

City of San Antonio



AGENDA

City Council A Session

Municipal Plaza Building
114 W. Commerce Street
San Antonio, Texas 78205

Thursday, October 15, 2026

9:00 AM

Municipal Plaza Building

The City Council will hold its regular meeting in the Norma S. Rodriguez Council Chamber in the Municipal Plaza Building located at 114 W. Commerce Street beginning at the above referenced date and time for the following items. Once convened, the City Council will take up the following items in any order during the meeting but no sooner than the designated times.

9:00 AM: Call to Order

Members of the public can comment on items on the agenda. To sign up to speak visit www.saspeakup.com. Click on meetings and events and select the meeting you'd like to participate in. Sign up to speak or submit a written comment. **NOTE: Speaker registration closes 15 minutes before the start of the meeting.** Questions relating to these rules may be directed to the Office of the City Clerk at (210) 207-7253.

Individuals signing up for public comment may register for VIA bus fare or parking validation at www.saspeakup.com. VIA bus fare or parking at City Tower Garage (located at 100 Blk N. Main) will be provided to individuals who request the assistance. Staff will provide VIA bus fare passes and parking validation tickets in the lobby of City Council Chambers.

To view the Live meeting please view our [Live Stream](#)

During the meeting, the City Council may meet in executive session for consultation with the City Attorney's Office concerning attorney-client matters under Chapter 551 of the Texas Government Code.

ACCESS STATEMENT

The City of San Antonio ensures meaningful access to City meetings, programs and services by reasonably providing: translation and interpretation, materials in alternate formats, and other accommodations upon request. To request these services call (210) 207-7253 or Relay Texas 711 or by emailing the Office of the City Clerk at OCCC@sanantonio.gov. Providing at least 72 hours' notice will help to ensure availability.

La Ciudad de San Antonio se compromete en ofrecer un acceso útil para reuniones, programas, y servicios de la ciudad, proporcionando de una manera razonable: servicios de traducción, interpretación, materiales en un formato modificado, y otras ayudas ó servicios auxiliares con pedido previo. Para solicitar estos servicios, llame ó envíe un correo a (210) 207-7253 ó OCCC@sanantonio.gov, ó Relay Texas 711. Aviso de por lo menos 72 horas de anticipación ayuda a asegurar disponibilidad.

For additional information on any item on this agenda, please visit www.sanantonio.gov or call (210) 207-7080.

1. Briefing on the updated Economic Development Strategic Framework to include the Nelson W. Wolff Municipal Stadium draft concept design. [Alejandra Lopez, Assistant City Manager; Brenda Hicks -Sorensen, Director, Economic Development]

THE CITY COUNCIL MAY RECESS FOR LUNCH AND RECONVENE TO CONSIDER ANY UNFINISHED COUNCIL BUSINESS

6:00 P.M. – If the Council has not yet adjourned, the presiding officer shall entertain a motion to continue the council meeting, postpone the remaining items to the next council meeting date, or recess and reconvene the meeting at a specified time on the following day.

Printed on: 10/15/2026 09:06 AM



City of San Antonio

Agenda Memorandum

File Number: 26-224532

POSTING LANGUAGE: Briefing on the Updated Economic Development Strategic Framework to include the Nelson W. Wolff Municipal Stadium Draft Concept Design. [Alejandra Lopez, Assistant City Manager; Brenda Hicks -Sorensen, Director, Economic Development]

Agenda Item Number: 6

Agenda Date: October 15, 2026

In Control: City Council A Session

DEPARTMENT: Economic Development Department

DEPARTMENT HEAD: Brenda Hicks-Sorensen

COUNCIL DISTRICTS IMPACTED: Citywide

SUMMARY:

The Economic Development Department (EDD) in collaboration with TIP Strategies, Inc. (TIP) is finalizing the update the Economic Development Strategic Framework (Framework) originally accepted by City Council in October 2022. EDD executed a contract with TIP on February 26, 2026, after a Request for Proposals (RFP) was issued in October 2025.

TIP and EDD undertook a robust stakeholder engagement process beginning in April 2026 to assess how San Antonio can “level up” to increase competitiveness with national and global peers, create new opportunities for employment at all levels, and expand the wealth, assets, and tax base of residents and businesses, that resulted in approximately 20 roundtables, 25 interviews, over 180 small business survey responses, and engagement with an ad hoc advisory committee.

Additional completed activities include a site readiness evaluation, site consultant perception assessment, a competitive landscape and benchmarking analysis, small business ecosystem assessment, talent pipeline review, and a policy alignment assessment.

As a result, the updated framework includes the following goals and strategies, with additional detail nested beneath.

GOAL 1. Innovation and Industry: Strengthen San Antonio's position as a globally competitive destination for business investment and innovation.

- Business Development
- Innovation
- Small Business

GOAL 2. Placemaking and Real Estate: Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.

- Place-Based Investment and Redevelopment
- Business Site Development
- Tourism and Culture

GOAL 3. Talent and Workforce: Improve economic mobility for San Antonians through developing a workforce with the skills to access good jobs.

- Ready to Work 2.0
- Talent Ecosystem
- Talent Retention and Attraction

Additionally, the updated Framework includes a Capacity and Resources section intended to refine the City's economic development tools, align partners, and pursue new funding options to activate the updated framework, which is also included in the Implementation Matrix. Specifically, the matrix will include short-, mid-, and long-term targets of implementing the Framework and identifying responsible parties and potential partnerships for implementation. It will also include budget estimates (where applicable) and identified funding sources, as well as meaningful and realistic performance metrics.

The Nelson W. Wolff Municipal Stadium (Wolff Stadium) concept design process is an example of strategies included in Goal 2 – Placemaking and Real Estate. In partnership with WestEast Design Group (WestEast) following a solicitation in early 2026, a community-centered effort establishes an initial concept for the future redevelopment of Nelson W. Wolff Municipal Stadium and adjacent City-owned property in Council District 6.

WestEast conducted a survey in which 220 responses were collected, completed stakeholder engagement meetings, and held two public meetings to initially garner input on the desired outcomes for the site. The Economic and Workforce Development Committee (EWDC), was briefed most recently on both the updated Framework and Wolff Stadium effort on September 22, 2026.

Using EWDC's feedback and market research, as well as a third community meeting, the draft design concept organizes five sub-areas connected by shaded park connectors: retail, single-family residential, a multigenerational community center, senior housing with supporting retail and medical office, and commercial flex space. This mix reflects current market conditions

while leaving room to adjust uses, scale, and phasing as demand, financing, and partnership opportunities evolve.

Following the City Council briefing, Council will be asked to consider acceptance of the updated Framework on November 5, 2026.

FISCAL IMPACT:

N/A

LEVEL UP: SAN ANTONIO

Economic Development Strategic Framework Update (2026-2031)

City of San Antonio, Texas

DRAFT

Acknowledgments

TIP Strategies, Inc., (TIP) would like to thank the dozens of business and community leaders who participated in the creation of the City of San Antonio's *Economic Development Strategic Framework*. TIP is especially grateful to the Economic Development Department staff who generously gave their time and provided valuable insights to steer the framework toward success. In addition, TIP would also like to thank the City of San Antonio department directors for their critical guidance, support, and feedback throughout the development of this framework.

CITY OF SAN ANTONIO MAYOR AND CITY COUNCIL

- Gina Ortiz Jones, *Mayor*
- Dr. Sukh Kaur, *District 1*
- Jalen McKee-Rodriguez, *District 2*
- Phyllis Viagran, *District 3*
- Edward Mungia, *District 4*
- Teri Castillo, *District 5*
- Ric Galvan, *District 6*
- Marina Alderete Gavito, *District 7*
- Ivalis Meza Gonzalez, *District 8*
- Misty Spears, *District 9*
- Marc Whyte, *District 10*

ADVISORY COMMITTEE

- Bryant Ambelang, *Silver Ventures*
- Carl Bain, *Bain Medina Bain*
- Sarah Baray, *PreK 4 SA*
- Mario Bass, *Visit San Antonio*
- Christy Baumann, *EY*
- John Beauchamp, *Hixon Properties Incorporated*
- Laura Cabanilla, *USAA*
- Priscilla Camacho, *Alamo Colleges*
- Art Campsey, *Global Health Reach*
- Sarah Carabias Rush, *greater:SATX*
- David Carver, *JCB*
- Jaime Castillo, *SAWS*
- Shane Denn, *NABTU*
- Katie Ferrier, *The Greater San Antonio Chamber of Commerce*
- Brett Finley, *Metro SA Chamber*
- Marti Garza, *Carpenters Local 14*
- Sebastian Garzon, *Alamo Ventures*
- Dan Geddes, *Frost*
- Leo Gomez, *Brooks Development Authority*
- Yvette Gomez, *Region 20 Education Service Center*
- Matt Gonzalez, *LiUNA*
- Adam Hamilton, *Southwest Research Institute*
- Heather Hanson, *BioMedSA*
- Amy Hereford, *LiftFund*
- Krystal Jones, *City of San Antonio – Arts & Culture*
- Dawn Ann Larios, *Texas Restaurant Association – San Antonio Chapter*
- Adrian Lopez, *Workforce Solutions Alamo*
- Melissa Mastrodomenico, *Mastrodomenico CPA*
- Shanon Miller, *City of San Antonio – Downtown Office*
- Jim Perschbach, *Port SA*
- Jennifer Potter, *UT San Antonio*
- Leilah Powell, *LISC San Antonio*
- Mike Ramsey, *City of San Antonio – Workforce Development Office*
- Stephanie Reyes, *Real Estate Council of San Antonio*
- Bianca Rhodes, *Knight Aerospace*
- Luis Rodriguez, *San Antonio Hispanic Chamber of Commerce*
- Crystal Royal, *H-E-B*
- Sarah Shakil, *Small Business Advisory Commission*
- David Sodeinde, *Lonestar Civil*
- Jonathan Tijerina, *CPS Energy*
- Johnny Vahalik, *SAISD*

ADVISORY COMMITTEE (CONTINUED)

- Luis Vazquez, San Antonio LGBTQ+ Chamber of Commerce
- Rebecca Viagran, South Texas Business Partnership
- Janie Villarreal-McClinchie, Que Retro Arts LLC
- Dr. Jorge Villegas, Texas A&M San Antonio
- Bridgett White, City of San Antonio – Planning Department
- Tim Woliver, JBSA
- Charles Woodin, Geekdom
- Yen Yan, Alamo Asian American Chamber

CITY OF SAN ANTONIO STAFF

- Erik Walsh, City Manager
- Alex Lopez, Assistant City Manager
- Brenda Hicks-Sorensen, Economic Development
- Ana Bradshaw, Economic Development
- Alfred Breuer, Economic Development
- Ashley Poston, Economic Development

CONSULTING TEAM



TIP Strategies, Inc., is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

Contact

TIP Strategies
13492 N Hwy 183, Suite 120-254, Austin, TX 78750
PH: +1 512 3439113
www.tipstrategies.com

Project Contributors

Tom Stellman, CEO and Founder
John Karras, VP of Business Development
Alexis Angelo, Consultant



Global Location Strategies has conducted location strategy, site selection, and incentive negotiations for world-class industrial and manufacturing corporations for more than 60 years. Since 2009, the firm has announced \$43 billion in capital investment and 15,000+ jobs. The GLS site identification methodology leverages proprietary technology platforms and decades of site selection experience and is customized to fit the needs of each unique state and region.

Contact

Global Location Strategies
310 Mills Avenue, Suite 103 Greenville, SC 29605
PH: +1 864 5657849
www.globallocationstrategies.com

Project Contributors

Phil Schneider, Principal
Parker Wyatt, Senior Consultant
Lindsay Germany, Consultant

The images used throughout this report were provided courtesy of _____ or were licensed by TIP Strategies through Adobe Stock.

Contents

Introduction.....	1
Strategic Evolution.....	2
Community Engagement.....	3
Updated Strategic Framework	6
Transforming Vision into Action	7
Strategic Framework	8
Goal 1. Innovation and Industry	8
Goal 2. Placemaking and Real Estate.....	15
Goal 3. Talent and Workforce	21
Capacity and Resources.....	26
Performance Metrics.....	29
Appendix A: Qualitative Analysis	32
Stakeholder Engagement	32
Competitive Position	33
Perception and Visibility.....	35
SWOT Analysis.....	36
Appendix B: Quantitative Analysis	38
Benchmarking and Competitive Analysis.....	38
Target Industries.....	45
Talent Pipeline	50
Worker Opportunity and Mobility	54
Placemaking and Real Estate	56
Appendix C: Small Business Ecosystem	62
Small Business Lending Patterns	62
Small Business Survey	64
Barriers and Opportunities	68
Appendix D: Site Verification and Evaluation.....	69
Labor-Intensive Model	70
Capital-Intensive Model	71

Introduction

In 2022, the City of San Antonio (the City) launched its Economic Development Strategic Framework, establishing a blueprint for long-term vitality, cultivation of key industries, and equitable growth. Developed with assistance from TIP Strategies, Inc. (TIP), the 2022 framework was structured around three goals: innovation and industry, placemaking and real estate, and talent and workforce. Over the subsequent four years, targeted alignment between the City and its partners has yielded measurable success. San Antonio has met or exceeded many of the framework's original strategies and actions.

While San Antonio's economic momentum is heading in the right direction, the 2026 economic landscape presents a vastly different context than the one in which the original framework was created. A combination of federal funding realignments, shifting trade and tariff dynamics, and reduced support from state and federal governments requires greater local adaptability. Concurrently, rising costs for businesses and workers, sharp drop-offs in international migration, and localized cuts to education and research funding present real challenges to traditional growth models. At the same time, rapid advancements in artificial intelligence (AI) continue to create noticeable disruptions across labor markets and energy infrastructure.

