A stylized world map with a dark blue background. The map is composed of dark grey landmasses and a lighter blue ocean. Numerous small, glowing yellow dots are scattered across the map, primarily concentrated in North America, Europe, and parts of Asia, representing energy and infrastructure investment locations. The text is overlaid on the top left of the map.

THE NEXT ECONOMY: Transforming Energy and Infrastructure Investment

The Great Recession Has Been A Wake Up Call

THE NEXT
ECONOMY



The Great Recession Has Been A Wake Up Call

THE NEXT
ECONOMY



1 2 3

1 A vision for the next American economy



1 2 3

2 The next economy will be led by metropolitan areas



1 2 3

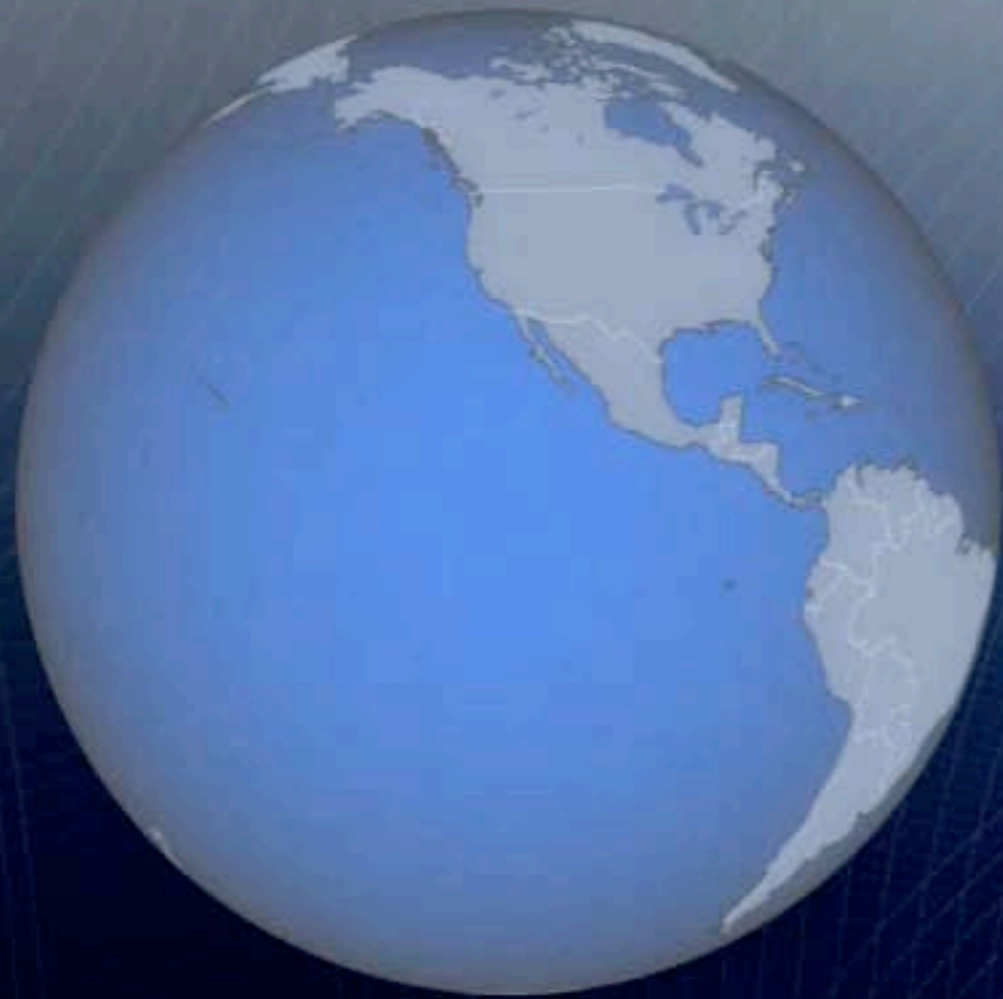
3

To build the next economy the U.S. must connect the macro to the metro

MACRO
TO METRO

The Next American Economy

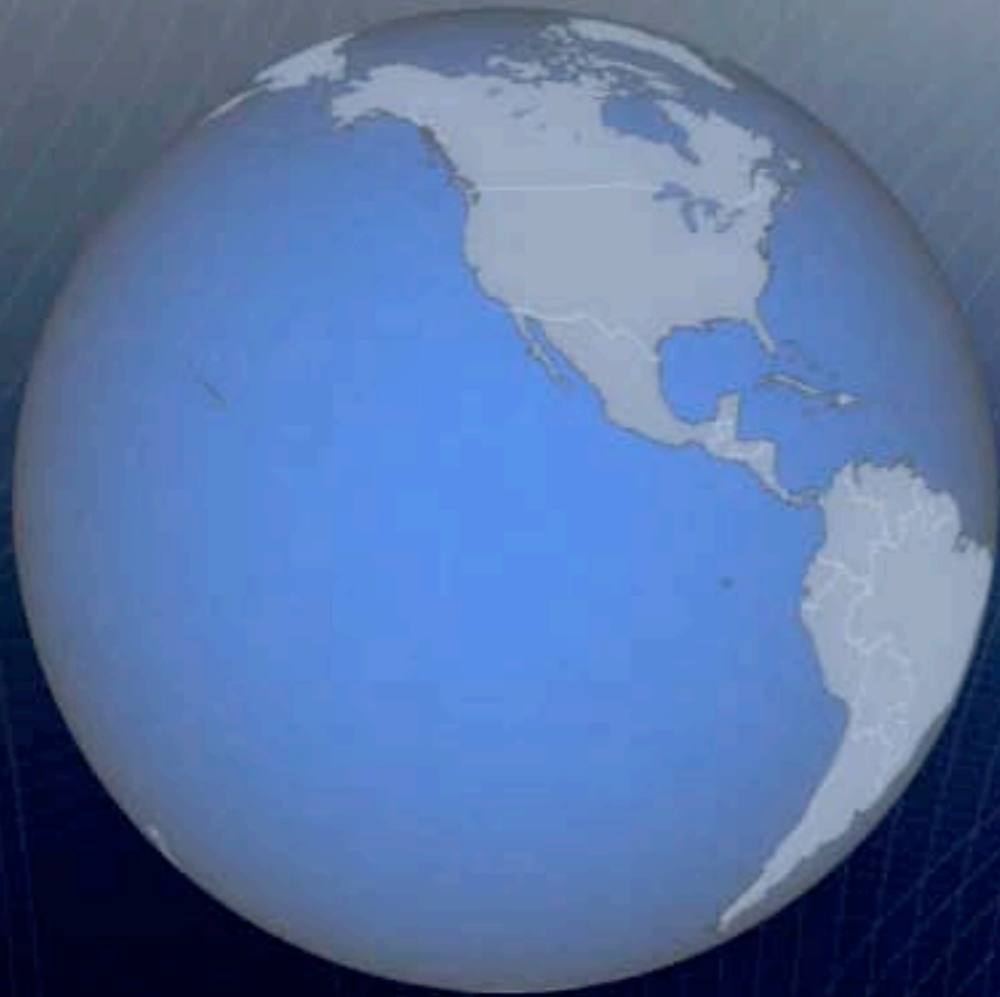
THE NEXT
ECONOMY



We compete in a fiercely
competitive world

The Next American Economy

THE NEXT
ECONOMY



1 2 3

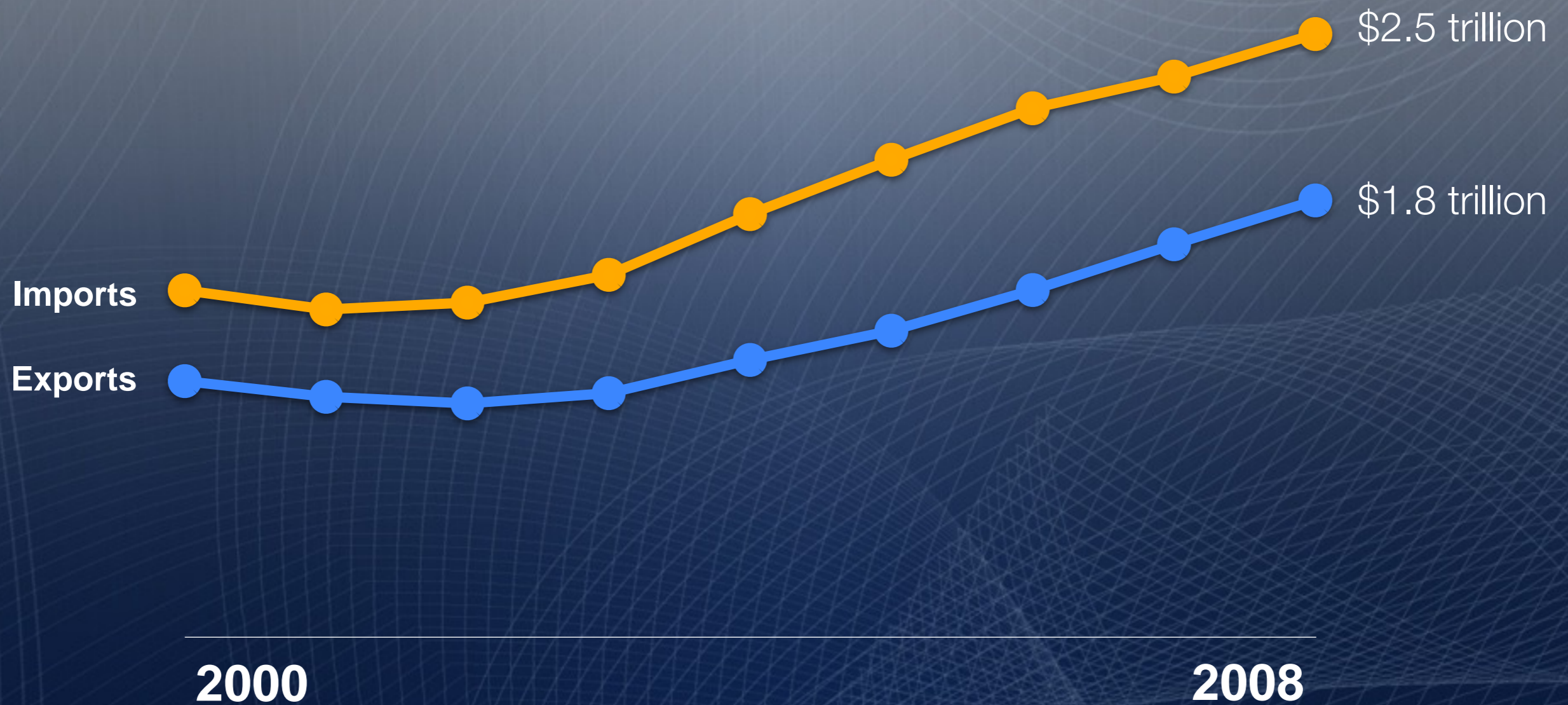
1 A vision for the next American economy



