment.



Many businesses in this industry appreciate proximity to amenities such as restaurants and shops. Nearby residential space may also be desired, and employees may desire walkability to amenities. Attractive space is typically desired, and access to open space may also be desired.

In general, approximately 300 square feet per employee is required for office functions, and the minimum space required is likely to be 3,000 square feet. Many of the establishments within this industry are small; in fact, most of the establishments in this industry employ fewer than 50 people. This offers the opportunity for infill development in more urban areas, particularly for these smaller sized businesses.


It should be noted that it is not necessary for businesses in this industry to be in the same complex as the headquarters they support. There may be efficiency advantages, however, to companies co-locating multiple functions on one campus. The decision to collocate will depend on the corporate culture and headquarters location of the business considering Hillsborough County for their cross-business functions.

Although proximity to the airport or highways may not be required, ease of commute is important to this industry.

Financial Services

Back- and mid-office businesses in financial services require general office space and may also require some data center accommodations. These businesses tend to locate in office buildings, but prefer a business park or campus environment with some green space. General access and connectivity is important for their employees, but they do not have stringent transportation requirements. As is the case with cross-business functions, businesses in this industry also prefer proximity to amenities such as shops, restaurants, and possibly residential space. Employees may also desire walkability to amenities. To the extent that data center services are provided, security may be required. This may simply involve surveillance cameras, but some data centers may need trained guards, fenced campuses, and other more stringent security measures in place.

Generally, 300 square feet per employee is required for financial services functions. The data center would likely require a minimum of 1,000 square feet and possibly as much as 2,000 square feet per employee. Office elements of this industry are likely to require a



minimum of 3,000 square feet. The data center is likely to be at least 10,000 square feet in size and may be as large as 1,000,000 square feet for a facility employing 500 people.

Biotechnology Research and Medical Device Manufacturers

For this industry, proximity to universities, other businesses within the industry, and possibly medical centers is preferred. The type of space required is somewhat flexible for biotech research. Office buildings may be sufficient for some forms of biotech research, while some may require specialized facilities to support operations. Location is typically determined by the location of existing, and similar businesses. Biotech firms tend to “cluster” with similar businesses.

For biotech researchers, 500-1,000 square feet per employee is preferred. Because these businesses tend to be smaller, however, space requirements can be as low as 5,000 square feet and unlikely to exceed 100,000 square feet.


Medical device manufacturers need more industrial space, typically located in either a light industrial district or industrial park. Attractiveness of the space is not generally a requirement, nor is proximity to amenities. General accessibility to transportation is important for employees, but this sector also prefers to have good highway access to better accommodate the distribution of their products. They also find proximity to an airport an important factor in site selection to facilitates timely global distribution.

These manufacturers also tend to be relatively small, with less than 100 employees, and are not likely to require more than 60,000 square feet for their facility. Minimum space requirements are likely to be in the 6,000 square foot range.

Defense and Security

This industry is comprised of technical consultants, general office employees, and more data intensive employees. For the office space, 300 square feet per employee is required.

General office building space is sufficient for many service aspects of the industry, but data intensive operations may require more specialized space. Businesses in this industry tend to be reasonably small, however, with most employing fewer than 100 people. The overall space requirements are not as large as some of the other industries



being targeted, and the office space functions could be located in an urban mixed use environment. The data components likely will need a larger, single tenant building.

General access to good transportation is desired, but there are no special transportation requirements. There may be some businesses in this industry that would prefer to locate near Mac Dill Air Force Base, but others may have no such preference. Depending on the nature of the work being conducted, enhanced site and building security may be required.


Medicine and Medical Management

The businesses being targeted in this industry are somewhat unique from one another. Businesses providing electronic health records support may require a data center environment. A medical simulation facility may be part of an existing medical center, and the more specialized medicine businesses are likely to resemble treatment centers. As a result, the facility requirements for businesses being targeted are very different.

The electronic health records sector would likely require office space and quite likely data center capabilities. As a result, it is anticipated that 1,000 to 2,000 square feet of space per employee would be needed to accommodate a business in this sector. The size of the business may vary considerably, but a minimum of 10,000 square feet would likely be required. The facility needed for particular functions may be as large as 1,000,000 square feet, if a significant number of people are employed there.

Medical simulation facilities are often affiliated or part of a medical center and proximity to a hospital or medical center is desired. Some of the space requirements for simulation facilities can be quite small. In Providence, Rhode Island, and other communities in the U.S., for example, the space required for simulation may only be on the order of 1,200 to 1,500 square feet in size. In contrast, the USF Health's Center for Advanced Medical Learning and Simulation (CAMLs) center is 90,000 square feet. This facility is very unique, however, and it is unlikely that many, if any, other facilities of this size would be developed in the area.

Specialized medicine can vary in scope and size. Outpatient service facility requirements are usually on the order of 1 to 2 square feet per patient. Inpatient treatment requires more space, 300 to 500 square feet per inpatient per day.



In general, access to good transportation is required for both employees and patients visiting the facility. Some visibility may also be desired to simplify patient travel. The facility itself is likely to be in an office building, but the actual location is reasonably flexible. That said, proximity to other medical facilities is typically desired. Depending on the nature of the treatment, some security may be required as well.

5. ECONOMIC DEVELOPMENT AREA DEFINITION

The EDAs shown on the attached maps define locations in Hillsborough County having the greatest short-term potential to support targeted industry investment. The limits of the EDAs were identified based on an evaluation of factors influencing suitability, attractiveness, and readiness for investment. A review of factors considered in the identification of EDAs follows.

