

**COMPUTER &
ELECTRONIC INDUSTRY**

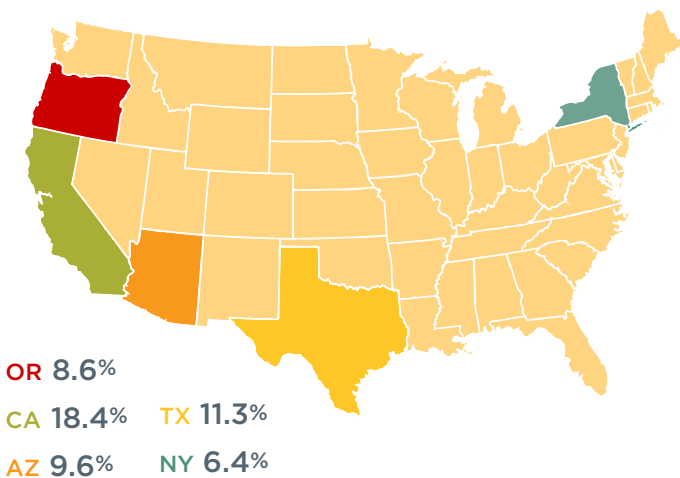
Greater Portland is widely regarded as “Silicon Forest” due to key assets and industry strength.

- ▶ INDUSTRY STRENGTH
- ▶ INFRASTRUCTURE
- ▶ WORKFORCE

The greater Pacific Northwest region, known as Silicon Forest, is part of the U.S. “Silicon Nation,” along with Silicon Valley, California; Silicon Alley, New York; the Silicon Cowboys (Texas, Arizona). The state of Oregon has the 4th highest Computer and Electronics industry concentration in the US, just behind California, Texas and Arizona.

The Greater Portland region is uniquely positioned within the Pacific Northwest and encompasses two states, seven counties and 25 municipalities. What that means for your business is simple: options. Already home to globally competitive companies like Intel, FLIR Systems, and WaferTech - and with a gross regional product of \$124 billion - Greater Portland offers a variety of sites, cultures and assets to meet your business needs.

U.S. ELECTRICAL EQUIPMENT MANUFACTURING:
HIGHEST CONCENTRATION OF COMPUTER
AND ELECTRONICS FIRMS BY STATE



% = share of US Computer and Electronics Firms

Source: IBISWorld, October 2013



LEGEND

- | | | |
|------------------------------------|-------|------------------------|
| 1 PORT OF VANCOUVER | I-5 | BNSF RAILROAD |
| 2 PORT OF PORTLAND | I-205 | UNION PACIFIC RAILROAD |
| 3 PDX INTERNATIONAL AIRPORT | I-84 | |

INDUSTRY STRENGTH

Intel and Tektronix opened their doors in Oregon four decades ago, and their success has grown a forest of thousands of technology firms that employ over 32,000 in the region.



Some of the world's leading technology companies call Greater Portland home. Those include:

LEADING TECH COMPANIES BASED IN GREATER PORTLAND

- Intel
- FLIR Systems
- TriQuint Semiconductor
- Wafertech
- SEH America
- ON Semiconductor
- Microchip
- FEI
- Planar Systems

This industry strength is bolstered through public investment such as the Oregon Nanoscience and Microtechnologies Institute (ONAMI). ONAMI is a state-funded Signature Research Center that connects the top researchers and cutting-edge laboratories at Oregon's research universities with businesses in order to translate research into commercial products, and ultimately, a competitive advantage for the state of Oregon.

