

Memorandum



DATE May 15, 2009
TO Honorable Mayor and Members of the Dallas City Council
SUBJECT Global DFW – A Globally Competitive Metropolitan Economy

On Wednesday, May 20, 2009 you will be briefed on the DFW metropolitan region's global competitiveness among other international metropolitan regions. Dr. Lyssa Jenkins, Chief Economist and Vice President of the Dallas Regional Chamber, will be presenting.

Should you have any questions please feel free to contact me.



Mary K. Suhm
City Manager

cc: Deborah Watkins, City Secretary
Thomas P. Perkins, Jr., City Attorney
Craig Kinton, City Auditor
Judge C. Victor Lander, Administrative Judge
Ryan S. Evans, First Assistant City Manager
Ramon F. Miguez, P.E., Assistant City Manager
Jill A. Jordan, P.E., Assistant City Manager
A.C. Gonzalez, Assistant City Manager
Forest Turner, Interim Assistant City Manager
Dave Cook, Chief Financial Officer
Frank Libro, Public Information Office
Helena Stevens-Thompson, Assistant to the City Manager



Global DFW

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Texas Woman's University

Major Findings

1. Modern DFW is the product of globalization
 - *Timing & structure of growth*
2. New terms of competition for a global economy
 - *Industrial sectors v regional assets*
3. DFW performs well among elite global metros
 - *Notable strengths and particular challenges*



MODERN DFW

Metro	Global Rank	Population (millions)		
		1975	2005	Growth
Los Angeles	32	8.9	12.3	3.4
Atlanta	41	1.4	4.3	2.9
Miami	43	2.6	5.4	2.8
New York	44	15.9	18.7	2.8
DFW	52	2.2	4.7	2.4
Phoenix	56	1.1	3.4	2.3
Houston	57	2.0	4.3	2.3

US Metros In Global 100

GLOBAL METROS

Dallas-Fort Worth (DFW) is one of the spikes in the global economy, claiming the 12th largest metro economy in the world. DFW posts a gross metro product exceeding \$300 billion, supported by a local workforce of three million and more than six million residents.

GLOBAL FOOTPRINTS

Logistics & Trade

Technology

Advanced Services



GLOBAL COMPETITION

- Talent: Availability of skilled labor
 - Quantity & Quality, Present & Future
- Access: To markets and partners
 - Air, Land and Water
- Resources: Local business supports
 - Services, finance and innovation
- Business Climate: Ease of doing business
 - Costs and risks
- Quality of Life: Livability
 - Health, safety and costs

BENCHMARK METROS

- Global Business Centers
- National Stature
- Advanced Service Centers
- International Airports
- Immigrant Hubs
- DFW Connections

UN 2007 POPULATION ESTIMATES

Rank	Metro Name	Nation	Population
1	Tokyo	Japan	35,676,000
2	New York	USA	19,040,000
3	Mumbai	India	18,978,000
4	Sao Paulo	Brazil	18,845,000
5	Shanghai	China	14,987,000
6	Los Angeles	USA	12,500,000
7	Paris	France	9,904,000
8	Seoul	South Korea	9,796,000
9	Chicago	USA	8,990,000
10	London	United Kingdom	8,567,000
11	Hong Kong	China-SD	7,206,000
12	Miami	USA	5,585,000
13	Toronto	Canada	5,213,000
14	DFW	USA	4,798,000
15	Atlanta	USA	4,506,000
16	Houston	USA	4,459,000
17	Singapore	Singapore	4,436,000
18	Melbourne	Australia	3,728,000
19	Monterrey	Mexico	3,712,000
20	Frankfurt	Germany	2,517,600
21	Amsterdam	Netherlands	1,031,000

INDICATORS

Talent

Working Age
Residents
Higher Education
Immigrant Index
Top 500 Universities
Nobel Prize Winners
Global Skills:
 Advanced Services
 Technology

Access

Destinations
Passengers
Air Cargo
Water Cargo
Railways*
Roadways*

Quality of Life

Livability
Environment *
Safety
Cost of Living Index
GDP per capita

Resources

Global 500 HQ
Domestic Market Cap
Expenditures on R&D*
Patents*

Business Climate

Cost of Doing Business
Cost of Office
Occupancy
Business Taxes*
Ease of Doing
Business*
Economic Stability*

** These indicators are reported at the national level to ensure reasonable quality and consistency.*

DFW RANKINGS

<i>Costs & risks of doing business</i>	Business Climate	2-t*
<i>Health, safety & material well-being</i>	Quality of Life	8-t
<i>Air, land, water access to markets & partners</i>	Access	10-t
<i>Institutional resources & culture</i>	Resources	10-t
<i>Quantity & quality of labor force</i>	Talent	11-t
	Competitiveness Index	10-t

* "t" denotes a tie between two or more metros for that ranking.

