

ETG OFFERS UNPARALLELED EXPERIENCE

For over twenty-five years, principals and staff from the Economic Transformations Group have assisted leaders in more than twenty U.S. states and twenty-five countries worldwide, focusing on the successful implementation of sustainable economic strategy programs. We have pioneered the field of cluster economics, innovation-driven economic development, and sustainable systems design and developed the most effective collaborative approaches available to today's regional and international leaders.

WHO WE ARE

The Economic Transformations Group, Inc. is a network of economists, analysts, specialists, planners, and process design consultants committed to working closely with people seeking to create more prosperous and sustainable futures for themselves, their businesses, their communities, their children and their grandchildren. ETG has developed groundbreaking methods for implementing an innovative, collaborative, cluster-based methodology and a host of related analytical and institution-building services.

Dr. Eric Hansen, President of ETG, initially broke new ground in the economics of clustering while at MIT and the World Bank during the late 1970s. He further developed and applied clustering approaches while at the Stanford Research Institute (SRI International) during the 1980s and 1990s. "Cluster-based Economic Development" is now recognized internationally as the most effective way to grow new economies and to revitalize existing economies.

Our success in highly varied economic and cultural contexts--from Silicon Valley to Slovenia, from Mexico to Morocco--has made us a world leader in collaborative strategy development and implementation. We have supported governments, organizations, business and industry leaders, and public-private partnership initiatives to achieve concrete advances in innovation-driven economic development.

Our action-based process is designed with a whole systems perspective and with the idea that consultants introduce a new

context for collaboration, while the stakeholders provide the content and leadership. As a part of our methodology, we continually refine our process to make it responsive to the particular structural and cultural conditions of a specific project. ETG focuses on activating leaders, creating breakthroughs in how people think and act, and building productive, lasting partnerships between the private and public sector. We partner with regional leaders to create sustainable economic transformations.

"Dr. Hansen and his team launched a comprehensive and ambitious public-private collaborative economic development program TABASCO EN ACCION to stimulate economic activity and job growth in the state. The results of the leadership and cluster process of Tabasco in Action have resulted in the formation of new companies, new jobs in aquaculture, tourism, light industry, agricultural processing, a reorientation of cacao production to organic markets, and the beginning of a whole new mindset shift from -- "the government has to solve our problems" -- to -- "we can do it!" - Tomas Yanez Burelo, Secretary of Economic Development in the State of Tabasco, Mexico



ETG SERVICES

ETG works with governments, organizations, and communities to create breakthroughs and activate sustainable economies, worldwide. In addition to traditional services such as economic analysis and benchmarking, ETG excels in bringing stakeholders together in creative and constructive ways to turn the momentum of ideas into focused action. We organize, design, and implement long term development projects, capacity building programs, workshops, summits, conferences, and fast track-action events.

WHAT WE DO

In its classic, cluster-based competitiveness and sustainable development projects, ETG works closely with business and government leaders in a region to:

- Provide a baseline economic and business climate analysis;
- Identify the region's industry "clusters" (regional agglomerations of key industries, supplier networks and economic infrastructure) and analyze the viability of their products and markets (more details describing "clusters" and ETG's cluster work is attached);
- Evaluate the region's economic foundations (infrastructure, human resources, quality of life, tax and regulatory policies, and access to technology and financial resources);
- Implement a highly interactive, collaborative strategy development process by involving key leaders from the business, government, education and civic communities;
- Mobilize and assist community leaders in the implementation of action initiatives that directly address the region's competitiveness and sustainability challenges.

"We work with leaders to catalyze large systems change - designing collaborative strategy and action processes with lasting results."

ETG PRODUCTS & SERVICES

Regional Cluster Competitiveness & Sustainability Projects

- ▶ Cluster analysis; sustainability assessments
- ▶ Public/private collaboration and working group facilitation
- ▶ Regional policy analysis and strategy development

Emerging Cluster Analysis, Business Climate Analysis

Small Business Development

Public-Private Dialogue and Collaborative Strategy Development

Design & Feasibility of Innovation/Technology Centers & Economic Development Agencies

Investment Attraction/Location Studies

Urban Planning/Transportation Consulting

Workforce Development

Competitiveness, Cluster, Sustainability Training

Large Systems Change Event Design and Facilitation—Sustainability & Economic Summits/Conferences/Workshops

Clean Tech and Creative Cities Strategy & Implementation

ETG CLIENTS

- ▶ The World Bank, InterAmerican Development Bank, UNDP, Asian Development Bank, EU
- ▶ National Governments
- ▶ States, Cities & Regions
- ▶ Public/private sector consortia
- ▶ Private sector organizations (Chambers of Commerce)
- ▶ Mexican states (public/private consortia)
- ▶ Private industry interested in new business locations
- ▶ Foundations and NGOs
- ▶ Regional development agencies

World Wide Impacts

STATES/PROVINCES IN U.S. AND CANADA

- ▶ Arizona: Arizona Strategic Plan for Economic Development
- ▶ Sustainable Cleveland 2019: New Economic Model
- ▶ Connecticut: Connecticut Competitiveness Initiative
- ▶ Florida: Florida Cornerstone
- ▶ Indiana: Business Climate Blueprint and New Enterprise Development
- ▶ Minnesota: Technology-Based Economic Strategy
- ▶ Nebraska: New Seeds for Nebraska
- ▶ North Dakota's New Economy Initiative
- ▶ Atlantic Provinces, Canada: Competitiveness Strategy
- ▶ San Francisco Bay Area: Renewable Energy Cluster
- ▶ Pasadena Bioscience Research and Innovation Center: Feasibility Study
- ▶ Long Beach: CSULB Research and Training Park/Base Conversion Strategy
- ▶ Long Beach in Transition: City of Long Beach
- ▶ Ventura County Defense Adjustment Strategy
- ▶ South East Los Angeles Corridor Cluster Strategy
- ▶ Greater New York Region Competitiveness Strategy
- ▶ Los Angeles: Regional cluster development strategy
- ▶ Silicon Valley: Joint Venture: Silicon Valley
- ▶ El Paso, Texas: Cross-Border Strategy
- ▶ Mid-America: Choosing & Investing in the Future
- ▶ Saginaw, Michigan: Saginaw Challenge

MEXICO, CENTRAL AND SOUTH AMERICA

- ▶ Chile – Regional Development and Clustering in Chile's Southern Regions
- ▶ Brazil – Competitiveness Strategy for Minas Gerais's Clusters
- ▶ Loja, Ecuador – Loja's Clusters in Action
- ▶ Brazil – Local Economic Development Strategy for Sao Luis
- ▶ Suriname – Competitiveness Enhancement Strategy
- ▶ Mendoza, Argentina – Clusters of Mendoza
- ▶ Guyana – National Cluster Policy, Public-Private Dialogue, & Economic Summit

- ▶ Chihuahua, Mexico: Nuevo Milenio
- ▶ Panama – Panama Competes
- ▶ Tabasco, Mexico – Tabasco in Action
- ▶ Campeche, Mexico – Transforming Campeche
- ▶ Chihuahua, Mexico – 21st Century Strategy
- ▶ Guatemala – National Competitiveness Program
- ▶ Ecuador – National Competitiveness Program
- ▶ Peru – Cluster Strategy Development

MIDDLE EAST AND AFRICA

- ▶ Morocco: Le Maroc Competitif (World Bank sponsored)
- ▶ South Africa: Cluster Leadership Training and Facilitation
- ▶ South Africa: Tourism Cluster Collaborative Strategy
- ▶ Ethiopia: Competitiveness and Economic Dev. Summit

WESTERN AND EASTERN EUROPE

- ▶ Macedonia – Competitiveness Strategy for Craft Cluster
- ▶ Albania – Strategy for Albinvest, economic development and investment attraction
- ▶ Former East Germany – Optoelectronic Region of Jena
- ▶ Slovenia – Maribor Jutri Regional Strategy
- ▶ Slovakia – Bratislava Innovation Park
- ▶ Italy – Regional Technology Park and Virtual Incubator Strategy, Mezzogiorno
- ▶ Italy – International comparative analysis of technology park policies.
- ▶ Spain – Future of the University Complutense of Madrid and University of Cantabria

SOUTHEAST ASIA & JAPAN

- ▶ Nepal: Urban Competitiveness & Tourism Dev.
- ▶ Malaysia: National Industry Cluster Strategy
- ▶ Hong Kong: Strategy for Post 1997 (Hong Kong-Guangdong region)
- ▶ India: Regional Technology-Economic Strategy for Karnataka (Bangalore)
- ▶ Japan: Osaka Tech-Infra 21 (Technology policy)
- ▶ Japan: Izumi Technopolis (Technology center/incubator strategy)

Selected ETG Regional Strategy Projects

REGIONAL ECONOMIC STRATEGIES

ETG has helped analyze the economies and develop economic development strategies in regions and nations spanning the globe. A component of each of these strategies has focused on our capability to design and, as required, help implement action initiatives to make economic strategy “real”. These activities have ranged from designing training centers, technology commercialization and business spin-off centers to alternative methods for enterprise finance, and new telecommunications and environmental infrastructure. Our analysis is designed to give strategy a strong foundation; our processes are designed to enable strategy to move naturally to action.

International Projects

LOCAL ECONOMIC DEVELOPMENT AND CULTURAL HERITAGE TOURISM DEVELOPMENT IN NEPAL (2012)



ETG developed a tourism strategy and action plan as part of a World Bank team for the urban

regeneration and economic competitiveness of the Kathmandu Valley. Conducted an assessment of the tourism cluster/value chain and develop a strategy and action plan, involving cultural heritage, soft adventure, wellbeing/health, rural village, and agri-tourism. Key recommendations involving the cultural heritage conservation and responsible tourism development of the seven World Heritage sites within Kathmandu. World Bank, 2012.