Availability of Buildings and Sites

Building and site availability was an important factor in defining the location and limits of potential EDAs. Areas with clusters of vacant sites and sites with redevelopment potential were identified as candidate areas for EDA designation as were largely built out areas like Downtown Tampa. Given the variety of uses defined as targeted industries and their diverse space requirements—from small space in multi-tenant buildings for office uses to large footprint, single tenant buildings for manufacturing and research—a wide range of sites and building typologies have the potential to satisfy targeted industry demands.

Proximity to Key Institutions

Proximity to key institutions also factored in to the screening of areas. For biotechnology and medical related targeted industries—Biotechnology and Medical Device Manufacturers and Medicine and Medical Management uses—areas within a short drive of USF and Tampa General Hospital were considered most attractive. For Defense and Security uses, areas within a short drive of MacDill Air Force Base were considered more attractive.



Presence of Like Uses

The presence of targeted industry uses was an important consideration in defining the EDAs. Areas with existing clusters of targeted industry uses, like the clusters of Core Business Functions and Financial Services uses in Westshore and Downtown Tampa, despite not having large blocks of vacant land, have the potential to support significant investment in existing vacant building space and through redevelopment of underutilized sites.

Limited Incompatible Uses

Areas with large expanses of residential or heavy industrial land uses were considered inappropriate for consideration as EDAs. Areas with clusters of heavy industrial uses like near the Port of Tampa or with scattered residential uses like in Drew Park were excluded from consideration. Although such areas could accommodate targeted industry uses, their potential to support regional clusters of targeted industry uses is considered limited due to existing patterns of use.

Ease of Access

Office, commercial, and light industrial districts near existing population centers and with ready access to the Interstate system were favored over areas at the region's periphery. Ease of access and limited commuting distances were found to be important factors influencing locational decisions, especially for Core Business Functions and Financial Services uses. Plans for high-capacity transit service such as the planned BRT service linking Downtown Tampa with USF was also considered in the assessment of accessibility.

Supportive Plans and Regulations

Existing future land use categories and Urban Service Area limits were also considered in the evaluation. In general, areas with future land use categories allowing targeted industry uses and located within the Urban Service Area were considered most favorably. However, a few areas without supportive future land use categories and outside the Urban Service Area, but with high levels of suitability based on other factors, were included within an EDA.



Availability of Urban Services

Areas served by sewer and water service or in close proximity to served areas were considered more favorably than those without service. However, a few areas without existing service but with high levels of suitability based on other factors were included as part of an EDA.

Absence of Natural Constraints

Sites identified as Environmentally Sensitive Areas on County and City Future Land Maps were not included in EDAs and sites with Flood Hazard Area designations within EDAs are recognized as constrained and having limited attractiveness for targeted industry investment.


6. ECONOMIC DEVELOPMENT AREA DESCRIPTIONS

The following descriptions summarize each EDAs locational, access, or other advantages and highlight qualities supporting the EDAs competitive position, readiness, and suitability for investment. For each EDA, a brief description of the area and planning context is provided, along with a review of factors influencing suitability for targeted industry investment.

UNIVERSITY OF SOUTH FLORIDA (USF) EDA

Area Description

The University of South Florida (USF) EDA includes the University of South Florida campus and surrounding non-residential areas, including University Community Hospital to the north, the James A. Haley Medical Center to the west, and the area south of Fowler Avenue containing a mix of multifamily residential, light industrial, and warehouse and distribution, and general office uses. The area includes land within the City of Tampa and Unincorporated Hillsborough County with the following existing land use categories: P/QP, HI, LI, UMU-60, RMU-100, SMU-6, and OC. Sites along and south of Fowler Avenue area designated as an Economic Development Overlay in City of Tampa Comprehensive Plan. Fowler Avenue, Fletcher Avenue, and 40th Street area designated as Transit Emphasis Corridors and the 30th Street Corridor is located within



a designated Transit Envelope Area. The entire area is located with the Urban Service Area boundary.


Although the area is not widely recognized as a general business district or corporate environment, the high concentration of medical, biotech, and other research activities and professionals at USF, Moffitt Cancer Research Institute, James A. Haley Medical Center, University Community Hospital, and the USF Research Park of Tampa Bay provides the basis for it's development as a regional center for biotechnology and medical related research and training. The existing incubator space and start-up assistance provided at Research Park serves as an important center for entrepreneurial activity and supportive uses and services, including lodging, retail, and restaurants are in the area or in close proximity.

The area benefits from indirect access to I-75 and I-275 via Fowler Avenue and Fletcher Avenues, high-capacity transit service is planned along Fletcher Avenue, and 30th Street is designated as Transit Emphasis Corridor.

Suitability for Targeted Industry Investment

The area is especially attractive for biotechnology and medical related uses given the presence USF, Moffitt Cancer Research Institute, James A. Haley Medical Center, University Community Hospital, and the USF Research Park of Tampa Bay. Incubator space at USF Research Park provides opportunities for start-ups and access to local researchers and practitioners, and an intensification of development on the USF campus and the redevelopment of large sites west and south of the Campus could provide space for the creation of a significant cluster of biotechnology and medical related uses.

For the area to achieve its' full potential to support targeted industry uses, several challenges need to be addressed. Few existing general office, tech-flex, or light industrial buildings exist in the area and no greenfield sites are available for single, large-footprint projects or the development of full-service business park development. Given the lack of vacant building space and vacant sites, future planning for the area should focus on promoting the intensification of uses on remaining vacant space on the USF campus and supporting the redevelopment of large sites like the University Mall property and selected sites south of Fowler Avenue between 30th and 46th Streets.