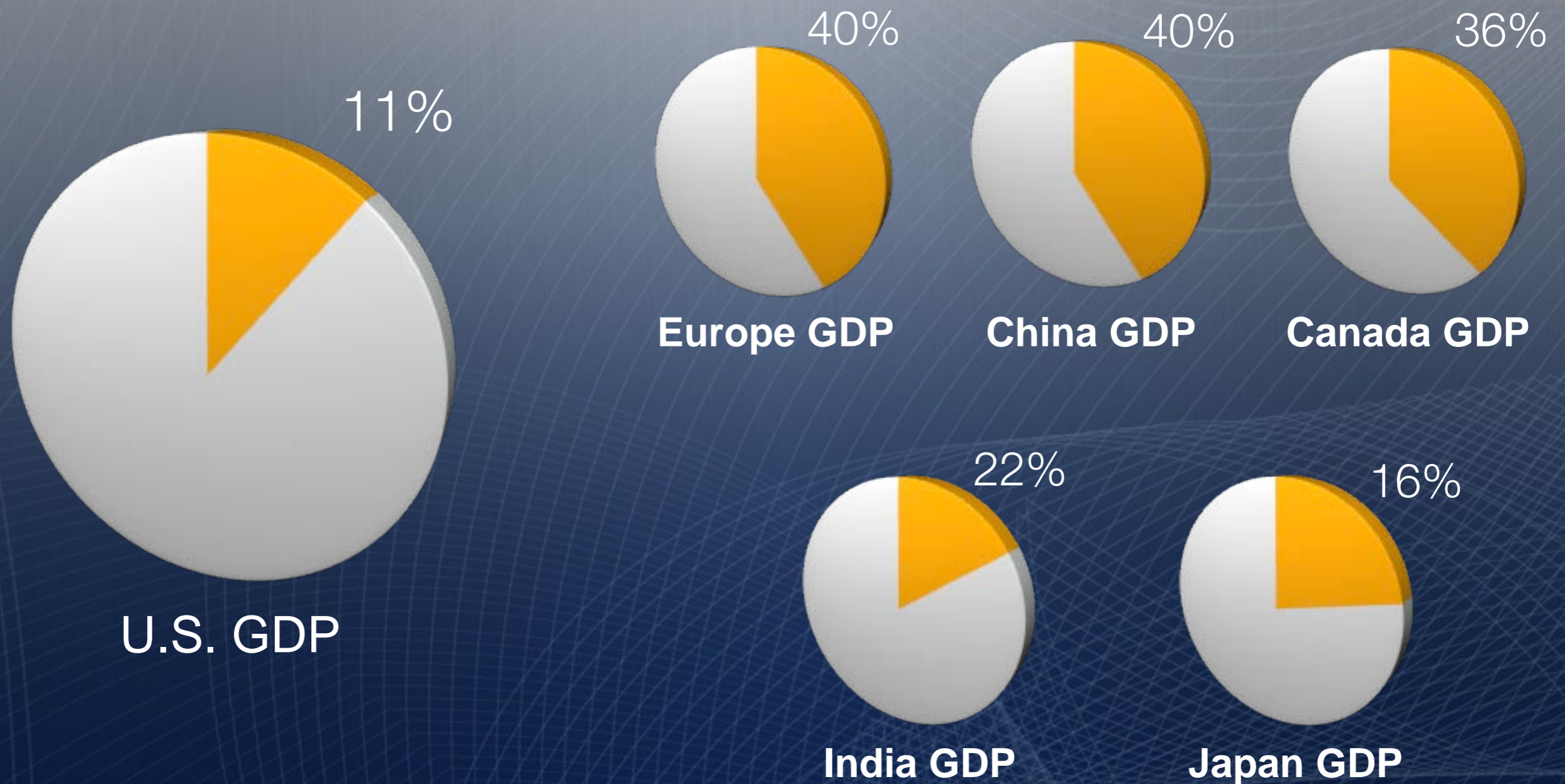
U.S. Trade is Dominated by Imports



U.S. Trade Balance



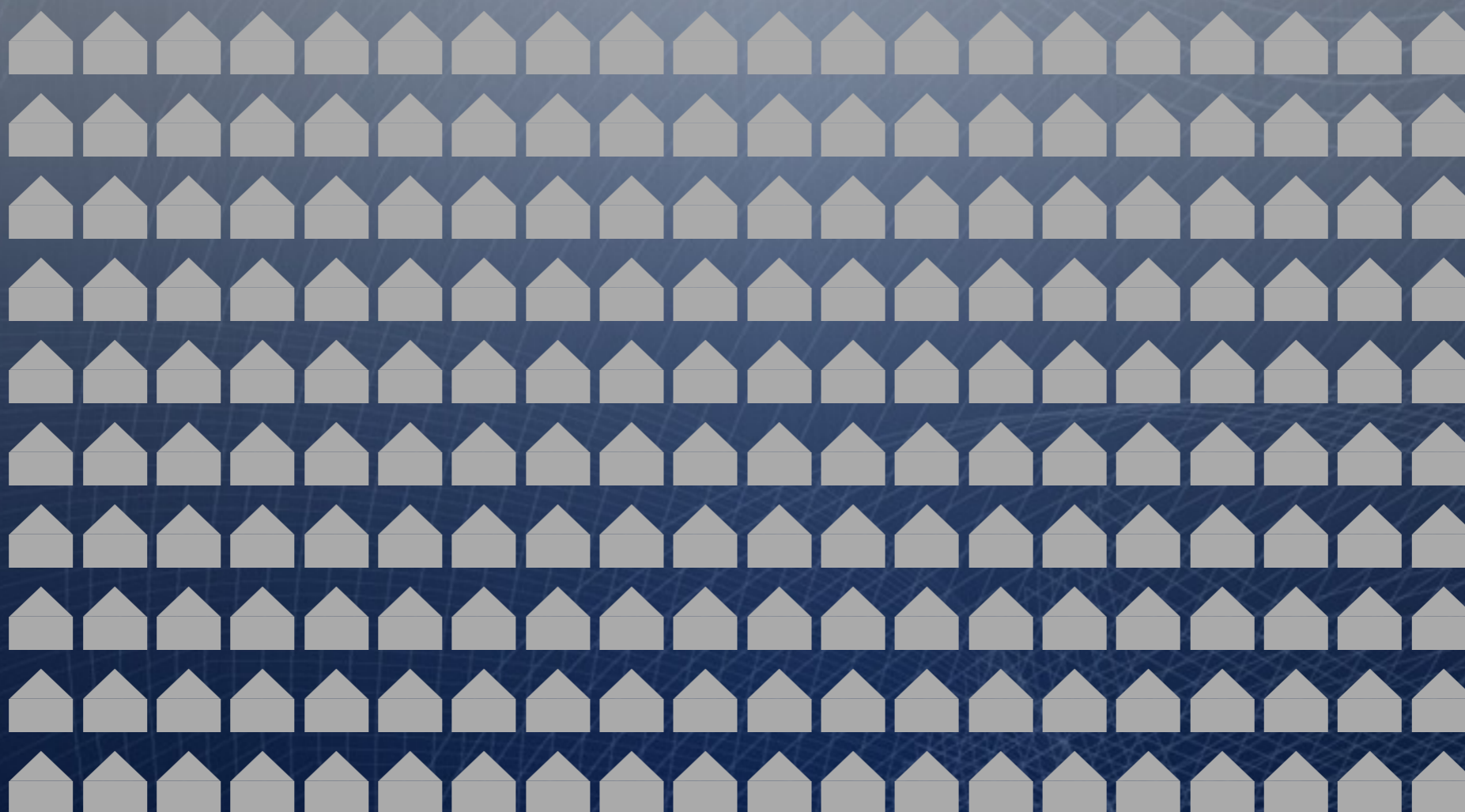
U.S. Exports Lag Our Competition



Exporting Is an Unnatural Act



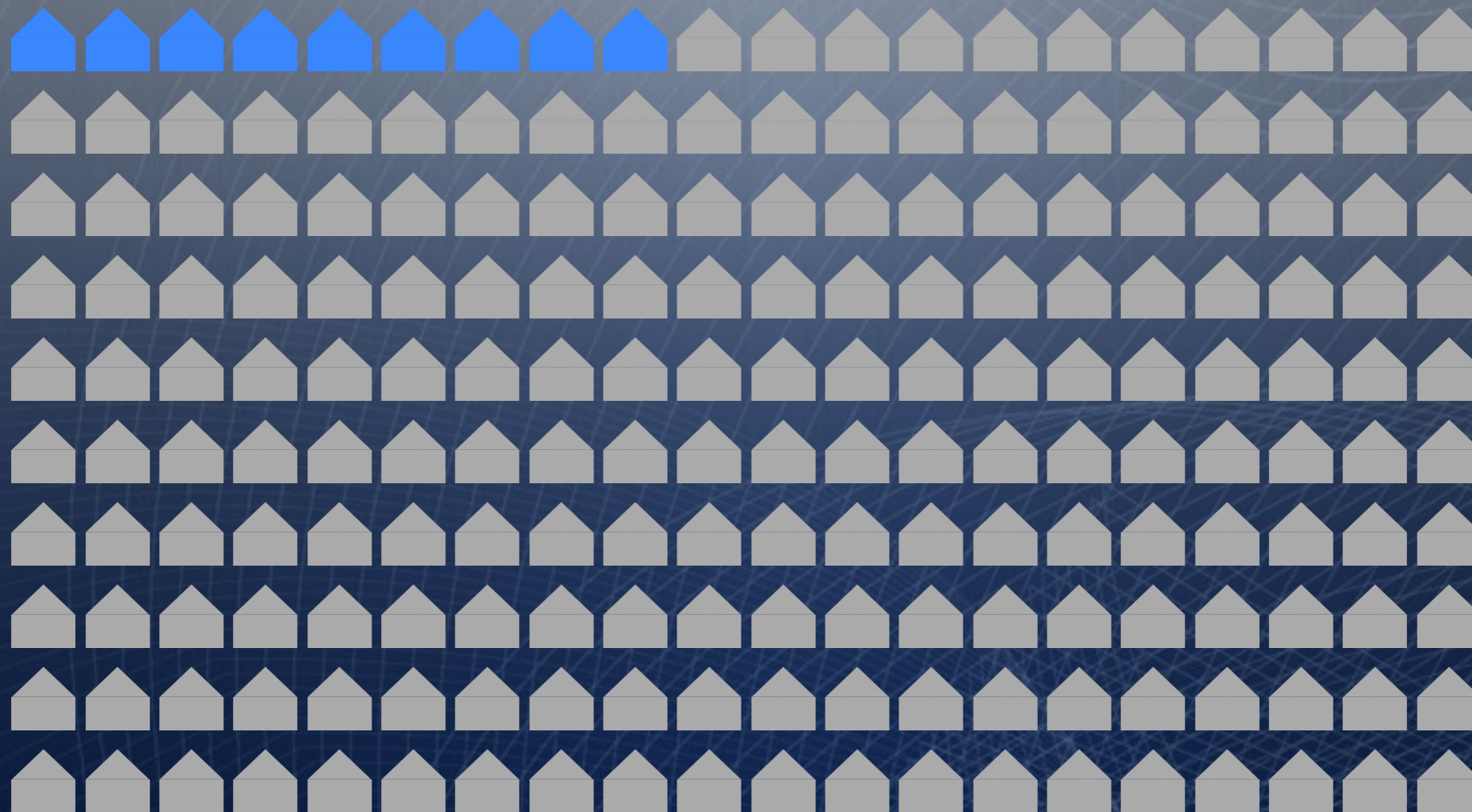
U.S. Companies



Exporting Is an Unnatural Act



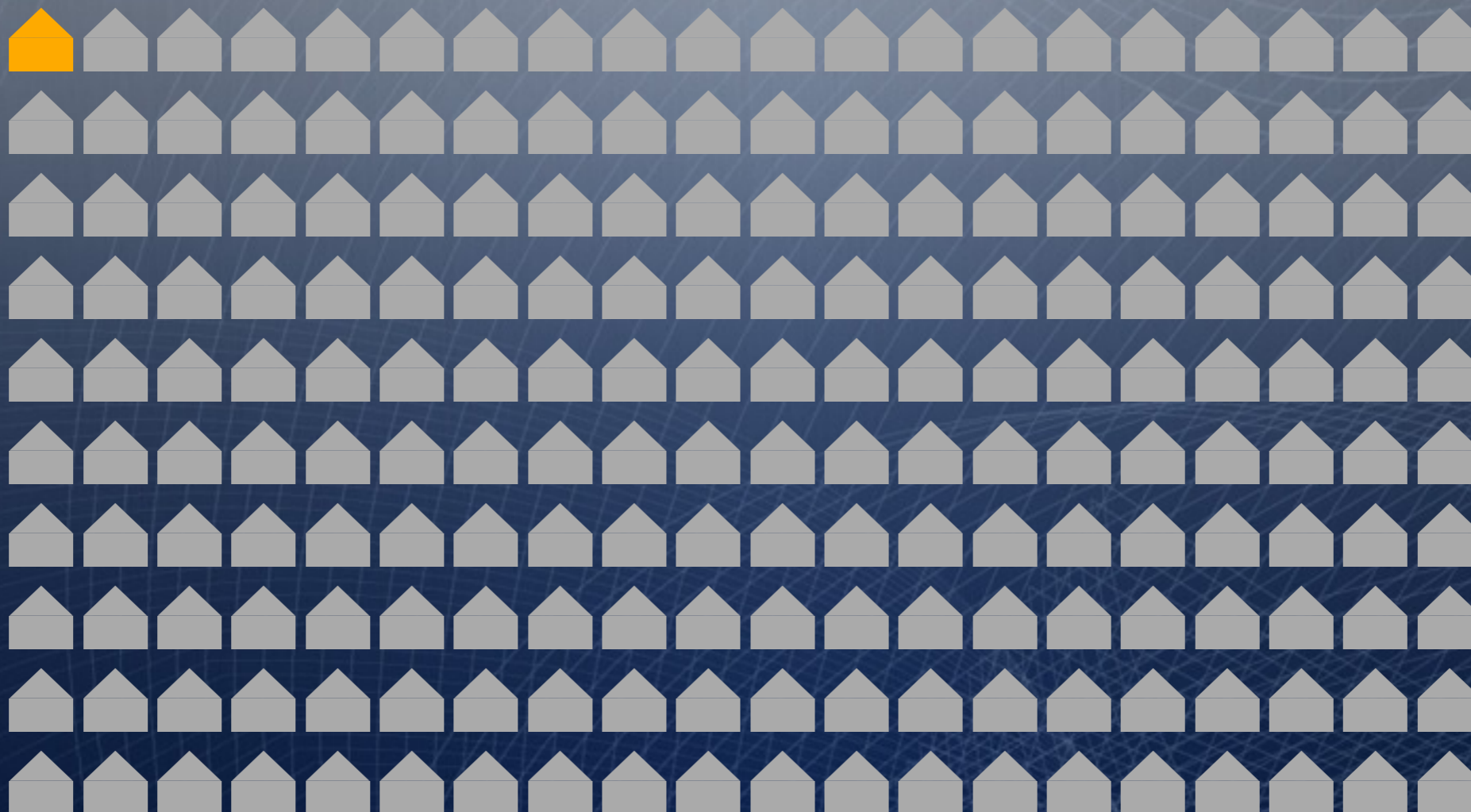
U.S. Companies that Export



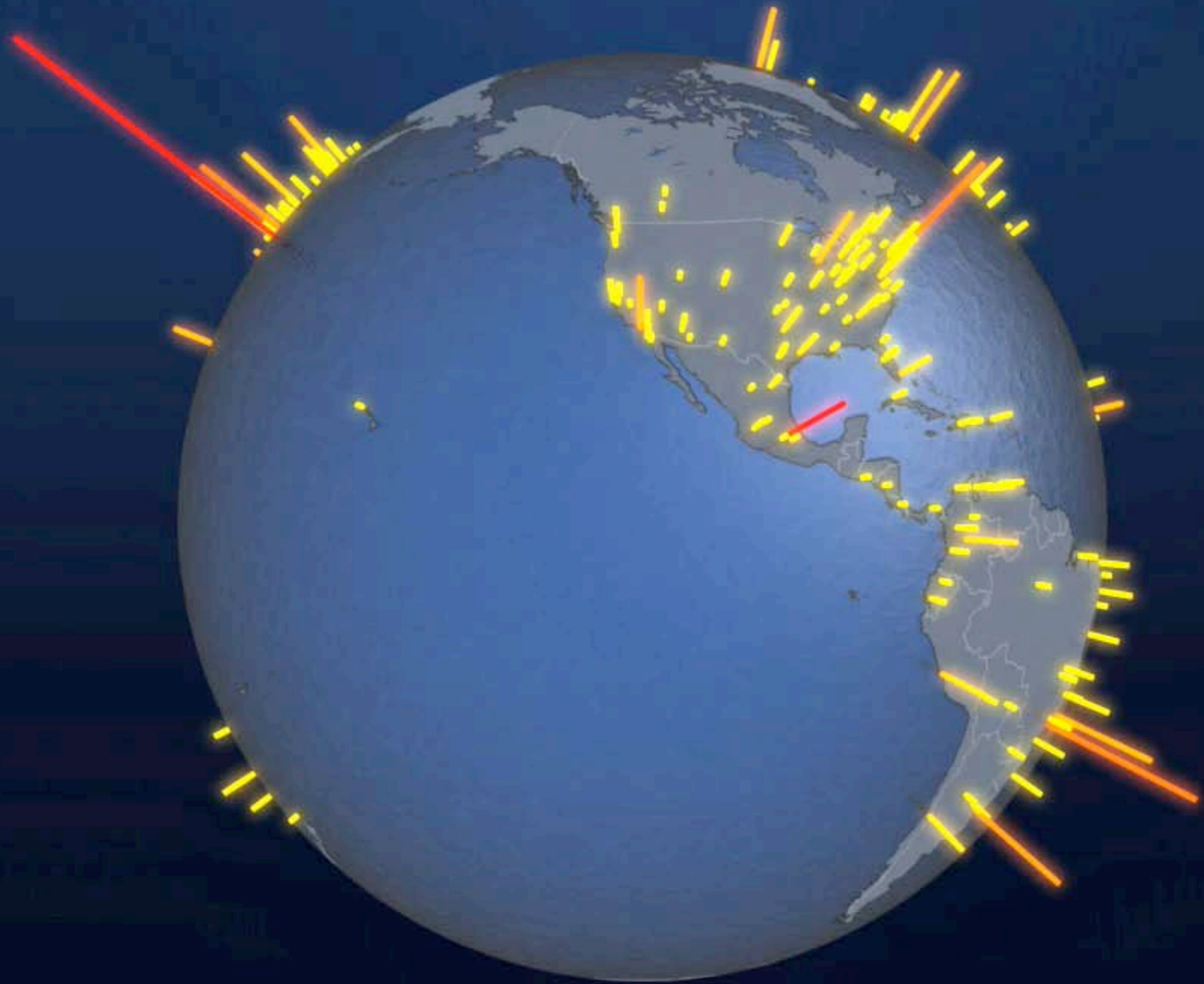
Exporting Is an Unnatural Act



U.S. Companies that Export to More than One Country



Can we get back
into the
export game?



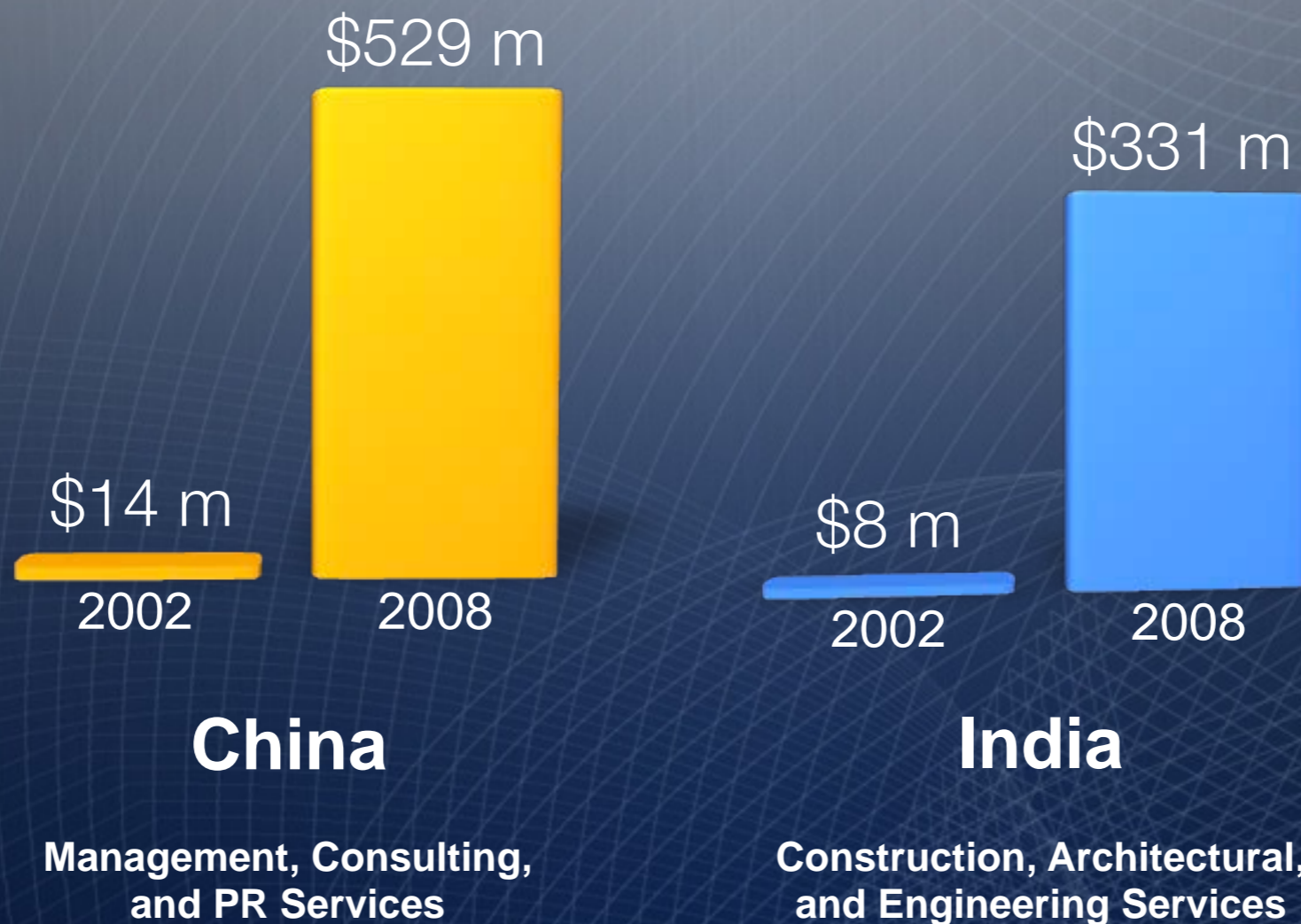
The U.S. Can Play At This Expansion



Educational Services are a Key Export



U.S. Exports To Other Countries Are Rising



China
Management, Consulting,
and PR Services

India
Construction, Architectural,
and Engineering Services

U.S. Goal for Exports



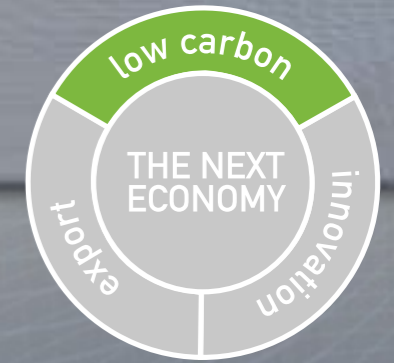
“We set a new goal: We will double our exports over the next five years, an increase that will support two million jobs in America.”

President Obama
January 27, 2010

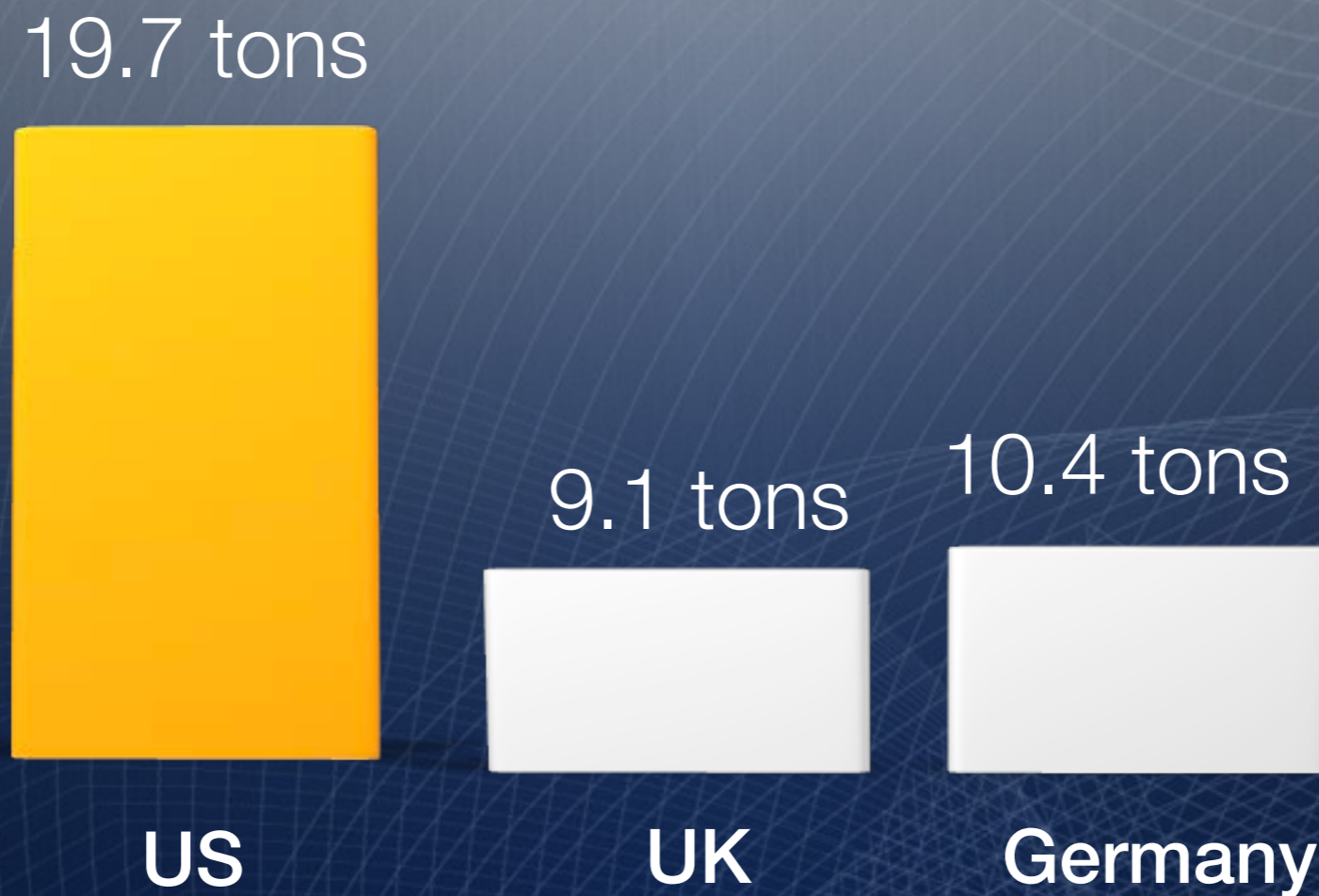




The U.S. Has Been Slow to Embrace the Green Economy



CO₂ Emissions Per Capita



We have been slow to embrace the Green Economy



Top solar production firms in the world



China is seeking to dominate the race to green



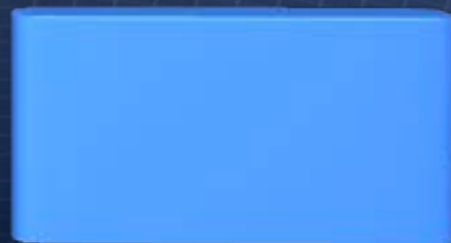
Stimulus packages on renewable energy

\$221 billion



China

\$94 billion



U.S.