SURINAME IN ACTION – TOURISM & AGRICULTURE CLUSTERS DEVELOPMENT (2011-12)



ETG supported the Suriname Business Forum and the Ministry of Trade and Industry to conduct a competitiveness

assessment of the tourism and agricultural sectors in Suriname and launch a private sector-led clustering process for the tourism and agricultural clusters. More than 200 private and public sector leaders were involved in developing 24 action initiatives, eight of which received \$60,000 in funding for early stage implementation. Suriname Business Forum, Government of Suriname, with funding by the InterAmerican Development Bank, 2011-2012.

AGRIBUSINESS INCUBATORS—ASSESSMENT OF BEST PRACTICES AND DEVELOPMENT OF INCUBATOR TRAINING PROGRAM (2010-2011)



ETG, in association with Agrifood Consulting International, co-led a team of world experts in agribusiness, clustering, and incubators, to assess best-practices

internationally in agribusiness incubation and developed a training program for Agribusiness incubation emphasizing whole value chain development and sustainability. The project team identified the twelve best agribusiness incubators in the developing world—ranging from the Fundacion Chile to TechnoServe-Mozambique to Villgro in India—and based on first-hand case studies of the approaches, histories, and lessons learned, prepared an assessment of the state-of-the-art in agribusiness incubation. ETG/ACI also prepared an extensive training program for agribusiness incubator managers and developers, and delivered the training at a world gathering of incubator managers in Helsinki, Finland in 2011. The assessment report and training materials are available at www.infodev.org/en/publication.1095.html. Project sponsored by infoDev/World Bank, 2010-2011.

LOCAL ECONOMIC DEVELOPMENT STRATEGY FOR SAO LUIS, BRAZIL (2010-2011).

Plano de Desenvolvimento Econômico Local de São Luis



ETG economic experts working with ECG/Maquina led a team of economists to develop a long range, cluster-based local sustainable

economic development strategy for the municipality of Sao Luis in the state of Maranhao, in Northeast Brazil. The project, funded by the World Bank, engaged 150 government and business leaders to develop a comprehensive strategy to accelerate growth of the city's economy, including Sao Luis's world heritage site for cultural tourism.

MACEDONIA: NATIONAL STRATEGY AND ACTION PLAN FOR CRAFTS INDUSTRY (2010-2011)



ETG in collaboration with INOA, were hired by the Government of Macedonia and the World Bank to

develop a collaborative strategy and action plan to ensure a stronger development and protection of the interests of crafts industry, which is an important part of Macedonia's economic and cultural heritage as well as an integral element of the entire tourist offer and promotion of Macedonia. The ETG/INOA team implemented the assessment of opportunities for crafts development. The team prepared a study of International Best Practices in Crafts Development and facilitated the dialogue with craft workers, business leaders, relevant government institutions and non-governmental organizations to develop a Strategy and Action Plan which aligns otherwise diminishing craft business products/services with most promising sources of tourism income.

ECUADOR: REGIONAL ECONOMIC DEVELOPMENT IN LOJA (2009 -2010)



The Government of Ecuador and the IDB hired ETG to enhance the economic competitiveness of the southern region of Ecuador, the provinces of Loja, Zamora, and Oro and develop four clusters in the

southern region: tourism, coffee, software and creative industries, and eco-services and biodiversity. ETG worked closely with the Provincial Government of Loja to create cluster groups and their business, government and academic leaders to develop these cluster strategy and action plans. In this project "Loja in Action", ETG adapted its "fast-track" clustering approach and created lasting results within 6 months, launching four new clusters and supporting the development of more than

42 business plans and action initiatives, with co-financing of initiatives by the private sector, regional governments, national government agencies, and the support of the Inter-American Development Bank

CHILE: REGIONAL DEVELOPMENT AND CLUSTERING IN THE 8 REGIONS OF SOUTHERN CHILE (2008-2010)



In a contract for Chile's lead economic development agency, CORFO, ETG staff are working with Dalberg Global Development Advisors in implementing Chile's new strategy to support economic

development at the regional level. The team is implementing ETG's "fast-track" clustering approach to demonstrate to Chile's regional development agency staff how to launch clusters and support local business entrepreneurs to develop and implement action initiatives. During the first eight months of 2008, nine new clusters have been launched and more than 250 action initiatives have been developed, with co-financing of initiatives by the private sector, regional governments, national government agencies, and the support of the Inter-American Development Bank. By 2010, a total of 25 clusters were underway and engaged in the implementation of more than 150 action initiatives.

ARGENTINA: CLUSTERS OF MENDOZA (2006-ONGOING)



ETG is supporting the development of nine clusters in the Province of Mendoza, Argentina and the Inter-American Development Bank. ETG is leading a consortium of four companies in launching

Argentina's first cluster-based economic development program. The project team is undertaking cluster mapping and analysis, and process design and implementation to accelerate development of nine industrial clusters, including two tourism clusters (adventure and rural tourism), four agricultural clusters, and three industry and services clusters.

GUYANA: NATIONAL CLUSTERING POLICY AND ECONOMIC SUMMIT (2005-2006)



The Government of Guyana and the Inter-American Development Bank hired ETG to develop and initiate the implementation of a National Clustering Policy and Public-Private Dialogue. The

project team analyzed and mapped Guyana's economic clusters and designed a new cluster-based economic development strategy and public-private collaborative approach. The strategy development process involved working with 300 government and private sector leaders of Guyana. The team developed detailed model for identifying, mapping, and selecting clusters for inclusion in Guyana's national competitiveness strategy. ETG helped to "kick-start" clustering activities in aquaculture and call centers. The Aquaculture cluster established the Guyana Aquaculture Association (www.aquaculture.org.gy). ETG also supported Guyana in identifying policy recommendations and associated investments that helped to facilitate dialogue and cooperation between the public and private sectors to improve competitiveness for Guyana. ETG designed and facilitated a major Economic Summit that brought together more than 400 leaders to take action for Guyana's development.

MEXICO: CHIHUAHUA NUEVO MILENIO (2004-2005)



Twelve years after supporting the State of Chihuahua to launch Mexico's first economic clustering project in 1992, ETG was called back in 2004 to support the new Governor's initiative Chihuahua

Nuevo Milenio Program to relaunch a statewide competitiveness strategy project for the eight regions in the state. ETG staff worked with regional leadership groups ranging from the state's two largest metropolitan areas (Ciudad Juarez and Chihuahua City), to its 6 mid- and small-sized cities to rural development areas. ETG provided training, support to more than 300 regional leaders to define next steps in their regional development projects. ETG is supporting leadership groups to launch regional cluster initiatives and begin early stage implementation in each region.

MEXICO: TABASCO IN ACTION (2002-2004)



In 2002, the new governor of the state of Tabasco (in Southeast Mexico) hired the Economic Transformations Group to revitalize the state's economy using an action-oriented, cluster-based approach. The clustering

process was launched in early 2002 with the formation of eight clusters, and the involvement of more than 600 business leaders throughout Tabasco. At the end of the first year, more than 60 action initiatives were in implementation. The project, Tabasco in Action, created a specific fund to support early stage initiative development (e.g., feasibility studies and benchmarking trips). The fund required co-participation by the initiative leaders and private sector in all initiative financing. The Fund has been very successful in converting initiatives from good ideas on paper to executable business plans and joint projects, to early stage implementation and financing. By 2004, more than 42 project have received funding, totally \$1.1 million. The estimated investment potential is more than \$80 million and generating 4,170 jobs. The results of the leadership and clustering process of Tabasco in Action have resulted in the formation of dozens of new companies, new jobs in aquaculture, light industry, agricultural processing, a reorientation of cacao production to organic markets, and the beginning of a whole new mindset shift from "the government has to solve our problems" to "we can do it!".

PANAMÁ: COMPITE PANAMÁ (2002-2003)

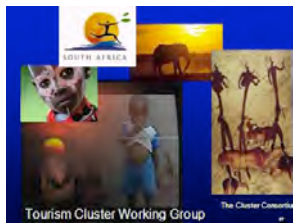


In March of 2002, the Government of Panama in collaboration with the private sector and with the financial and technical support of the InterAmerican Development Bank, launched a cluster-based

economic strategy program called Compite Panamá (Panama Compete). ETG was hired to facilitate the process and put into action a collaborative strategy process that would accelerate business competitiveness in Panama. One of the most important accomplishments was the development of a shared vision for the future economy developed by a public-private leadership team. Four key sectors were targeted for accelerated development (agro-industry, logistics/transportation around the Panama Canal, information technology, and tourism). Five

cluster working groups were organized and put to work, leading to the development of more than 40 action initiatives. The program is completed its second phase with the development of the Compete Panama Fund to support initiative development. ETG participated in the inauguration of a third generation of the program “Impulsando Panama” in 2008.

SOUTH AFRICA: TOURISM CLUSTER DEVELOPMENT PROJECT (1998-2000)



In 1998, ETG was hired to design, launch, and implement South Africa’s first tourism cluster initiative. The "Tourism Collaborative Action Initiative" leadership group was formed with high level leaders from

government, business, and organized labor to work together to realize the potential of South African tourism, and thereby impact positively on the national economy, through enhanced national and international tourism earnings and job creation. The project combined rigorous analytical research with collaborative human processes to develop a shared vision and strategy for tourism development and to mobilize collective action by key stakeholders in the private sector, labor and government. The project resulted in numerous action initiatives involving tourism stakeholders in both the private and public sectors to create foundations for sustainable partnerships, skills development and for a marketing platform that is credible and competitive in the global context.

The project developed a process of engagement among private and public tourism stakeholders in such a way as to develop a consensus view of the eco-, cultural and conventional tourism and the strategies needed to drive it forward. More than 500 leaders were involved in processes at the national cluster level, two “thematic” clusters, and four pilot regional clusters. A great many parties were involved in this program which, together with the sheer magnitude of the project, presented a great challenge in terms of co-ordination and integration, with results that ranged from exceptional to less than impressive.