Figure 1. 2022 Strategic Framework Summary

2022 Goals	San Antonio's Accomplishments
Goal 1. Innovation & Industry	• Successful business recruitment & expansion (Toyota, JCB, Guidehouse, International Motors, Boeing, H-E-B, Industry Electric Manufacturing, Blackwave) • Increasing out-of-state investment significantly each year since 2022, including anticipated investments for 2026 with major new announcements. • Global Engagement (IEDC 2026 Excellence in Economic Development) • Award Winner for "San Antonio's Latin America Taskforce," Category=Regional or Cross-Border Partnership)
Goal 2. Placemaking & Real Estate	• Downtown and urban development (UT San Antonio, Pearl/Midtown, Cattleman Square, as well as proposed Sports and Entertainment District and Missions ballpark) and significant commercial and industrial development in regional centers (Port SA, Brooks) • Major infrastructure investments including ELEVATE/SAT airport expansion program and VIA Rapid Green and Silver Lines • Revitalize SA Corridor Leadership Program and continued alignment with SA Tomorrow plans
Goal 3. Talent & Workforce	• UT San Antonio merger of former UT Health San Antonio and UTSA • Ready to Work (IEDC 2026 Excellence in Economic Development Gold Award Winner for "San Antonio Ready to Work", Categories=Talent Development & Retention, Economic Equity & Inclusion, Public-Private Partnership) • Strong, positive net in-migration of domestic and international talent alongside continued improvement of educational attainment levels in local workforce
Goal 4. Capacity and Resources	• Expansion of the EDD's internal research team and increased capacity with the acquisition of data intelligence platforms like PowerBI, DataAxle, and Lightcast. • Strong internal (City Departments) and external (greater:SATX and other partners) partner working relationships cultivated to advance implementation. • The EDD's pursuit of Accredited Economic Development Organization (AEDO) status through the International Economic Development Council, will validate that EDD has the internal management capacity, professional staff structure, and financial stability required to lead a top-tier national economy.

Source(s): TIP Strategies, Inc.

Despite these challenges, San Antonio remains well-positioned to capitalize on emerging opportunities. The region is benefiting from a historic surge in military and defense spending, reinforcing one of the City's core economic strengths, alongside substantial new investments in AI infrastructure. Furthermore, large-scale strategic investments across Texas in semiconductors, aerospace, energy, biotechnology, and financial services, combined with the ongoing reshoring and nearshoring of production and supply chains, offer momentum for long-term expansion. This strategic framework update refines the 2022 framework to directly address current economic shifts while leveraging these robust catalysts to secure future prosperity.

In early 2026, the San Antonio Economic Development Department (EDD) engaged TIP to develop an *Economic Development Strategic Framework Update* (Strategic Framework Update) to guide the City's next phase of growth and investment. The TIP planning team collaborated with EDD staff and community stakeholders to build a shared vision for San Antonio's economic future. The *Economic Development Strategic Framework Update* responds directly to the economic conditions of the City and its residents. San Antonio is taking control of its economic narrative. To compete nationally and globally, San Antonio is moving beyond its traditional reputation focused solely on military presence and leisure tourism. By highlighting its high-tech capabilities, computing infrastructure, biomedical discoveries, and advanced manufacturing capabilities, San Antonio is positioning itself as a premier destination for corporate headquarters, innovative startups, and global talent.

Strategic Evolution

The City's previous strategic framework, accepted in late 2022, was created during a period of profound global disruption. Designed primarily around COVID-19 relief, economic recovery, and pandemic safety nets, the 2022 framework focused on stabilizing small businesses and protecting vulnerable workers. A cornerstone of that effort was the strategic deployment of federal recovery dollars to fund immediate small business grants, workforce wraparound services, and emergency relief.

Over the past four years, San Antonio successfully executed the core strategies of that recovery framework. Successes include the scaling of Ready to Work, an initiative recognized with three IEDC 2026 Gold Awards for its impact on talent development, economic equity, and public-private partnerships. The EDD has also enhanced its internal research and business intelligence capacity to better inform strategic growth and investment decisions.

As San Antonio enters the 2026–2031 strategic cycle, the fiscal context has fundamentally changed. Federal recovery dollars have fully sunset, post-pandemic relief funds are exhausted, and municipal operations must adapt to tighter local General Fund constraints. Compounding this fiscal transition is the reality that economic priorities do not remain static over a five-year horizon. The updated framework transitions San Antonio from reactive economic protection to a proactive, assertive posture aimed at "leveling up" the City, its economy, and its residents. "Leveling up" means:

1. Increasing competitiveness with national and global peer communities.
2. Creating new opportunities for employment at all levels.
3. Expanding the wealth, assets, and tax base of residents and businesses.

"Leveling Up" does not mean chasing another metropolitan area's economic playbook or measuring San Antonio solely against outside benchmarks. Rather, it represents an internal commitment to defining San Antonio's own standards for community prosperity, economic resilience, and generational wealth creation. True economic advancement occurs when public, private, and community partners unite behind a shared vision. By treating business growth, placemaking, and talent not as isolated silos but as an interconnected ecosystem where actions reinforce one another, San Antonio elevates opportunity across all neighborhoods on its own terms.

Community Engagement

The framework update was informed by an exhaustive stakeholder engagement process and rigorous quantitative data analysis. Facilitated by TIP in close coordination with City leadership, the process gathered feedback from across the public, private, civic, and philanthropic sectors.

Figure 2. Stakeholder Engagement Overview



Source(s): TIP Strategies, Inc.

Stakeholder Touchpoints:

- **Executive & Council Leadership:** One-on-one discovery interviews conducted with the Mayor, City Council members, the City Manager, Assistant City Managers, the Economic Development Director, and department directors (including Planning, Downtown, Development Services, Aviation, and Workforce Development).
- **Partner Organizations:** Deep-dive strategic alignment sessions with key institutional leaders at greater:SATX, Port San Antonio, Brooks, Visit San Antonio, and VelocityTX.
- **Topic-Focused Roundtables:** 20 roundtables engaging over 168 participants across small business, young professionals, higher education, real estate development, labor unions, creative arts, and target industry clusters.
- **Advisory Committee & Council Review:** Routine progress presentations and strategy co-creation sessions with the 50+ member Advisory Committee and the City Council's Economic and Workforce Development Committee (EWDC).
- **Site-Readiness Evaluation:** Site evaluation workshops conducted with Global Location Strategies, greater:SATX, SAWS, CPS, Pape-Dawson, and City staff to consider the infrastructure and preparedness needed for ten priority greenfield sites.

- Small Business Survey: Engaged 182 respondents to capture perceptions of doing business in San Antonio and future business outlook for the City of San Antonio.
- Site Selectors & Real Estate Perception: Perception interviews conducted with national site selection consultants and commercial real estate brokers to evaluate San Antonio's competitiveness.
- Quantitative Data Analysis in Tableau: Extensive economic, demographic, and real estate trend analysis compiled into an interactive [Tableau Public visualization tool](#), mapping block-level job and resident density, target sector real estate footprints, and out-of-state capital flows.

Several key themes emerged from quantitative data analysis and qualitative stakeholder engagement. These themes informed the review of the City's strengths, weaknesses, opportunities, and threats (SWOT analysis) and the three goals that comprise the *Economic Development Strategic Framework Update*.

1. San Antonio is building momentum with major catalyst investments making downtown, placemaking, and quality of life priorities for San Antonio's economic competitiveness.

San Antonio is experiencing unprecedented urban momentum driven by massive physical and programmatic catalyst investments. Strategic assets like Brooks, Port San Antonio, the Pearl district, and the ongoing downtown revitalization serve as highly visible hubs of job creation and capital investment. Looking ahead, generational projects such as the Downtown San Antonio Sports & Entertainment District (anchored by a new arena for the San Antonio Spurs), the San Antonio Missions new downtown stadium, the Lone Star redevelopment, and the San Antonio International Airport (SAT) terminal expansion will structurally reshape the City's economic footprint. Stakeholders emphasized that these investments must not exist in a vacuum, they must be leveraged to create local supply chain opportunities for small businesses and be supported by Transit-Oriented Development along VIA's planned Green and Silver Bus Rapid Transit lines.

2. The region's strongest differentiators are defense innovation, cybersecurity, healthcare, bioscience, and advanced manufacturing, but there are opportunities to capitalize on emerging sectors.

The regional economy is anchored by highly concentrated, world-class industry clusters: Aerospace, Automotive, and Advanced Manufacturing; IT Security & Infrastructure; Bioscience & Healthcare; Energy; and Corporate Services. Rather than chasing generic economic targets, San Antonio's path to competitiveness lies in capturing highly technical subsectors where it has an advantage (such as defense health, prehospital trauma validation, military-to-civilian care translation, advanced robotics, space exploration, and transborder commerce with Mexico). Anchor employers like Toyota, Boeing, JCB, USAA, Valero Energy, H-E-B, and the Southwest Research Institute (SwRI) provide an industrial foundation that can be leveraged to capture emerging nearshoring and advanced technology supply chains. Anchors like Joint Base San Antonio (JBSA) must be leveraged not only for veteran transition, but also through an explicit strategy to protect, expand, and recruit military missions and strengthen the surrounding private-sector defense technology ecosystem.

3. Talent retention and workforce development to support quality and accessible jobs are among the region's most important long-term challenges.

Site selection perception studies and quantitative demographic data reveal that workforce availability and skills are the single most limiting factors to new corporate investment in San Antonio. The region is engaged in a national competition for talent, characterized by a loss of educated local graduates. While the City has made transformative commitments through the Ready to Work program and Pre-K 4 SA, long-term success requires: transitioning Ready to Work as its initial funding winds down, developing employer-led partnerships to align workforce supply and demand, and establishing targeted talent attraction and retention campaigns marketing San Antonio to young professionals.

4. Infrastructure is key to developing competitive sites for new and expanding business.

A weakness cited by site selection consultants is San Antonio's deficit in shovel-ready industrial real estate, which hampers speed-to-market competitiveness. Proactive site preparation is required across high-potential

greenfield properties. San Antonio must deliver a portfolio of market-ready sites with up-to-date information regarding land control, zoning, environmental/geotechnical conditions, electric interconnect schedules, water/wastewater mains, and permitting timelines. Achieving investment readiness requires: working closely with CPS Energy to resolve capacity limitations, partnering with SAWS to extend water and wastewater services, and conducting upfront risk mitigation to eliminate timeline risk for end-users.

5. Small business and entrepreneurship stakeholders want stronger pathways to procurement, capital, and scale.

San Antonio has a robust small business community, but local firms face hurdles regarding access to capital, awareness and navigation of City programs, and public procurement. Stakeholders called for "one-stop-shop" navigation programs, such as SupplySA and measuring long-term business longevity and wealth creation.

6. San Antonio needs to be better at sharing its story.

Site selectors and real estate brokers consistently note that San Antonio is overshadowed by Dallas, Houston, and Austin because it has historically failed to aggressively market its high-tech capabilities. San Antonio is perceived primarily as a tourism and military town, a narrative that limits opportunities to attract venture capital or PhD-level STEM professionals. To win higher-wage corporate recruitment projects, local leaders must sell a unified narrative of innovation, cybersecurity strength, and medical discoveries that proactively and positively tells the City's story.

7. Many stakeholders believe San Antonio has the ingredients of a nationally competitive innovation economy but has not yet fully translated its assets into economic outcomes.

While San Antonio possesses elite research, military, and academic ingredients, it has struggled to commercialize these assets into local startups and high-wage jobs. The landmark merger between UTSA and UT Health San Antonio creates a premier, integrated R1 research university that will serve as a powerful engine for the local bioscience, computing, and cybersecurity clusters. To capture locally generated innovations before they leave to commercialize and scale up elsewhere, the City must work directly with UT San Antonio and higher education partners to nurture prospective university-affiliated spinouts by creating a dense network of capital, corporate and military partners, business development organizations, customers, and skilled workers.

8. There is broad concern about balancing growth, affordability, and inclusive opportunities.

As San Antonio grows, there is broad community concern about a rising cost of living and the potential displacement of legacy businesses and culturally rich neighborhoods. Inclusive growth requires a deliberate strategy, championing investments that uplift historically underserved areas of town rather than pricing residents and businesses out of their own communities.

9. Stakeholders consistently called for greater focus, accountability, and implementation discipline.

A recurring critique of San Antonio is that execution strategies are frequently hindered by organizational silos and a lack of follow-through due to shifting City priorities. To prevent the strategic framework update from sitting on a shelf, stakeholders advocated for maintaining an active external advisory committee to continuously monitor implementation progress and hold public and private partners accountable.