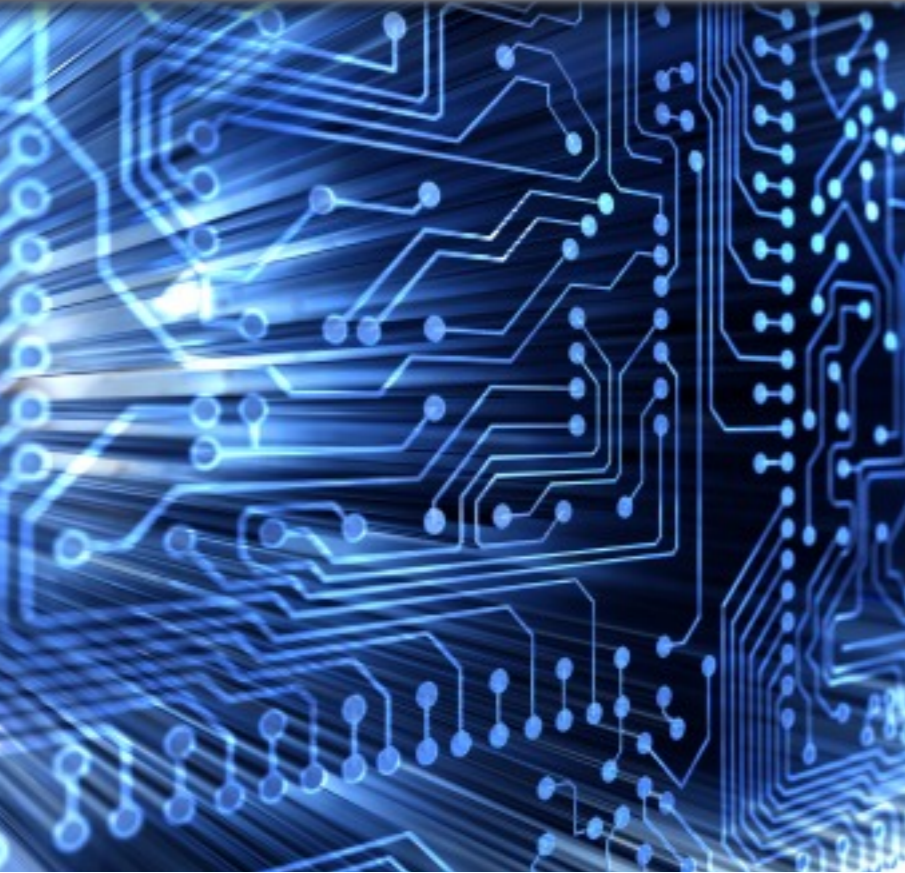
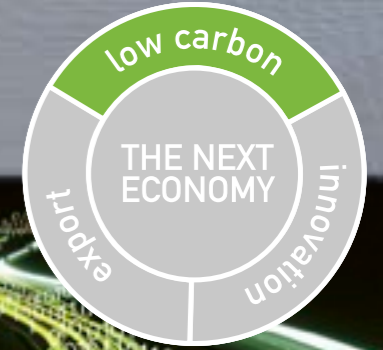


**Low carbon
economy = Markets**

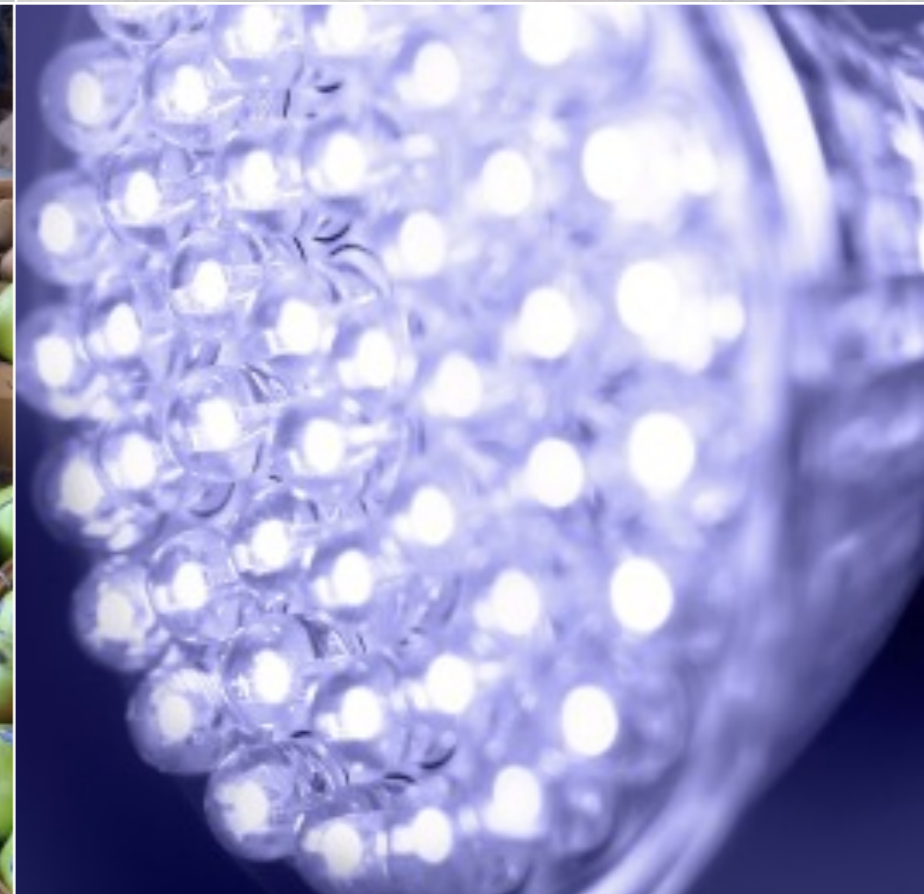
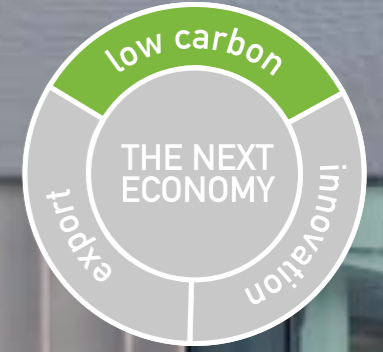
The Energy We Use



The Infrastructure We Build



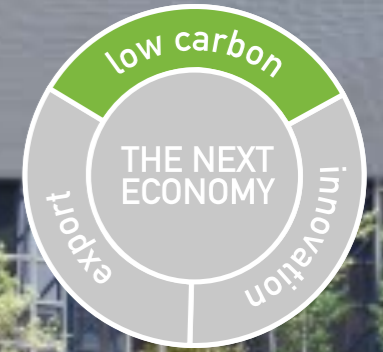
The Products We Buy



The Buildings We Live and Work In



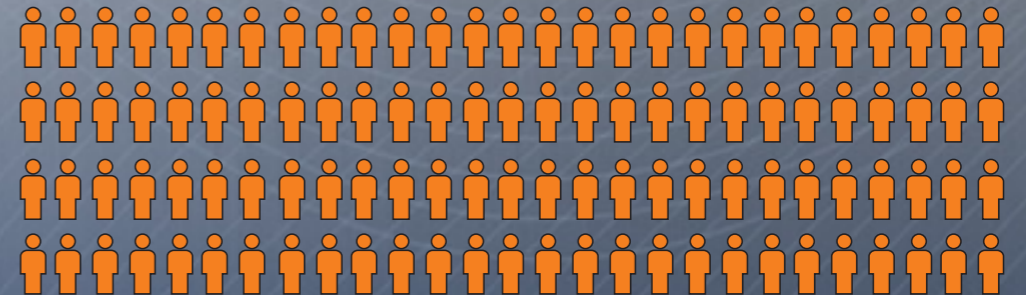
The Buildings We Live and Work In



Need Job Creation?



Financiers



Scientists / Engineers



Entrepreneurs



Laborers



Looking For A Smart Investment?