MEXICO: TRANSFORMANDO CAMPECHE (1996-98)



In April 1996, business leaders in the state of Campeche, Mexico arranged funding for and launched a 3-year cluster-based economic

strategy project. This unique, private sector-led project had three phases: Phase I provides a diagnosis of the strengths and weaknesses of the state’s economy, while in Phase II ETG staff developed strategic options for Campeche’s future using a process-intensive, working group approach. In the third and final phase of the project, specific initiatives were launched under the guidance of the consulting team, which includes Mexican sub-contractors with direct experience from the Chihuahua Siglo XXI project, in addition to ETG staff. The private and public sectors developed a joint, focused vision of the state’s future and the means for implementing that vision. Since 1998, Campeche has achieved a major transformation of its primarily agriculture and fishing economy into a diversified one with a boom in both 1) tourism (tripling the number of tourists to the region between 1997 and 2000), and 2) light industry (8,000 new industrial jobs from 1997-2000, the highest growth (48% increase) in Southeast Mexico).

SOUTH AFRICA – CLUSTER LEADERSHIP TRAINING (1997)

At the invitation of the Government of South Africa, private sector, and in collaboration with the World Bank, ETG professionals were invited by the Government of South Africa to carry out cluster leadership training and facilitation workshops, in South Africa during 1997. We met with more than 300 South African business, government and union leaders to carry out cluster-specific workshops and leadership training. We have established an on-going relationship to work with the SA government in implementing their cluster program.

CHIHUAHUA VENTURE CAPITAL SUMMIT (1997)

Professionals from ETG were invited by Chihuahua to plan and facilitate an economic development summit on Chihuahua in 1997. One of the primary objectives was to develop a collaborative process to design and implement mechanisms to support local entrepreneurship and wealth generation. ETG worked to develop an approach and help implement in the most effective way to mobilize local investment, support high growth enterprises, and position Chihuahua to become the most advanced high value-added economy in Mexico.

MOROCCO: LE MAROC COMPÉTITIF – CLUSTER-BASED ECONOMIC STRATEGY (1995-96)



In 1995 Morocco launched a new kind of economic development project with the help of ETG professionals (then at DRI-McGraw-Hill) and financing from the World Bank and European

Union. *Le Maroc Compétitif* was an ambitious project devoted to creating a new movement for “collaborative” economic action and change in Morocco. During its first year (1995-96), the project mobilized more than 150 key business and government leaders in four of Morocco’s most important industrial clusters (textiles/apparel, tourism, seafood products, and electronics and information technology). Each of these clusters formed working groups which brought public and private leaders together to articulate more than 30 concrete action initiatives that have demonstrated the viability of a participative, action-oriented approach to economic change in Morocco. Among these initiatives are the establishment of trade and investment promotion centers, training centers, and new enterprise incubators. To ensure the ability of the working groups to implement these initiatives, the private sector has demonstrated its commitment to the project by financing and launching the LMC Association, a new economic organization established to coordinate the continued implementation and operation of the project and its initiatives.

CHIHUAHUA, MEXICO: MEXICO’S FIRST 21ST CENTURY ECONOMY (1992-95)



The Chihuahua Siglo XXI Project was launched in 1992 as a long-term, comprehensive effort to design and implement new economic development strategies for Chihuahua. In 1992, the ETG

team with DRI/McGraw-Hill examined the external and internal economic environment for the state, developed a vision of a new kind of economy to guide the decisions of policy makers and leaders in the private sector and developed strategies and tactics for moving the economy in new directions. Then, via a comprehensive set of “cluster working group” meetings, ETG staff assisted group participants in identifying a set of concrete action initiatives on trade, investment, education, infrastructure, finance and other issues. These initiatives are still in the process of being implemented under the leadership of the project

organization: Chihuahua Siglo XXI. The transportation and distribution cluster was one of nine clusters identified. A transportation/ distribution cluster working group was formed and five new action initiatives emerged from a six month intensive working group process, including: a joint purchasing collaborative among trucking companies, the formation of a trucker’s credit union (bank), the development of a new local airline with direct passenger and freight connections between Dallas/Fort Worth and Chihuahua airports. Chihuahua created a very pro-active and positive business climate and became one of Mexico’s leading states in job growth, foreign direct investment, and high tech infrastructure.

HONG KONG: ECONOMIC STRATEGY (1988-89)



In preparation for its reintegration with China in 1997, the members of Hong Kong’s business community hired professionals from ETG (then at Stanford Research

Institute, SRI International) to develop a strategy to prepare Hong Kong to make the economic transition from a British to a Chinese Hong Kong. This project encompassed an enormous process of consultation with business leaders, government officials in Hong Kong and China, as well as universities and community organizations. The final report was to be issued when the Tiananmin Square event occurred. Responding to this event our team added an entirely new process step to re-examine the commitment of the community to its future economic vision. After being completed, our report confirmed Hong Kong’s sense of its future and was used as the guide for a number of international trade, education and technology initiatives. This project introduced our team to the nature of different types of cross-border partnerships—with Hong Kong and Guangdong being one important example of an entrepôt and cross-border production partnership region. One of the key economic opportunities related to Hong Kong’s role as an entrepôt (trading and transportation logistics) center for the region. Key transportation/logistics industry linkages and opportunities were identified and developed in industry working groups.

BANGALORE, INDIA – INNOVATION-DRIVEN ECONOMIC DEVELOPMENT (1988)



ETG professionals (then at Stanford Research Institute, SRI International) were hired to develop a technology-based economic strategy project for the

region of Karnataka, India—focusing on Bangalore. At this time Bangalore was not known, as it is today, as one of the major software development centers of the world. Our project with this region focused on analyzing the region's clusters, their requirements, the capabilities of the region's universities, national labs (they had four) and how to sustain and accelerate the technology-based enterprise development process that was just taking shape. This project helped shape a collaborative strategy that created a network for shared R&D, training and venture financing that helped to chart the course for Bangalore to become the "Silicon Valley. We learned from Bangalore, India the importance of understanding the buyer-supplier dynamics of business in a region and how very often economic development programs are less essential to economic development than "virtual" programs that improve market efficiency by removing barriers or creating opportunities for collaboration.

SLOVENIA—MARIBOR REGIONAL STRATEGY (1992-93)



Soon after Slovenia declared its independence a project was undertaken by a team of professionals (now at ETG) to help the region of Maribor position itself for a market economy. The effort,

funded entirely by the city of Maribor and the government of Slovenia, involved a systematic process of (1) analyzing the region's industrial capabilities and future requirements, (2) assessing the responsiveness of the region's soft and hard economic infrastructure, and (3) developing a strategic vision of the Maribor economy. This strategy process collaboratively shaped new economic directions based on the region's geographic location with respect to the emerging Alp-Adria community, and the potential of the region based on evolution of its heavy industry, textiles, agriculture, trade and tourism into a region of mechanical, light diversified industries and construction services; specialty and niche finished product textiles; regional-transportation and business services, and tourism services. In order to implement the vision of the region

the project developed a business plan for a Maribor Development Agency (MDA), and undertook initial restructuring efforts with selected companies.

STRATEGY FOR THE ELECTRO-OPTICS REGION OF JENA, EAST GERMANY (1991)



Immediately following the announcement of integration professional staff (now with ETG) under took an assignment to assist the region of Jena, Thuringia in former East Germany in linking the privatization process with

regional economic strategy. The project was financed by the Treuhandanstalt and Jenoptik Carl Zeiss (JCZ). The project took place at the time that the JCZ had already announced layoffs of over 25,000 workers, with plans for layoffs of 20,000 more. The project undertook the following activities: (1) Presentation of an economic development framework based on market principles. (2) Multiple workshops on current world market trends and technology issues in electro-optics and optical technologies. (3) Organization and management of technology-business development working groups to develop business plans for spin-offs, joint-ventures and collaborative R&D. (4) Organization and management of a regional economic infrastructure strategy process, focusing on retraining, R&D and physical infrastructure. (5) Development of a business plan for a regional economic development organization (JEDCO). (6) Brokering of partnerships between US optoelectronics companies and components of CZJ. The project concluded with presentation of a business plan and limited business introductions. Subsequent to the project new management was brought to CZJ, the state of Thuringia established an economic development organization, became a co-owner of the remaining company, new federal government investment was attracted to the region, a Japanese company located operations in the region.

Selected US Projects

SUSTAINABLE CLEVELAND 2019 – BUILDING AN ECONOMIC ENGINE TO EMPOWER A GREEN CITY ON A BLUE LAKE (2010)

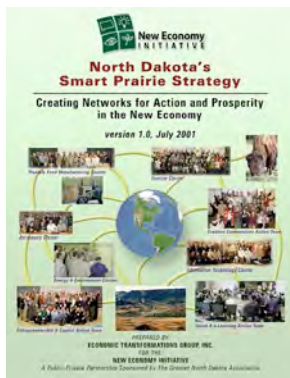
<http://sustainablecleveland.org/resources/action-resources-guide>



ETG teamed up with local experts and the Sustainability Chief of the Mayor of Cleveland to analyze and develop a sustainable economic development strategy framework and action plan for Greater Cleveland. The SC2019 Resource and Action Guide. It was a collaborative effort, informed by the direct inputs of hundreds of Clevelanders, and the indirect

inputs of countless people who have been working hard to make Cleveland great for many years. SC2019 not only developed new model for sustainable economic development in Cleveland, but, is serving as the roadmap for coordinating sustainability action by the government, private sector, and community.

NORTH DAKOTA'S NEW ECONOMY INITIATIVE (2000-2002)



Leaders from the Greater North Dakota Association business chamber hired ETG to design and conduct an action-oriented program to accelerate North Dakota's economy, revitalize the business leadership, and diversify the economy. North Dakota's New Economy Initiative (NEI) is a statewide, action-oriented effort to mobilize North Dakotans

around new ideas to grow the economy and create a more dynamic and prosperous state. During 2001 and into 2002, hundreds of citizens representing the spectrum of businesses, government agencies and higher education responded to the call to participate in the activities of the New Economy Initiative. These committed North Dakotans gathered at a series of industry cluster meetings and organized around five opportunity industry clusters in the state: flexible food manufacturing, tourism, information technology, aerospace, and energy and the environment. In addition, interested and passionate citizens and



community leaders formed action teams to develop real solutions to the broad economic challenges of recruiting talent, generating capital, stimulating entrepreneurship, and igniting the

creative potential of our communities.