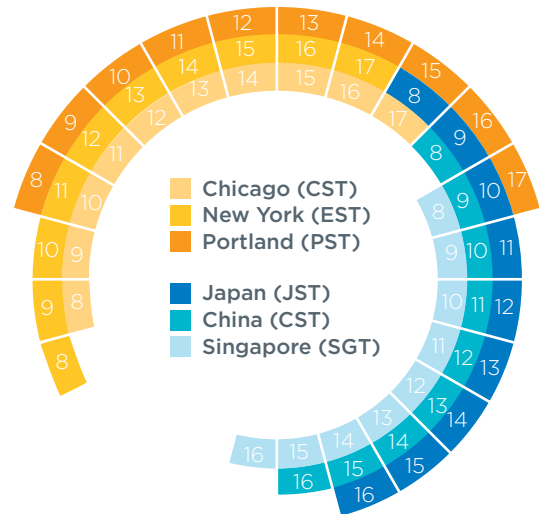
SUPPLY CHAIN

The computer and electronics (C&E) industry, and in particular semiconductors, forms the core of the Greater Portland region's economy and its exports. With a foundation in semiconductors and other embedded electronics, the industry offers regional opportunities to build success in growing sectors such as communications, optoelectronics, photoelectronics, medical devices, and marine, air and rail transportation.

TIME ZONE ADVANTAGE

Whether maintaining key business relationships that necessitate air passenger travel or getting the product to the client more quickly, the Greater Portland region provides a distinct advantage compared to other areas in the country. As indicated below, a business location in the Portland region saves time and money in accessing the Pacific Rim.

OVERLAP OF BUSINESS HOURS BETWEEN UNITED STATES AND ASIAN TIME ZONES

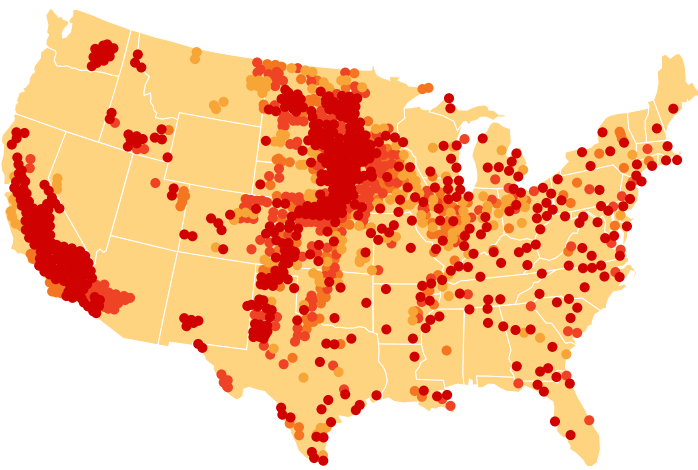


Business Hours shown as 8:00 to 17:00 in United States (8 am - 6 pm)

ABUNDANT WATER SUPPLY

“Private-sector companies are rapidly moving the issue of water scarcity from the sustainability agenda to a key business risk consideration. Companies have often underestimated the importance of assessing water as a key business risk as they set up operations across the world and seek to capture the opportunity from growth in these water-stressed regions.”¹ As evidenced in the map below, locating a business in the Greater Portland region alleviates the risk having a limited water supply.

AREAS FACING THE HIGHEST POTENTIAL FOR WATER SHORTAGE



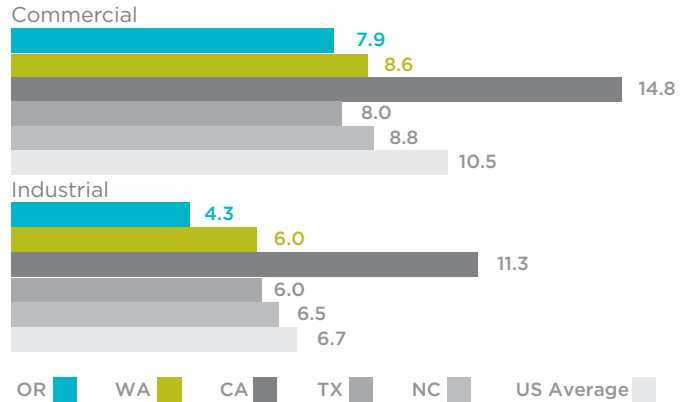
Source: Full report can be found at www.growingblue.com

COST-EFFECTIVE AND RELIABLE ENERGY

The Greater Portland region is strategically located on the convergence of the Columbia and the Willamette Rivers, giving customers direct access to the largest hydroelectric power supply in the country. In 2011, 80% of Oregon’s net electricity generation came from conventional hydroelectric power plants and other renewable energy resources. In 2010 and 2011, the region’s abundant hydroelectric power grid contributed to below-average commercial and industrial electricity prices in the Oregon and Washington.