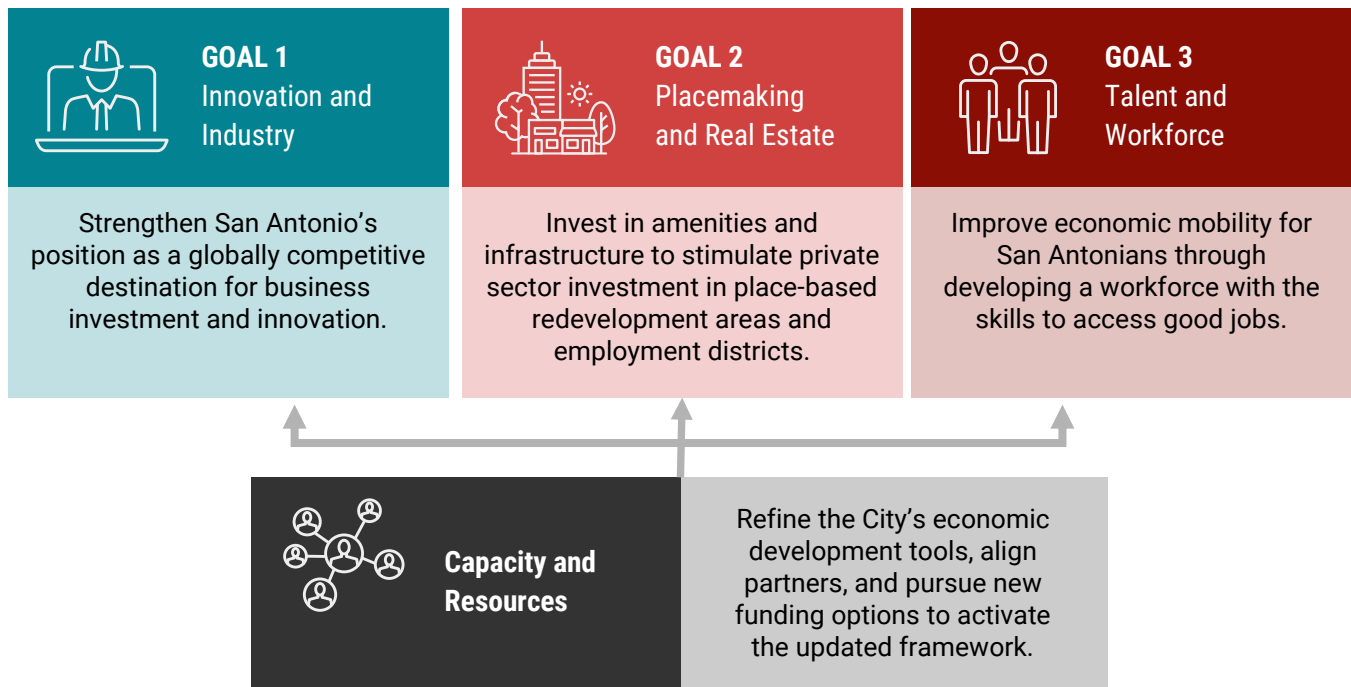
10. San Antonio must embrace industry-driven cross-border and international engagement.

International business development must be driven by industry opportunity rather than geography alone. International engagement should center on concrete manufacturing, logistics, tech, and FDI opportunities, leveraging cultural familiarity to reinforce a solid business rationale. The strategic framework update focuses on structuring joint business-recruitment initiatives alongside expanded nonstop service to international destinations from San Antonio International Airport (SAT), establishing soft-landing programs and targeted relocation marketing aimed at attracting international corporations, and collaborating with peer cities across South Texas and Northern Mexico to build a transborder economic region that stands out on the global stage.

Updated Strategic Framework

The updated framework translates community input and analysis into a blueprint for action. To address San Antonio's challenges and opportunities, the framework establishes three guiding principles: increasing **competitiveness** with national and global peer communities; creating new opportunities for **employment** at all levels; and expanding the **wealth, assets, and tax base** of residents and businesses. These principles ground the three goals. In addition, a section on capacity and resourcing details the tools, partnerships, and staffing needed to achieve them. The updated framework uses the City's stable foundation to encourage investment, foster economic mobility, reduce neighborhood poverty, and expand the wealth of San Antonio's residents and businesses.

Figure 3. Economic Development Strategic Framework Update Overview



Source(s): TIP Strategies, Inc.

In addition to these goals, TIP reviewed the City's target industries: mobility, IT security and infrastructure, sustainable energy, bioscience, and corporate services. After discussing these targets with City staff, TIP kept the original industry definitions but modified their names to reflect new opportunities. The team analyzed these targets against current market trends, focusing on supply chains and research. Finally, TIP identified emerging clusters and recommended ways to support them.

Figure 4. Target Industry Clusters Overview

 Aerospace, Defense, & Transportation	 IT Security and Infrastructure	 Energy	 Bioscience Anchors and Catalysts	 Corporate Services
- Automotive Manufacturing - Aerospace Manufacturing - Logistics Technology - Defense/Military	- AI Software and Hardware - Aerospace - Cybersecurity - IT - Defense/Military	- Technology - Energy - Environmental Services - Defense/Military	- Bioscience Manufacturing - Healthcare - Higher Education - Research/Development - Defense/Military	- Financial Services - Insurance Services - Corporate, Regional, and Divisional HQs

Source(s): TIP Strategies, Inc.

Transforming Vision into Action

Given the dynamic economic and fiscal landscape, San Antonio’s economic strategy must be inherently agile and focused. Rather than evaluating progress solely through static checklist completions, the City and its key economic partners will commit to forming an implementation task force, to be called the *Level Up Committee*. This committee will continuously scan partner resources, evaluate shifting utility and budgetary constraints, identify redundant services, and realign tactical actions around the highest-priority, highest-impact opportunities.

A strategic plan is only as effective as its execution. Moving San Antonio forward requires transitioning from high-level strategic alignment to disciplined, trackable execution. To yield visible results that benefit all residents and businesses, the City should commit to this implementation framework:

- **Implementation Matrix:** Every strategic action item is paired with a designated lead department or partner organization, supporting entities, target timelines, required funding, priority level, and explicit status indicators.
- **Interdepartmental/Interagency Alignment:** EDD should continue to support interdepartmental collaboration through regular coordination with Development Services, Planning, Aviation, Public Works, Transportation, Capital Delivery, and other City entities to accelerate project permitting and site readiness.
- **Transparent Performance Accountability:** EDD will provide ongoing performance reviews with the Economic and Workforce Development Committee (EWDC) and public progress reports to track high-wage job creation, capital investment, educational attainment, and local tax base expansion.
- **Annual Economic Competitiveness Review:** EDD should coordinate with greater:SATX to evaluate the dynamic market conditions, energy constraints, federal policies, competitor incentives, and corporate location requirements to determine San Antonio’s progress towards becoming more competitive. This review will continuously recalibrate tactical actions while maintaining long-term strategic direction.

By executing this plan, San Antonio will build on its momentum, expand opportunity across every neighborhood, and secure a prosperous future.

Strategic Framework

The outlined strategies and actions are organized into two categories that reflect successful initiatives or programs that currently exist and should be expanded upon based on TIP’s analysis (**ENHANCE**), versus additional initiatives or programs that the City should implement (**NEW**). These strategies and actions are targeted for economic growth while being mindful of the City’s organizational structure, staffing capacity, and potential additional resourcing needs.

HOW TO READ THE ACTION PLAN	
1.1	Strategy to achieve the goal
1.1.1	Action item to accomplish strategy
NEW	New strategy or action either not currently being performed or needing a more targeted approach.
ENHANCE	Refined strategies or activities that are currently resourced or may require additional resources.
①	Indicates which case studies are applicable to a strategy or action. Case studies are grouped at the end of each Goal.

Goal 1. Innovation and Industry

Strengthen San Antonio’s position as a globally competitive destination for business investment and innovation.

San Antonio stands at a pivotal point, expanding beyond its traditional economic footprint to establish itself as a globally competitive destination for high-value corporate investment and industrial innovation. By deploying an aggressive, data-driven business development model, the City will accelerate business retention and expansion while targeting domestic and international corporate recruitment across five core growth clusters: Aerospace, Defense & Transportation; IT Security & Infrastructure; Energy; Bioscience Anchors & Catalysts; and Corporate Services. Special attention should be given to target industry employers and investment attraction from San Antonio’s 10 priority countries: Mexico, Canada, Japan, South Korea, Germany, the UK, Australia, Taiwan, Singapore, and Spain.

Simultaneously, this goal transitions San Antonio from a traditional manufacturing and service hub into a high-density, technology-driven innovation economy. Central to this evolution is the commercialization of cutting-edge research, anchored by the merger of the University of Texas at San Antonio and UT Health San Antonio into a premier Carnegie R1 research powerhouse. By creating direct bridges between university research labs, military health assets, and early-stage venture capital, the City and its partners will systematically intercept academic founders, de-risk intellectual property, and scale high-growth startups locally. Coupled with place-based investments in innovation districts and a robust corporate recruitment engine, this unified framework will cultivate a resilient enterprise ecosystem that positions San Antonio as an international magnet for top-tier talent, capital, and industry-defining businesses.

Strategies and Actions

- 1.1. **Business Development.** Strengthen the regional economy by retaining and expanding existing employers while aggressively attracting domestic and international businesses within key strategic clusters. **ENHANCE**
 - 1.1.1. **San Antonio business story.** Create one clear, simple, and differentiated business narrative for the City of San Antonio that goes beyond existing perceptions and highlights its high-tech, computing,

defense research, and biomedical innovation assets. **NEW** ① (Case Study: Tampa Bay Economic Development Council [Florida] | Make It Tampa Bay)

Next-level initiatives include aligning messaging across partners to promote a single business value proposition, focusing external marketing so site selectors and corporate executives instantly understand San Antonio's core strengths, and increasing involvement in signature events on the national and global stage.

- 1.1.2. Business retention and expansion (BRE).** Expand the City's BRE efforts to protect and support existing midsize and large employers within the five target industry clusters (Aerospace, Defense, & Transportation; IT Security & Infrastructure; Energy; Bioscience Anchors & Catalysts; and Corporate Services). **ENHANCE** (See Target Industries on page 45 for more details.)

Next-level initiatives include conducting onsite or virtual business visits annually, establishing a proactive visitation program for out-of-market parent companies to address growth barriers, and creating relationships with employers' supply chain networks to capture expansion opportunities and prevent loss.

- 1.1.3. Military mission advancement.** Increase the City's commitment to protect and expand military mission operations in San Antonio and continue to grow the defense-related ecosystem. **NEW**

Next-level initiatives include supporting installation infrastructure and utility resilience across all JBSA locations; marketing transitioning and retired service members and military spouses as a talent asset to recruit defense-related employers; and fostering connections between military research, private defense contractors, and local university commercialization hubs.

- 1.1.4. Business attraction.** Target domestic and international firms within the target industry clusters for business attraction, emphasizing high-wage job creation, out-of-state capital flows, and target sector real estate density. **ENHANCE** ② (Greater Brownsville EDC [Texas] | Saronic Technologies Expansion) ③ (Greater Kansas City Area, Missouri–Kansas | Animal Health Corridor)

Next-level initiatives include holding regular prospect pipeline alignment meetings between EDD and greater:SATX, developing industry-specific marketing materials targeting business decision-makers, capturing post-decision selection data for prospective investment projects, and launching a new stand-alone economic development website to serve as the hub for the City's economic development efforts.

- 1.1.5. Global engagement.** Position San Antonio as a competitive international business hub by aligning geographic recruitment with target industry opportunities, leveraging diverse global partnerships, and strengthening transborder supply chains. **ENHANCE** ④ (Greater Portland Inc. [Oregon] | Soft-Landing Portland)

Next-level initiatives include replacing metro-only targeting with an agile model focused on primary markets to capture nearshoring production and logistics operations and specialized international technology hubs, integrating high-profile assets like the San Antonio Spurs and UNESCO designations into international business recruitment campaigns, creating soft landing programs for international enterprises establishing their North American headquarters in San Antonio, positioning San Antonio's Foreign Trade Zone (FTZ No.80) as a primary economic tool to attract international businesses and reduce supply chain costs, and continuing to align international business development with expanded aviation routes and the Americas Taskforce.

- 1.1.6. Business intelligence.** Equip decision-makers and site selectors with real-time demographic and real estate analytics by leveraging advanced data subscriptions and a dedicated research team. **ENHANCE** 5 (Greater Phoenix Economic Council [Arizona] | Economic Monitor)

Next-level initiatives include leveraging the EDD's expanded research team to track real-time local and competitor economic trends, utilizing data subscriptions (i.e., Lightcast, CoStar, GIS software, DataAxle) to analyze workforce reduction trends and capture loss metrics, and creating an intelligence report examining trends within San Antonio's regional economy and existing and emerging target industries.

- 1.2. Innovation.** Grow the ecosystem assets to fuel startups, support commercialization, and build an innovation economy. **NEW**

- 1.2.1. Ecosystem density and connectivity.** Elevate the work of existing entrepreneurial support organizations to reinforce the support structure for local entrepreneurs and international startup communities, including networking events and structured mentorship opportunities. **NEW** 6 (Titledown Tech [Wisconsin] | Innovation Ecosystem) 7 (Dallas Innovates [Texas] | Innovation Storytelling)

Next-level initiatives include launching a new corporate innovation program, driving physical and programmatic connections across San Antonio's innovation ecosystem to support scale-ups and startups, and launching a San Antonio Innovates media and storytelling platform to highlight and promote success stories from the local innovation network.

- 1.2.2. Venture and angel investment capital.** Deploy an integrated capital continuum, a structured framework that anchors homegrown companies by closing pre-seed funding gaps, to establish a self-sustaining regional startup ecosystem. **NEW** 8 (Frisco Economic Development Corporation [Texas] | Venture Capitalist In-Residence)

Next-level initiatives include cultivating a local funding pipeline to support homegrown tech and life science companies to reduce the capital gap that forces local startups to relocate, engaging local family offices and high-net-worth individuals to invest in regional venture funds and angel networks like Alamo Angels, and establishing a dedicated \$25,000–\$50,000 proof-of-concept grant fund for homegrown early-stage technologies.