The area has limited suitability for targeted industries core business function, financial service, and defense and security uses.

EDA-Specific Planning Strategies

- Support emerging efforts to brand area as a destination for biotechnology and medical-related investment.
- Consider changing FLU categories HI and LI south of Fowler Avenue and R-20 west of 30th to categories more compatible with targeted industry uses.
- Support transportation and public realm investments to improve competitive position.
- Explore methods to limit extent of residential uses on vacant and redevelopment sites.
- Explore redevelopment potential of University Mall site to support hospital expansion and additional medical, biotech, and support uses.
- Support university efforts to intensify research and incubator activities on USF Campus.
- Explore potential to redevelop or adaptively-reuse warehouse and distribution spaces south of Fowler Avenue.
- Explore potential to consolidate ownership and land bank vacant sites.

I-75 / FLETCHER AVENUE EDA

Area Description

The I-75 / Fletcher Avenue EDA is located immediately west of I-75 on the north and south sides of Fletcher Avenue two miles east of USF. The area, recognized regionally as an attractive setting for office, medical, and general business uses, includes Telecom Park (199 acre), Hidden River Corporate Park (250 acres), and sites with development potential east of I-75. The area north of Fletcher is in City of Tampa, the area south of Fletcher Avenue is in Temple Terrace, and southern area is in unincorporated Hillsborough County. Future Land Use Categories include RCP and UMU-20 in Temple Terrace, SMU-6 in City of Tampa, and CMU-12 in Unincorporated Hillsborough



County. The area is within the Urban Service Area boundary. Supportive uses and services include lodging, retail, and restaurants along Fletcher Avenue.

The area benefits from direct access to I-75 and indirect access to I-275 via Fletcher Avenue. The area is located at the northern/eastern terminus of planned high-capacity transit service (BRT) connecting USF and Downtown Tampa. Sewer and water service is available west of I-75.

Suitability for Targeted Industry Investment

The area is an optimal location for core business function and financial service uses and has strong potential to support other targeted industry uses with a preference for campus-style settings and direct access to I-75. Vacant building space and sites within established corporate parks can accommodate space designed to house a variety of core business functions, financial services, and biotech and medical related uses. Proximity to USF bolsters competitive position and existing business park restrictions on use and design, high levels of amenities, and security enhance attractiveness.

Barriers to targeted industry investment include the relatively small size of remaining vacant sites, which restrict opportunities for large-scale or specialized building development; the limited potential for development of datacenters, medical device manufacturing, and other specialized uses which don't typically fit the profile of preferred uses in business park environments; and limited suitability for uses with a preference for more urban, mixed use settings. In addition, the presence of floodplains limits the attractiveness of southernmost sites and sites east of I-75.

EDA-Specific Planning Strategies

- Continue support for extension of high capacity transit service with links to USF and Downtown Tampa.
- Focus public realm improvements to maintain attractiveness.
- Explore methods to limit extent of commercial and residential uses on remaining vacant sites.



WESTSHORE EDA

Area Description

The Westshore EDA, located at the center of the Tampa-St. Petersburg market adjacent to Tampa International Airport, contains the highest concentration of office space in the State of Florida. Over 12 million square feet of existing office space house a wide range of uses, including a high number of core business function and financial service uses. Supporting uses include regional concentrations of hospitality, retail, restaurant, and professional services. The area is within the City of Tampa and with Future Land Use Categories including RMU-100, M-AP, and P/QP with pockets of R-10 located in the eastern half of area.

Located within 30 minute commute of an estimated 75% of region's residential population, the area has direct access to I-275 and Veteran's Expressway and is located along the planned high-capacity transit corridor with connections to Downtown Tampa, the USF area, and destinations in Pinellas County to the west.

Suitability for Targeted Industry Investment

Westshore is an optimal location for core business function and financial service uses and has strong potential to support other targeted industry uses in existing and planned multi-tenant buildings. The area includes several existing multi-tenant office buildings with space for lease and several sites with the potential to support new multi- or single-tenant buildings. The area also has the long-term potential for redevelopment of obsolescent and underutilized buildings.

Although few greenfield sites area available for single, large-footprint projects or full-service corporate office park development, numerous sites are available for single-or multitenant office buildings. The area's character as a corporate office district use may limit its suitability for select targeted industry uses, including datacenters, medical device manufacturing, and other specialized uses. The presence of floodplain also limits the attractiveness of sites west of Westshore Boulevard.



EDA-Specific Planning Strategies


- Support Westshore Alliance efforts to strengthen brand identity and enhance attractiveness.
- Continue support for extension of high capacity transit service with links to USF and Downtown Tampa.
- Support transportation and public realm investments to improve competitive position.
- Determine if regulatory barriers exist and limit the redevelopment potential of underutilized sites
- Explore methods to limit extent of commercial and residential uses on remaining vacant sites.
- Provide buffering and transitions to protect integrity of existing neighborhoods within and surrounding area.

DOWNTOWN TAMPA EDA

Area Description

The Downtown Tampa EDA is the region's traditional urban mixed use district with high concentrations of office, civic, and entertainment uses, high density residential uses, and supporting commercial, retail and professional services. The area contains over 12 million square feet of existing office space housing a wide range of corporate uses, including a high number of core business function and financial service uses. The area includes the Central Business District, Ybor City, the Channel District, Tampa Heights, the Encore Redevelopment site, and the area west of the Hillsborough River surrounding the University of Tampa. Future Land Use Categories include CBD, RMU 100, UMU-60, CMU-35, GMU-24, and P-PQ, along with pockets of CC-35, R-83, and R-35.