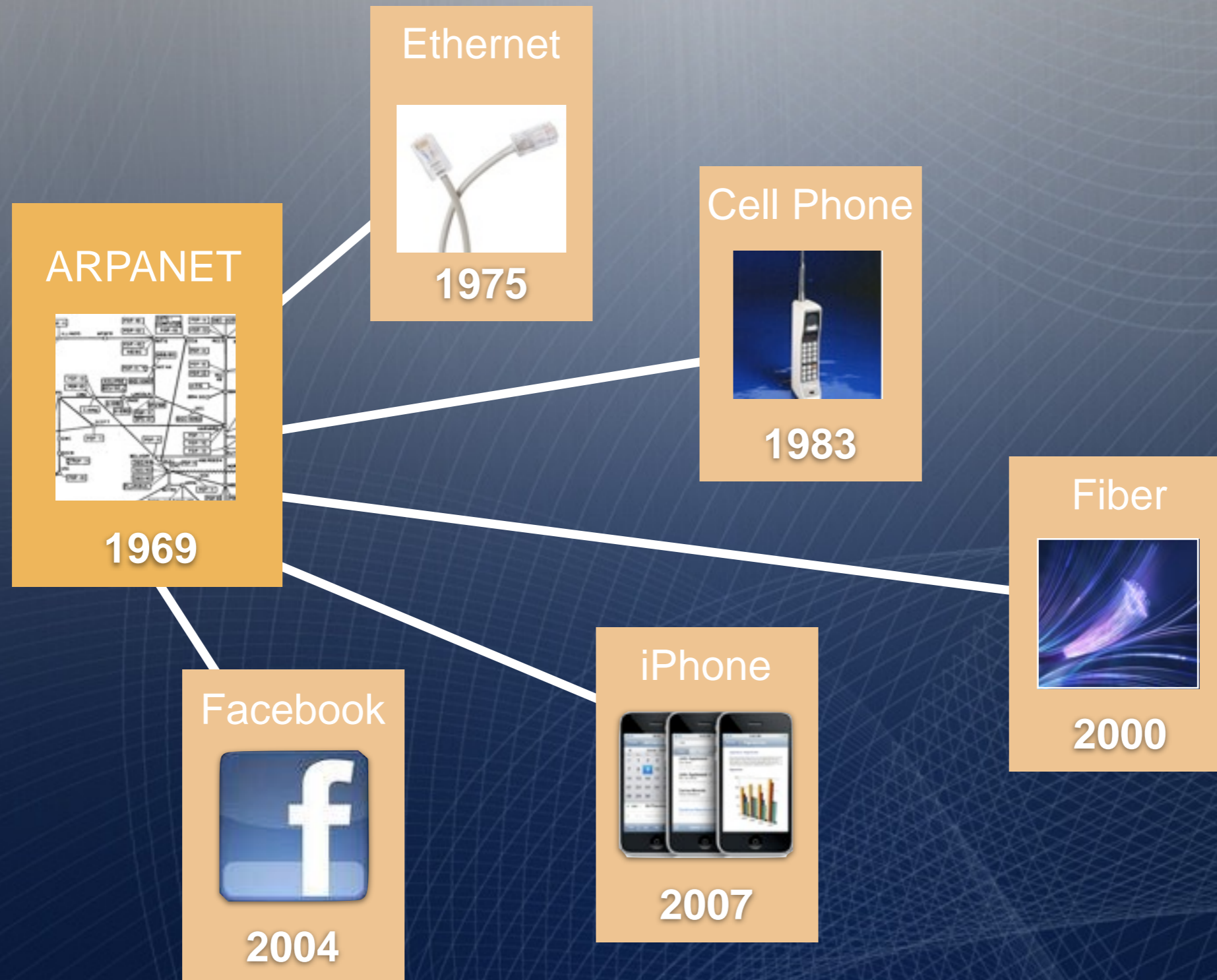
\$13 trillion

by 2050

to reduce greenhouse gas
emissions



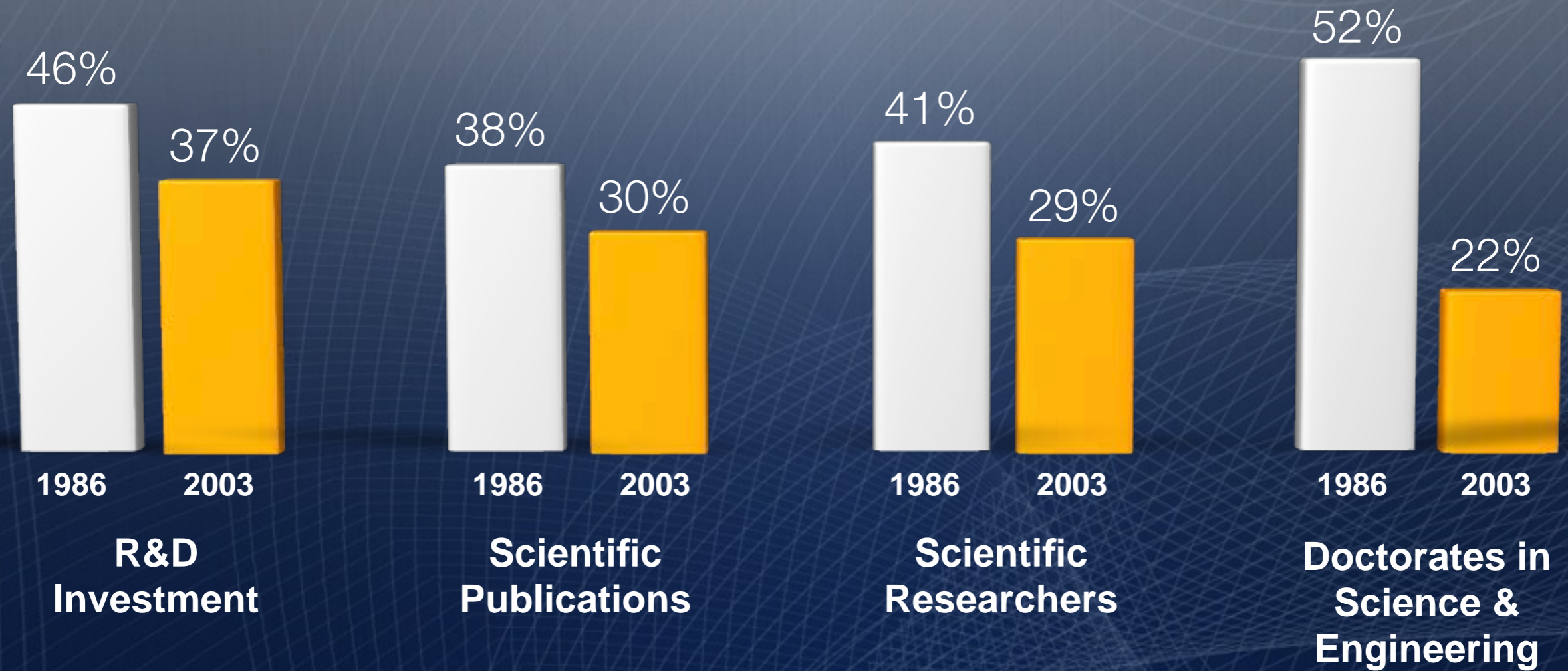
Internet and Telecom Innovation



U.S. Leadership On Key Innovation Indicators Is Slipping



U.S. Share of Global Totals



The U.S. Ranks Low In Science and Engineering Degrees

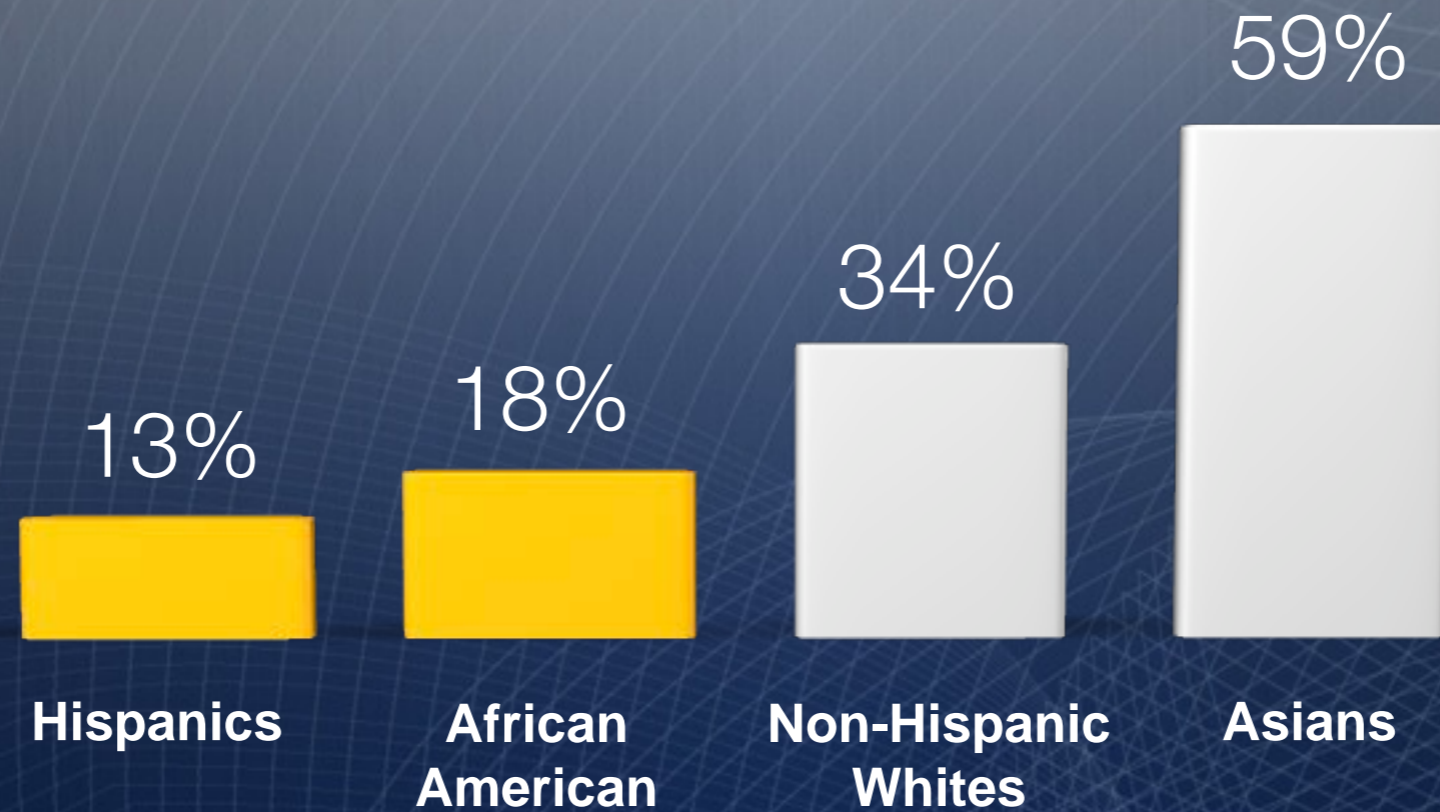


- Turkey
- United Kingdom
- Lebanon
- Mexico
- Canada
- Bolivia
- Spain
- Switzerland
- Uganda
- Algeria
- Estonia
- Slovenia
- South Africa
- Mozambique
- Morocco
- United States**
- Honduras
- Lithuania

The Next American Workforce Is Ill Equipped



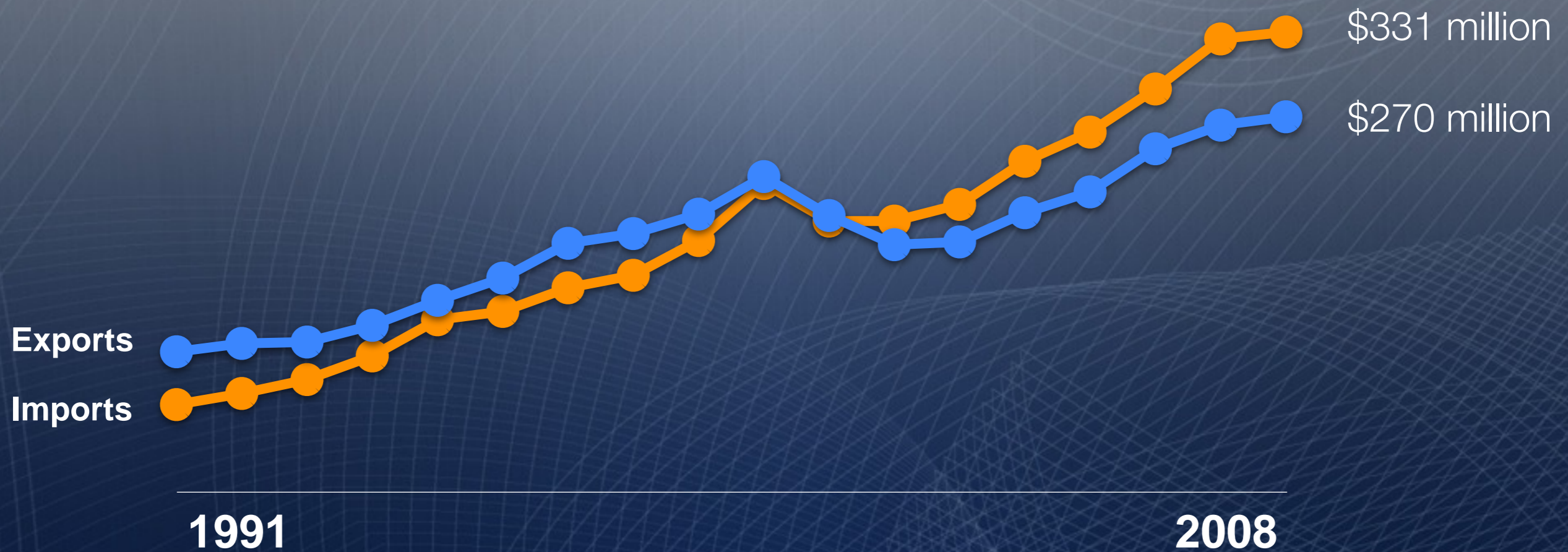
Bachelor's Degree Attainment



U.S. Lags On The Conversion Of Innovation Into Production



Advanced Technology Products



**It is time to
rediscover our
innovation...**

m o j o

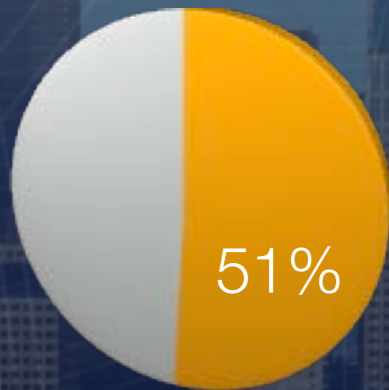
1 2 3

2 The next economy will be led by metropolitan areas

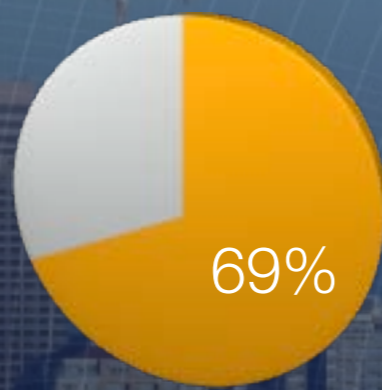




Seattle

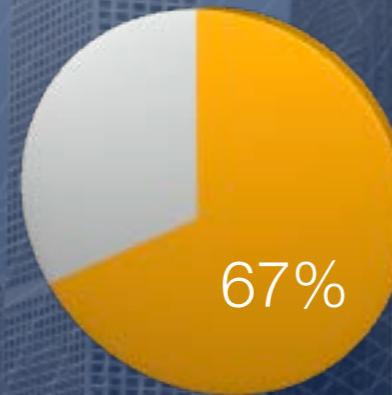


Residents

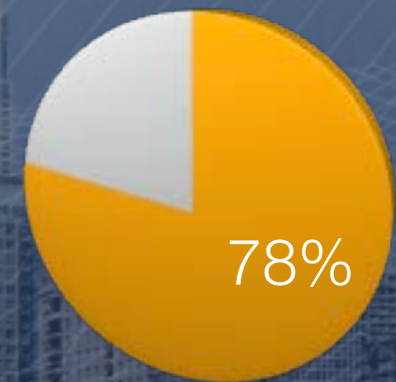


Economic Output

Chicago

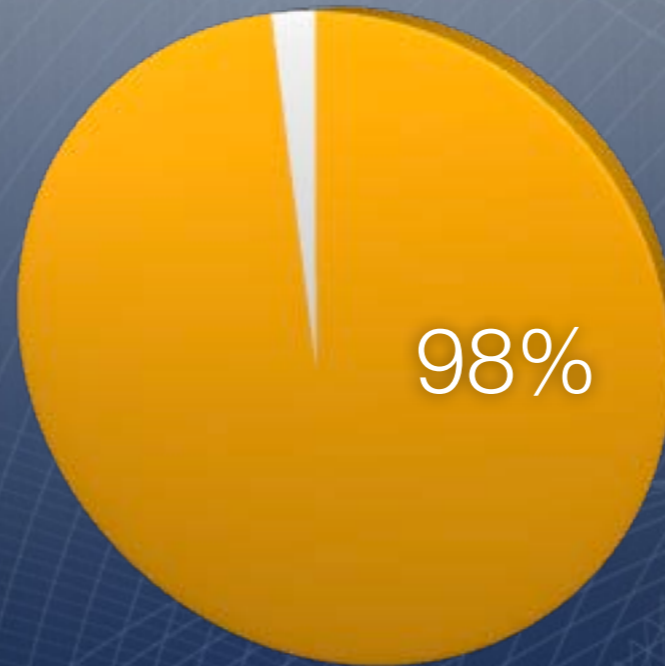
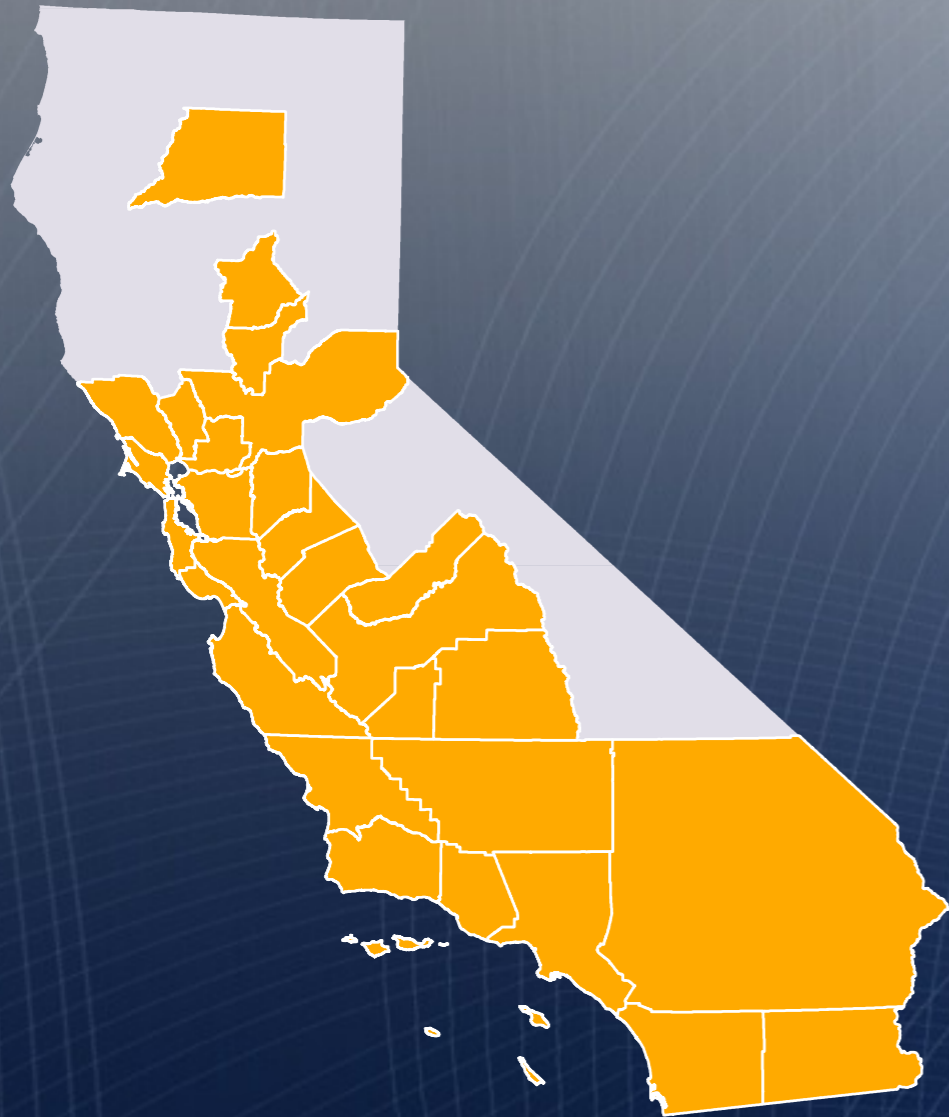