- 1.2.3. Place-based innovation.** Invest in physical innovation infrastructure, including purpose-built lab space and incubator/accelerator facilities co-located with clinical and military partners. **NEW** 9 (Dallas, Texas | Pegasus Park)

Next-level initiatives include using place-based incentives to develop shared lab space for startups and scale-ups in existing and emerging innovation districts focusing on military health and prehospital validation testing, creating a working group of leaders from key districts (i.e., Downtown, Port San Antonio, Brooks, and Medical Center), and developing complementary amenities and housing options.

- 1.2.4. Entrepreneurship.** Elevate regional entrepreneurial support organizations (ESOs) and small business resources to help local, high-growth startups scale and transition into traded-sector, export-oriented operations. **ENHANCE** 10 (Texas Tech University [Texas] | Red Raider 100)

Next-level initiatives include marketing LaunchSA as a one-stop-shop clearinghouse and business strategy navigator for small business scaling, establishing a Roadrunner 100 group in partnership with UT San Antonio to highlight and connect the fastest-growing UT San Antonio alumni-led firms, and creating cross-border start-up pipelines (such as the recent memorandum of understanding [MOU] between San Antonio and Monterrey).

- 1.2.5. R&D and commercialization.** Accelerate the translation of university research and federal laboratory patents into viable commercial startups, leveraging the UT San Antonio merger and Carnegie R1 research university status. **ENHANCE**

Next-level initiatives include leveraging the UTSA and UT Health San Antonio merger to advance biomedical discovery, collaborating closely between EDD and UT San Antonio to intercept potential university founders before they relocate elsewhere, and establishing a lab-to-market military and defense industry commercialization effort.

- 1.3. Small Business.** Empower local and diverse small businesses through expanded procurement opportunities, small business strategy and business development, alternative financing, and local purchasing incentives. **ENHANCE** (See Appendix C: Small Business Ecosystem on page 62 for more details.)

- 1.3.1. Expanded opportunities for procurement.** Establish a resilient local supply chain that expands market access, minimizes contracting risks, and aligns megaproject spending with local small business growth. **NEW** 11 (Fiserv Forum and Deer District [Wisconsin] | Municipal Development Agreement) 12 (Los Angeles, California | Local Sourcing)

Next-level initiatives include implementing contract legal review assistance to protect small subcontractors from unfavorable contracting terms, maximizing the access of local small businesses to lucrative municipal contracts and major private development procurement, and coordinating with private developers to ensure that any major development or project features a local subcontractor and supplier procurement plan.

- 1.3.2. Business strategy and development.** Institutionalize and expand the City's existing 6-, 18-, and 36-month business survey framework, utilizing incoming 36-month surveys to drive data-informed program adjustments, BDO accountability, and deeper wealth creation metrics. **NEW** 13 (The Right Place, Inc. [Michigan] | New Community Transformation Fund)

Next-level initiatives include integrating the first major tranche of 36-month survey findings with business survivability and partner-assisted revenue growth rates into the EDD Economic Performance Dashboard; establishing an early-warning support system using 6- and 18-month survey indicators to automatically trigger targeted interventions for vulnerable firms; evolving future surveys to capture broader wealth accumulation metrics like multi-year business survival rates, debt consolidation and cash flow improvement, and commercial property and physical asset ownership for small businesses; partnering with community organizations to deploy technical assistance to prepare local businesses for external economic disruptions; and establishing succession-planning supports for businesses.

- 1.3.3. Financing.** Partner with financial institutions to expand affordable, stage-appropriate capital access for small businesses. **ENHANCE**

Next-level initiatives include focusing on creating alternative debt/equity options for small businesses excluded from SBA funding, partnering with traditional and nontraditional financial institutions to pilot alternative small business funding mechanisms, and deploying stage-appropriate capital (i.e., startup and micro-enterprise capital, affordable working capital, contract and purchase order financing, commercial property acquisition capital, and ownership transition financing).

- 1.3.4. Buy local.** Incentivize residents and corporations to purchase locally through facade grants, neighborhood walkability improvements, and joint marketing campaigns. **ENHANCE**

Next-level initiatives include continuing and expanding San Antonio's Buy Local program through collaboration with BDOs, creating a staycation buy local program during major events like Fiesta to encourage local spending throughout the City, and creating new opportunities for local businesses to be featured in large venues (such as SAT, the Sports and Entertainment District, Downtown Mission Baseball Stadium, and Stock Show & Rodeo Grounds).

Goal 1 Case Studies

① Tampa Bay Economic Development Council (Florida) | Make It Tampa Bay

Launched as a joint initiative between Visit Tampa Bay, the Tampa Bay Economic Development Council, and Hillsborough County, [Make It Tampa Bay](#), is a talent attraction campaign that leverages tourism marketing channels to recruit out-of-state professionals. The campaign strategically targets visitors, convention attendees, and remote workers in high-cost metro markets like New York, Boston, and Chicago, encouraging them to "work where you love." Through a centralized digital platform featuring cost-of-living calculators, key industry job boards, and community relocation resources, the initiative directly connects prospective workers with local high-growth employers in tech, finance, and life sciences. Widely recognized as a national best practice for unifying destination marketing with economic development, Make It Tampa Bay demonstrates how cross-agency alignment can convert visitor traffic into a long-term workforce recruitment engine.

② Greater Brownsville EDC (Texas) | Saronic Technologies Expansion

In a landmark win for regional economic development, the [Greater Brownsville EDC](#) and state partners successfully secured Saronic Technologies' \$3.24 billion Port Alpha expansion, expected to be the largest advanced autonomous shipyard in the nation. By leveraging an \$80 million Texas Enterprise Fund (TEF) grant alongside the region's infrastructure readiness, land scale, and logistics advantages, Brownsville captured 10,000 new high-paying maritime manufacturing jobs. To sustain this massive industrial footprint, local economic developers established strategic workforce pipelines with regional technical colleges and school districts, ensuring the investment provides long-term upward mobility for South Texas residents while solidifying the area as a national security innovation hub.

3 Greater Kansas City Area, Missouri–Kansas | Animal Health Corridor

Greater Kansas City's [Animal Health Corridor](#), an initiative of the Kansas City Area Development Council (KCADC), spans from Manhattan, Kansas, to Columbia, Missouri. The bistate area is home to over 300 animal health companies and over 90 contract research organizations. The Corridor supports target industry growth through multiple strategic initiatives: mapping [corridor assets](#); hosting the annual [Animal Health Summit](#) to connect startups with investors; promoting career development through the [Explore Animal Health Careers](#) platform, offering detailed animal health career pathways for students, educators, and job seekers; and working with regional universities and technical schools to design curriculum with employer needs in mind. It also facilitates public-private partnerships, R&D collaborations, and site selection support through the KCADC.

4 Greater Portland Inc. (Oregon) | Soft-Landing Portland

Greater Portland Inc. (GPI) developed [Soft Land Portland](#), a Global Business Residency Program designed to de-risk market entry for established international companies exploring expansion into the region. By partnering with CENTRL Office, the initiative provides eligible foreign businesses with up to 90 days of complimentary coworking space, conference rooms, and a professional mailing address to serve as an instant home base. Furthermore, the program equips participants with a digital resource library and customized support—including market research, real estate due diligence, and talent availability metrics—giving them the essential connections and intelligence needed to confidently establish a permanent presence in Greater Portland.

5 Greater Phoenix Economic Council (Arizona) | Economic Monitor

The Greater Phoenix Economic Council (GPEC) drives its business intelligence efforts through the [Economic Monitor](#), an interactive platform that tracks 22 macroeconomic indicators across regional and national levels. The tool offers continuous visibility into the region's overall economic health and structural shifts. Integrated features—such as automated daily summaries, custom indicator comparisons, and historical trend analysis—equip municipal leaders and corporate executives with the actionable insights required to evaluate market risk. Ultimately, this research-driven engine empowers GPEC to proactively align supply chain developments, workforce pipelines, and target industry strategies to maintain regional competitiveness.

6 Titledown Tech (Wisconsin) | Innovation Ecosystem

Formed through a partnership between the Green Bay Packers and Microsoft, [TitledownTech](#) is a Green Bay-based venture capital firm and innovation hub designed to build and scale early-stage technology startups across the Midwest. Managing nearly \$100 million in combined funds, the firm provides pre-revenue to Series A capital for founders solving operational challenges in core regional sectors like advanced manufacturing, digital health, supply chain, and agtech. Beyond direct equity investments, TitledownTech accelerates commercialization through its hands-on Builder Studio and an on-site Microsoft AI Co-Innovation Lab, connecting startups directly with corporate partner networks and technical engineering support. By coupling dedicated seed-stage capital with deep corporate co-innovation, this ecosystem model counters regional talent drain and anchors high-growth tech ventures within Wisconsin and the broader region.

7 Dallas Innovates (Texas) | Innovation Storytelling

Launched in 2016 by the Dallas Regional Chamber (DRC), [Dallas Innovates](#) is a dedicated media platform and newsroom established to chronicle the Dallas-Fort Worth (DFW) region's rapidly expanding innovation economy. Rather than relying solely on traditional chamber marketing, the publication operates an editorially independent newsroom that delivers daily reporting, feature stories, and intelligence on local startups, corporate R&D, university research, and venture capital. By spotlighting regional disruptors and emerging technology sectors, the platform connects local entrepreneurs directly with enterprise partners, institutional investors, and corporate leaders across North Texas. This storytelling model serves as a strategic economic development tool that amplifies DFW's momentum nationally, helping the region attract high-tech talent, venture funding, and corporate innovation hubs.

8 Frisco Economic Development Corporation (Texas) | Venture Capitalist In-Residence

The Frisco Economic Development Corporation, with the intention to become the “Venture Capital Capital of the Central US” by 2040, hired a [Venture Capitalist In-Residence](#) to foster Frisco’s innovation ecosystem by recruiting venture capital and angel offices. Leveraging Frisco’s proximity to regional Fortune 500 companies with corporate venture arms, this term-limited position focuses on building relationships with angel investors, venture capitalists, and high-net worth individuals. The position also represents Frisco at regional innovation investment events, connects startups to successful paths of funding, and conducts targeted outreach to tier-1 venture capital firms, family offices, and accredited investors outside the state. By advising local startups, tracking emerging technology trends, and collaborating with local innovation hubs, this position strategically aims to improve access to capital as an essential component of an innovation ecosystem.

9 Dallas, Texas | Pegasus Park

Developed through private and philanthropic capital, [Pegasus Park](#) is a 26-acre master-planned life sciences and social impact campus in Dallas designed to co-locate biotech entrepreneurs, corporate partners, and venture capital within a self-sustaining mixed-use development. The district's national prominence was solidified by its selection as a national hub for the \$2.5 billion federal Advanced Research Projects Agency for Health (ARPA-H), leveraging proximity to University of Texas Southwestern’s \$700 million annual academic R&D engine. By combining specialized wet-lab infrastructure with a profit-generating real estate model, the campus serves as the primary regional gravity point transforming the Dallas-Fort Worth metroplex into a top-tier North American life sciences market.

10 Texas Tech University (Texas) | Red Raider 100

Created by the Lubbock Economic Development Alliance (LEDA) in partnership with Texas Tech University, the [Red Raider 100](#) program systematically identifies and ranks the 100 fastest-growing businesses owned, founded, or led by university alumni using audited compound annual revenue growth. The initiative converts graduate success into an active regional economic development engine. LEDA leverages the annual program to reconnect high-growth Red Raider executives with the local business landscape. Other universities have similar programs like Texas A&M’s [Aggie 100](#) and [LSU 100](#), transforming institutional alumni pride into a functional economic development engine that drives capital reinvestment, talent retention, and regional enterprise scale.

11 Fiserv Forum and Deer District (Wisconsin) | Municipal Development Agreement

During the development of the \$524 million [Fiserv Forum and Deer District in Milwaukee](#), the municipal development agreement mandated that prime contractors allocate at least 25 percent of construction spending and 18 percent of professional services to local Small Business Enterprises (SBEs). To meet these targets, the lead joint-venture contracting team operationalized neighborhood matchmaking sessions, unbundled contract packages, and deployed real-time compliance tracking tools. As a result, the project significantly surpassed its requirements, directing 36.8 percent of total construction dollars—exceeding \$103 million—to local SBE and Disadvantaged Business Enterprise (DBE) firms. This framework serves as a national benchmark for leveraging major sports venue developments to expand local supply chain opportunities and build regional small business capacity.

12 Los Angeles, California | Local Sourcing

Ahead of major global events and infrastructure expansions—including the [LA28 Olympic Games](#) and the 2026 FIFA World Cup—regional leadership established initiatives like [Compete4LA](#) and [Get in the Game LA](#) to connect local small businesses directly with mega-project prime contractors. Developed through coalitions involving the LABC Institute, LISC LA, and the Los Angeles Area Chamber of Commerce, these platforms feature a verified database of up to 40,000 local vendors integrated with regional procurement clearinghouses. By pairing structured "Meet the Primes" matchmaking fairs with ambitious local spend targets—such as LA28's commitment to direct 75 percent of addressable procurement spend to regional suppliers—the region compels major developers to prioritize local sourcing. This coordinated ecosystem transforms multi-billion-dollar venue and infrastructure investments into a long-term economic catalyst for regional small businesses and diverse trade suppliers.