The area benefits from direct access to I-275 and I-4 and close proximity to Tampa International Airport. Downtown serves as a hub of planned high-capacity transit services with connections to the Airport, Westshore and the USF Area. The area's longer-term potential to serve as the western terminus of a High Speed Rail system with



links to Orlando and Miami further supports its position as the centerpiece of the region's mobility plans and programs.


Suitability for Targeted Industry Investment

Downtown Tampa is an optimal location for core business function and financial service uses and has strong potential to support other targeted industry uses in existing and planned multi- and single-tenant buildings. Proximity to Tampa General Hospital, the Convention Center, and the future presence of CAMLs increases attractiveness for biotechnology and medical-related uses. The area has the potential to accommodate a wide range of target industry uses in existing multi-tenant office buildings, in renovated buildings, and in new buildings on smaller infill sites. The area has long-term potential for redevelopment of obsolescent, underutilized buildings and buildings and sites in Ybor City and periphery of the Central Business District should prove attractive to small-scale uses with a preference for urban, mixed use settings.

The area's potential is somewhat limited by the lack of available vacant sites for single, large-footprint projects or full-service corporate office park development. In addition, the mixed use character of development restricts for potential for the development of datacenters, medical device manufacturing uses, and other specialized uses and building types.

EDA-Specific Planning Strategies

- Support City of Tampa and the Downtown Partnership's efforts to strengthen brand identity and enhance attractiveness.
- Continue support for extension of high capacity transit service with links to USF and Westshore.
- Determine if regulatory barriers exist and limit the redevelopment potential of underutilized sites
- Support transportation and public realm investments to improve competitive position.
- Explore methods to limit extent of commercial and residential uses on remaining vacant sites.

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- Provide buffering and transitions to protect integrity of existing neighborhoods within and surrounding area.

VETERAN'S HIGHWAY / ANDERSON ROAD EDA

Area Description

The Veteran's Highway / Anderson Road EDA is an established warehouse, distribution and light industrial district close to Tampa International Airport and the Westshore business district. The area includes property north of Tampa International Airport north of Hillsborough Avenue, south of Linebaugh Avenue, east of Henderson Road and the Veteran's Highway, and west of Manhattan Avenue and West Park. The area is in Unincorporated Hillsborough County, within the Urban Service Area boundary, and includes Future Land Use Categories LI and UMU-20. Supportive uses and services include retail, and restaurants along Hillsborough and Waters Avenues.

The area benefits from direct access to Veteran's Expressway and indirect access to I-275 via Veteran's Expressway, Hillsborough Avenue, Waters Avenue, and Linebaugh Avenue.

Suitability for Targeted Industry Investment

The area has the potential to support targeted industry uses with a more light industrial character, including medical device manufacturing uses, in existing, renovated, or new space. Access to the airport and rail service may benefit specialized, larger-scale manufacturers.

Given the existing light industrial character of much of the area, it has limited suitability for core business functions, financial services, and defense and security uses. The area also has very limited suitability for biotechnology uses and medical-related uses due to its industrial character and distance from hospitals and medical research centers. The lack of large, greenfield sites available for single, large-footprint projects or full-service corporate office park development further limits its suitability to support target industry uses. The presence of floodplain limits the attractiveness of sites north of Waters Avenue.



EDA-Specific Planning Strategies

- Support transportation and public realm investments to improve competitive position.
- Provide buffering and transitions to protect integrity of existing neighborhoods within and surrounding area.

US 301 / Harney Road South EDA

Area Description


The US 301/Harney Road South EDA is defined as the area along Harney Road and US 301 with uses ranging from residential and agricultural to light and heavy industrial. The area lies generally between 56th Street and the Tampa Bypass Canal, and between Hillsborough Avenue to the south and Temple Terrace Highway to the north. The area includes several vacant greenfield sites, some as large as 80 acres and several along Harney Road in the 50-60 acre range. Supportive uses include retail and restaurants along US 301 and Hillsborough Avenue.

Areas north and south of Harney Road are in the City of Temple Terrace and the balance falls within Unincorporated Hillsborough County. Future Land Use Categories include CMU-12, P/QP and RCP and the area is fully in the Urban Service Area. Sewer and water service is available except for properties immediately adjacent to canal. The area benefits from indirect access to I-75 and I-4 via US 301.

Suitability for Targeted Industry Investment

Greenfield sites along Harney Road west of 301 have potential to support single, large-footprint projects suitable for a wide range of uses, including medical device manufacturing uses in existing, renovated or new space. The area also has the potential to accommodate small scale targeted industry uses in existing light industrial buildings.

The area's light industrial character, the fragmented pattern of uses, and presence of low density residential uses is incompatible with the general requirements for core business functions, financial services, and defense and security uses. The area also has limited suitability for biotechnology uses and medical-related uses due to its industrial character and distance from hospitals and medical research centers. Areas within



designated floodplains further limits attractiveness of sites north of Hillsborough Avenue west of US 301.

EDA-Specific Planning Strategies

- Study the potential to enhance the area’s competitive position through access and public realm improvements, with a focus on improving conditions with rights-of-way at key gateways and along the Harney Road, US 301, 56th Street, and Hillsborough Avenue corridors.
- Explore methods to limit extent of commercial and residential uses on remaining vacant sites.
- Provide buffering and transitions to protect integrity of existing neighborhoods within and surrounding the area.