The results were significant: over 50 action initiatives—ranging from the development of a new leadership and management training and retreat center in Medora to an entrepreneur business plan competition and investor network to a tribal arts and products marketing program to a \$400 million philanthropy fund. Other important initiatives have led to the establishment of an 80 megawatt wind energy farm, technology center for nano technology, and a food processing technology center. Instead of just a plan or strategy or recommendations, these initiatives are already developed and have individual champions committed to carrying them out. The New Economy Initiative is a real, action-oriented, cluster-based effort designed to kick-start a new, proactive way for North Dakotans to take the future into their own hands.

LOUISIANA ECONOMIC DEVELOPMENT PLAN (2000)



During 1999-2000, ETG served on a consulting team that was asked by the Governor's Office to conduct a cluster analysis of the state, focusing on Louisiana's Vision 20/20 and the six high

technology target clusters that were identified in that vision. We validated the cluster selection, developed a state-wide cluster development strategy, integrated existing economic development programs throughout the state, and evaluated the Department of Economic Development in terms of mission and effectiveness. We worked on six clusters, covering 1) Information Technology, 2) Bio-Medical, 3) Food Technologies (primarily biotechnology-related), 4) Advanced Materials, 5) Micro-manufacturing and 6) Environmental Services, and developed strategies for each cluster, as well as a less detailed cluster development plan for each of the 9 established clusters. Our analysis is leading to the dissolution of the existing Department of Economic Development, and the creation of a private agency to carry out those functions.

WESTCHESTER COUNTY ECONOMIC DEVELOPMENT ACTION PLAN (1999-2000)



For the Westchester Economic Development Office, ETG professionals served on a consulting team to conduct a cluster analysis of Westchester County, and developed an action plan and marketing strategy. The team facilitated cluster working group meetings for most major clusters, including a biotechnology cluster, and made recommendations for re-organizing county government in order to deliver economic development services more effectively. As a county with a high concentration of Fortune 500 corporate headquarters, including IBM, Pepsico, MCI, Phillip Morris, Texaco, Prodigy, and Ciba Specialty Chemicals, the team identified a HQ and SME Corporate Services Cluster, organized to serve the specialized needs of headquarter operations, both large and small. The need for better organized conference facilities, R&D labs, and telecommunications infrastructure became apparent when this key cluster was identified, the expansion of small and large headquarters became a goal.

ARIZONA AT THE CROSSROADS: STRATEGIC PLAN FOR ECONOMIC DEVELOPMENT (1991-1992)



Professionals from ETG, working with DRI/McGraw-Hill, supported the Arizona Strategic Planning for Economic Development (ASPED) project--the most comprehensive, participative statewide planning project ever. In Phase I, completed in April 1991, a Strategic Assessment of the Arizona economy was conducted.

The team undertook a competitive assessment of Arizona's current economic position and identified strategic opportunities to develop economic clusters and economic foundations. The document, "Arizona at the Crossroads: Strategic Assessment," served as the baseline document for the Phase II strategic planning process. Through working groups, town halls, and public forums, this planning process involved a broad cross section of Arizonans in setting priorities and developing specific initiatives for Arizona's economic development.

AMERICA'S CLUSTERS: EXPERIENCES AND LESSONS LEARNED (DOC/EDA) (1995)



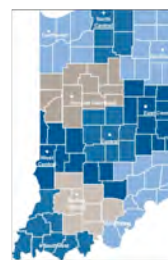
In a project funded by the Economic Development Administration of the U.S. Department of Commerce, professionals of ETG ((then at DRI/McGraw-Hill) developed the first comprehensive mapping of the key 21 clusters of the U.S. economy. This report was published by the U.S. Department of Commerce in 1995 and became a key reference for state and local economic development agencies across the country.

EL PASO TECH 21 PROJECT (1993-1994)



In 1994, ETG professionals then working at DRI/McGraw-Hill assisted El Paso through a 12-month economic strategy process. A Steering Committee was formed, along with working groups covering the seven major industrial clusters in the region. With major support from the two largest chambers of commerce, and institutional support from UTEP's IM3, the project defined a series of strategies and initiatives at both the cluster level, county level, and cross-border level (Camino Real Corridor). The resulting Action Plan defined a vision and a series of steps to be taken at the level of the County and City of El Paso, but some of the key institutional recommendations have yet to be implemented. One of the clusters identified and worked with in this project was the Transportation/Logistics Cluster, related to US/Mexico trade and the opportunities and challenges of NAFTA.

BLUEPRINT FOR A DYNAMIC SMALL BUSINESS COMMUNITY (1997)



For the Indiana State Chamber of Commerce, ETG professionals, then working with ECG, completed a major study describing the factors underlying the success of small business communities at global level. The study included an extensive literature survey of successful regions, and in-depth case studies of six selected regions: West Jutland (Denmark), Cambridge (UK), Catalonia (Spain), Silicon Valley (CA),

Minnesota (MN), and Research Triangle Park (NC). The study focused on “best practices” — activities and programs set up by public, private, or mixed sponsors to assist small enterprises, and on identifying the underlying “stories” behind the success of each individual case. The study concludes with an analysis of the underlying principles of creating and sustaining dynamic small business communities, along with specific recommendations for the State of Indiana.

PENNSYLVANIA’S COMPETITIVENESS STRATEGY (1997-98)



ETG professionals assisted Pennsylvania to identify its clusters, both on a state and regional level, and indicate which emerging or “high-tech seed clusters” might be the best

candidates for attraction and retention programs. The study not only mapped the Commonwealth’s cluster structure, but also the underlying technological capabilities in Universities, research centers, training programs and private R&D labs. The cross mapping of established clusters, seed clusters and technological capabilities provided a powerful lens for government and private sector leaders to focus on the leading drivers of the economy in the future.

UNDERSTANDING SOUTHERN CALIFORNIA’S ECONOMY: HOW CONVERGING FORCES DRIVE THE REGION’S DYNAMIC INDUSTRIAL CLUSTERS (1988)



In a set of projects, ETG professionals (then at SRI International) examined the underlying economic dynamics of the Southern California economy from three perspectives--historical, regional, and industrial--to help

identify opportunities for the regional utility to affect the economic future of the region. Four major clusters were identified and the linkages between them were examined in detail: aerospace, advanced manufacturing, and process industries; diversified manufacturing; advanced services (business/ financial, health services, tourism/entertainment); and agriculture and food processing. The report discusses a number of important roles the client can play through its own activities and through cooperative efforts with other private firms and public agencies to promote critical public actions that will help

build stronger industry linkages and promote economic infrastructure. The regional utility has used the study to help identify new business opportunities as well as to take action in enhancing the overall long-term economic growth of the region.

ENTERPRISE FLORIDA: GROWING THE FUTURE (1989)



At the request of the Florida Chamber of Commerce, the professionals from ETG (then at the Stanford Research Institute—

SRI International) worked to identify strategic directions for how Florida can build a leadership economy by promoting the growth of new enterprise. Enterprise Florida focused specifically on new enterprises that can capture added income for the Florida economy. The report evaluated the growth of new enterprise within several emerging industry clusters: laser/electro-optics, health technologies, information, and space industries. The team formulated a strategy and action plan from which the public and private sectors can encourage the growth of industrial clusters to create the higher-value-added economy of Florida's future. Several Florida communities have utilized Enterprise Florida in developing regional strategies. In 1996, the team updated and benchmarked the progress in Florida for the Chamber.

Sustainable Development

PIONEERING SUSTAINABLE CLUSTER-BASED ECONOMIC DEVELOPMENT MARKS ETG'S MISSION FOR THE 21ST CENTURY



This is an essential response to emerging environmental imperatives to accelerate the shift to renewable energy and to take action to protect our air, land, water and communities while developing strong economies. ETG is pioneering the work of Sustainable Economic Development—earth-conscious and

people-oriented economic competitiveness and growth—using our leading edge clustering methodology.

Our approach: supports the development of innovative regional economies that are ecologically sustainable as well as prosperous; sustains communities where education, economic opportunities, cultural integrity, wellness, spirit, recreation and celebration thrive; accelerates the shift to a renewable energy economy.

We work side-by-side with local business, government, and community leaders as they collaborate and achieve success, and have done this in highly varied economic and cultural contexts. Our focus on action and results has enabled communities, states, regions, and countries in highly varied economic and cultural contexts to build adaptive, innovative, and sustainable economies for the 21st Century. ETG has been involved in many sustainable development projects during the past two decades.

SUSTAINABLE CLEVELAND 2019 – BUILDING AN ECONOMIC ENGINE TO EMPOWER A GREEN CITY ON A BLUE LAKE (2010)

<http://sustainablecleveland.org/resources/action-resources-guide>



ETG teamed up with local experts and the Sustainability Chief of the Mayor of Cleveland to analyze and develop a sustainable economic development strategy framework and action plan for Greater Cleveland. The SC2019 Resource and Action Guide. It was a collaborative effort, informed by the direct inputs of hundreds of Clevelanders, and the indirect

inputs of countless people who have been working hard to make Cleveland great for many years. SC2019 not only developed new model for sustainable economic development in Cleveland, but,

is serving as the roadmap for coordinating sustainability action by the government, private sector, and community.

WEST COAST GREEN—WORLD'S PREMIER CONFERENCE/EXPO ON GREEN RESIDENTIAL BUILDING, SAN FRANCISCO (2005 - 2009)



ETG supported the design and development of West Coast Green since its premier event in 2005. ETG supported WCG in the overall design of the conference and has developed and facilitated the Action Hub—a central part of the conference that supports green building and clean-tech entrepreneurs to convert ideas into concrete actions, businesses,

and networks. Over the past three years, the Action Hubs have

resulted in dozens of new businesses—ranging from launching green building suppliers to the first green Habitat-for-Humanity model home. WCG Action Hub aims to make our tracks wider, and our carbon footprint lighter. The Action Hub invites and supports creative energy conversion of thought to deed, inspiration to tangible next steps, and traction to accelerated action. At the 2008 WCG Action Hub, sustainable projects were screened by a panel of venture capitalists. www.westcoastgreen.org

SAN FRANCISCO RENEWABLE ENERGY CLUSTERING (2004-2007)



ETG teamed with Local Power (www.local.org) in 2004 to support San Francisco implement its Energy Independence declaration and take action towards radically increasing its use of renewable energy in its overall electricity and energy portfolio.