13 The Right Place, Inc. (Michigan) | New Community Transformation Fund

The Right Place, Inc. in Grand Rapids partnered with Bank of America and the Consumers Energy Foundation to establish the [New Community Transformation Fund](#) (NCTF), a venture fund designed to pair regional business retention with inclusive ownership succession. To prevent corporate relocation or closure during leadership changes, the fund identifies legacy West Michigan businesses facing ownership transitions and matches them with qualified entrepreneurs of color seeking acquisition opportunities. NCTF assists in structuring acquisition financing and provides follow-on growth capital to help new owner-operators scale the business post-sale. By integrating succession planning into its venture model, the initiative preserves local supply chains, protects existing jobs, and expands diverse executive leadership across the regional economy.

Goal 2. Placemaking and Real Estate

Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.

To capture transformative corporate investments and satisfy the speed-to-market demands of target industries, San Antonio must proactively prepare its physical infrastructure across key employment corridors and industrial districts. Prioritizing shovel-ready site assembly, urban land banking, and pre-allocated utility capacity eliminates critical development lead times for expanding biomanufacturing, aerospace, and advanced technology enterprises. Paired with strategic multi-modal freight and transit investments, including airport capacity expansion and high-capacity corridor links like the South Texas Parkway, this utility-and-site-first posture guarantees grid readiness and connects regional talent directly to major employment hubs.

Parallel to industrial readiness, driving long-term economic vitality requires targeted place-based investments that convert aging commercial corridors and regional centers into vibrant, transit-oriented neighborhoods. Deploying structured public-private partnerships (P3s) and tax increment reinvestment zones (TIRZ) enables the City to incentivize dense commercial infill, Class A research spaces, and office-to-residential conversions, while protecting culturally rooted community anchors through equitable anti-displacement strategies. By blending heavy infrastructure readiness with urban livability, transit-oriented development (TOD), and cultural asset preservation, San Antonio creates dynamic, connected economic nodes that catalyze private real estate investment, elevate quality of life, and sustain long-term competitiveness.

Strategies and Actions

2.1. Place-Based Investment and Redevelopment. Drive place-based initiatives to stimulate business development, placemaking, redevelopment, and revitalization in regional centers, community areas, and corridors identified as having the greatest need and economic potential. **ENHANCE** (See Placemaking and Real Estate on page 56 for more details.)

2.1.1. Regional centers. Support the growth of major employment nodes by deploying P3 approaches for developing commercial, industrial, and mixed-use places that attract new jobs and investment.

ENHANCE ¹⁴ (Washington, DC | Office to Anything) ¹⁵ (Phoenix Biomedical Campus [Arizona] | Phoenix Bioscience Core)

Next-level initiatives include continuing to strategically use P3 approaches to develop properties (i.e., wet labs, Class A office, and downtown student housing), creating building conversion guidelines for high-vacancy commercial properties, and coordinating real estate planning to drive high-wage employment and residential density in designated regional centers (e.g., Brooks, Port San Antonio, the Medical Center, and Downtown).

2.1.2. Port San Antonio and Brooks. Elevate Port San Antonio and Brooks as primary regional employment and innovation centers, deploying customized municipal tools to support their expansion. **NEW**

Next-level initiatives include deploying targeted R&D reimbursements and public infrastructure investments to complement the land, governance, and tax advantages of these sites; supporting master planning for high-density commercial, aerospace, cyber, and biomanufacturing facilities across both campuses; and pursuing strategic expansion opportunities with the Port and Brooks beyond the original boundaries of the campuses to attract more investment and job creation into under-developed areas.

2.1.3. Community areas. Advance placemaking projects across historically underserved community areas with the greatest economic need, ensuring development benefits existing residents and businesses and prevents the displacement of culturally rich legacy businesses and residents. **ENHANCE** ¹⁶ (Minneapolis, Minnesota | Cultural Districts)

Next-level initiatives include marketing commercial and hospitality opportunities around community areas (e.g., Frost Bank Center, Alamodome, and Tech Port Arena), mapping and addressing healthcare facility gaps in underserved areas of town (e.g., the Southside along the Military Drive corridor), assisting local business owners in purchasing their physical commercial properties to build long-term real estate equity, and collaborating with the Neighborhood and Housing Services Department (NHSD) on anti-displacement policies.

- 2.1.4. Corridors.** Focus commercial corridor reinvestment and redevelopment efforts on two equally important ends of the spectrum—ranging from economically challenged corridors with limited commercial activity (in need of significant public support to stimulate new business growth), to dynamic corridors with significant ongoing private investment (that could be further strengthened to attract more high-wage employment and quality business growth). **ENHANCE** 17 (Prosper Portland [Oregon] | Affordable Commercial Tenanting Program)

Next-level initiatives include expanding the Revitalize SA Corridor Leadership Program, incentivizing transit-oriented development along the VIA Rapid Green and Silver Lines, and using TIRZ revenues to build affordable commercial spaces alongside affordable housing.

- 2.2. Business Site Development.** Prepare and prioritize shovel-ready industrial sites to eliminate development delays and meet the rapid timelines of expanding businesses. **NEW** (See Appendix D: Site Verification and Evaluation on page 69 for more details.)

- 2.2.1. Market-ready site portfolio.** Develop a portfolio of industrial sites for which zoning, environmental, geotechnical, water, gas, power, and permitting requirements have been pre-answered and remaining risks quantified. **NEW** 18 (Gwinnett County, Georgia | Rowen) 19 (Greater Houston, Texas | Generation Park)

Next-level initiatives include advancing development of the 10 industrial sites evaluated in the Global Location Strategies (GLS) Site Identification program by studying the site risks, securing land control, and rezoning properties; pursuing the development of a new business site specifically designed to meet the needs of large bioscience manufacturing plants; and partnering with landowners to identify future business sites to accommodate target industry recruitment and expansion projects.

- 2.2.2. Utility infrastructure.** Collaborate with CPS Energy and SAWS to plan and construct power, water, and wastewater extensions ahead of project arrivals, addressing the long site-development lead times currently stalling projects. **ENHANCE** 20 (JobsOhio | Utility-First Strategy)

Next-level initiatives include setting aside land for substations and water infrastructure in planned employment corridors; addressing site-specific utility restrictions in current or future business sites; ensuring that access to utilities is extended to the 10 industrial sites identified in the Site ID program; and establishing a formal policy framework to evaluate data centers and large-load energy/water users based on net economic impact, resource utilization, and strategic sector alignment.

- 2.2.3. Transportation.** Prioritize multi-modal transportation investments to maximize passenger and freight access to and through San Antonio's employment centers. **ENHANCE** 21 (Grand Parkway Project [Texas] | Regional Freight Bypass)

Next-level initiatives include encouraging mixed-use development along the VIA Rapid Green and Silver lines, continuing to invest in SAT's future capacity to attract new domestic and international nonstop flights (especially across Latin America), and pursuing funds to accelerate strategic projects such as South Texas Parkway.

- 2.3. Tourism and Culture.** Leverage San Antonio's unique heritage, arts, and hospitality assets to attract global business talent and investment. **ENHANCE**

- 2.3.1. Community heritage.** Elevate historic preservation and legacy businesses as central pillars of San Antonio's cultural identity and competitiveness. **ENHANCE**

Next level initiatives include expanding the legacy business registry and facade support, executing standardized Community Benefits Agreements (CBAs) for large-scale developments, and collaborating with Visit San Antonio to drive visitor foot traffic directly from downtown tourism nodes to surrounding historic neighborhoods and commercial centers.

- 2.3.2. Arts and culture.** Support the creative economy as an economic engine and integrate art installations into urban redevelopment projects. **ENHANCE** 22 (Rally Austin [Texas] | Cultural Trust)

Next level initiatives include encouraging art installations in large-scale new developments and redevelopment projects, establishing a centralized City calendar and clearinghouse for arts and culture events, and using public-private partnerships to protect, preserve, and enhance arts and culture venues (including music venues and other creative spaces).

- 2.3.3. Tourism.** Optimize tourism assets, converting leisure visitors into business development leads and talent attraction targets. **ENHANCE** 23 (Orlando Economic Partnership [Florida] | Unbelievably Real Campaign) (See Perception and Visibility on page 35 for more details.)

Next-level initiatives include expanding collaboration between economic development and tourism through the Exchange SA program and other efforts to leverage conferences for business development in target industries; investing in strategic capacity additions to the convention center and other venues to compete for top-tier trade shows, industry conferences, and sporting events; and partnering with visitor economy anchors (such as the Spurs, JBSA, and global events like Fiesta) to position San Antonio as a business destination.

Goal 2 Case Studies

14 Washington, DC | Office to Anything

The District of Columbia's [Office to Anything Program](#) (officially the Central Washington Activation Projects Temporary Tax Abatement) provides a 15-year property tax freeze to incentivize developers to reposition vacant and underutilized downtown office buildings into non-residential commercial uses. Designed by the Office of the Deputy Mayor for Planning and Economic Development (DMPED) to complement existing residential conversion policies, the initiative targets buildings of at least 50,000 square feet to foster diverse uses including retail, hospitality, entertainment venues, and specialized commercial hubs. By aiming to convert over 2 million square feet of obsolete office footprint across town, the competitive tax relief mechanism de-risks capital-intensive adaptive reuse projects and drives sustained downtown foot traffic.

15 Phoenix Biomedical Campus (Arizona) | Phoenix Bioscience Core

The City of Phoenix established the [Phoenix Bioscience Core](#) (PBC) as a 28-acre downtown innovation district through a public-private partnership uniting Arizona State University, the University of Arizona, Northern Arizona University, and private developers like Wexford Science & Technology. By leveraging municipal land assembly, long-term ground leases, and public infrastructure investments, the city incentivized private capital to construct specialized wet labs, academic medical facilities, and high-density Class A research space. Key assets like the 850 PBC building integrate university research with private incubator lab space, enabling early-stage biopharma and digital health startups to scale alongside institutional anchors. Ultimately, this standardized P3 strategy converted underutilized urban land into a high-wage economic engine, driving downtown density and positioning Phoenix as a premier Southwestern life sciences hub.

16 Minneapolis, Minnesota | Cultural Districts

Established through the *Minneapolis 2040* comprehensive plan, the city's [Cultural Districts Initiative](#) designates seven commercial corridors to center culturally rooted placekeeping and prevent displacement in historically disinvested communities of color and immigrant neighborhoods. To ensure economic development directly benefits long-term residents and local entrepreneurs, the framework prioritizes municipal resources for housing stability, commercial land trusts, and small business financing while reducing regulatory barriers for corridor activation. Additionally, the initiative collaborates with destination marketing partners like Meet Minneapolis and Greater MSP to promote these designated areas for ethical, community-centric tourism. Ultimately, this policy framework transforms public investment into an engine for racial equity, preserving local cultural identity while driving sustainable, resident-led wealth creation.

17 Prosper Portland (Oregon) | Affordable Commercial Tenancing Program

Prosper Portland utilizes Tax Increment Financing across designated urban renewal areas to re-envision auto-centric commercial corridors into walkable, mixed-use transit nodes. Through its [Affordable Commercial Tenancing Program](#) and commercial floor-area bonus policies, the agency provides tenant improvement grants and incentivizes developers to offer below-market ground-floor retail space to local, minority-owned small businesses alongside upper-story affordable housing. To sustain corridor vitality, Prosper Portland funds neighborhood-level Main Street leadership organizations to deliver technical assistance and coordinate corridor-wide marketing. This holistic model prevents small business displacement while revitalizing aging commercial districts into dense, community-serving neighborhood hubs.

18 Gwinnett County, Georgia | Rowen

Developed by the Rowen Foundation in partnership with Gwinnett County and regional higher education institutions, Rowen is a 2,000-acre master-planned knowledge community designed to anchor the Southeast's biomedicine, agriculture, and environmental innovation sectors. Validating the site's strategic vision, [global biopharmaceutical company UCB](#) recently committed a \$2 billion investment to construct a 460,000-square-foot manufacturing facility on the campus. Expected to generate an estimated \$5 billion regional economic impact and create over 330 specialized jobs, the facility serves as the foundational tenant for Rowen's mixed-use convergence center and future corporate village. This landmark recruitment demonstrates how intentionally designing large-scale, specialized innovation districts along connected regional corridors can successfully capture global investments and catalyze long-term employment growth.

19 Greater Houston, Texas | Generation Park

Generation Park is a 4,300-acre master-planned commercial district in Greater Houston that has rapidly transformed into a premier national biomanufacturing hub. The district secured [landmark mega-projects](#) including a \$6.5 billion active pharmaceutical ingredient facility from Eli Lilly and a \$2.3 billion multi-modal manufacturing campus from Bristol Myers Squibb, anchoring nearly \$9 billion in private biopharma capital. Supported by state incentives via the Texas JETI program and specialized workforce pipelines like San Jacinto College's Center for Biotechnology, these facilities are projected to create over 1,100 high-wage permanent jobs. This rapid cluster development demonstrates how pairing shovel-ready infrastructure and master-planned site capacity with higher-education alignment can position a region to capture global life science supply chain expansions.

20 JobsOhio | Utility-First Strategy

Through its [SiteOhio](#) program, state economic development agency JobsOhio partners with utility providers like AEP Ohio to fund upfront infrastructure extensions and pre-allocate dedicated land for electrical substations across priority industrial corridors. By extending high-capacity power, water, and sewer lines to greenfield boundaries prior to tenant selection, the initiative eliminates 12 to 18 months of critical site-development lead time. This proactive alignment guarantees incoming end-users immediate grid capacity and predictable interconnect schedules during final site selection. Ultimately, this utility-first strategy positioned Central Ohio to capture transformational advanced manufacturing investments, including Intel's multi-billion dollar semiconductor campus in Licking County.