US 301 / HARNEY ROAD NORTH EDA

Area Description

The US 301/Harney North EDA, the area along Williams Road east of the I-75 and the Tampa Bypass Canal, includes multiple greenfield sites along Williams Road, Harney Road, and US 301 ranging in size from 1 to over 50 acres and an area north of Fowler Avenue containing approximately 100 acres of undeveloped land in single ownership. The entire area is in unincorporated Hillsborough Avenue and is comprised of sites with a variety of Future Land Use Categories, including R-4, R-12 and SMU-6 and an area of R-1 north of Fowler Avenue. The area is within the Urban Service Area boundary with exception of the parcels north of Fowler Avenue.

The area benefits from indirect access to I-75 via US 301 and Fowler Avenue and access to I-4 via Williams Road.

Suitability for Targeted Industry Investment

Greenfield sites in the area have potential to support single, large-footprint projects suitable for targeted industries requiring office space and for specialized buildings designed to accommodate biotechnology and medical-related uses. The area’s



competitive position is bolstered by both its proximity to USF and access to the I-75 and I-4.

Limiting the area's potential are the existing fragmented pattern of uses and the presence of low density residential land use. Such conditions are considered incompatible with the requirements for core business function, financial service, and defense and security uses and thus limit the likelihood of the area developing as a regional destination for targeted industry investment.

EDA-Specific Planning Strategies

- Explore changing Future Land Use Categories to permit targeted industry uses with appropriate buffering and transitions to adjacent uses.
- Consider expanding the Urban Service Area to the vacant properties north of Fowler Avenue and identify site design and development strategies to minimize impact on adjacent environmentally-sensitive areas.
- Explore methods to limit residential uses on remaining vacant sites.
- Provide buffering and transitions to protect integrity of existing neighborhoods and rural areas in surrounding area.

I-4 / I-75 EDA

Area Description

The I-4/I-75 EDA encompasses the area along I-75 north of I-4 from the Tampa Bypass Canal to Williams Road. The area contains multiple greenfield sites along Williams Road ranging in size from 7 acres to 20 acres with a 286 acre parcel and a 106 acre parcel split by I-75. The area is in unincorporated Hillsborough County, has Future Land Use Categories R-1 and P/QP, and is outside the limits of the Urban Service Area boundary.

The area benefits from direct access to I-4 and I-75 via Williams Road and had direct access to the Tampa Executive Airport. Sewer and water service is available.



Suitability for Targeted Industry Investment

Greenfield sites along Williams Road have potential to support single, large-footprint projects suitable for core business function and financial service. The area also is suitable for large-scale biotechnology and medical related uses, although distance from USF and medical research centers may affect this potential. Access and visibility from I-4 and proximity to the airport bolster attractiveness.

Significant planning policy changes are required to permit targeted-industry investment, including changes in existing Future Land Categories to allow commercial and office use and the expansion of the Urban Service Area. In addition, designated floodplains limit the attractiveness of sites immediately northwest of the I-4 - I-275 interchange.

EDA-Specific Planning Strategies

- Explore changing Future Land Use Categories from R-1 to permit targeted industry uses with appropriate buffering and transitions to adjacent uses.
- Consider expanding Urban Service Area boundary to support the extension of urban services to vacant sites along Williams Road.
- Explore methods to limit residential uses on remaining vacant sites.
- Provide buffering and transitions to protect integrity of existing neighborhoods and rural areas in surrounding areas.

I-75 / CROSSTOWN / US 301 EDA

Area Description

The I-75/Crosstown/US 301 EDA is comprised of the area along the I-75 and US 301 corridors from I-4 to the north to Progress Boulevard to the south. The area includes a number of large-scale corporate campuses, planned business parks, and light industrial parks interspersed with large format retail centers, and pockets of residential use. Multiple greenfield sites exist in the southern portion of the area including large tracts abutting the Crosstown Expressway near US 301, at the intersection of Progress Boulevard and Faulkenburg Road, and along Faulkenburg Road between Causeway Boulevard and SR 60. The area is in unincorporated Hillsborough County and includes



the following Future Land Use Categories: UMU-20, CMU-12, RMU-35, LI-P. The area falls within the limits of the Urban Service Area.

The area is well served by the regional road network and offers direct access to I-75, I-4, and the Crosstown Expressway.

Suitability for Targeted Industry Investment

The I-75/Crosstown/US 301 EDA is an optimal location for core business function and financial service uses with strong potential to support other targeted industries uses in multi-tenant buildings, in existing corporate parks, and in new projects on greenfield sites. Larger greenfield sites in the area have the potential to support single, large-footprint projects suitable and long-term potential exists for redevelopment of obsolescent and underutilized buildings in older light industrial and business parks. Access to I-75, I-4, and the Crosstown Expressway bolsters attractiveness.

The area is less suitable for biotechnology uses and medical-related uses due to distance from hospitals and medical research centers, and distance from Tampa International Airport and lack of access to rail service may limit attractiveness for larger-scale medical device manufacturing uses. Also limiting the area's potential is the fragmented pattern of development and land use, especially in the area between MLK and I-4.

EDA-Specific Planning Strategies

- Explore changing Future Land Use categories in selected areas to limit residential and commercial uses and provide density, parking or other incentives to promote TI investment.
- Explore methods to limit residential and retail uses on remaining vacant sites with potential support targeted industry investment.
- Explore the potential to adjust land use mix and permitted intensities of development in existing Developments of Regional Impact to promote more employment-intensive, targeted industry investment.
- Provide buffering and transitions to protect integrity of existing neighborhoods within and surrounding area.