Residents

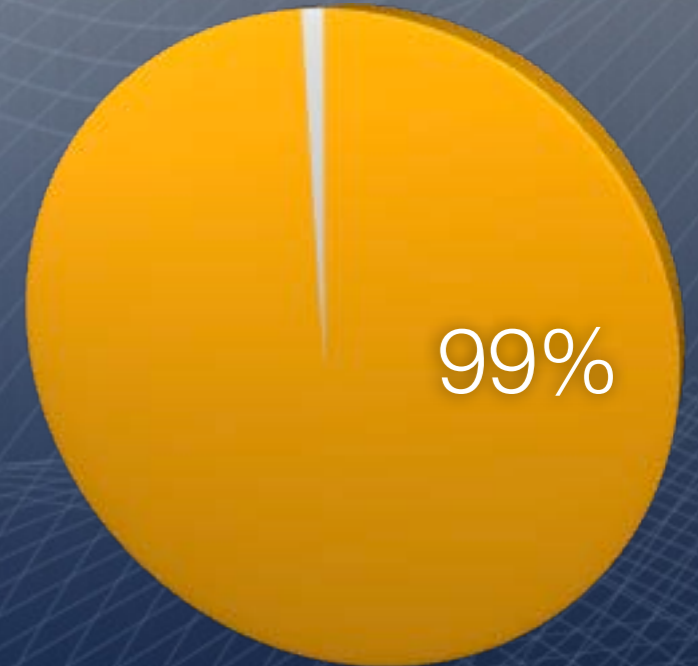


Economic Output

California Metros



Residents

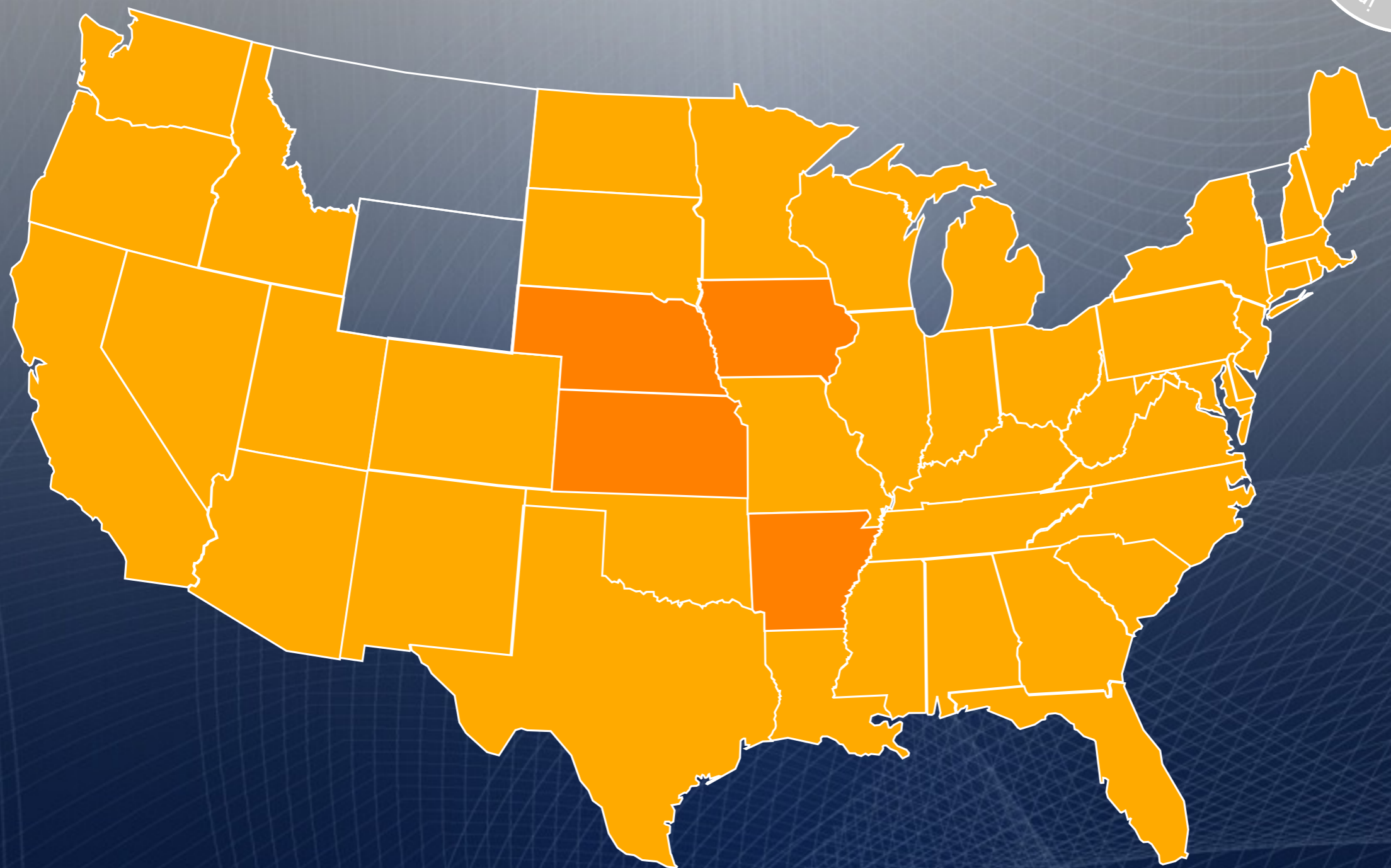


Economic Output

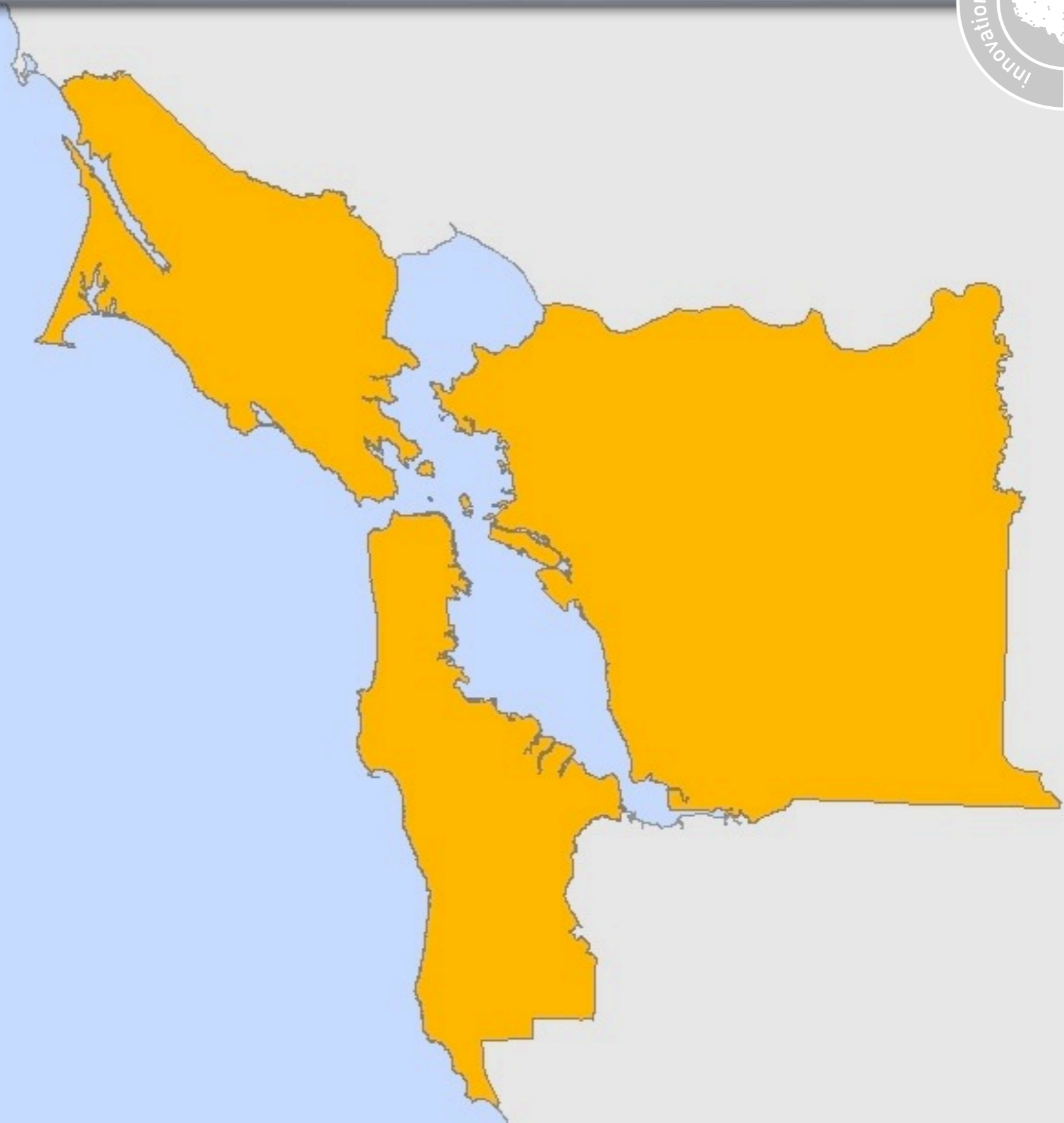
U.S. Metros



U.S. Metros



Bay Area and Silicon Valley



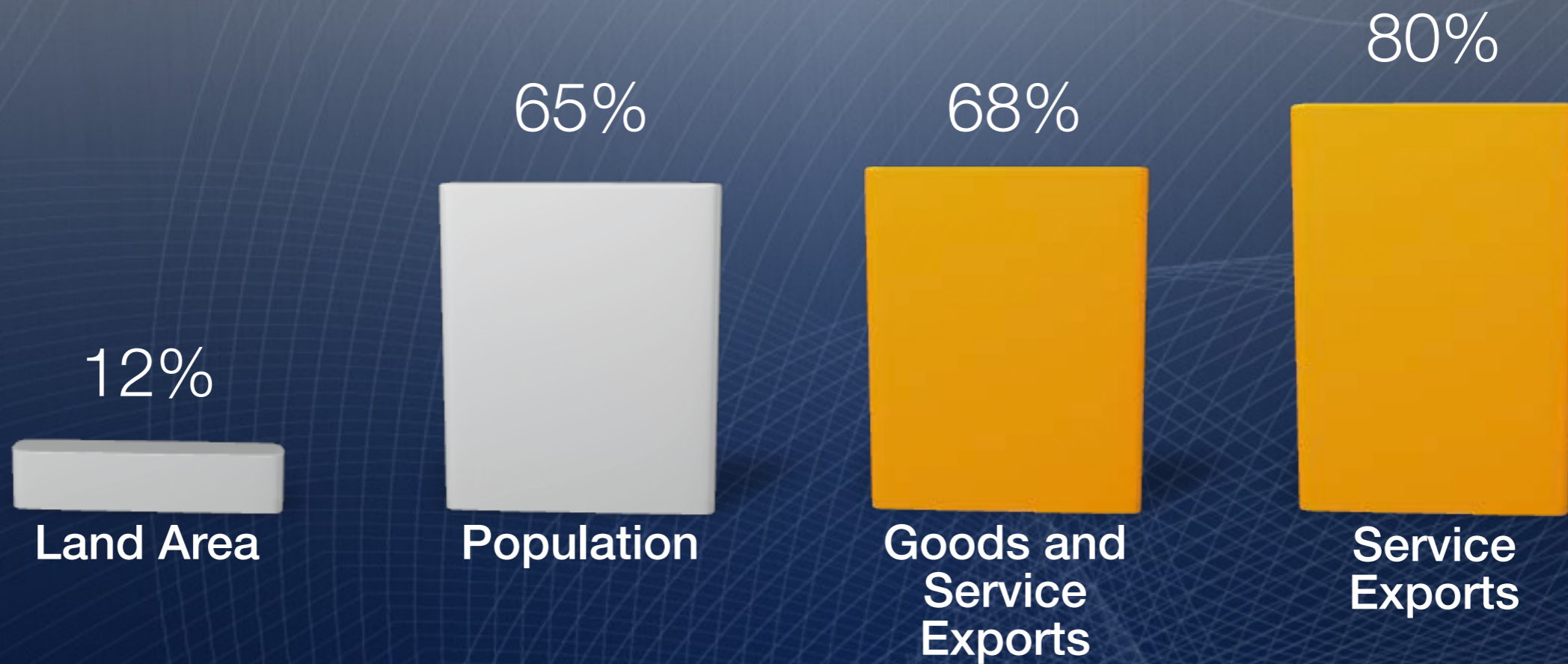
Bay Area and Silicon Valley



U.S. Metros Dominate Trade



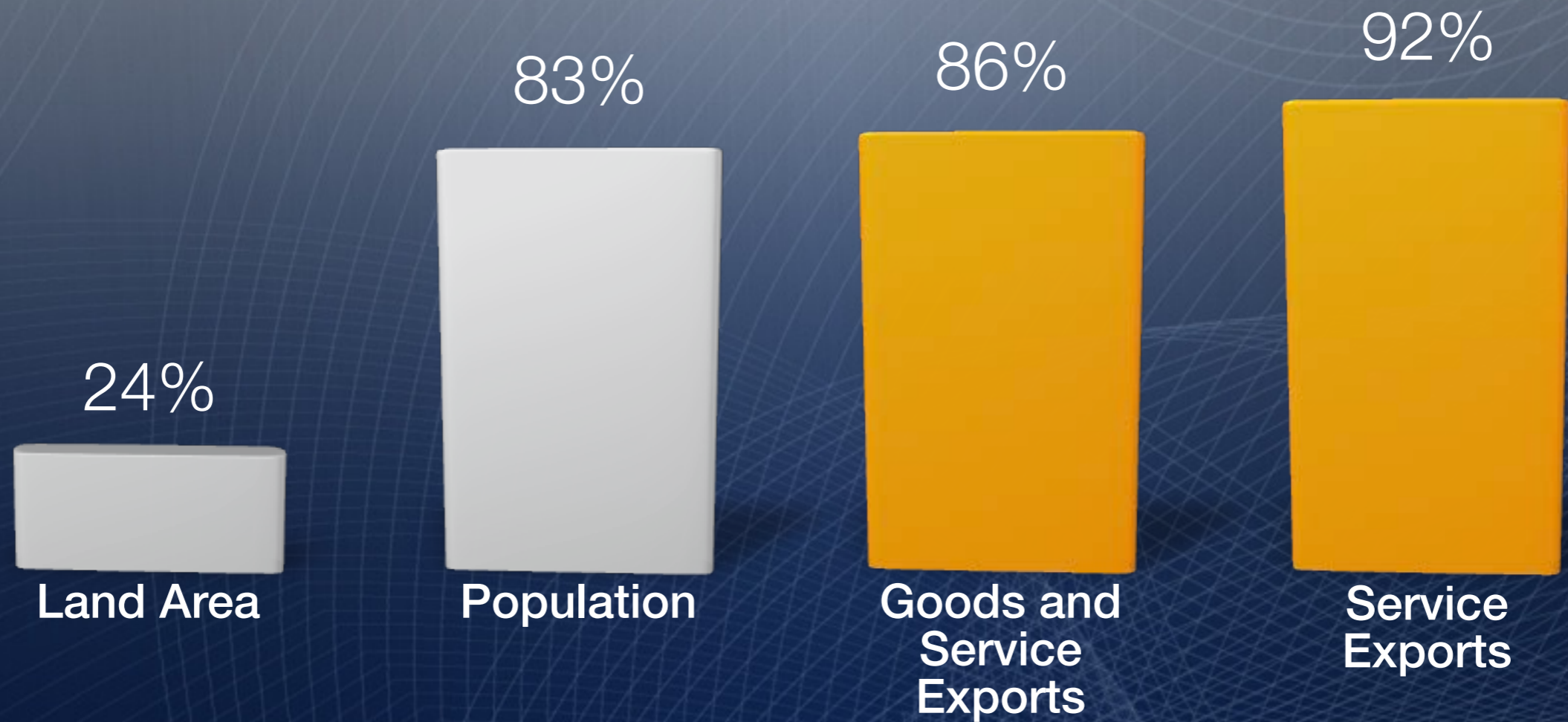
Top 100 Metros



U.S. Metros Dominate Trade



All Metros

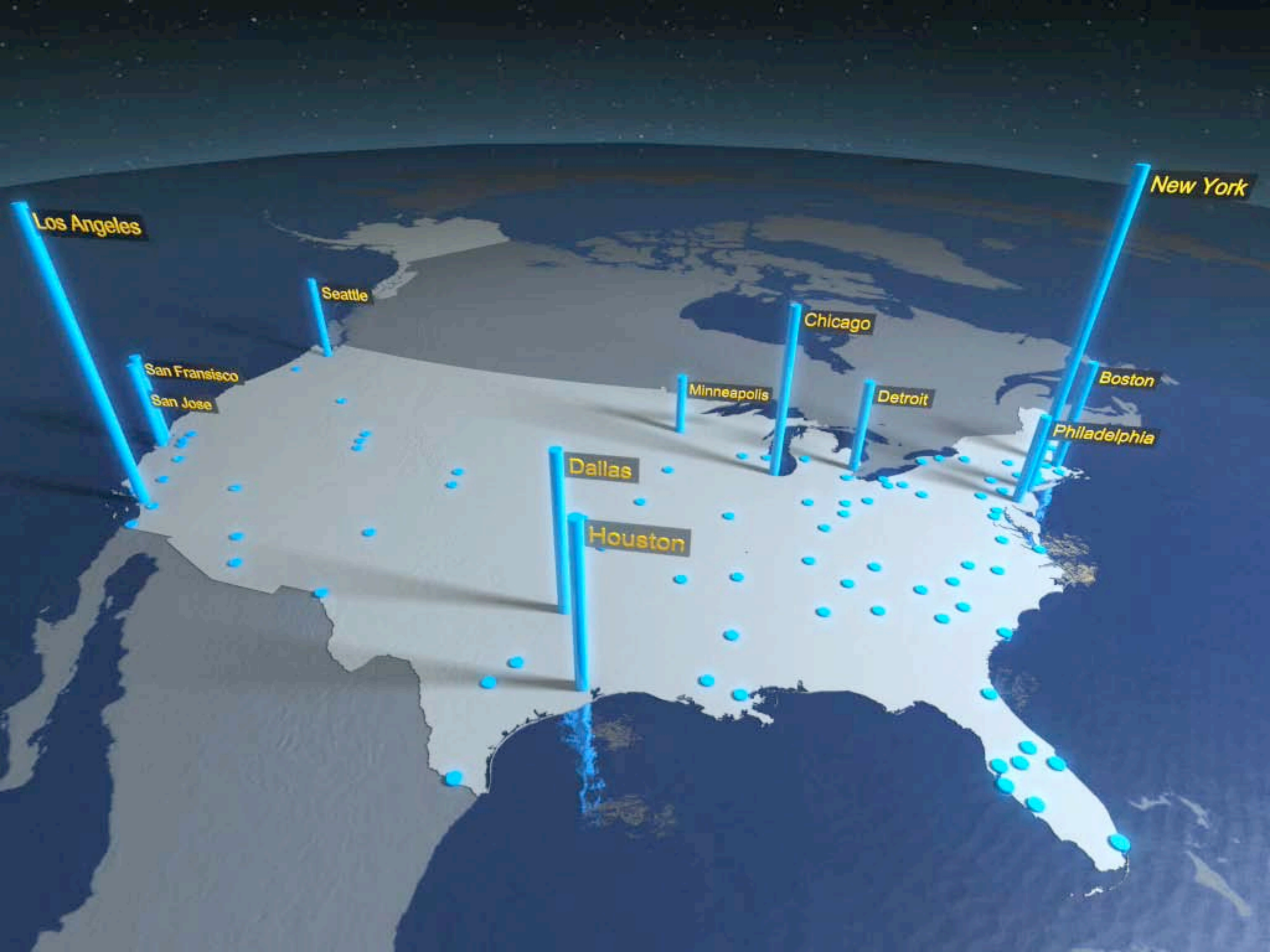




Los Angeles

Chicago

New York



Los Angeles

Seattle

San Francisco

San Jose

Chicago

Minneapolis

Detroit

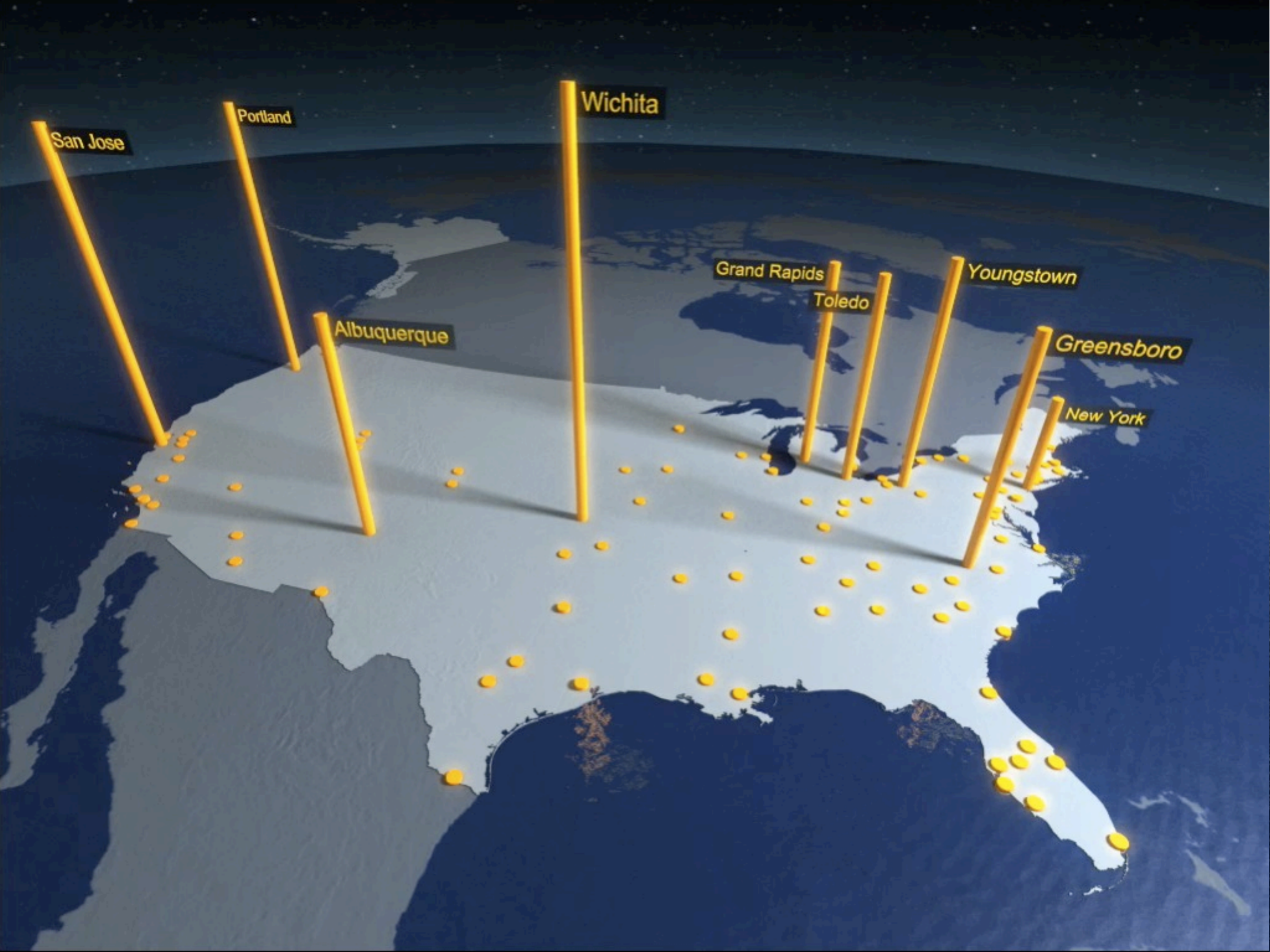
Boston

Philadelphia

Dallas

Houston

New York



San Jose

Portland

Wichita

Albuquerque

Grand Rapids

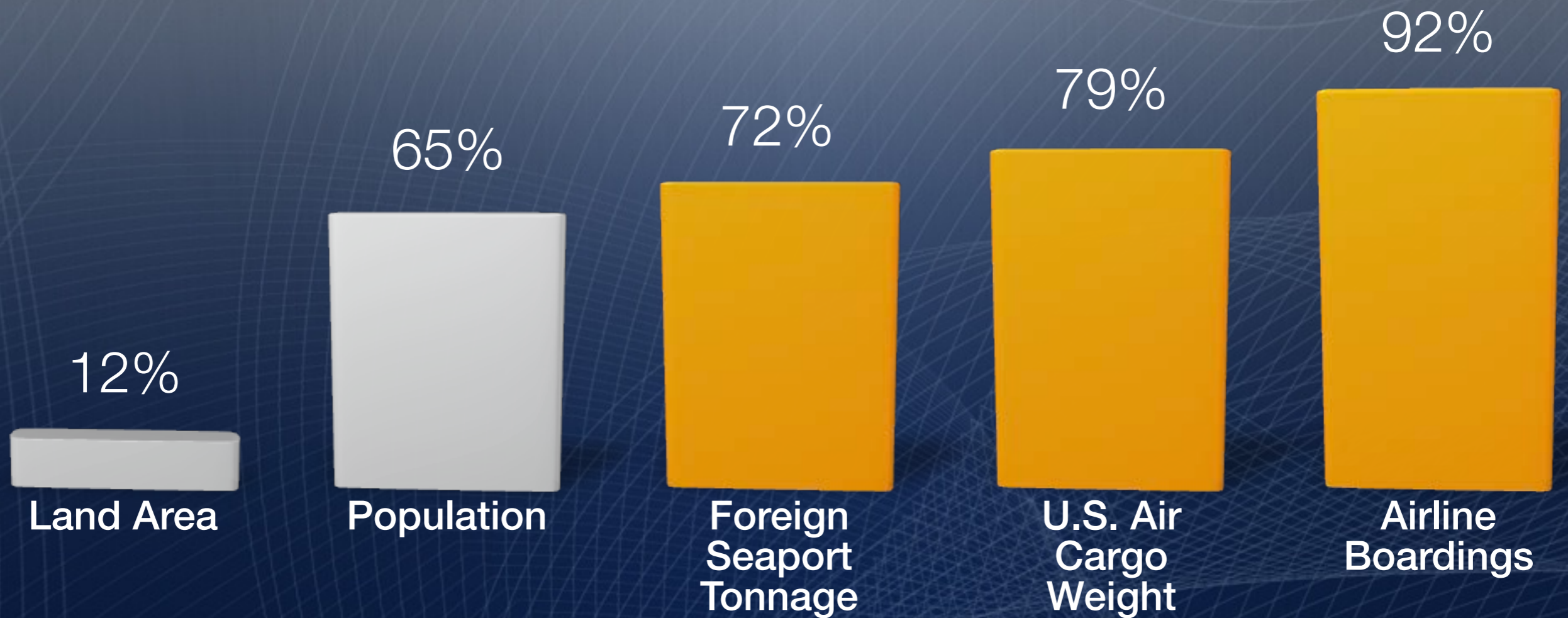
Toledo

Youngstown

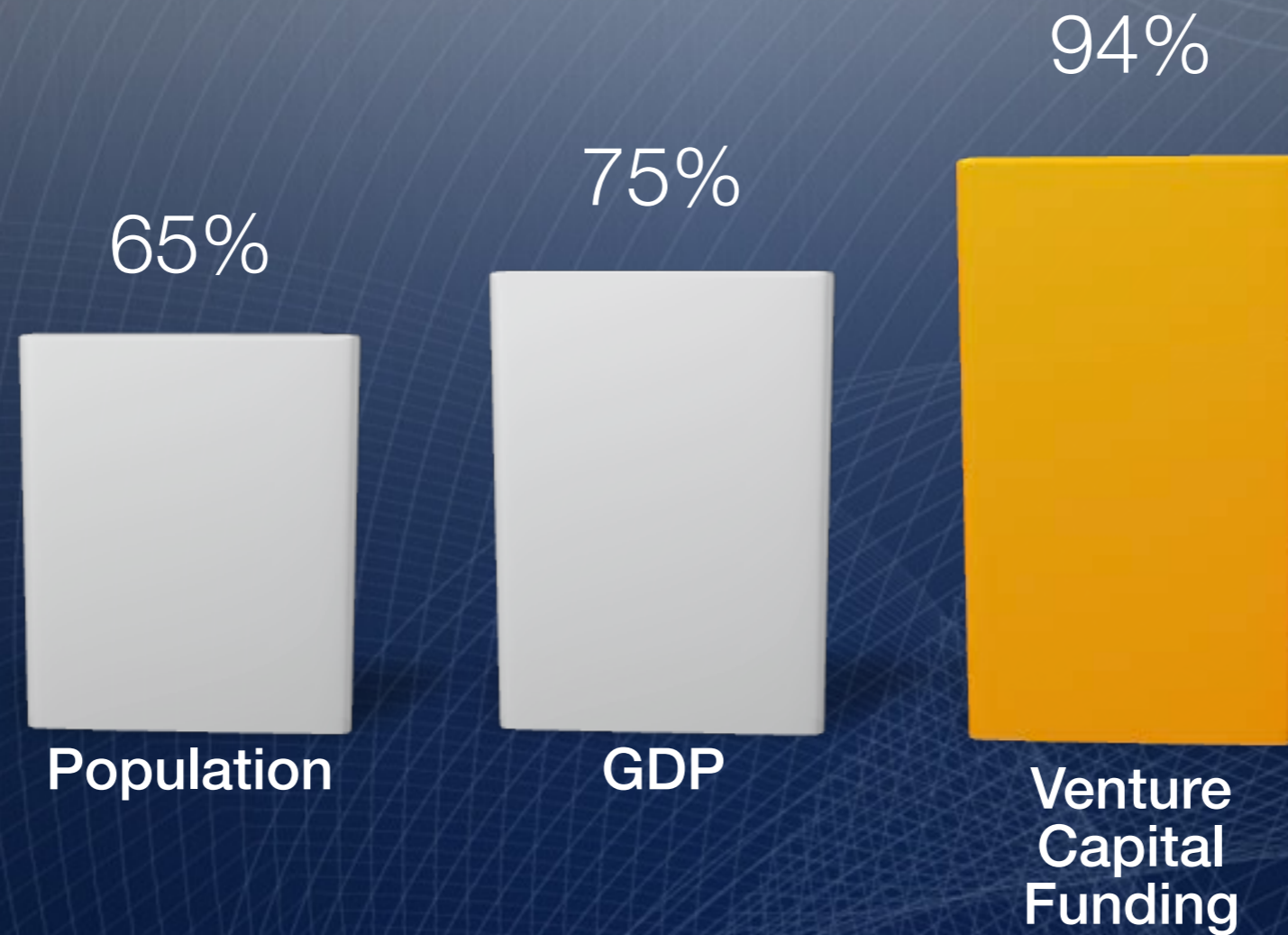
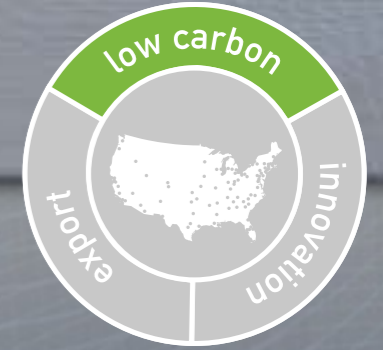
Greensboro

New York

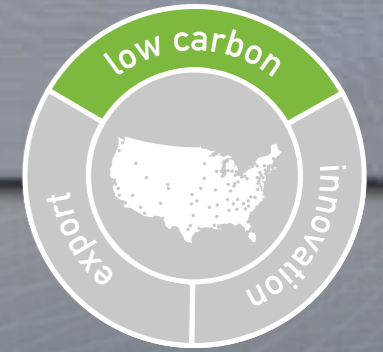