21 Grand Parkway Project (Texas) | Regional Freight Bypass

The Texas Department of Transportation (TxDOT), in partnership with regional county toll authorities, utilized public-private partnerships and design-build delivery to accelerate construction of the 184-mile [Grand Parkway \(SH 99\)](#) outer loop around Greater Houston. By establishing critical regional bypass capacity ahead of rapid urban growth, the multi-billion-dollar highway project unlocked high-capacity freight corridors and mitigated congestion across seven counties. This opened the opportunity for suburban employment districts, directly attracting major corporate campuses—such as ExxonMobil's headquarters—and multi-hundred-acre industrial hubs like Generation Park. Ultimately, the Grand Parkway demonstrates how proactive outer-loop transportation investments can optimize regional supply chains, expand workforce access, and catalyze large-scale commercial development.

22 Rally Austin (Texas) | Cultural Trust

Managed by public-private investment corporation Rally Austin, the [Austin Cultural Trust](#) operates as a transactional real estate vehicle to combat the displacement of artists, creative businesses, and live music venues driven by rapid real estate appreciation. Rather than providing short-term grants, the Trust combines voter-approved bond funds with hotel occupancy taxes, philanthropic capital, and real estate tools to purchase commercial property outright or negotiate long-term, stabilized leases (up to 40 years) for local anchors like Empire Control Room and Hole in the Wall. The initiative has dedicated over \$17 million to leverage \$37.5 million in total project value, securing more than 53,000 square feet of affordable, permanent cultural space while generating an estimated \$75 million to \$94 million in regional economic impact. Ultimately, this model demonstrates how economic development corporations can deploy blended capital stacks and mission-driven real estate stewardship to execute equitable placekeeping and preserve foundational creative industries in high-cost metro markets.

23 Orlando Economic Partnership (Florida) | Unbelievably Real Campaign

The Orlando Economic Partnership and Visit Orlando launched the unified "[Unbelievably Real](#)" global brand campaign, merging tourism marketing with regional economic development strategy to engage leisure travelers, convention delegates, and corporate decision-makers through a single narrative. By deploying B2B recruitment concierges and targeted executive messaging across major trade shows at the Orange County Convention Center, the partnership systematically engages visiting C-suite executives while they are physically in the region. This strategy leverages Central Florida's tens of millions of annual visitors as a primary pipeline for business expansion, generating hundreds of corporate recruitment leads and international trade inquiries each year.

Goal 3. Talent and Workforce

Improve economic mobility for San Antonians through developing a workforce with the skills to access good jobs.

San Antonio's long-term economic competitiveness hinges on empowering local residents with the high-demand, high-wage skills required to achieve sustainable, generational mobility. San Antonio has experienced great success with the Ready to Work program, achieving over 6,100 approved job placements and increasing participant wages by 300 percent on average.¹ Transitioning municipal workforce investments into Ready to Work 2.0 will strategically align training dollars exclusively with recession-resistant target occupations across key growth clusters including Aerospace, Cybersecurity, Energy, Bioscience, and Corporate Services. By formalizing employer-led industry sector partnerships and deploying real-time analytics through a centralized talent intelligence center, the City will eliminate skill mismatches, streamline post-secondary pathways, and ensure local training platforms directly feed active corporate hiring pipelines.

Concurrently, sustaining a resilient enterprise ecosystem requires an aggressive strategy to retain homegrown talent while removing systemic barriers to employment. San Antonio should build direct bridges to keep regional university graduates local and systematically transition separating Joint Base San Antonio military personnel into private sector roles. To guarantee that vulnerable and historically underrepresented populations can fully participate in this growth, the City should support the integration of essential wraparound supports—such as employer-funded childcare models, transit connectivity, and AI digital upskilling. By coupling employer-driven training with comprehensive candidate support and talent retention, San Antonio will cultivate an adaptable, future-proof workforce that drives inclusive regional prosperity.

Strategies and Actions

3.1. Ready to Work 2.0. Maximize regional economic mobility by aligning local workforce training directly with high-demand, high-wage target industry careers. **NEW**

3.1.1. Sustainable funding model and program. Formulate the Phase 2 sustainability plan for Ready to Work as the program evolves, identifying alternative funding models and administrative transitions.

NEW

Next-level initiatives include creating city-county-private-sector co-investment pools, employer-paid training partnerships, and customized micro-credential and on-the-job training models.

¹ Ready to Work training completers to date include: 3,900 Healthcare, 1,892 Warehouse/Transportation, 1,244 IT/Cyber, 602 Construction/Trades/Utilities, 524 Professional Services, 344 Finance/Insurance, 220 Manufacturing/Aerospace, and 203 Education.

- 3.1.2. Prioritize demand occupations.** Align training resources exclusively with recession-resistant, high-wage, high-demand tracks within target industry clusters. **NEW**

Next-level initiatives include re-evaluating the methodology for identifying demand occupations, including more outcomes-based criteria, and incorporating the impacts of future technologies.

- 3.1.3. Target populations.** Focus outreach and support resources on San Antonio's most vulnerable and economically displaced populations. **NEW** 24 (GreatJobsKC [Missouri] | Tuition-free skills training) (See Worker Opportunity and Mobility on page 54 for more details.)

Next-level initiatives include utilizing new data sources like the Job Quality & Access tool to identify geographies of high need, aligning programming with local workforce agencies, partnering with community nonprofits and labor unions, and closely tracking economic mobility indicators. (See indicators in Performance Metrics on page 29.)

- 3.2. Talent Ecosystem.** Coordinate educational systems, employer boards, and emerging technologies to build a highly adaptable, future-proof workforce. **NEW**

- 3.2.1. Higher education.** Strengthen programmatic integration with regional universities and Alamo Colleges to align academic curriculums and experiential learning with industry needs. **ENHANCE** 25 (Kansas City Civic Council [Missouri] | KC Rising)

Next-level initiatives include building a collaborative K–12 and higher education entrepreneurship curriculum to align regional academic degrees with current and future industry demands, creating a consortium of higher education providers to address raising educational attainment, partnering with higher education institutions to scale experiential learning programs, and creating connections between secondary and postsecondary career and technical education (CTE) providers to strengthen career pathways.

- 3.2.2. Sector partnership implementation.** Establish formal, employer-led sector boards in target industries to aggregate hiring demand and align regional training providers. **NEW** 26 (NoCo Works [Colorado] | Northern Colorado Sector Partnerships)

Next-level initiatives include continuing talent pipeline management efforts focused on target industries, and hosting industry-specific roundtables with employers and educational providers to identify training gaps and needs.

- 3.2.3. AI adoption.** Prepare local employers and workers for technological disruption through a dedicated digital skills and AI upskilling initiative. **NEW** 27 (City of Seattle, Washington | AI Plan)

Next-level initiatives include developing an employer self-assessment tool, connecting employers in high-exposure industries with AI skills courses, and providing support/information for internal process improvements.

- 3.2.4. Talent intelligence center.** Launch a real-time digital dashboard tracking occupational openings, graduate supply, and local wage trends. **NEW** ²⁸ (University of North Texas [Texas] | Texas Talent Accelerator)

Next-level initiatives include establishing a real-time labor market and predictive skills tool, forming employer-led rapid credentialing taskforces, and deploying an integrated apprenticeship and work-based learning clearinghouse to provide better information to both jobseekers and employers.

- 3.3. Talent Retention and Attraction.** Grow San Antonio's workforce by retaining educated graduates, attracting out-of-market specialists, and eliminating systemic workforce participation barriers. **ENHANCE**

- 3.3.1. Military personnel.** Retain retiring or separating JBSA personnel and spouses by connecting them to local training and employment opportunities, placing military talent into target sector corporate roles. **ENHANCE** ²⁹ (The Work Opportunity Tax Credit | Veteran Hiring) ³⁰ (New North Inc. [Wisconsin] | Mission: Workforce Alliance)

Next-level initiatives include using the real-time JBSA survey results of separating or retiring military personnel to promote San Antonio's talent pool to employers, creating clear handoffs to connect military personnel and spouses to employment opportunities, and working with employers and area nonprofits to provide veterans and military families with support to help them reacclimate to the civilian workforce.

- 3.3.2. Targeted talent attraction and retention.** Launch national and international marketing campaigns to attract skilled workers and retain regional graduates and young professionals. **ENHANCE** ³¹ (San Diego, California | Just Say No to Winter)

Next-level initiatives include launching a targeted talent attraction campaign showcasing regional career opportunities and lifestyle benefits to retain four-year college graduates, establishing specific programs to recruit highly trained workers required by target industries, and creating a "talent concierge" program to assist San Antonio companies with hiring out-of-market executive talent and difficult-to-fill professional and technical positions.

- 3.3.3. Wraparound supports.** Coordinate access to childcare, housing, transit, health services, and broadband to support employability. **ENHANCE** ³² (Pearland, Texas | Community Resource Network)

Next-level initiatives include creating a network of local nonprofits partners to address employment barriers and establishing a multi-party employer-match childcare program.

Goal 3 Case Studies

24 GreatJobsKC (Missouri) | Tuition-free skills training

Kansas City-based nonprofit, [GreatJobsKC](#), deploys a philanthropy-funded workforce and education platform designed to help low- and modest-income individuals secure family-sustaining careers across the bi-state region. To bridge regional equity and labor gaps, the organization pairs multi-year college scholarships and tuition-free skills training in high-growth sectors with dedicated career navigation, wrap-around support, and direct employer placement. A third-party evaluation by Mathematica revealed that program completers achieve an average 91 percent salary increase, driving the initiative toward its goal of placing 50,000 area residents into quality jobs by 2032. This comprehensive workforce framework demonstrates how leveraging philanthropic capital for stackable credentialing and employer alignment builds inclusive talent pipelines that strengthen regional economic mobility.

25 Kansas City Civic Council (Missouri) | KC Rising

Initiated by the Civic Council of Greater Kansas City, a collective of the region's primary corporate employers, [KC Rising](#) is a business-led, cross-sector partnership that convenes civic, philanthropic, educational, and public-sector leaders across the bi-state metro area. Structured around data-driven Horizon Goals across core pillars—Talent, Industry, and Culture—the initiative aligns regional strategy to strengthen globally competitive business clusters, accelerate tech commercialization, and expand high-wage job access. By connecting executive leadership directly with local training platforms, community organizations, and higher education systems, KC Rising aligns workforce development pipelines with real-time employer demand across Kansas and Missouri. Ultimately, this framework demonstrates how private-sector leadership can leverage shared metrics and multi-jurisdictional governance to convert corporate clout into sustainable, regional economic growth.

26 NoCo Works (Colorado) | Northern Colorado Sector Partnerships

Managed by NoCo Works across Larimer and Weld Counties, the [Northern Colorado Sector Partnerships](#) (NoCo Spark) convenes industry-led coalitions across key growth sectors—including manufacturing, healthcare, construction, and hospitality—to align regional workforce systems with real-time business needs. By uniting over 30 civic, educational, and economic development partners, the initiative directly engages local employers to identify skill gaps, coordinate work-based learning, and adapt K–12 and post-secondary curricula to industry standards. Through shared governance and centralized resource hubs, the ecosystem breaks down jurisdictional silos between chambers of commerce, workforce boards, and higher education institutions across the bi-county labor market.

27 City of Seattle, Washington | AI Plan

The [City of Seattle's 2025–2026 AI Plan](#) establishes a municipal framework for integrating AI across city operations, scaling early generative AI pilots to optimize core services like housing permitting, public safety, and customer service. Structured around four strategic pillars—data excellence, secure cloud infrastructure, workforce upskilling, and external partnerships—the plan combines centralized governance under a dedicated municipal AI leadership role with strict "human-in-the-loop" ethics and privacy guardrails. To prevent job displacement and maximize public value, Seattle partnered with labor groups, local universities, and technology leaders to deploy a three-tiered training curriculum for city employees alongside public innovation hackathons.

28 University of North Texas (Texas) | Texas Talent Accelerator

Launched by the University of North Texas in partnership with regional higher education, industry, and economic development leaders, the [Texas Talent Accelerator](#) operates as a regional workforce intelligence hub serving the rapidly expanding North Texas metroplex. The initiative generates actionable, data-driven labor market analytics to identify critical skill gaps and align post-secondary degree programs and technical credentials with real-time employer demand. By breaking down institutional silos between colleges, economic development organizations (EDOs), and corporate partners, the coalition accelerates talent pipeline development to support high-growth industry clusters and major corporate expansions.

29 The Work Opportunity Tax Credit | Veteran Hiring

[The Work Opportunity Tax Credit](#) (WOTC) is a federal income tax benefit for businesses through the US Department of Labor. Businesses can qualify for the WOTC by hiring veterans who served a minimum of 180 days in active duty or have a service-related disability of at least 10 percent. Credits range from \$2,400 to \$5,600 per year depending on the veteran's disability status and length of previous unemployment.

30 New North Inc. (Wisconsin) | Mission: Workforce Alliance

New North, Inc., is the regional marketing and economic development corporation for 18 counties in northeast Wisconsin. In September 2024, New North, Inc., partnered with [Mission: Workforce Alliance](#), a Wisconsin program that helps businesses connect with transitioning servicemembers, to create a hiring portal. Businesses throughout the region can post job opportunities on the portal and seek resources to bolster their veteran-ready hiring practices. Candidates such as transitioning military servicemembers, trailing spouses/partners, and veterans can use the portal to translate their background experience into skills that employers have listed demand for, like data analysis, logistics, project management, and information technology.