ETG designed and facilitated a

series of renewable energy cluster meetings to support the development of local capacity to provide solar, wind, tidal, geothermal energy. Cluster meetings brought together energy industry leaders representing large electric service providers, renewable energy producers, solar installers, wind turbine developers along with municipal bond specialists and experts from the wireless industry—to join forces in developing the emerging market opportunity stemming from California’s cities movement toward Energy Independence and Community Choice Aggregation. At present, San Francisco is implementing its Community Choice Aggregation initiative to become energy independent. ETG’s involvement served to accelerate the strategic alignment, networking, collaboration, and competitiveness among energy companies in responding to these opportunities resulting in a variety of strategic alliance, attracting venture capital, and fostering innovation.

SUSTAINABILITY & COMPETITIVENESS AGENDA FOR SOUTH EAST TURKEY (2007-2008)



In a project for the Government of Turkey, funded by UNDP, ETG professionals worked with a team of international experts to design a vision, strategy and action plan for Southeast Anatolia region

of Turkey—one of Turkey’s most important and challenging regions, bordering Syria and Iraq. The competitiveness agenda was designed as an effort to develop a framework for transforming the region’s economy. The Competitiveness Agenda charts a new sustainable economic direction for the region and develop a cohesive framework for its further elaboration and implementation. In particular, the project showed how the region can become a new, value-added economy—based on reengaging its identity as the “cradle of sustainable civilization”—thereby both renewing the Region’s cultural and economic distinctiveness and establishing the Region as a new role model for developing regions in Turkey and worldwide. The Agenda specifically charts a roadmap for the region to leverage its high concentration of renewable energy (hydro, solar, wind), organic agriculture and food processing, organic cotton and textile production, and sustainable tourism to position the region as a center for sustainable development in the developing world. The consultant team conducted research, interviews, analysed sectors, markets, and developed a comprehensive economic vision, strategy and action plan for the region. The Competitiveness Agenda was presented and accepted by the Government of Turkey and resulted in budget allocations of over \$12 billion over the next five years.

SUSTAINABLE RURAL DEVELOPMENT—WOMEN INSPIRING WOMEN IN TABASCO MEXICO (2002-2008)



During the past seven years, in the small “spicy” state of Tabasco in Southeast Mexico, ETG has supported the development and evolution of rural clustering program to help

poor rural women pull themselves out of poverty. ETG has joined forces with Dr. Armando Mejia to develop a model for economic entrepreneurship based on savings groups, entrepreneurship development and micro finance. The model first emerged in 1999 with the formation of a savings group of 10 women. By 2003, 34 groups had formed in the Costa Chica region, totaling some 800 women, each saving and earning on average \$68 per year. In 2003, ETG helped to expand the women’s saving group model to two other poor rural regions in Tabasco. In 2005, the Governor of Tabasco invited ETG to expand the program to all 17 provinces in the state. In 2005, at the inaugural meetings of the Clinton Global Initiative, Governor Andrade and Dr. Hansen made a \$9 million commitment expand the program and provide entrepreneurship

support to 15,000 women. This commitment was implemented in 2005-2006 and was featured as one of the most successful rural development programs during President Clinton's hour-long CNN program on Sustainable Economic Development. Today, the "Cajas" program has more than 12,500 women involved in savings circles and all together are organized into 12 cooperative organizations and are launching their own micro finance bank.

CROSS BORDER ENVIRONMENTAL PLANNING: NADBANK (1997)

ETG staff were hired by the North American Development Bank (NADBank) to plan and facilitate a collaborative planning workshop for a major meeting of the Border Environmental Cooperation Commission (BECC), NADBank, the Commission Nacional de Agua, the International Boundary and Water Commission, and the US Environmental Protection Agency. The conference brought together the executive leaders and staffs from each of these organizations. In this meeting, the key objective was to identify barriers to progress and reach consensus on an action plan for success. A secondary objective was to build a collaborative team of all groups and improve communications and trust. The three-day workshop, which involved simultaneous meetings for 50 participants of six different agencies as well as breakout groups, produced an action document that outlined consensus on goals, roles, and actions. An action plan was put together defining specific roles and responsibilities for collaboration among the different organizations in the upcoming year.

LAKE SUPERIOR INITIATIVE: CONCEPTUAL PLAN FOR THE INSTITUTE FOR LAKE SUPERIOR RESEARCH

ETG professionals (then working with SRI International) was hired by the state of Minnesota, as part of the Lake Superior Initiative, to prepare a conceptual plan for an Institute for Lake Superior Research (ILSR). The mission of the proposed institute is to develop the research and knowledge base necessary to guide policy decisions to maintain the environmental integrity of Lake Superior. The consulting team identified the resources available to address research and information-transfer needs for ensuring the ecological integrity of Lake Superior. The consulting team also proposed an administrative and management structure for development of scientific research and information transfer on Lake Superior. Today the ILSR is functioning well in its 10th year of operation.

NORTH DAKOTA'S ENERGY AND ENVIRONMENTAL CLUSTER As part of the North Dakota's New Economy

Initiative—a statewide, action-oriented effort to mobilize North Dakotans around new ideas to grow the economy—ETG helped to invite North Dakota's energy leaders (principally from the coal and oil industries) to expand their cluster to include a focus on wind energy and the environment. Leaders from North Dakota's emerging wind became a driving force of this cluster and developed and implemented action initiatives ranging from the development of rural wind farms to new legislations promoting wind development, to proposals for expanding the state's electricity transmission capacity.

TABASCO (MEXICO) CACAO CLUSTER – During 2002-04, ETG helped to launch the cacao cluster and supported the development and implementation of the cacao cluster's main initiative—the transition to organic cacao. By 2005, more than two-thirds of all cacao production in the state was certified as organic cacao.

MENDOZA (ARGENTINA) ENERGY CLUSTER – ETG was instrumental in shifting the focus of Mendoza's energy cluster to renewable energy and helped to formulate a number of action initiatives ranging from bio-diesel production, to rural wind power development, to solar research.

CLUSTERS AND SUSTAINABILITY SYMPOSIUM (2007)



ETG designed and facilitated world's first collaborative symposium about sustainability, clusters, and competitiveness to address global climate change and sustainable economic development in Portland Oregon in 2007. It

was sponsored by The Competitiveness Institute (ICI) and State of Oregon. The symposium focused on the role that clustering—as one of the world's most successful approaches to economic development—can play in accelerating the emergence of these important new industries and in fostering sustainable regional development. The symposium was a highly interactive, action-oriented event that fosters networking and a commitment to a clustering-sustainability agenda including specific actions to support the growth of sustainable clusters and communities. The symposium addressed issues ranging from advanced energy technologies, "green" development, bio-based products, eco-industrial parks, and early-stage approaches to sustainable regional development have emerged in response to the sustainability imperative in places ranging from Oregon, California and Vermont to Europe, Brazil, Indonesia and China.

Innovation Centers, Research and Technology Parks

PLANNING AND DEVELOPING INFRASTRUCTURE FOR INNOVATION INDUSTRIES

ETG has helped a variety of regions to develop technology parks, design incubators, and otherwise build intellectual and physical infrastructure in an effort to implement their cluster growth strategies. A component of each of these strategies has focused on our capability to design and, as required, help implement action initiatives to make economic strategy “real”. Other projects are included here to demonstrate the depth and breadth of ETG’s planning and implementation capabilities, and the strong collaborative strategy development core methodology that runs through all of our work.

ETHIOPIA INNOVATION AND INCUBATION CENTER (I²)



ETG is collaborating with its Ethiopian partner, PCI, to establish I², a sustainable agribusiness incubator in Ethiopia—funded by the USAID—whose objective is to

transform Ethiopian agriculture sector-by-sector through the establishment of a multi-faceted innovating and incubating business whose primary mission consists of transforming agribusiness value chains and enhancing their competitiveness. The I² incubator is designed according to the time-tested best practices of successful agribusiness incubators worldwide. Experience reveals that working with and through change-oriented companies is the most efficient way to bring real innovation and value-added initiatives into the market. Therefore, I² works along the entirety of the agribusiness value chain with a dual focus to identify and support existing pioneer firms as well as to stimulate and promote emerging entrepreneurs.

I² accomplishes competitive transformation first at the enterprise level and subsequently at the sector level. It achieves its objectives by:

- i) Identifying promising agribusiness value chains with significant untapped growth potential;
- ii) Analyzing the underlying economics of these chains;
- iii) Undertaking strategic interventions in each chain which afford the greatest breakthrough gains;
- iv) Engaging pioneering business leaders, innovators, and entrepreneurs to test strategic interventions along multiple trajectories.

I² is focusing initially on three value chains with high potential for growth: Honey, Sesame and Dairy products. I² analyzes each sector in depth in order to pinpoint propitious targets for intervention in the market. Such targets may exist in the area of

inputs, production, packaging, transportation, processing, distribution or marketing; they may involve complementarities between several value chains, they may imply coordination between the private and the public sector and they may occur in the domestic, regional or global market. I² seeks out pioneers and entrepreneurs to test alternative business models, create economies of scale and scope, experiment with apt new technology, and work to realign public policy with sector interests.