Top 100 U.S. Metros



Top 100 U.S. Metros



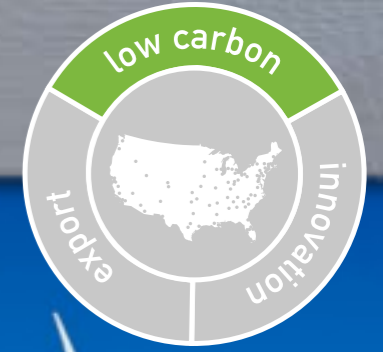
Innovations Cluster Around Research Institutions



National Energy Laboratories
Located in Metropolitan Areas



Leverage the Expertise of Older Metros



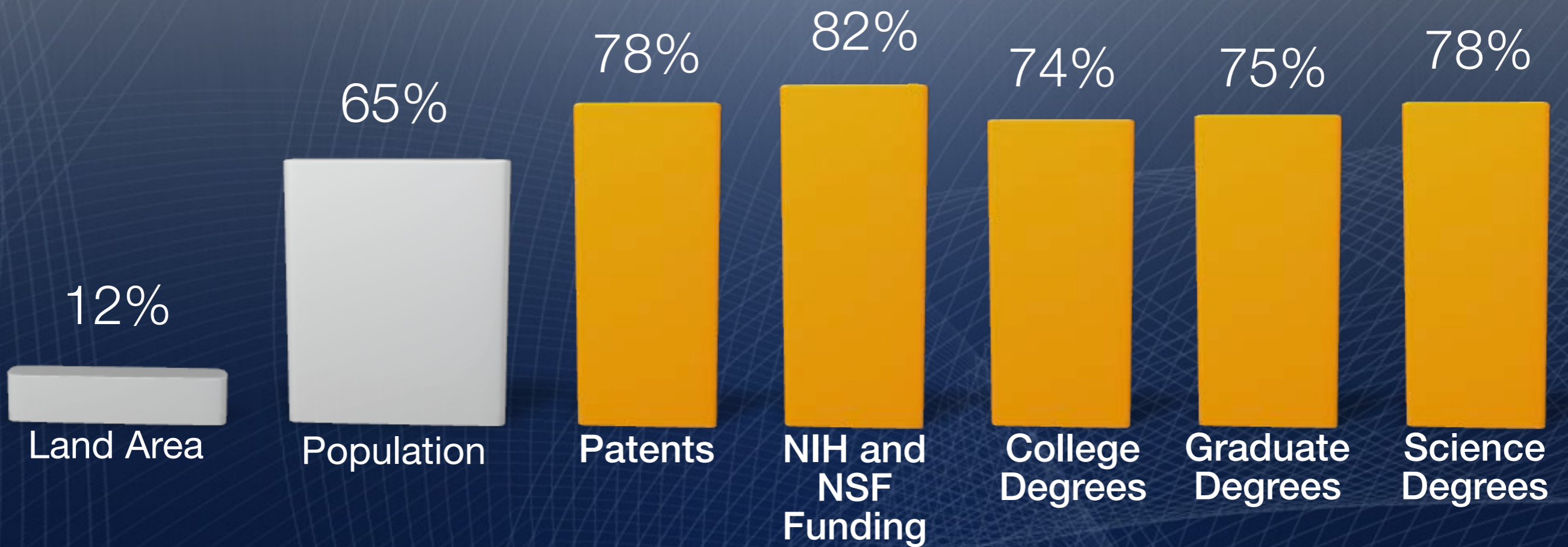
Energy Efficiency is a Metropolitan Act



Innovation Nation



Top 100 U.S. Metros



1 2 3

3 To build the next economy the U.S. must connect the macro to the metro



**MACRO
TO METRO**

The U.S. is Not China

MACRO
TO METRO



Playbook for the U.S. Economy

THE NEXT
ECONOMY



Playbook for the U.S. Economy

MACRO
TO METRO

Federal & State Governments

Lead where they must



Metropolitan Areas

Innovate where they should

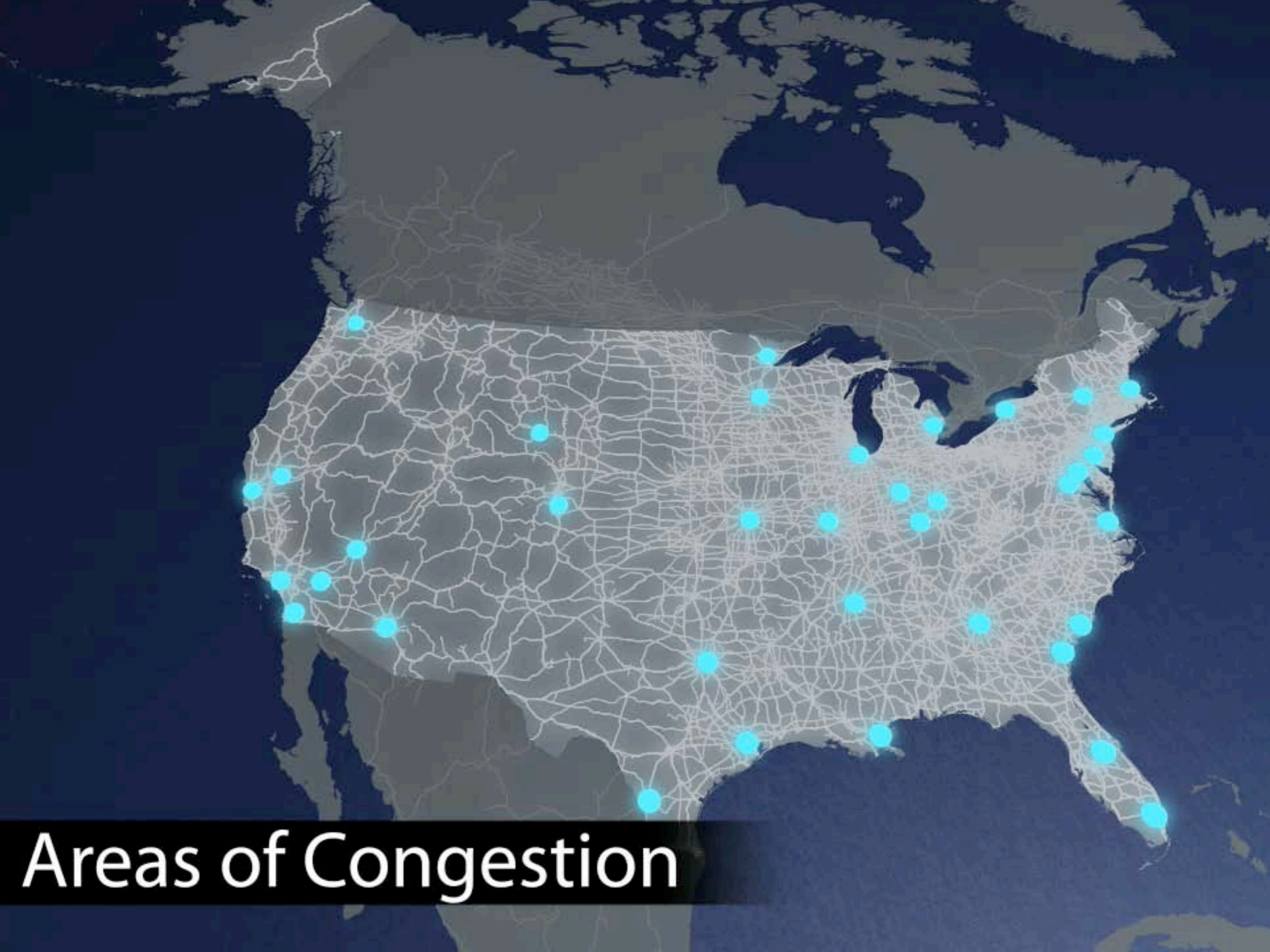


Macro Levers for Export Growth



**Double Exports
by 2015**





Areas of Congestion

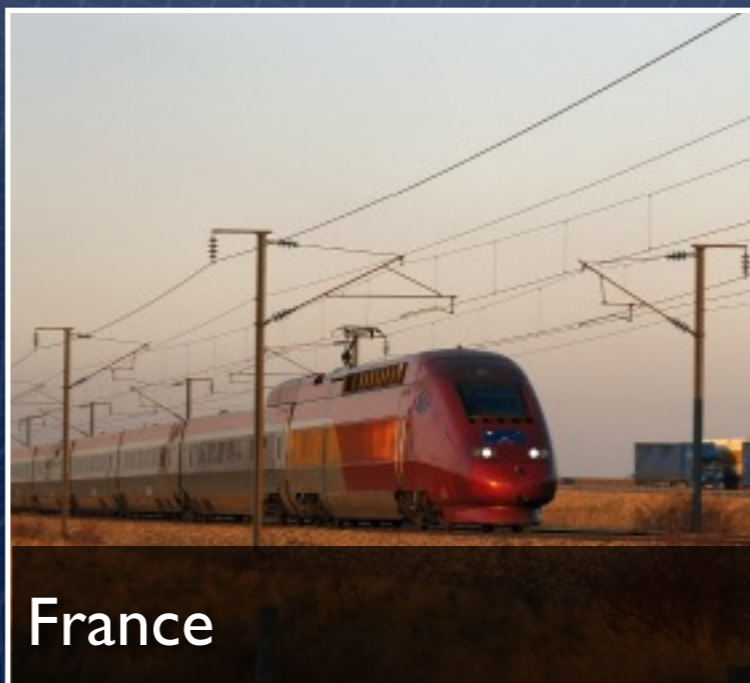
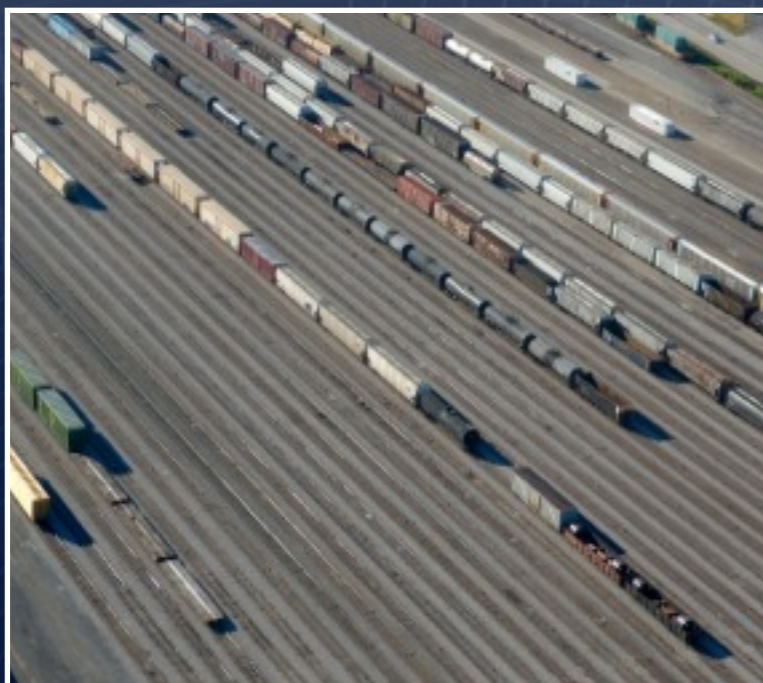
National Infrastructure Bank