6. AREAS REQUIRING FURTHER STUDY

The analysis of potential EDAs resulted in the identification of two broad areas worthy of further study. Although these areas are not currently recognized as primary or secondary locations for corporate business investment and thus have limited short-term potential to attract targeted industries, longer range development trends indicate their suitability and competitive position may improve over time as population intensities increases in eastern Hillsborough County and the scarcity of greenfield development sites increases over time. Consequently, the potential of these areas to accommodate target industry uses should be evaluated during future plan update processes.

A brief description of these areas follows.

I-4 Corridor & Plant City

Lands along I-4 in Unincorporated Hillsborough County and Plant City were carefully studied over the past two years as part of the *I-4 Economic Corridor Study* and determined to have limited potential to support employment intensive uses. However, it is anticipated that large sites along in the area may have the potential, over the long term, to support targeted industries with a preference for large, greenfield sites, planned campus environments, and locations closer to the Lakeland and Orlando regional markets. With appropriate land use changes, access improvements, extension of public sewer and water service, and establishment of regulations protecting the rural and agricultural character of adjacent properties, these areas could be considered appropriate for investment.

Further evaluation of the potential to support targeted-industry investment in this area is required to determine long-term suitability. Such evaluation should assess market perceptions of the area for targeted-industries considering distance from key institutions, Tampa Airport, and regional centers of employment and population. Also evaluated should be public costs associated with improvements to access, the extension of public infrastructure, and impacts on the area's rural character.



I-75 South County

Areas in Southern Hillsborough County also were evaluated for their potential to support targeted-industry investment. Existing Development of Regional Impact Development Orders for sites in Southern Hillsborough County call for the construction of over 1 million square feet of office space, some or all of which has the potential to house target industry uses. However, distance from existing employment and population centers and the dispersed pattern of planned commercial and office uses will likely place sites in the area at a competitive disadvantage to sites clustered in more central locations.

Future economic development planning for Southern Hillsborough County should examine the feasibility of establishing more compact centers of employment-intensive uses with the potential to evolve into regionally-significant centers of activity. As with future studies of the I-4 Corridor, evaluations of this area should assess market perceptions of the area for targeted-industries considering distance from key institutions, Tampa Airport, and regional centers of employment and population.


7. PLANNING POLICIES & STRATEGIES

The EDAs are identified as appropriate locations to concentrate and focus investment in industries with the potential to improve the region's economy. For these areas, planning policies and strategies should be designed to accomplish the following:

Planning & Regulatory Refinement

Existing future land use policies and development regulations should be assessed to determine if current tools unduly limit or the potential of areas to support target industry investment. The following specific issues should be addressed:

- Institute a sector planning process for designated EDAs to evaluate development potential and engage economic development professionals and local stakeholders in the process of planning for targeted industry investment.
- Evaluate permitted uses by future land use category and zoning district to determine if the mixed use policies are promoting fragmented patterns of uses



in areas identified as attractive to targeted industry uses and more employment-intensive clusters of development.

- Consider drafting a new or adjusting an existing future land use category like Research Corporate Park with a limited list of permitted uses focused on supporting targeted industry development and supportive uses.
- Determine if existing or new future land use categories offer sufficient development intensities while also ensuring effective transitions to adjacent residential and rural areas.
- County sponsored zoning to allow office and industrial development.
- Seek consenting property owners within appropriate locations.

Branding & Capacity Building

Support for area-specific initiatives and organizations designed to promote investments in EDAs should continue. Organization like the newly-formed Tampa Innovation Alliance, the new venture between USF, the H. Lee Moffitt Cancer Center & Research Institute, University Community Hospital and Busch Gardens, with goals to 1) make North Tampa more welcoming and to create a sense of entry for the university, hospitals and theme park and 2) establish a brand for the area that emphasizes each institution's role as an innovator in health, research, education or entertainment.

Targeted Capital Investments

Future capital investments should be focused on improving the competitive position of each EDA. Capital investment, ranging from access, mobility, and infrastructure improvements to streetscape, landscape, and gateway improvements, should be targeted to address EDA-specific issues.


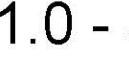
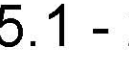
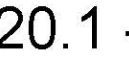