PASADENA BIOSCIENCE COLLABORATIVE (2000-01)

www.pasadenabiosci.com



www.csuchico.edu/csuperb/Pasadena.html

ETG, in collaboration with its brother company, ECG, and the Institute for Biotechnology Information (IBI), and the Smith Group, developed an analytical and participatory approach to assessing the needs, market potential, and feasibility of developing the proposed multi-use biotechnology facility in Pasadena. The overall goal was to enhance the growth of biotechnology industry in the Pasadena regional economy by recommending a state-of-the-art design and defining the mission, role and structural attributes of the new Center. The project team worked with the California State University client team and other regional bioscience industry stakeholders. The strategy process combines innovative analysis of niche markets with collaborative participation by regional industry, institutions, and public entities in the design of the new biotechnology facility. The Pasadena Biosciences Innovation and Training Center was implemented in 2003 and now is known as the Pasadena Bioscience Collaborative and is closely related to the

California State Universities Program for Education and Research in Biotechnology (CSUPERB).

LONG BEACH, CALIFORNIA: DEFENSE CONVERSION AND INCUBATOR/TECHNOLOGY PARK (1995-96)

Professional with ETG (then a unit of DRI/McGraw-Hill) were asked by California State University Long Beach to develop a conversion strategy for the Cabrillo Navy base. The approach used here was to analyze the surrounding industry clusters in Long Beach and Los Angeles and determine their status, growth and requirements for expansion in the region, then use their requirements to shape a research and technology park complex that would leverage the core competencies of the University. The project provided an economic rationale and design for development of the converted base facilities to new uses. This plan is now being implemented, and ETG went on to design components of the park being developed. In addition, ETG developed the first cluster analysis of the City of Long Beach, and demonstrated how their cluster structure sets the stage for future economic development investments. In a follow-up study with Long Beach we are helped to design a demand-driven regional business incubator that utilized ETG's approach of avoiding "physical" incubators when not necessary and emphasizing "virtual" incubators wherever possible to accelerate enterprise formation by overcoming market gaps in business services, market information, technology "downstreaming", production partnerships and financing.

MONTEREY BAY EDUCATION, SCIENCE, AND TECHNOLOGY CENTER, FORT ORD (1996)

In 1996, ETG (then a unit of DRI/McGraw-Hill) led a multi-disciplinary team to develop the MBEST center. This study articulated the nature of market demand that, in turn, determined the MBEST Center concept, its physical design, and implementation strategy. A complementary approach was to understand the mix of industries, institutions, and organizations in the region that could be mobilized to pursue identified market opportunities. ETG conducted detailed market niche studies tied to concrete action-oriented marketing plans for each of four clusters, one of which was The Biotechnology Cluster.

SOUTHEAST LOS ANGELES COUNTY DEFENSE ADJUSTMENT PLAN (1995-1996)

ETG professionals (then with DRI/McGraw-Hill) was selected to provide the County of Los Angeles and the cities of

Commerce, Downey, Lakewood, Montebello, Pico Rivera, Santa Fe Springs and Whittier with a defense adjustment framework. The team fashioned analytic tools and data bases for the defense adjustment strategy as well as engineered a collaborative strategy process. The resulting action plan mobilizes the diverse communities of Southeast Los Angeles to work together to leverage their defense/aerospace work force, subcontractors and site assets in a highly competitive regional, state and global market place. This project addressed all facets of defense industry adjustment, including patterns of aerospace and defense worker displacement, identifies opportunities and risks arising from cluster growth and decline, and assesses training and retraining resources integrating this information into a data base and cluster development strategy process. The consulting team developed an action plan to create, retain, expand and attract clusters to the Southeast Los Angeles County areas through a strategy that links economic development with specific aerospace/defense adjustment initiatives for displaced workers, subcontractors and sites in a collaborative and strategic process.

BRATISLAVA INNOVATION PARK (1993)

Under contract to the US Agency for International Development members of the ETG project team undertook an unusual assignment to prepare the economic rationale and business plan for a science park for Bratislava, Slovakia. This effort paralleled that of an EC group, but reached a different conclusion. The project team applied principles of economic development to the planning of a technology park that stress the importance of developing industrial clusters as a means for enabling economic growth in regions, and, the emphasize that soft and hard economic infrastructure of accessible technology, available skills, adequate financing, and appropriate physical infrastructure is essential to cluster development. In applying these principles, the project team achieved the following: (1) Evaluated the economy to identify the "seeds" of potential clusters. In doing this, the team identified an emerging information technology cluster comprising over 200 small software companies, and mixture of restructuring hardware and systems firms. (2) Assessed European and international information technology markets that Slovak and Bratislava firms could reasonably compete in, directly or through partnerships-- which could drive the region's future economy forward. (3) Assessed the responsiveness of the regions economic infrastructure to the information technology industries. This identified specific business service needs for the emerging

information services cluster. (4) Prepared a business plan that would lead to the creation of a "virtual" innovation park rather than a physical science park. This concept enables establishing a service management business that will broker and provide services needed by the information technology industries, manage a network of existing real estate across the city to "incubate" companies to a point at which they require new and larger facilities. At the point at which the domestic demand and capabilities have grown, the new business organization (Bratislava Innovation Park) would actually become a development partner and core service provider in an actual technology park. The project concluded with provision of a business plan, implementation plan and identification of private investors for the new organization.

ETG Team & Affiliates

TEAM PHILOSOPHY

Economic Transformations Group (ETG) is a networked consultancy, which means that we hire the most qualified experts according to the needs of the project. We also work in partnership with other development organizations and consultancies. Our core team consists of the partner members of ETG who provide the overall framework and philosophy behind all of our projects. Through our combined network of professional contacts built up through years of experience, we have the ability to build a dream team for activating sustainable economies in a variety of contexts.

CORE TEAM

DR. ERIC ROLF HANSEN, PRESIDENT, sustainable regional economic development, sustainable clustering and action, innovation and technology development, public-private dialogue, urban and regional planning

MANUEL ALDERETE, economic and business analysis, strategy and implementation; cluster development, investment attraction

RONALD KOPICKI, value chain assessment and development, agribusiness development, agribusiness incubator development, investment climate assessment

MYAN BAKER, sustainable systems strategies, implementation, cluster facilitation, public-private dialogue, training design

KELLI ROSE PEARSON, intercultural communications, cluster process management, sustainable development

LUIS ROMITO, strategic planning and implementation, regional economic development/clustering facilitation and training

DR. MARY ANN GALLAGHER, sustainable development, training curriculum designer, organizational development consultant/trainer/manager and personal coach

DR. ARMANDO MEJIA, rural sustainable development, agricultural development, micro-finance, women's based-development

MIGUEL AGUAYO, economic analysis, cluster development and facilitation, business strategy

TADEJA COLNAR, industrial policy and strategy, cluster analysis, strategy, facilitation and training

DR. CRIST INMAN, sustainable tourism development, tourism business consulting, sustainable resort development, tourism clustering development

CHRIS MILLER, innovation-driven economies, technology, investment attraction, creative industries, high-quality economic growth.

FRANZ HELBIG, management, finance, and venture capital
Robert Gonzales, economic development and strategic planning, investment attraction.

FLAVIO FEFERMAN, economic development, agricultural development, marketing strategy, financial valuation and entrepreneurship

ALEX BOYD, clustering and economic development analysis, strategy, and facilitation, and clustering training

Core Team, Biographies

DR ERIC ROLF HANSEN, PRESIDENT, ETG



Dr. Hansen's areas of expertise are economic competitiveness analysis, strategy development, and managing broad-based economic change and action implementation for regions and industries. He is a specialist in cluster-based economic development and tourism

development, and is innovating procedures for stimulating private-sector development and public-private collaboration in multiple socio-economic and cultural contexts. Dr. Hansen directed major economic strategy projects for South Africa, Brazil, Chile, Nepal, Texas, Pennsylvania, Panama, Guatemala, Morocco, and Mexico, as well as projects in Eastern Europe. He has directed a numerous sustainable economic competitiveness and clustering projects in 15 U.S. states and regions, including Cleveland, California, Florida, Arizona, North Dakota, Iowa (cluster-based economic strategy).

Dr. Hansen was previously Director at DRI/McGraw-Hill and program manager of SRI International's Center for Economic Competitiveness where he led and worked on economic strategy projects worldwide. Formerly, Dr. Hansen was with the World Bank, was professor of economics and planning at the University of Wisconsin-Milwaukee, and worked with the Iranian Plan and Budget Organization.

He holds a BA in economics from the University of California at Santa Cruz and a Ph.D. in regional economics and planning from M.I.T. He is fluent in English, Spanish, and French, and has working knowledge in Portuguese and Farsi (Persian). He has authored numerous articles and publications, and is Adjunct Professor at the ESSEC Business School (Paris), and lectures at lectures at NYU, Columbia University, UC Berkeley and Stanford University. He is co-founder and past-board member of the Competitiveness Institute, the Cluster Practitioners Network (see www.competitiveness.org).

MANUEL ALDERETE, ALDERETE AND ASSOCIATES

Manuel Alderete is an economic strategy and implementation expert with more than 20 years of practical experience in creating regional economic development, especially in the areas

of industrial attraction and the development of industrial parks.



Mr. Alderete served as Director of Economic Development for the State of Chihuahua Mexico and has 15 years of experience in investment attraction, industrial development, and preparation of feasibility studies for industry. He has worked with ETG and DRI/McGraw-Hill in the

development of Project Chihuahua's 21st Century (cluster-based collaborative action strategy) and with ETG in the implementation of Project Transformando Campeche (cluster strategy project for the State of Campeche, Mexico). He has played a lead role in the creation, design, and development of Chihuahua's Center for Advanced Materials Research and Center for Machine Tools. He is director of Alderete and Associates, an economic development consulting firm, based in Chihuahua, Mexico. Mr. Alderete has a degree in Chemical and Industrial Engineering from the Technology Institute of Chihuahua (ITCH), and has a license in business management from IPADE in Mexico City.

MYAN BAKER



Myan Baker specializes in conceptualizing and implementing sustainable systems strategies, models and processes. Her work has taken her into over 400 organizations, networks and alliances. Myan is noted for her capacity to focus on the future and

to infuse relevant new ideas and creative methods into the implementation of change initiatives. She has designed and implemented cluster-based sustainable development strategies in North Dakota, Tabasco, Mexico and developed a strategy for sustainable rural development for regions in Mexico.