31 San Diego, California | Just Say No to Winter

Co-created by the San Diego Regional Economic Development Corporation and the San Diego Tourism Authority, the ["Just Say No to Winter"](#) campaign targeted mid- and senior-level STEM, biotech, and software professionals in cold-weather metros like New York, Boston, and Chicago. The initiative deployed subway ads, digital marketing, and street activations that juxtaposed harsh northern winters with San Diego's coastal quality of life, directing candidates to a centralized portal featuring target-industry job listings and relocation resources. By uniting destination marketing budgets with economic development priorities, the campaign converted regional visitor appeal into an active talent recruitment engine for major tech and life science employers like Qualcomm, Illumina, and Apple.

32 Pearland, Texas | Community Resource Network

The [Community Resource Network](#) centralizes more than 70 local nonprofit partners in south Houston to help residents overcome specific employment barriers, such as health service or childcare. Connecting workers and jobseekers to these essential support services helps employers improve employee retention and productivity by ensuring that all residents have the resources they need to thrive in the workplace.

Capacity and Resources

Refine the City's economic development tools, align partners, and pursue new funding options to activate the updated framework.

To execute San Antonio's strategic framework, the City must modernize its economic development toolkit, align partners, and secure new funding for major redevelopment projects. Success relies on uniting public, private, and community resources so the framework's goals reinforce one another rather than operate in isolation.

Achieving this vision requires confronting the real-world obstacles that could hinder the execution of the framework. Implementation must directly navigate challenges, including persistent funding gaps, complex regulatory and permitting burdens, changing economic conditions, and departmental capacity constraints. Recognizing that EDD staff cannot execute every strategy alone, the City will adopt a phased rollout model that prioritizes high-impact annual actions and actively leverages external partner systems, private capital, and non-City funding instruments. Each year, the EDD and the Level Up Committee will review partner capabilities to eliminate duplicate services and address funding gaps.

To eliminate blurred accountability and ensure follow-through, every major priority in the implementation matrix will designate a single lead organization with decision authority, supporting partners, funding responsibilities, clear metrics, and timelines.

Strategies and Actions

- **Tools.** Overhaul incentives, expand creative place-based financing, and leverage public land banking to catalyze strategic redevelopment. **ENHANCE**
- **Incentives.** Adopt an agile incentive policy that focuses on flexibility and responsiveness to attract investment, create alternative incentive pathways to recruit out-of-state venture-backed scale-ups, strategically deploy the San Antonio Economic Development Corporation (SAEDC), and pursue redevelopment P3 projects. **ENHANCE**
- **Innovative financing.** Expand the commercial Community Land Trust model to protect local small business space from gentrification, coordinate with NHSD to reauthorize TIRZ funds for mixed-use infrastructural site-readiness projects, direct TIRZ revenues toward infrastructure readiness and mixed-use commercial developments, and continue structuring the upcoming and future bond packages to elevate projects that impact economic development goals. **ENHANCE**
- **Land banking and P3 development.** Acquire and assemble land for redevelopment or infill opportunities for industrial and mixed-use employment spaces, align public and private resources to catalyze signature mixed-use districts such as the new sports and entertainment districts in downtown, and use P3 development approaches to spark small-scale commercial reinvestment and business growth in community areas and commercial corridors across the City. **NEW** 33 (Richmond, Virginia | Diamond District)
- **Partnerships.** Align City departments and external organizations around clear roles to build a highly collaborative economic development network. **ENHANCE**
- **Level Up Committee.** To ensure shared ownership for the implementation of the framework, a taskforce with key partners will meet regularly to review implementation milestones, resolve inter-agency barriers, and hold public and private partners accountable. An annual ecosystem scan should be conducted to map organizational responsibilities and eliminate duplicative efforts among local and regional economic development partners, coordinate roles across partners, and launch implementation-focused task forces organized around specific goals and/or strategies in the updated strategic framework. **ENHANCE**

- **greater:SATX.** Maintain regular project coordination between EDD and greater:SATX, with appropriate project-specific information sharing, and rely on greater:SATX to track the region’s economic competitiveness and relevant national, state, and regional trends. **ENHANCE**
- **Interdepartmental collaboration.** Continue and expand cross-department collaboration between EDD and other City departments to strengthen San Antonio’s position as a competitive business destination, including permitting, infrastructure, communication, and marketing. **ENHANCE** ³⁴ (City of Irving, Texas | Irving Economic Development Partnership)
- **International partnerships.** Partner with global municipal networks (Sister Cities, UNESCO Creative Cities Network, Strong Cities Network US Conference of Mayors, ICMA, and IEDC) to expand San Antonio’s global brand presence and share best practices and technical exchanges. Coordinate between the EDD, greater:SATX, and other international trade policy agencies to ensure San Antonio remains competitive.
- **Funding Options.** Pursue new and alternative funding options to activate the strategic framework and expand regional economic resources. **NEW**
- **Public sector (state and federal).** Establish a dedicated intergovernmental affairs workflow to aggressively pursue state and federal capital for infrastructural site-readiness, workforce development, and business financing. **NEW**
- **Private sector (corporate and foundation).** Form partnerships with private foundations and corporate sponsors to support workforce training, small business development, and entrepreneurship initiatives. **NEW**
- **Grant writing expertise.** Build dedicated municipal grant-writing capacity focused on economic development, infrastructure, and community resiliency. **NEW** ³⁵ (Texas Semiconductor Innovation Fund and Space Exploration & Aeronautics Research Fund) ³⁶ (Lilly Endowment | College and Community Collaboration grant program)

Capacity and Resources Case Studies

³³ Richmond, Virginia | Diamond District

The [City of Richmond and the Richmond Economic Development Authority](#) executed a public-private partnership with master developer Diamond District Partners to redevelop 67 acres of municipally banked land into a \$2 billion mixed-use sports and entertainment district. The deal structure leveraged private capital alongside public infrastructure financing to deliver CarMax Park—a 10,000-capacity, multi-use venue anchored by a 30-year lease with the Richmond Flying Squirrels—as the catalyst first phase. By assembling and controlling the contiguous property, the city unlocked surrounding development that includes hundreds of mixed-income residential units, dedicated affordable housing, trophy office space, retail, a 180-key hotel, and public green space. Ultimately, Richmond’s model demonstrates how cities can combine strategic land banking with structured P3 financing to convert underutilized public real estate into high-density, tax-generating economic corridors.

34 City of Irving, Texas | Irving Economic Development Partnership

The City of Irving and the Greater Irving-Las Colinas Chamber of Commerce operate under a formal contract for services agreement through the [Irving Economic Development Partnership](#), creating a clear functional division of labor for regional growth. Under this public-private framework, the Chamber acts as the primary engine for marketing, corporate recruitment, and business retention and expansion, while the City leads infrastructure delivery, zoning, placemaking, and economic incentive negotiations. By aligning municipal planning and incentives directly with private-sector marketing agility, the partnership has successfully positioned Irving-Las Colinas as a premier corporate destination, attracting numerous Fortune 500 headquarters and major enterprise operations. This structured contractual model demonstrates how cities can leverage specialized third-party EDO capabilities to streamline business development without duplicating municipal staffing or resources.

35 Texas Semiconductor Innovation Fund and Space Exploration & Aeronautics Research Fund

Established by the Texas Legislature to secure state dominance in emerging tech sectors, the [Texas Semiconductor Innovation Fund](#) (TSIF) and the [Space Exploration & Aeronautics Research Fund](#) (SEARF) serve as dedicated public financing vehicles that co-invest alongside federal grants and private capital. Administered through the Texas Semiconductor Innovation Consortium and the Texas Space Commission, these strategic funds deploy state grants and matching capital to higher education institutions, research facilities, and private enterprise for advanced R&D, specialized workforce training, and infrastructure. By committing nearly \$1 billion through TSIF to leverage federal CHIPS Act matching funds and \$150 million via SEARF to accelerate commercial space and spaceport ventures, the state systematically de-risks capital-intensive innovation clusters.

36 Lilly Endowment | College and Community Collaboration grant program

Lilly Endowment Inc.'s [College and Community Collaboration](#) (CCC) initiative awarded over \$458 million in philanthropic grants to 19 Indiana higher education institutions, positioning colleges and universities as anchor catalysts for regional economic growth. To ensure cross-sector alignment and long-term sustainability, the competitive program required higher education grantees to co-design projects with civic, municipal, and business leaders while securing at least 70 percent matching capital from non-Endowment sources. Funded initiatives spanned transformative regional investments, including downtown commercial revitalizations, tech and innovation districts, early childhood care expansions, and regional transit trails.

Performance Metrics

The performance metrics used to track progress are an important part of the updated strategic framework. These are the numbers that tell the story of how the strategic framework is helping San Antonio level up its economic development program. However, it is important to acknowledge that the City does not operate in isolation. External factors ranging from geopolitical conflicts to financial market volatility affect economic performance at the local level. An understanding of the broader economic landscape allows the City to maintain a realistic view of progress while focusing on strategies where it can most directly impact positive change in the local economy. If the national economy enters a recession, for instance, the City should not be held to unrealistic expectations.

The table shown in Figure 5 includes four distinct tiers: (1) inputs, which monitor the direct resources invested; (2) outputs, which show the work delivered and activities dedicated to implementation; (3) outcomes, which capture the immediate programmatic results of specific actions and initiatives; and (4) impacts, which track long-term, citywide and countywide macroeconomic trends. This approach ensures that the underlying actions and tactics remain data-driven, accountable, and focused on delivering a measurable return on investment for the community.

A full list of economic performance indicators and data sources is found in Figure 6 to gauge long-term, implementation success of *Level Up: San Antonio*. These indicators should be measured citywide and against benchmark communities. Where possible, indicators should be disaggregated by race and ethnicity, age, and gender.

Figure 5. Implementation Metrics

INPUTS	OUTPUTS	OUTCOMES	IMPACTS
<i>Resources invested</i> • Municipal Program Funding: Operating budgets and capital funds available for business assistance, incentives, and corridor programs. • Staff Capacity and Allocation: Full-time equivalent (FTE) staff time dedicated to project delivery. • Data & Technology Infrastructure: Software subscriptions, real estate databases (CoStar), labor analytics tools (Lightcast), and Census/ACS demographic tools. • Partner & CDFI Resources: Matching capital, BDO network capacity, and co-operator resources (e.g., LiftFund, LISC, LaunchSA co-operators). • Incentive Allocations: Available Chapter 380 funds, Tax Abatement allocations, and 0% interest loan facility reserves. • Specialized Counseling Tools: Succession planning and enterprise transfer resources for legacy small businesses.	<i>Work delivered and activities</i> • Business Visits: Onsite and virtual business retention and expansion (BRE) visits conducted (target: 750 visits/year). • Small Business Outreach: Small business technical assistance sessions, workshops, and direct counseling delivered. • Marketing & Digital Impressions: Website traffic, portal inquiries, and social media impressions. • Trade Missions & Global Outreach: International trade missions (outbound and inbound) and site selector meetings hosted. • Incubator/Accelerator Participation: Number of local startups and companies participating in local incubators and accelerators. • Leads & Pipeline Prospects: Active corporate recruitment leads, site queries, and outreach to site selectors and real estate professionals.	<i>Direct results</i> • Direct Capital Investment: Total capital investment generated from business recruitment and expansion projects. • Job Creation & Wages: Net new and retained jobs from City-supported projects, median wages of jobs created, and share of jobs created paying living wages. • Venture & Angel Capital: Number and total dollar value of venture capital and angel investment deals closed. • High-Growth Scaleups: Expansion in the number of high-growth scaleup companies located in the region (Inc. 5000 list; target of 30 in MSA / 20 in City). • Innovation & IP Creation: Rate of new patents and intellectual property registered within local industry clusters. • Commercial Real Estate Added: Square footage of new industrial space (target: 25M sq. ft. over 5 years). • Small Business Growth & Survival: Multi-year small business survival rates, percentage of assisted businesses reporting revenue growth, and debt consolidation. • Commercial Property Ownership: Increase in commercial property and physical asset ownership among small businesses. • Urban Core Vitality: Long-term residential unit additions in the greater downtown area (e.g., 2,500 units in 5 years).	<i>Long-term economic and community difference</i> • Total Employment Growth: Overall increase in employment and employment diversity across target industry clusters. • STEM Employment Growth: Percentage increase in STEM-related occupations. • Commercial Tax Base Expansion: Long-term growth in the City's commercial property assessed value (e.g., target 6.7% CAGR reaching \$108.1B by 2030). • Household Income & Poverty Reduction: Increase in median household income and long-term reduction in the poverty rate across demographics. • Educational Attainment: Long-term increase in educational attainment levels and labor force participation rates.

Source(s): TIP Strategies, Inc.