¹ THE WATER FACTOR From Site Selection magazine, January 2013

AVERAGE RETAIL PRICE OF ELECTRICITY TO ULTIMATE CUSTOMERS BY END-USE SECTOR, BY STATE, YEAR-TO-DATE THROUGH JULY 2014 (CENTS PER KILOWATT HOUR)



Source: U.S. Energy Information Administration, Form EIA-826, Monthly Electric Sales and Revenue Report with State Distributions Report.

COST OF LIVING

Cost of living for Greater Portland residents is a West Coast bargain: lower than in Los Angeles, San Francisco, or Seattle. Similarly, average salaries in the Greater Portland region tend to be lower than in other West Coast metros. The continued growth in our region’s talented workforce suggests that skilled workers understand that their wages will go further here. Employers see the benefit of a low cost of doing business on the bottom line.

	Average Commute	Median Home Value	Class A Office	Industrial	Median Household Income
Greater Portland	25	\$249,300	\$21.59	\$0.38	\$56,978
San Francisco	30	\$557,700	\$56.62	\$1.62	\$74,992
Seattle	29	\$293,700	\$29.97	\$0.54	\$65,667
Los Angeles	29	\$428,500	\$30.96	\$0.61	\$57,271

In minutes
Price per square foot
Price per sq. ft./month

WORKFORCE

The robust computer and electronic industry in Greater Portland has developed a smart and significant regional workforce. Portland regional employment is highly concentrated in STEM fields (science, technology, engineering and math), accounting for 7.2% of metropolitan regional jobs versus 5.8% nationwide. Portland has a relatively high technology manufacturing sector – greater than Houston, Dallas, Pittsburgh or Atlanta.

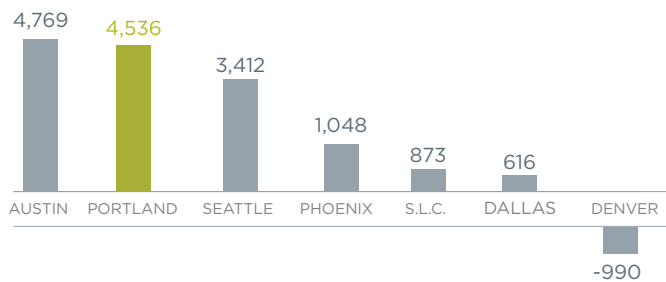
The region also has a higher proportion of skilled employees in electronics and related fields: engineers, technicians, web developers, “all other computer occupations,” and industrial and electronic engineers.

Profession	% Regional Degree Holders	% U.S. Degree Holders
Science & Engineering Related Fields	48%	44%
Engineering	8.3%	7.8%
Science & Engineering	8%	9%
Physical Sciences	4.3%	3.5%
Computers, Math, Statistics	3.8%	4.2%

TALENT ATTRACTION

In looking to expand a company, ability to attract talent is of significant importance. Greater Portland is simply a talent magnet. It attracted over 4,200 net new residents over the age of 25 with a Bachelor’s degree or higher: one of the highest rates in the nation.