SOURCES

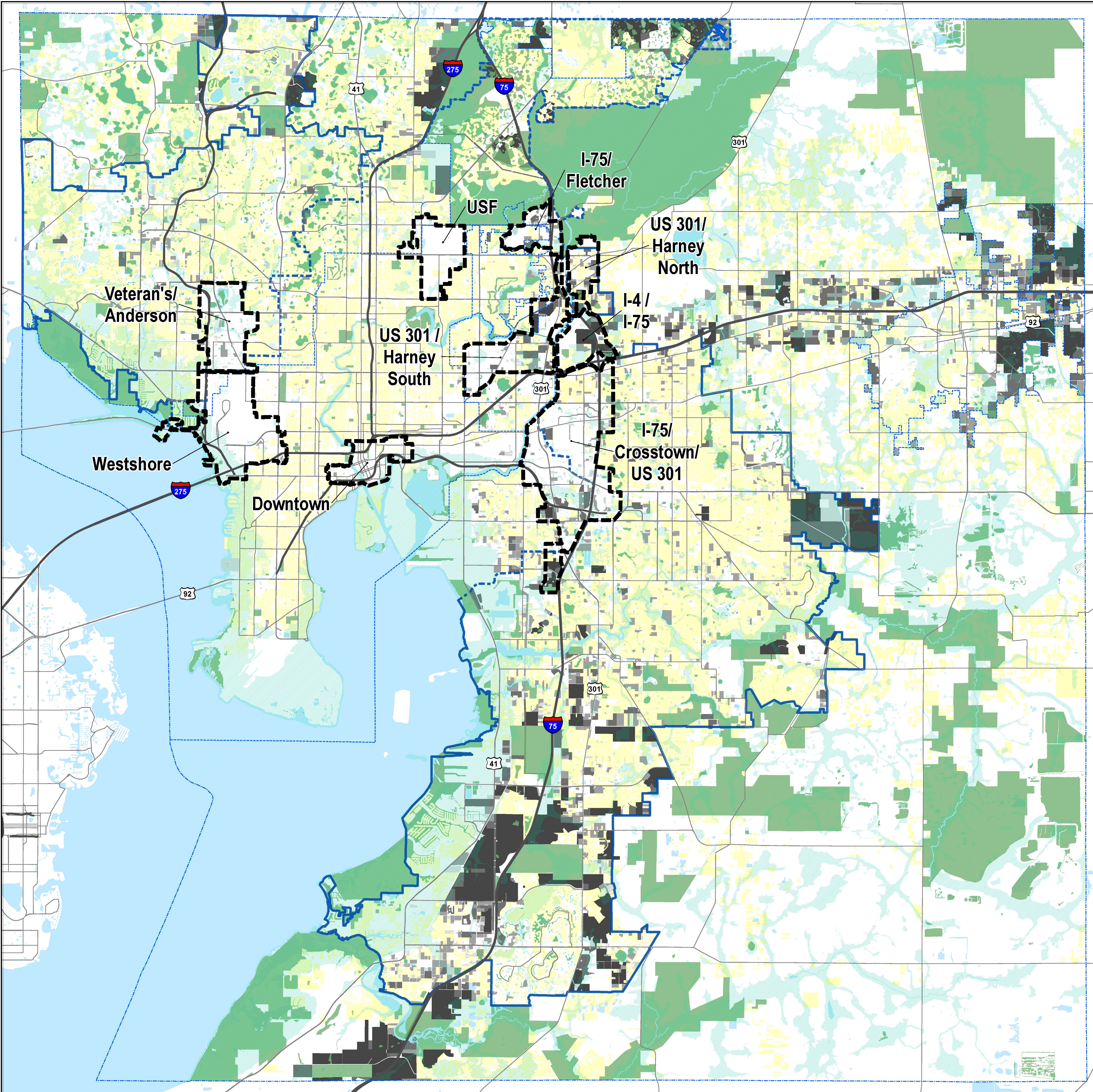
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- Corporate Realty Advisors website.
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- *I-4 Economic Corridor Study*, Prepared by the Hillsborough County Planning Commission.
- *Land/Building Needs Analysis For Targeted Industries*, Prepared by URS in Association with Development Research Partners, Inc., for the City of Fort Collins, October 2009.
- *Locational Assessment and Recommended Strategic Plan for Economic Growth*, Prepared for the Tampa Hillsborough Economic Development Corporation.
- *County Business Patterns*.
- *Medical Devices Industry Assessment* prepared by the International Trade Association.
- Rhode Island Hospital and Stanford University Hospital websites.

ECONOMIC DEVELOPMENT AREA STRATEGY
**ECONOMIC DEVELOPMENT AREAS &
 VACANT & AGRICULTURAL LAND**

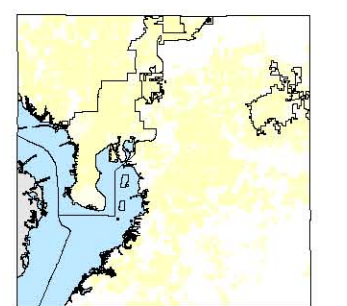
LEGEND

-  Economic Development Area
- Vacant or Agricultural Parcels*
 -  1.0 - 5.0 acres
 -  5.1 - 20.0 acres
 -  20.1 - 50.0 acres
 -  > 50.0 acres
-  Residential Existing Land Use
-  Future Land Use - Natural, Water, or Open Space
-  FEMA Floodplain
-  Tampa Service Area
-  Urban Service Area
-  County Boundary
-  Jurisdiction Boundary
-  Controlled Access Highway
-  Arterials
-  Water

* Vacant and Agricultural Parcels include:
 - parcels located within the Urban Service Area or Plant City that have more than 1 acre of land outside FEMA Floodplain
 - parcels outside Urban Service Area that have more than 5 acres of land outside FEMA Floodplain that are located within 1 mile from highway (I-4, I-275, I-75, Veteran's Highway, or Crosstown Expressway).