Sustainable Initiative Design—Myan works collaboratively to assess contextual changes. She guides the development of new collective visions of adaptive change; evolves interactive, living systems strategies to help leaders realize vision. She creates structures, processes, special events and training programs to help people make rapid progress toward attaining collective

vision, and facilitates examination and renewal of relationships to mobilize momentum toward common goals.

Human Capability Enhancement—As a facilitator and group process designer, Myan enables individuals and groups to identify and capitalize on their strengths and discover new patterns of creativity, connection and effectiveness. A "world-bridger" who communicates effectively across traditional boundaries (culture, specialization, position, gender, sector), she inspires people to develop authentic relationships that spur sustainable systems innovations. Myan coaches leaders to authentically model behaviors and attitudes that support sustainable development and action. She quietly backstops a wide array of consultants and trainers with "on-demand" creative options to help them and their clients turn real-time dilemmas into useful forward movement.

Training—Myan trains trainers in the art of strategic, interactive curriculum design and in the delivery of participant-centered courses. She trains advanced facilitators to enable them to invent practical processes to support creative collaborative work. She also designs content specific training and trainer training programs.

Myan has experience working with public and private sector leaders in states and regions in the United States and internationally, and with private sector corporations (banking, distribution, retail, telecommunications & e-businesses); national and international networks and collaborations; governments and related agencies; academic and research institutions; and with a wide array of non-profit organizations. She has a BA in English and is the Innovation Consultant for the National Center for Innovation and Research in Graduate Education (University of Washington). She is a member of the Board of Directors of the Ecological Options Network and the International Poetry Museum (San Francisco).

RONALD KOPICKI



Ron Kopicki is an expert in supply chain development, agribusiness development, clustering, and investment climate assessment. Ron advises private companies concerning their strategies for expanding into developing countries. While with the World Bank as its Supply Chain Advisor for 16 years, he worked on more

than 30 agribusiness and agricultural market development projects, as well as on projects involving food supply chain development. His field experience with the Bank was gained in more than 50 countries in Africa, the Middle East, Southeast Asia, Central Asia, Central America and the Caribbean. From the World Bank Ron was seconded to the FAO of the UN for two years, where, as an Agribusiness Development Economist, he worked with the FAO's Investment Center. At FAO, he developed strategies for encouraging private sector investment in the agricultural sectors of developing countries. From within the FAO he assisted other development agencies, including IFAD and the African Development Bank, with their investment project preparation. Ron has extensive hands-on management experience in starting private enterprises and in building distribution channels, as well as in making and appraising private sector investments. He started three companies himself and has advised on many more.

Ron served as Director of Strategic Planning for a Fortune 500 Company (CSX Corporation) during a period of tectonic shift in its market and business environment from a highly regulated enterprise for which opportunities for enhanced profit were primarily derived from on regulatory appeal and rate case defense to one in which profit making opportunities increasingly depended on innovative service designs and new kinds of risk sharing partnerships with customers. During that period he assisted the company change its culture, its strategic orientation and its fundamental value proposition, all with significant positive results. His achievements were acknowledged with an industry association award for service innovation. Ron served as well as Manager of Rehabilitation Planning for a large, state owned enterprise (CONRAIL) during its transition from public to private ownership and control. During this transition period he developed management control systems and programs to more precisely target capital spending, to reduce redundancies and inefficiencies in facilities, basic infrastructure and viable service networks and work forces. Both of these early formative management experiences have served him well in his subsequent role as principle change agent and industrial reformer of transport and heavy industries in more than 50 developing countries. Ron holds BA and MA degrees from Cornell University, as well as an MBA from Stanford University. He has lectured and spoken in workshops and seminars on these topics in several international venues. In addition to English he speaks some French and Italian.

KELLI ROSE PEARSON



Kelli Pearson specializes in small business development, sustainable economic development, and international cultural communications. During 2008, she joined ETG's team and is working on-site on the Southern Chile economic competitiveness and clustering

project. Kelli has been coordinating activities with business leaders and staff from Chile's regional development agencies. Kelli brings her strong and dynamic experience as a business entrepreneur and civic leader in Savanna Georgia over the past eight years where she created the Sentient Bean, a coffee shop and cultural community center. She has a BA in Religious Studies from Carlton College, in Minnesota, she has a professional certificate in Sustainability Leadership from the University of Oregon, and she is currently enrolled in an MSc program in Environmental Governance at the University of Freiburg in Germany. She has working knowledge of French, Spanish, and German.

MIGUEL AGUAYO



Miguel Aguayo is an economic development and clustering expert and small business development consultant with 17 years of experience internationally. Miguel has worked with ETG over the past 12 years on projects ranging from the highly successful economic clustering project in Chihuahua

Mexico (Chihuahua Siglo XXI), Compite Panama, Tabasco in Action, Transformando Campeche, to Re-Inventing Nicaragua (with ECG). Over the course of this work, Miguel has worked with more than 50 different clusters. Miguel's strength is his ability to work closely with business and government leaders in defining, developing and implementing action initiatives. Miguel is also a seasoned expert in conducting feasibility analyses for business and government projects and programs, and is a specialist in market analysis. He is a polished public speaker and served as president of the ToastMaster Club. Miguel is a native of Chihuahua, Mexico, has advanced degrees in industrial

engineering and business from the Technological Institute of Chihuahua, and is fluent in Spanish and English, and has working knowledge of Japanese.

TADEJA COLNAR-LESKOVŠEK



Tadeja Colnar-Leskovšek is a clustering and industrial policy expert, institution design and development consultant, and clustering and economic development facilitator and trainer. She was a president of Center for International

Competitiveness (CIC) - a pioneering research and consulting organization for competitiveness enhancement and regional development in Slovenia. Tadeja was involved in Slovenia's highly successful cluster development program and facilitated both the initiation of first clusters in Croatia and the establishment of Central and Eastern European ClusterNetwork. She is currently leading a World Bank project in Macedonia to facilitate an integrated national industrial development and competitiveness policy—working to interface different aspects of industrial policy across Macedonia's main ministries, agencies, and private sector associations. Tadeja worked with ETG professionals in developing the "Competitiveness Agenda" for Southeast Anatolia, Turkey, a highly successful sustainable economic development strategy for this lagging and politically critical region of Turkey, leading to the Turkish government's decision to invest US\$12.3 billion over the next five year. She also collaborated with Dr. Hansen in conducting needs assessments and cluster trainings in Turkey as part of Turkey's Development of a National Clustering Policy during 2007-2008. Tadeja has her masters degree in SME management and organizational learning at the University of Ljubljana. She is also a lecturer and an associated member of the Department of International Business at the Faculty of Economics, University of Ljubljana. She is fluent in English, Slovenian, Croatian, Serbian and has good understanding of French and Macedonian.

LUIS ROMITO

Luis Romito, Senior Consultant with ETG, is cluster



development expert and industrial engineer with more than 30 years of business experience in the agrobusiness sector. Since joining the ETG team in 2006, Mr. Romito has played a key leadership role on ETG's clustering project in Mendoza, Argentina – coordinating 9 cluster analyses, cluster working groups, and client relations—and with the Dalberg-ETG team in the eight regions of the south of Chile. Luis is an expert in clustering facilitation, implementation, and training. In his spare time, Mr. Romito is professor of industrial engineering at the University of Mendoza. Luis is fluent in Spanish and English.

MARY ANN GALLAGHER



With her PhD in Educational Technologies, Mary Ann Gallagher has worked for over 30 years as a program developer, curriculum designer, organizational development consultant, trainer, manager and personal coach. Her expertise is in: designing,

managing, and implementing transformative trainings and events that produce effective learning and lasting organizational and behavioral change. She focuses on using living systems principles to align the means and the ends of a learning event, which results in deeper, more lasting learning experiences. Over the past three years, Mary Ann has worked as the conference design director for West Coast Green (WCG), a cutting edge conference and expo that attracts more than 10,000 attendees and brings together key luminaries from businesses, NGOs, communities, and governments. WCG is the world's largest event of this type that focuses on nexus of sustainability, green building, and clean tech. Relevant Experience Includes: * Developing and directing a training institute for the Labor Dept. Western Region - the design and development development system produced much-in-demand workforce development and program management and design courses. * Developing training for implementing a demonstration personnel system for the Naval Weapon's Center and as head of management analysis. * Bringing the Forest Service Personnel

System into compliance with affirmative action for women. * Coaching school leadership teams. * Working as design director for West Coast Green.

DR ARMANDO MEJIA



Dr. Armando Mejia, Senior Advisor to ETG, is an expert in sustainable rural development with more than 30 years of experience in training, design, and implementation of production systems and rural development. He has worked with ETG as a sustainable rural development

expert, coordinating various rural clusters and developing a project to empower rural women to develop clusters of rural saving and loan groups and economic projects.

Dr. Mejia is Sub-Secretary for Agriculture, Forestry and Fishing for the State of Tabasco Mexico. He has been instrumental in developing new systems for agricultural production including organic cocoa beans and chocolate, forestry restoration, and shrimp aquaculture.

Dr. Mejia has a Ph.D. in Soil Sciences from the University of California at Davis (1983). He served as professor of Soil Sciences at the Colegio Superior of Tropical Agriculture in Tabasco Mexico (1972-1985), delegate for the national Ministry of Agriculture in Tabasco, and worked at for Apasco Cement Company as director of rural development programs.

CHRIS MILLER, CREATIVE CITIES



Chris Miller is a leading thinker on innovation driven economies, creative industries, and high quality economic growth. He integrates principles of innovation, organizational development, urban and regional planning to create business and social environments that grow,

create, and attract innovative, knowledge-based, creative and technical entrepreneurs.

Prior to re-locating to Savannah, Georgia in 2001, Chris Miller was an original member of, and held a number of roles critical to the widely acclaimed success of MindSpring/Earthlink corporation, the nation's 2nd largest ISP.

In addition to his wide technology experience, he was also a former U. S. Peace Corps Volunteer in Zanzibar, Tanzania, and brings to Illuminomics a wealth of senior management expertise from a wide variety of roles including technical management, commercial sales, event productions, manufacturing operations, small business and entrepreneurship consulting, as well as international, economic and community development.