Germany



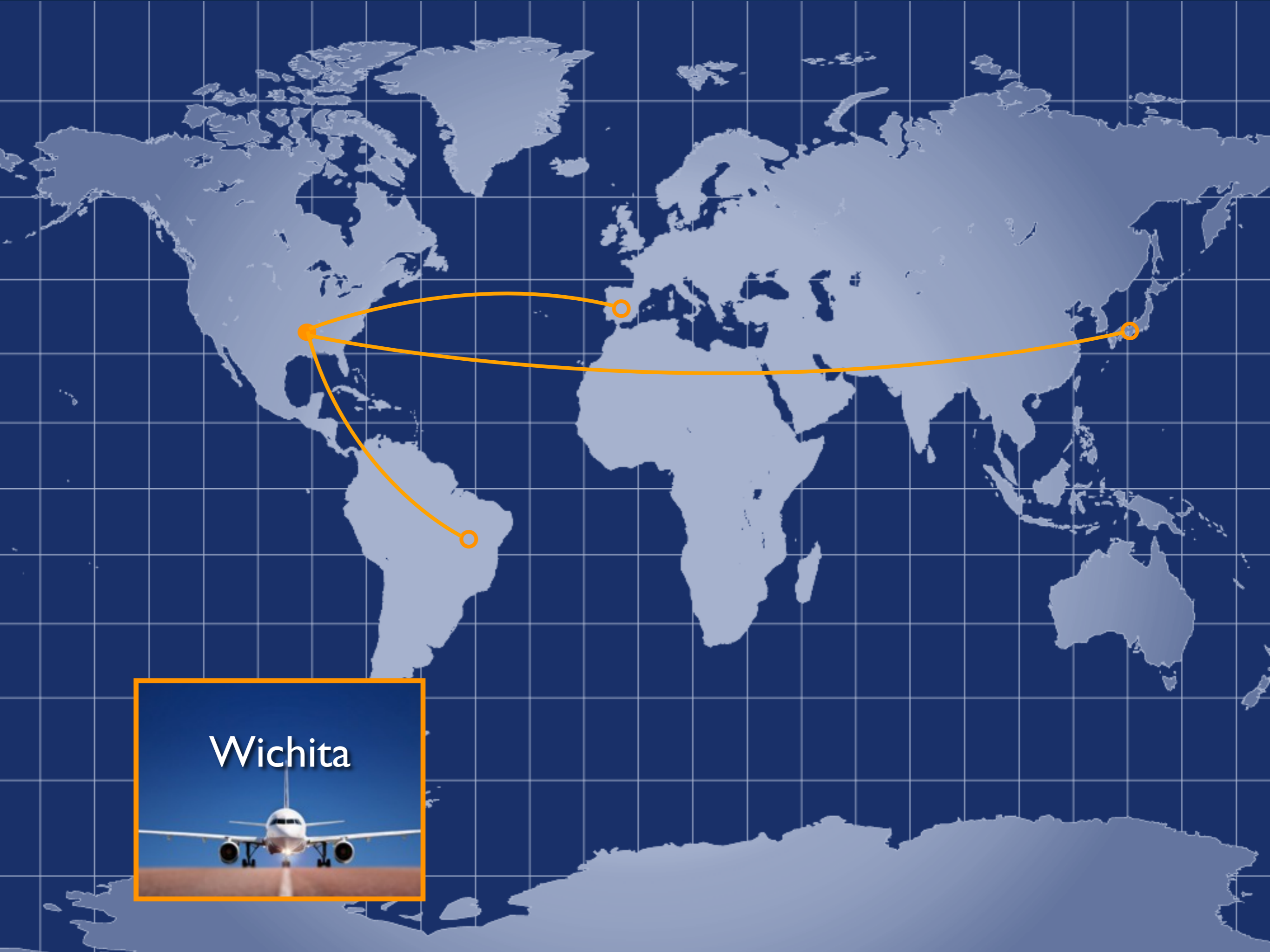
London



France



London



Wichita



Wichita



Minneapolis



Wichita

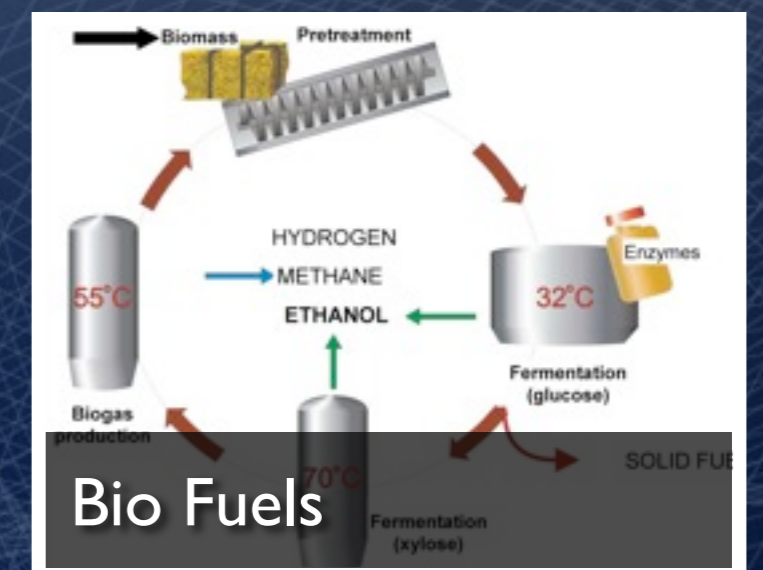
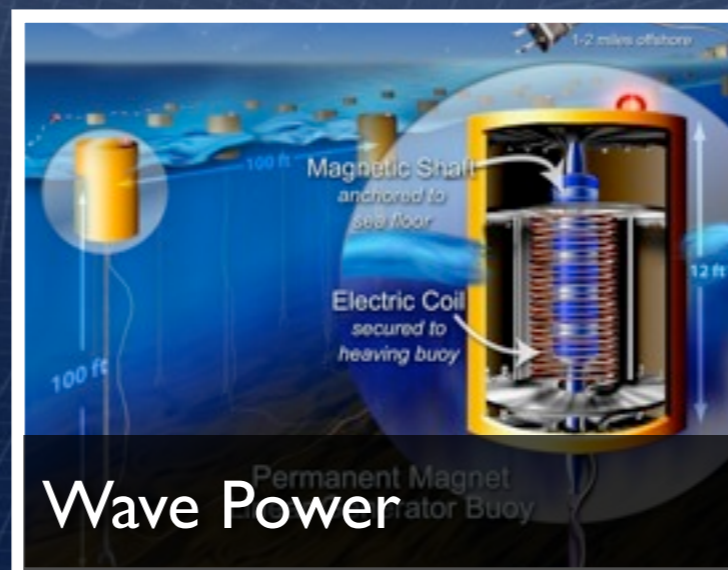
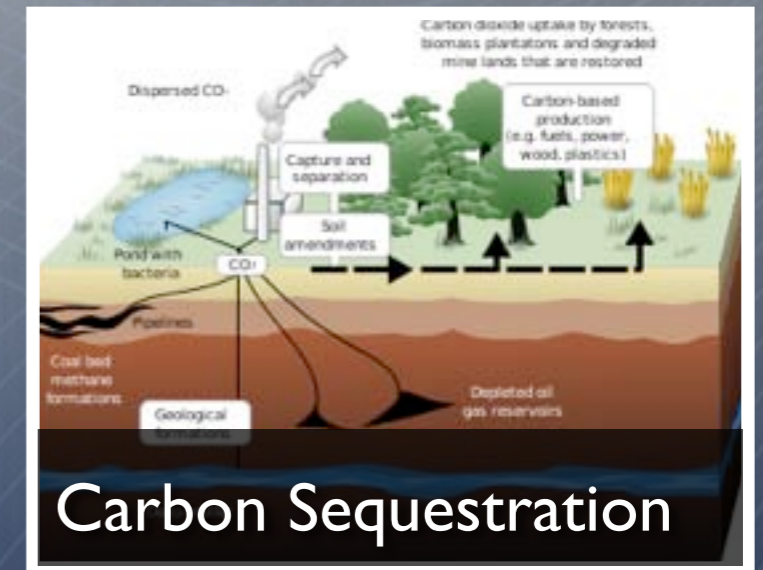
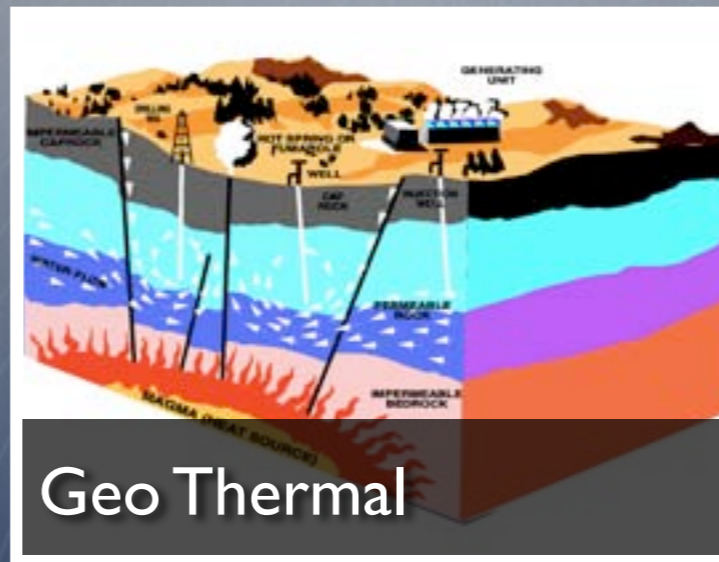
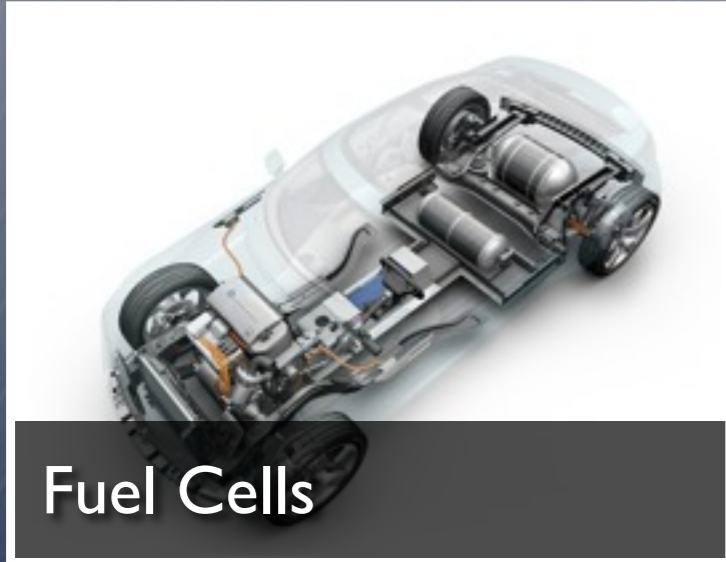


Minneapolis

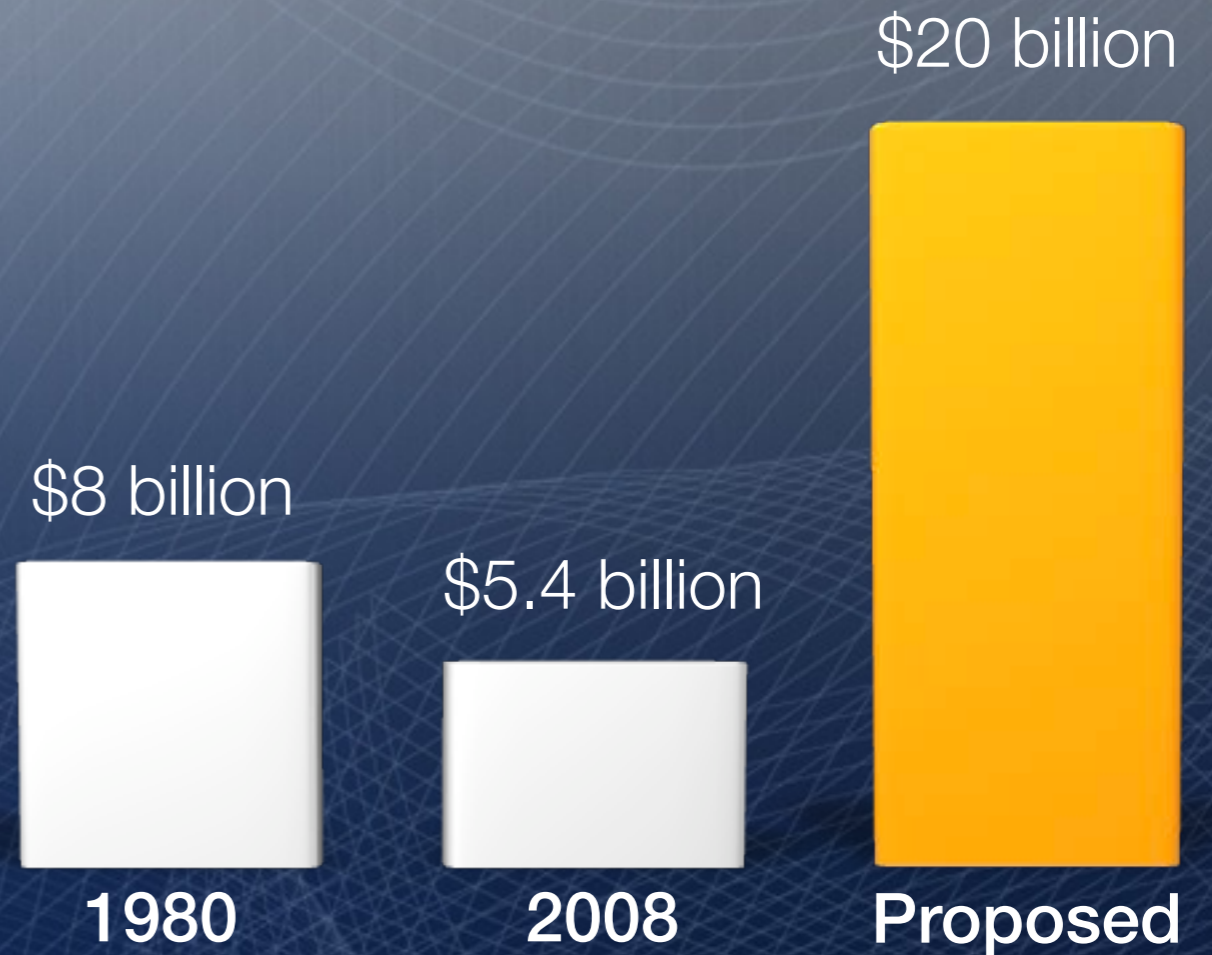
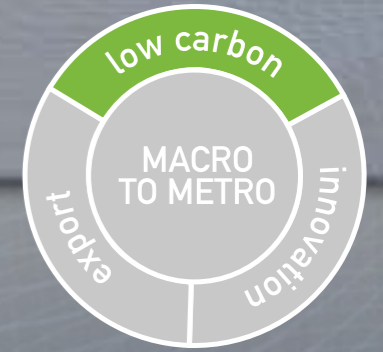


San Francisco

Energy Discovery Innovation Institutes



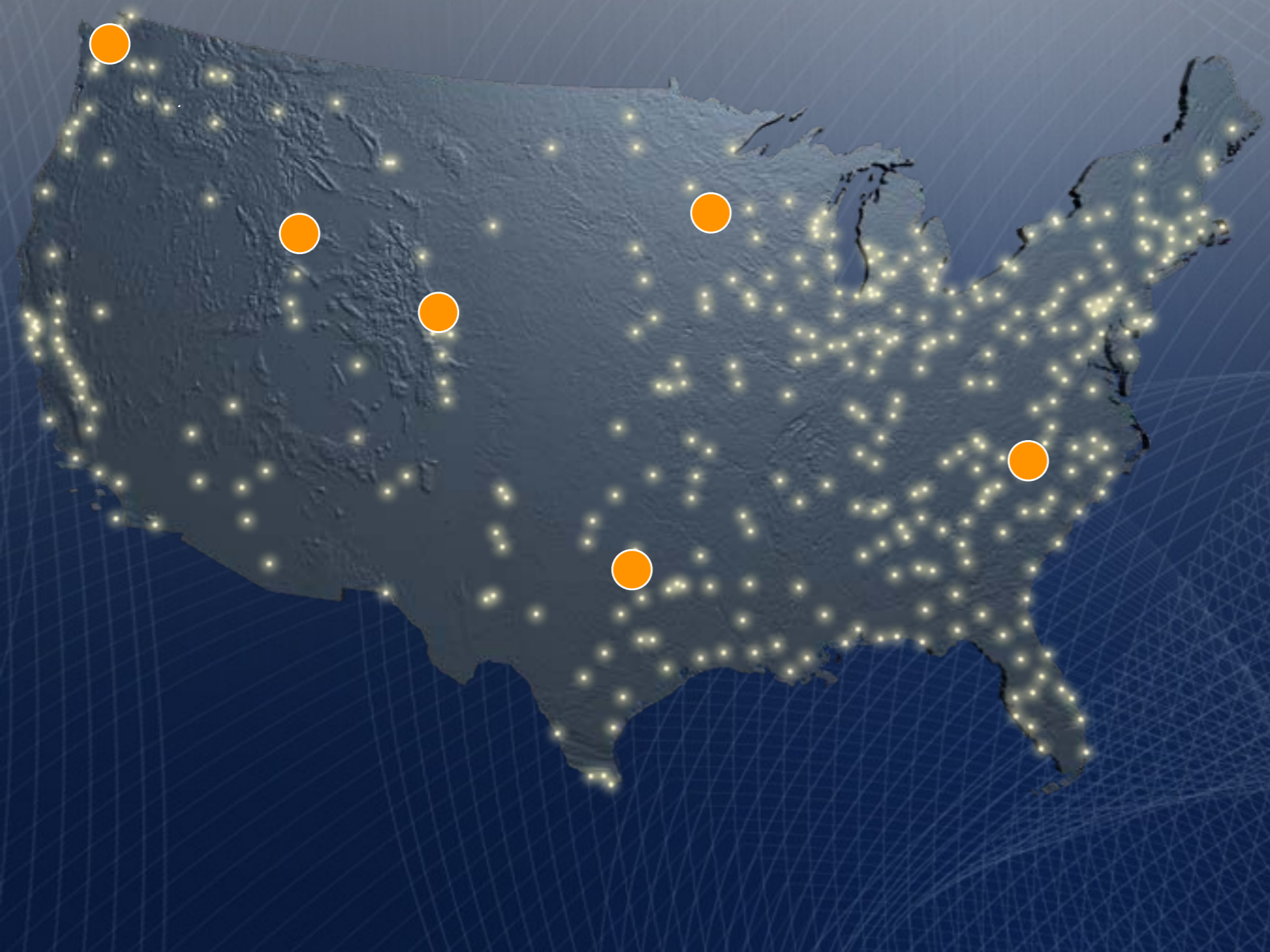
Energy Should be Prioritized in Federal R&D Funding