LOCATOR MAP



CREDITS

DATA SOURCES: Hillsborough County Appraiser, July 2011; Municipality Utility Departments, 2011; FEMA IFIRM Data, 2011; The Planning Commission, July 2011.
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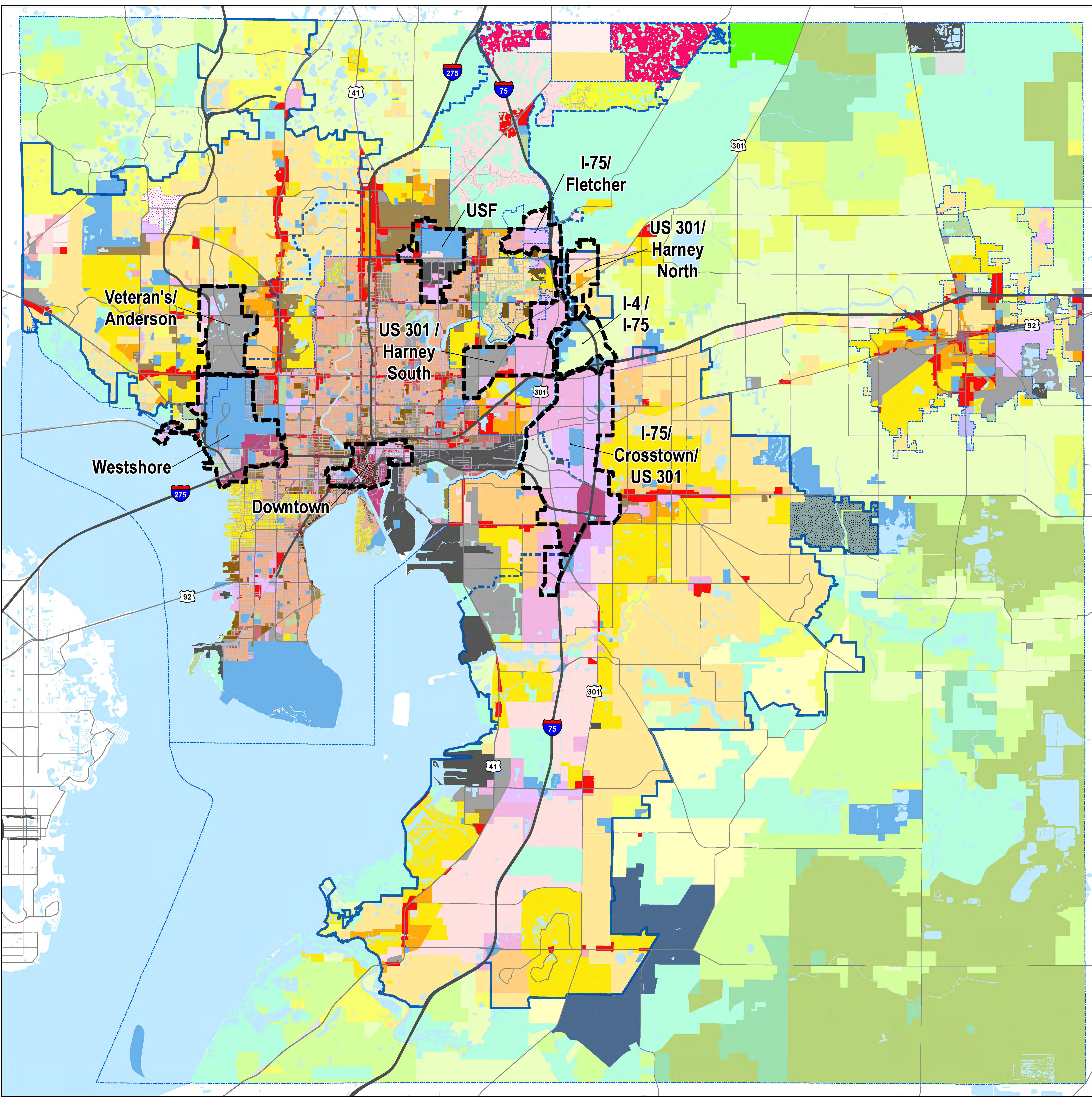


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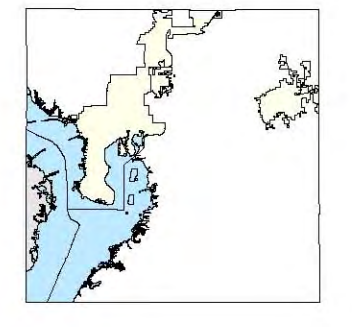
ECONOMIC DEVELOPMENT AREA STRATEGY
ECONOMIC DEVELOPMENT AREAS & FUTURE LAND USE

LEGEND

	Economic Development Area		Water
	Tampa Service Area		
	Urban Service Area		
	County Boundary		
	Jurisdiction Boundary		
	Controlled Access Highway		
	Arterials		
Hillsborough County Future Land Use			
	A/M		R-4
	PEC		R-6
	A		R-9
	A/R		R-12
	AE		R-16
	R-1		R-20
	R-2		NMU-4
	RP-2		SMU-6
	CMU-12		LI
	UMU-20		HI
	RMU-35		P/QP
	OC		N
	RCP		WVR-2
	EIP		CPV
	EIP-USA		WATER
	LI-P		
Tampa Future Land Use			
	RE-10		R-83
	R-3		SMU-3
	R-6		SMU-6
	R-10		GMU-24
	R-20		UMU-60
	R-35		CMU-35
	R-50		TU-24
	RMU-100		M-AP
	CC-35		LI
	ESA		HI
	CBD		R/OS
	MACDILL AFB		P/QP
	WATER		
	RW		
	TA		
Temple Terrace Future Land Use			
	C		P
	CMU-12		R
	DMU-25		R-18
	OI		R-4
	R-9		RCP
	WAT		ROW
			UMU-20
Plant City Future Land Use			
	R-4		MU/RC
	R-6		MU-R/C/I
	R-12		MU/GW
	R-20		LCO
	C		RO
	DC		NP
	I		WATER
	P		TA



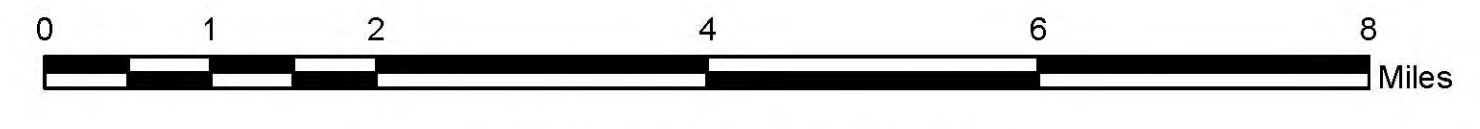
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