BUSINESS CLIMATE

Metro Rank

Singapore	1
Atlanta	2-t
DFW	2-t
Los Angeles	4
Houston	5
Amsterdam	6
Chicago	7
Miami	8-t
New York	8-t
London	10
Toronto	11

Business Climate Indicators	DFW Metro	
	Rank	Value

Office Costs (*\$/workstation*) 2 \$5,320

Ease of Doing Business 5-t 3

Cost of Doing Business 3 97.3

Economic Stability 8-t 87.4

Business Taxes (*TTR*) 10-t 46.2%

Metro

Rank

Tokyo	1
Frankfurt	2-t
Toronto	2-t
Paris	4
London	5
Los Angeles	6
Melbourne	7
Amsterdam	8-t
Chicago	8-t
DFW	8-t
Houston	8-t

QUALITY OF LIFE

Quality of Life Indicators	DFW Metro	
	Rank	Value
Healthy Life Expectancy	9-t	69
Environmental Performance	7-t	81
Safety	8-t	105.3
GDP per Capita	5	\$45,024
Cost of Living	4	78.6
Livability	11	90.6

ACCESS RANK

Hong Kong	1
Tokyo	2
New York	3t
Paris	3t
Frankfurt	5t
Los Angeles	5t
Seoul	7
Singapore	8
London	9
Atlanta	10-t
Chicago	10-t
DFW	10-t
Houston	10-t

Access Indicators	DFW	Metro
	Rank	Value
Destination Cities (#)	9	186
Passengers (millions)	8	66
Air Cargo (mil tons)	14	1
Water Cargo (tons)	19-t	0
Rail & Road Quality	7-t	11.4

RESOURCES RANKINGS

Metro	Rank
Tokyo	1
Paris	2
New York	3-t
Seoul	3-t
Chicago	5-t
Toronto	5-t
London	7
Frankfurt	8
Los Angeles	9
DFW	10-t
Houston	10-t

Resources Indicators	DFW	Metro
	Rank	Value
Global 500 HQ (#)	8-t	6
Domestic Market Cap (\$)	12-t	NA
R&D Expenditures (%)	10-t	1.6%
Patents (per mil residents)	3-t	742

Metro	Rank
New York	1
London	2-t
Tokyo	2-t
Toronto	2-t
Paris	5
Amsterdam	6
Frankfurt	7-t
Los Angeles	7-t
Chicago	9-t
Melbourne	9-t
DFW	11-t
Houston	11-t
Singapore	11-t

TALENT RANK

Talent Indicators	DFW	Metro
	Rank	Value
Working Age	11-t	68%
Higher Education	11	33%
Advanced Services	12-t	21%
Technology	8	45
Nobel Prize Winners	6	5
Top 500 Universities	9-t	3
Immigrant Index	12	54

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Top 10 Metros	Global Rank	Talent	Access	Resources	Business Climate	Quality of Life
Tokyo	1	2-t	2	1	14	1
New York	2-t	1	3-t	3-t	8-t	12-t
Paris	2-t	5	3-t	2	18	4
Toronto	4	2-t	19	5-t	11	2-t
London	5	2-t	9	7	10	5
Los Angeles	6	7-t	5-t	9	4	6
Frankfurt	7	7-t	5-t	8	15-t	2-t
Amsterdam	8-t	6	14	13	6	8-t
Chicago	8-t	9-t	10-t	5-t	7	8-t
DFW	10-t	11-t	10-t	10-t	2-t	8-t
Houston	10-t	11-t	10-t	10-t	5	8-t

Remaining Metro Global Rankings:

Singapore (12), Atlanta (13), Melbourne and Miami (14-t), Hong Kong (16), Seoul (17), Shanghai (18), Sao Paulo (19), Mumbai (20), Monterrey (21)



GLOBAL DFW

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