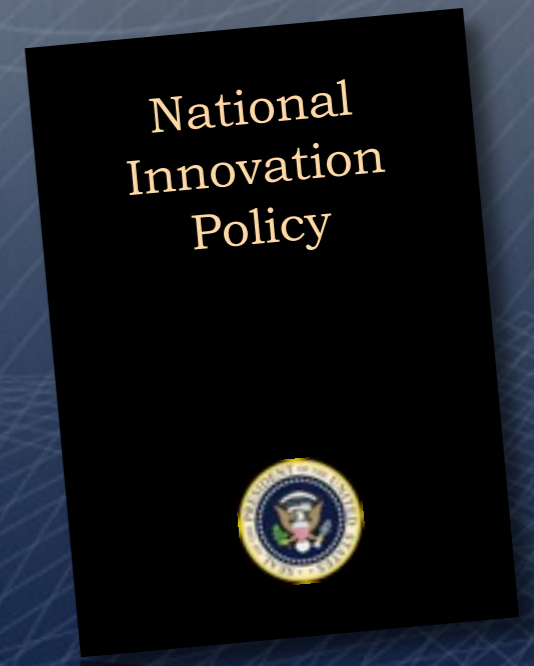
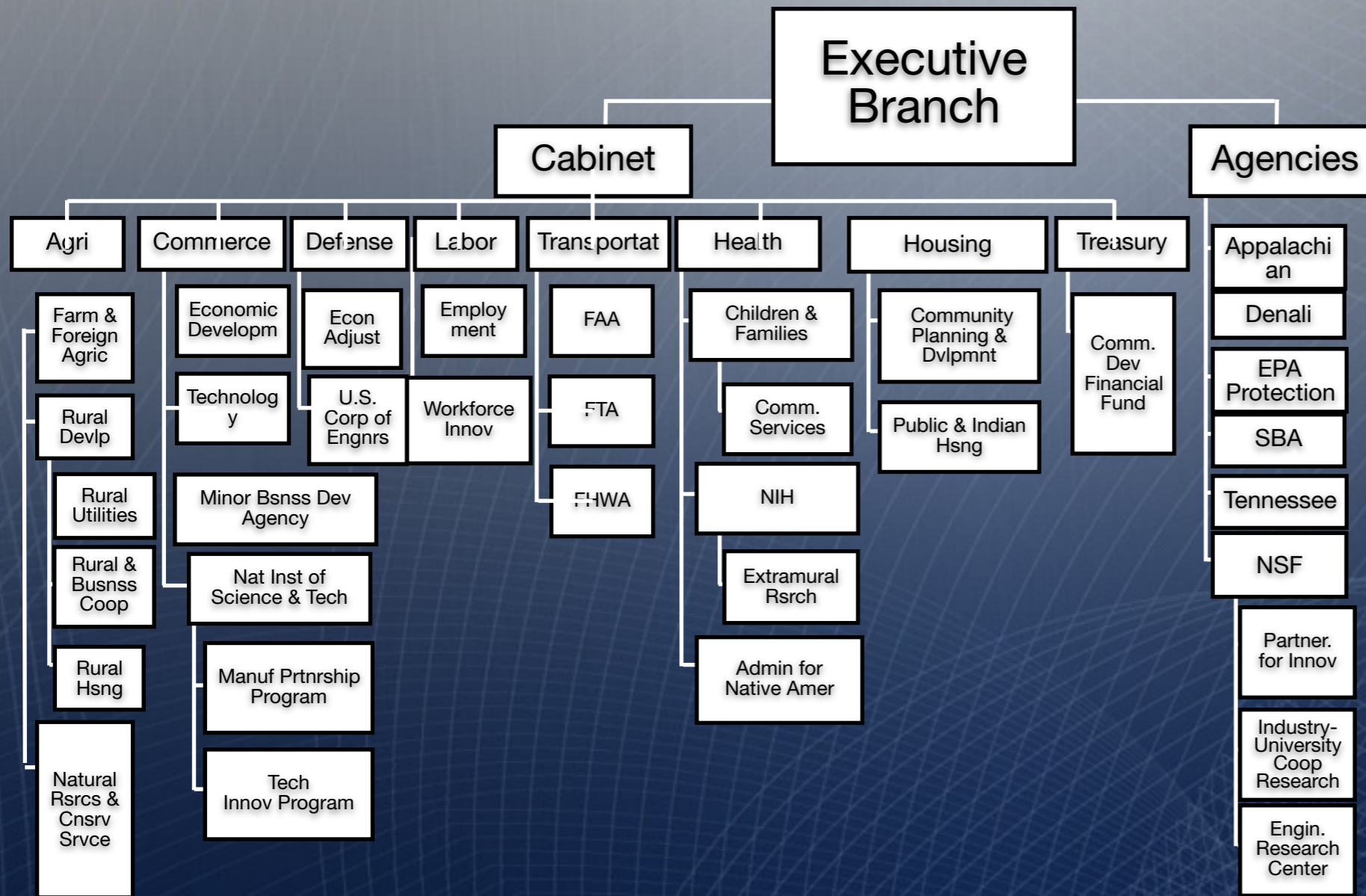


Metros Can Develop Livable Places



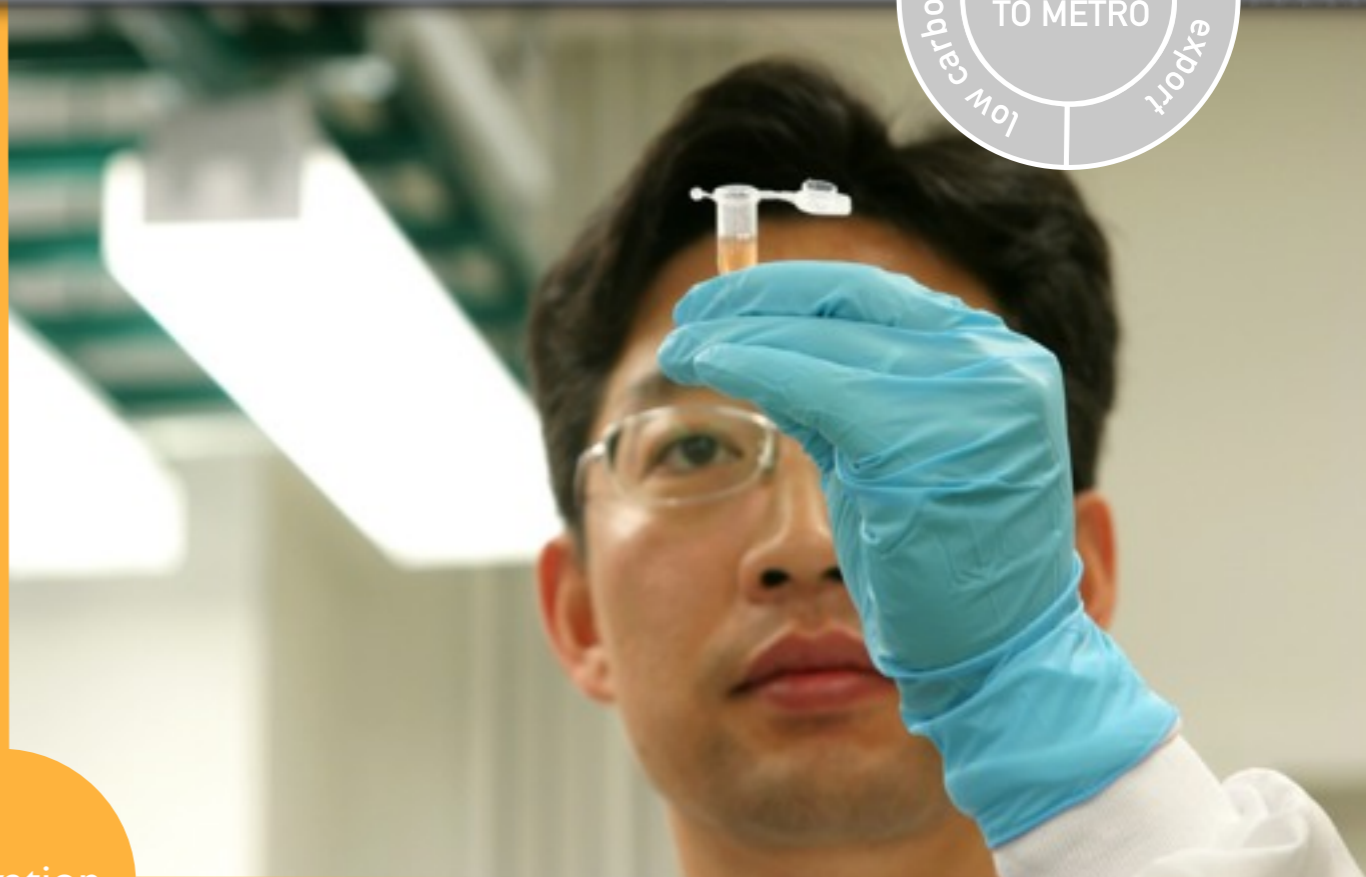
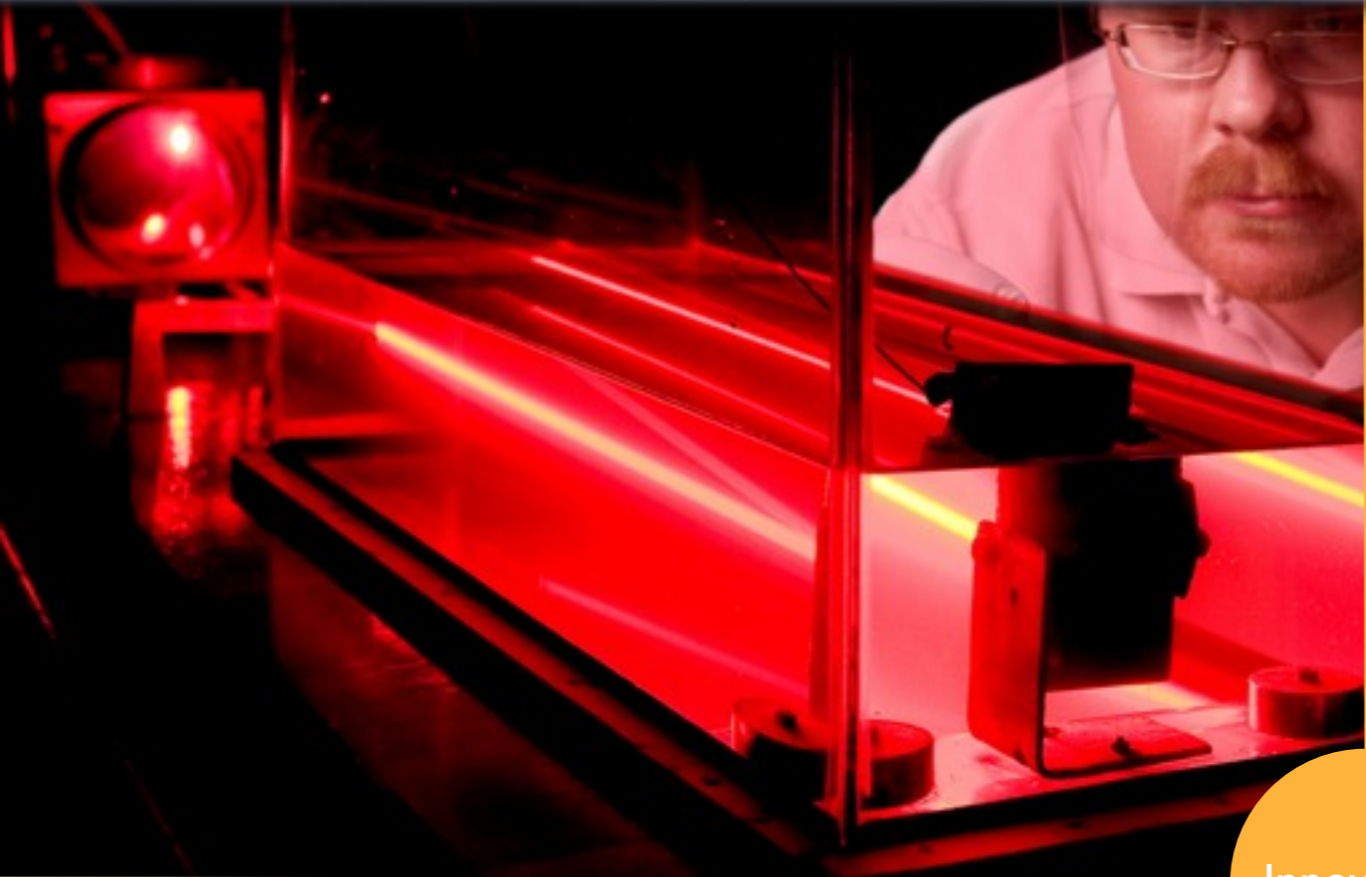
Metros Lead the Effort to Create Quality Places





National
Innovation
Foundation

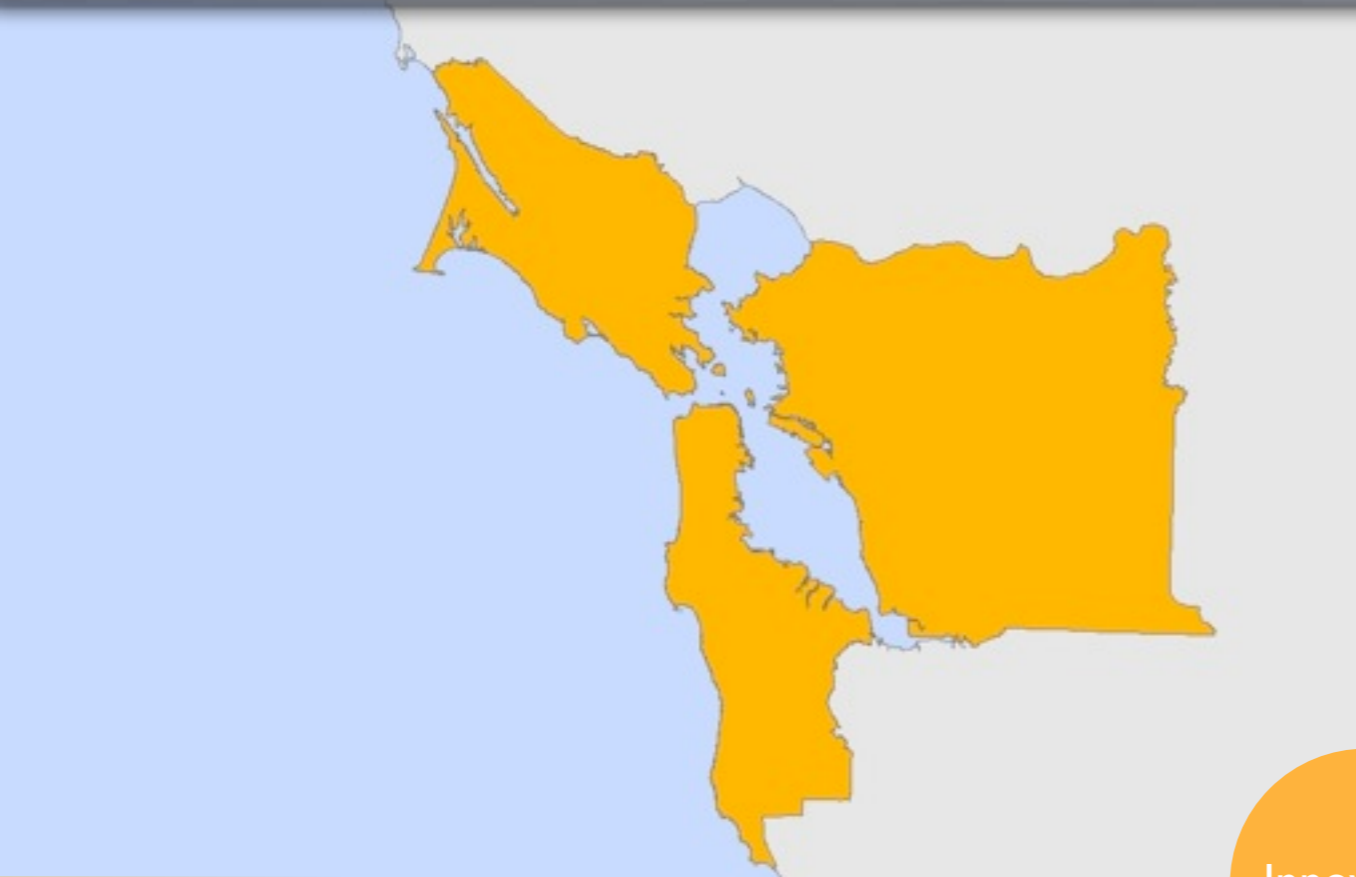
Metro Innovation Clusters



Innovation



Metro Innovation Clusters



Innovation



Building the Workforce

MACRO
TO METRO

Community
Colleges

Post Secondary
Schools

Tech Schools



Playbook for the U.S. Economy

MACRO
TO METRO

Federal & State Governments

Lead where they must



Metropolitan Areas

Innovate where they should



Playbook for the U.S. Economy

MACRO
TO METRO

Federal & State Governments

Lead where they must

National
Infrastructure Bank

National Innovation
Foundation

Energy Discovery
Innovation Institutes



Metropolitan Areas *Innovate where they should*

Leverage economic clusters

Connect transportation and housing

Strengthen institutions for
innovation and education



The Great Recession Has Been A Wake Up Call

THE NEXT
ECONOMY



THE NEXT ECONOMY: Transforming Energy and Infrastructure Investment