In 2002, Miller founded the original concept, energy and plan which launched The Creative Coast Alliance into a leading position in innovation-led economic development in the U.S. The impact on Savannah and the region has been significant and has put Savannah well on a quality job and wage growth path that has further enhanced the regional high-quality of life.

From October 2003 through December 2007, Miller served in dual roles as the Executive Director of The Creative Coast Alliance and as Director of Technology Development for the Savannah Economic Development Authority. In December 2007, Miller stepped down as director of The Creative Coast Initiative to launch his own ventures, “Creative Cities Consulting” and “Illuminomics”. He continues to be heavily involved with Savannah and the regional community, is a lead consultant to The Creative Coast Alliance, and is currently working on projects in Sweden, the Baltic states and other projects around the southeast U.S.

FRANZ HELBIG



Franz Helbig is a senior business executive with a wide range of management and consulting experience in domestic and international economic and business development, strategic planning, venture capital and investment financing, general management of growth

companies, including marketing and distribution. He has extensive knowledge of American and European high-technology, medical, consumer and financial services and capital markets. He has significant experience in promoting business issues at national and state government as well as international diplomatic and trade organization levels.

He worked with the ETG team, DRI, and SRI International in economic competitiveness projects in Eastern Europe (Slovenia, Hungary, and Slovakia) with responsibilities ranging from local (European) project responsibility, proposal writing, marketing

and selling, cluster working group facilitation, report preparation, and major project presentations. Special areas of activity included: strategic business planning, restructuring of companies, privatization, technology centers, investment fund planning, project relations with World Bank, EBRD and other international institutions.

Mr. Helbig's has extensive experience as a business executive. Most recently, he was president of Weleda Inc, a Swiss medical and healthcare company, and was a manager of product development at Johnson & Johnsons. He has experience in managing venture capital funds as managing director of ExperConsult GmbH, Dortmund, Germany, a financial consulting firm specializing in securing development financing for growth firms in the U.S and Europe, and managing director of Matuschka Berlin GmbH, an integrated financial services and investment company responsible for venture capital and later stage investment fund management in a range of technology companies in Germany and Berlin. He was also managing director of Churchill International, a San Francisco venture capital management company.

Mr. Helbig has a masters in economics and political science from the University of Pennsylvania and a B.A. in Business Administration (with honors) from Texas Technological University. He is fluent in German, English and Dutch, with basic knowledge in French and Spanish.

DR. CRIST INMAN



Dr. Crist Inman began working in the hospitality industry in 1976 in restaurant and hotel operations, culminating in two years with Restaurant Guy Savoy (1981-1983). After his undergraduate education he joined Latham International in New York City as an

organizational development consultant focused on hospitality industry clients and in 1988 left to pursue graduate studies at Cornell University. He completed both MBA and Ph.D. degrees, and has taught courses there since 1990. In 1996 he began directing the Tourism Competitiveness & Sustainable Development project, based at INCAE in Costa Rica. Crist founded La Paz Group as an outgrowth of that work. Crist leads La Paz Group's work around the world on development strategies for innovative brands dedicated to the

principles of entrepreneurial conservation. This has included work with ETG in emerging conservation-oriented destinations such as Mendoza, Argentina and Chile's Patagonia region, assisting local entrepreneurs and public sector leaders in their efforts to develop sustainable tourism; operations management and start up of premier conservation resorts such as Lapa Rios and Morgan's Rock; and more recently the creation of the brand Organikos for authentic, crafted food products from locations where La Paz Group has projects around the world.

Crist dedicates ten percent of his time each year to education and related outreach. This includes teaching Entrepreneurship & Sustainable Development at Cornell University's School of Hotel Administration; a field course on behalf of Cornell University's Center for Sustainable Global Enterprise; and the Hotel Development & Management course at Spain's Instituto de Empresa.

ROBERT GONZALES



Robert Gonzales is an economic development professional in regional economic development; industry cluster-based economic development and strategic planning. Most recently in 2008, Robert collaborated with ETG and Dalberg on the regional development program in Southern Chile bringing his expertise in high

tech development strategies and investment attraction. He also participated in a USAID project in Ecuador assessing five newly formed regional economic development agencies' capacity for investment attraction. Robert brings more than 25 years of experience in business, consulting, and as director of economic development agencies.

During the 1990s Robert was president/CEO of the Greater Tucson Economic Development Council (GTEC), a regional public/private community partnership of the private sector, the City of Tucson and Pima County. Under Robert's leadership, Tucson was a national leader in attracting jobs and investment; creating effective regional collaboration; and in high-tech industry cluster development. Previously, Robert was President of the Brownsville Texas Economic Development Council a public-private partnership agency supporting industrial growth and new business development in the Rio Grande Valley on the border with Mexico. In the 1980's Robert worked with Henry

Cisneros, Mayor of San Antonio to develop that city as the primary hub of US/Mexico trade and investment and to develop new initiatives to foster attraction of investment by technology and industrial firms from the five tigers of Asia: Japan, Republic of Korea, Taiwan, Hong Kong and Singapore. Robert conducted research for and advised San Antonio Mayor Henry G. Cisneros while he served on the President's Commission on Central America (Kissinger Commission) in 1984-1985 and on the Bilateral Commission on the Future of U.S./Mexico Relations, 1987-1989. Robert has a Bachelor's in business degree from the University of Texas at Austin, an MBA from Loyola College, and is a Certified Economic Developer (CEcD) of the International Economic Development Council. He also serves on the advisory board of The Competiveness Institute (TCI), the international organization of cluster-based economic development, based in Barcelona. Robert is fluent in English and Spanish, with working experience in Japanese, French, Italian and some Mandarin.

FLAVIO FEFERMAN



Flavio Feferman is President of DevMarkets and Lecturer at the University of California, Berkeley, Haas School of Business. During his 20 years of professional experience, Flavio directed several international feasibility studies and sectoral evaluations for private

investors and for international organizations such as the World Bank, the Inter-American Development Bank, and the U.S. Trade and Development Agency. He has served as strategic consultant to companies such as eBay, Visa, and Bechtel, as well as to non-profits such as the Goldman Environmental Prize, Global Greengrants, and Technoserve.

Flavio has worked in several countries in Latin America and Africa and recently served as keynote speaker for a conference organized by the World Business Council for Sustainable Development. He is a Lecturer at the University of California, Berkeley, where he teaches a course on Business, Technology and Economic Development in the MBA program. His teaching and professional interests include economic development, information technology, renewable energy, agricultural development, marketing strategy, financial valuation and entrepreneurship in developing regions.

Flavio obtained an MBA from the U.C. Berkeley Haas School of Business, focusing on Finance and Marketing. He holds an MA in Economic Development and Agricultural Economics (FRI program) from Stanford University and a BA in Quantitative Economics also from Stanford. Flavio is originally from Brazil and is fluent in Portuguese, Spanish and French.

ALEX BOYD



Alex Boyd is an expert in clustering and economic development analysis, strategy, and facilitation, and clustering training. Alex has worked in more than 8 countries over the past decade in economic development and clustering project.

Alex has ten years of professional experience, and in the past three years has led or worked in more than 10 projects dealing with competitiveness and clusters in countries places ranging from Monterey, Marin (California) and Seattle to Argentina, Guyana, Georgia, Khazakastan, Bosnia, Chile, and Belize. His specialization is the formulation of strategies for industrial clusters, new Business development, and market Studies for small and medium-sized business—all the while searching for ways to improve the dynamics and interactions between the public and private sector in regional growth strategies. Alex has considerable experience in competitiveness projects specifically with the tourism sector in Guyana, Georgia, California, Chile, and Argentina. Alex acquired his background in Business and International operations with four years of progressive experience and progressive responsibility working in diverse U.S. firms in the area of sales and marketing for Latin America (Costa Rica, Argentina, Bolivia, Chile, Peru and the Czech Republic. Alex has a master's in International Affairs (Latin American focus) from the University of California, San Diego and B.A. in Political Science from the University of Colorado in Boulder. He is fluent in English, Spanish, and has professional proficiency in Portuguese.

Senior Consulting Advisors

The following leaders in the field of regional economic development act in a senior capacity on special assignments, and serve as strategic advisers for content and direction of ETG activities.

ROBERT BREault, Chairman of the Board, Breault Research Organization; Co-Chairman, Arizona Optics Industry Cluster, Tucson, Arizona.

ALAN HALD, Founder, MicroAge Computers; Chairman, Arizona-Governor's Strategic Planning for Economic Development, Tempe, Arizona.

SAAD KETTANI, Chairman, WAFACORP (WAFABANK Group and Wafa Insurance); President, Morocco Council for Private Sector Development; President, Le Maroc Competitif, Vice-Chairman, Confederation General des Entrepreneurs Maroc (CGEM), Casablanca, Morocco.

ANTONIO SANCHEZ, President, Business Council for Investment and Development of Southeast Mexico (CEIDES), former President of COPARMEX, Mexican Business Leaders Council, Mexico City, Mexico.

ALONSO RAMOS, President, Desarrollo Economico, Chihuahua, Mexico.

Alliances

To meet the demanding and rapidly changing needs of our clients, ETG recognizes the need to maintain a network of allied organizations. The other firms have either served as subcontractors in the past or represent strong interpersonal alliances which broaden our ability to market and implement projects in a variety of settings.

Alderete & Associates, Chihuahua, Mexico

DALBERG GLOBAL DEVELOPMENT ADVISORS, New York, Copenhagen, Johannesburg, and Santiago

Developing Markets Group, San Francisco

West Coast Green, San Francisco

Economic Competitiveness Group, San Francisco

FOCS, Casablanca, Morocco

IGT, Santiago Chile

INOA, Innovative Organizations, Ltd., Ljubljana, Slovenia

LA PAZ GROUP, Costa Rica, Paris, Atlanta

LOCAL POWER, San Francisco

Villour, Mendoza, Argentina

Economic
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