DOMESTIC NET MIGRATION WITH A BACHELOR’S OR HIGHER: POPULATION 25 YEARS AND OLDER

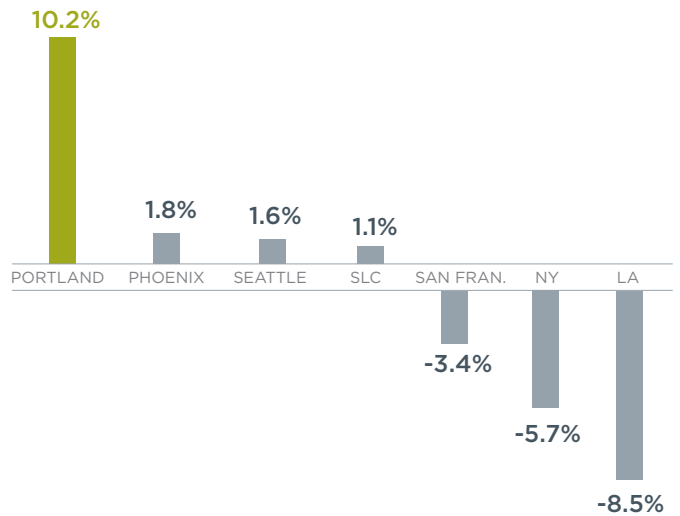


Source: U.S. Census Bureau, 2013 American Community Survey 1-Year Estimates

PRODUCTIVITY

The Greater Portland region has one of the highest production levels in the nation. Current regional gross domestic product is more than \$147 billion, with substantial growth of 10.2% in the past five years. Even more compelling is the regional GDP per capita, which has seen double-digit growth.

GROSS REGIONAL PRODUCT PER CAPITA (5-YEAR GROWTH)



Source: U.S. Bureau of Economic Analysis 2008-2011

GROSS REGIONAL PRODUCT PER CAPITA (BY WORKER)

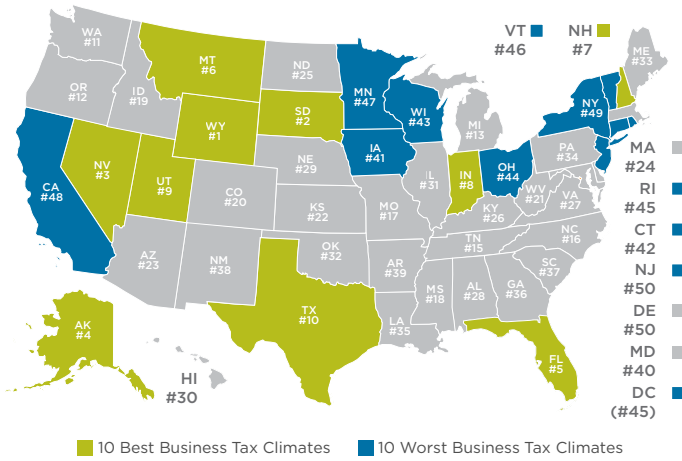


Source: U.S. Bureau of Economic Analysis 2008-2012

MODERATE TAXES

The Greater Portland region includes two states —Oregon and Washington. This means businesses here have the advantage of considering two distinct tax codes to determine which state is the best fit. Whichever they end up choosing, businesses will find that both states have designed their tax codes to attract and retain companies. As indicated below, both Oregon and Washington rank in the top quarter of the nation for business-friendly tax structure.

2015 STATE BUSINESS TAX CLIMATE



Source: State Business Tax Climate Index, Published October 28, 2014

GLOBAL ACCESS

FLIGHTS

Air service is easily accessible, with the Portland International Airport (PDX) less than nine miles from downtown Portland, linked directly to the city via lightrail. There are 249 non-stop daily departures, including direct flights to New York; San Francisco; Vancouver, BC; and Washington, DC. Daily international flights run to Tokyo and Amsterdam. More than 14.3 million passengers passed through PDX's gates in 2012.



MARKET ACCESS

Greater Portland is a global hub of export opportunity, positioned at a crossroads of ocean-bound and river shipping lanes, interstate highways and national rail lines, including Union Pacific and Burlington Northern Sante Fe. The region also has two major ports—the Port of Portland and the Port of Vancouver—for easy and direct access to overseas shipping and receiving services. With annual exports of more than \$21 billion, Greater Portland was one of only four regions in the nation that doubled exports in the past decade, and it is poised to do the same again in half the time. In cooperation with the Brookings Institution, Greater Portland has developed the Greater portland Export Initiative which is a new strategy designed to propel the region's export growth over the next five years.

JOIN US

In Greater Portland, life ignites work. Young, talented and well-educated people flock here, bent on building something better, something more balanced and meaningful. Be one of them. Don't miss the chance to become part of a region that is pioneering new approaches to industry. Join us.



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