Figure 6. Economic Performance Indicators

Demographic and Social Characteristics

SPECIFIC INDICATOR	DESCRIPTION	DATA SOURCE
Population Growth	Population estimates over time	US Census Bureau
Age Groups	Population by share of broad age groups (senior 65 and older, experienced working age 35–64, young adults 20–34, youth 0–19)	ACS
Race and Ethnicity	Population by share of race and ethnic groups (White, Latino or Hispanic, Black or of African descent, Asian, All Other Races)	ACS
School Enrollment	Share of population under 15 by school enrollment status (not in school, enrolled in college or graduate school, enrolled in high school, enrolled in school grades 1–8, enrolled in kindergarten or preschool)	ACS
Veterans	Share of civilian population (18 and older) with veteran status	ACS
People with Disabilities	Share of civilian population with a disability	ACS
Health Insurance	Share of civilian population that had health insurance coverage at some point in the previous calendar year	ACS

Economic Characteristics

SPECIFIC INDICATOR	DESCRIPTION	DATA SOURCE
Household Income	Median household income	ACS
Poverty	Share of population with poverty status based on the past 12 months of income	ACS
Supplemental Assistance	Share of households participating in the Supplemental Nutrition Assistance Program	ACS

Workforce Characteristics

SPECIFIC INDICATOR	DESCRIPTION	DATA SOURCE
Educational Attainment	Population (25 and older) by educational attainment	ACS
Labor Force	Population (16 and older) by labor force status (not in labor force, unemployed, employed in armed forces, employed civilians)	BLS
Commute Time	Average commuting time in minutes for workers (16 and older)	ACS
Work from Home	Share of workers (16 and older) who worked from home	ACS
Public Employment	Public vs. private sector employment in industry clusters	BLS
Cluster Employment	Employment by industry clusters	BLS
Occupational Employment	Employment by occupational group	BLS
Educational Attainment	Population (25 and older) by educational attainment	ACS

Housing & Infrastructure Characteristics

SPECIFIC INDICATOR	DESCRIPTION	DATA SOURCE
Occupancy	Share of housing units by occupancy status and housing type	ACS
Housing Stock	Share of housing stock by type of structure and share of housing stock by age of structure	ACS
Mobility	Residence location one year ago for the current population that is at least one year old	ACS
Housing Cost	Median home value among owner-occupied units and median monthly rent	ACS
Internet Connectivity	Share of households with access to a computer at home and share of households with access to broadband internet at home	ACS
Walkability	Walk Score for the city as a whole and for individual neighborhoods	Walk Score
Air Travel	Average monthly passenger traffic at SAT International Airport	USDOT Bureau of Transportation Statistics

Source(s): American Community Survey (ACS); US Census Bureau, Population Estimate Program; and US Bureau of Labor Statistics (BLS).

Appendix A: Qualitative Analysis

Stakeholder Engagement

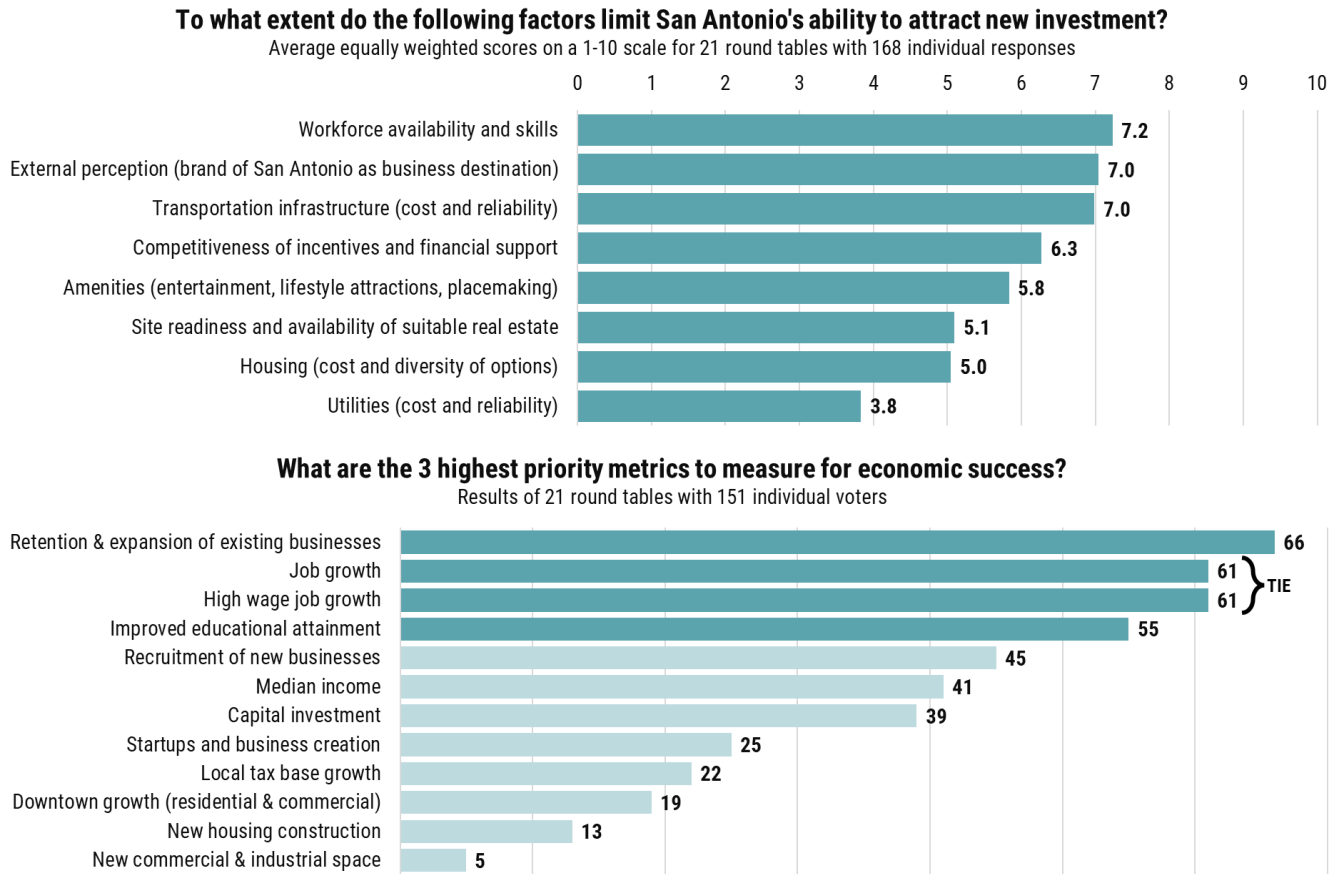
To leverage the expertise of local leaders, TIP conducted a robust stakeholder engagement process. The process included: individual interviews, roundtable discussions, site selector and real estate perception interviews (see Perception and Visibility), a community-wide small business survey (see Small Business Survey), and site-readiness interviews (see Appendix D: Site Verification and Evaluation).

Over 25 individual interviews were conducted with San Antonio City Council, City Manager and Assistant City Manager, leaders representing a variety of departments within the City of San Antonio (including Planning, Downtown, and Workforce Development), and partner organizations (including greater:SATX). Additionally, TIP facilitated a half-day staff retreat with the San Antonio Economic Development Department. TIP also engaged stakeholders and subject matter experts through 20 roundtable discussions and with the advisory committee made up of over 50 members. These facilitated sessions were organized to gain an understanding of how San Antonio can leverage cross-sector collaboration. Roundtables engaged the following stakeholders.

- Advisory committee
- Community nonprofits
- Labor
- Economic development partners
- Mobility
- Sustainable energy/green tech
- IT security and infrastructure
- Bioscience anchors
- Workforce development and education
- Key employers
- Global perspectives
- Young professionals
- City department directors
- Startups & entrepreneurs
- Small business
- Supplier engagement
- Real estate development community
- Downtown development
- Placemaking
- Creative economy, arts, & culture
- Infrastructure & transportation

During the roundtables, community members provided their insights through a live polling exercise via Mentimeter. Through this mechanism, roundtable participants discussed a variety of San Antonio's strengths, challenges, and opportunities. Figure 7 includes key findings from the poll questions.

Figure 7. Roundtable Mentimeter Results



Source(s): TIP Strategies, Inc.

Competitive Position

San Antonio’s competitive position and differentiation was informed by the quantitative and qualitative data analyses. Initial data collection began in March 2026 and extended through September 2026. The Socioeconomic Performance Comparisons (Figure 8) and Competitive Assets (Figure 9) informed the direction of the framework update.

Figure 8. Socioeconomic Performance Comparisons

Socioeconomic Performance Comparison	Description
Race and Ethnicity	San Antonio is the only of its peer cities/MSAs to have a majority Hispanic or Latino population. It leads the next-closest city/MSA (Houston) by a significant margin.
Age Distribution and School Enrollment	The City of San Antonio has the largest share of youth (0-19) residents among its peer cities. This comes to bear on school enrollment, where the City of San Antonio has the largest share of school-enrolled residents among peer cities.
Veteran Status	Both the City of San Antonio and the San Antonio MSA demonstrate relatively high shares of adult residents with veteran status, with both being second only to Jacksonville, FL, within their respective peer groups.
Educational Attainment	Both the City of San Antonio and the San Antonio MSA have the lowest share of adults with a bachelor’s degree or higher within their respective peer groups.
Household Income and Poverty Status	Median household income is relatively low for both the City of San Antonio (among peer cities, only Houston is lower) and the San Antonio MSA (the lowest among peer MSAs).

Source(s): TIP Strategies, Inc.

Figure 9. Competitive Assets

Differentiator	Description
Gateway to Latin America	San Antonio's unique culture, demographics, and proximity to the border position it as a gateway to Latin American markets. The City's Global Engagement Division is an important tool in promoting San Antonio's brand internationally and boosting global trade and investment in San Antonio. • Global Engagement Division • Taskforce on the Americas • Geographic location • Diverse population
Military Assets	San Antonio's military presence, particularly Joint Base San Antonio, the largest joint base in the United States, offers a major asset to San Antonio. It provides a highly trained workforce and anchors the aerospace and defense clusters. • Joint Base San Antonio • Port San Antonio • Brooks • Cyber security ecosystem (Texas Cyber Command) • Key military and defense employers like Boeing
Culture of Collaboration	San Antonio's big city, small town feel allows it to explore partnerships and collaborations that benefit its residents and businesses alike. • PreK-4-SA • Ready to Work • Strong local infrastructure partners (City, CPS, SAWS, and Bexar County) • Small business ecosystem and supports • Accessible elected officials
Quality of Life	San Antonio offers a vibrant culture, history, strong community feel, and affordability that is incomparable. • Relatively low cost of living • UNESCO World Heritage Site • UNESCO Creative City of Gastronomy • Arts community • Greenway Trail System
UT San Antonio Merger	The merger between UTSA and UT Health San Antonio creates an elite, integrated research university. With both institutions holding the Carnegie R1 designation, San Antonio's anchor institutions are national leaders and serve as a major driver of key industries in the city • Biomedical discovery • AI and computing • Cybersecurity • Health • Energy • Sustainability • Place based investments through downtown development
Home to major industry partners	Several major employers have a large presence in the San Antonio economy. Business diversity ranges from advanced manufacturing, aerospace, food manufacturing, research and development, insurance, and energy. • Toyota • Boeing • HEB • JCB • Southwest Research Institute • USAA • Valero Energy

Source(s): TIP Strategies, Inc.

Perception and Visibility

TIP conducted a perception analysis consisting of interviews with influencers in the site selection process to understand perceptions of San Antonio generally and relative to other locations in the region, the State of Texas, and the United States. The list of interviewees was provided by greater:SATX and EDD based on site selection influencers who have past experience working in San Antonio. The key findings from these perception interviews were:

1. **Municipal Responsiveness and Incentive Policies.** The City must increase administrative responsiveness, enact agile incentives that can adjust with opportunities, and provide "concierge" service to emphasize the city is open for business and to prevent losing projects to competing metropolitan areas.
2. **Storytelling, Marketing, and Brand Positioning.** San Antonio must aggressively promote a distinct national and international narrative centered on its high-tech, defense, and university research assets rather than relying on its reputation as a low-cost labor market or competing as a secondary Texas metro.
3. **Workforce Strengths and Pipeline Expansion.** Although the region benefits from strong population growth, a solid work ethic, and military talent with built-in security clearances, consultants recommend building customized workforce training programs and early K-12 pathways to meet complex industry needs and retain local graduates.
4. **Real Estate, Infrastructure, and Site Development.** Securing major relocations will require expanding direct air connectivity, shortening long utility and water connection lead times and ensuring their reliability and sustainability, and incentivizing new Class A office and shovel-ready industrial sites.
5. **Target Industry Cluster Opportunities.** The city has strong growth potential in advanced manufacturing, aerospace and defense, cybersecurity, financial services, and life sciences if it aggressively targets high-growth subsectors and leverages anchor assets like Port San Antonio, Brooks, and local universities.

TIP also reviewed approaches used by legacy organizations and other economic development and marketing entities in the region and how such efforts align with business attraction, retention, and expansion activities, emerging industries, and priority districts. The key findings from roundtables and interviews that helped to inform recommendations to strengthen regional branding and positioning San Antonio as a location for business and talent were:

1. **Reposition regional branding beyond tourism.** Shift San Antonio's image from a low-cost leisure destination to a modern, tech-driven economic hub. Systematically leverage major conventions and sporting events through programs like Exchange SA to connect visiting executives directly with local industry leaders.
2. **Align marketing with priority sectors and districts.** Focus campaign messaging on key competitive advantages, including cybersecurity, defense health, aerospace, and transborder trade with Mexico. Feature key employment hubs like Port San Antonio, Brooks, and Downtown to present a cohesive regional identity to site selectors.
3. **Build a unified narrative for business and talent.** Craft a brand narrative highlighting San Antonio's authentic cultural depth alongside its expanding innovation ecosystem. Invest in downtown livability, place-based innovation, and creative placemaking to attract corporate headquarters and retain STEM talent.
4. **Strengthen interagency coordination and incentives.** Align marketing resources across EDD, greater:SATX, Visit San Antonio, and Bexar County behind a single regional story. Modernize municipal incentive toolkits to deliver flexible, speed-to-market packages for high-growth startups and high-wage corporate expansions.

SWOT Analysis

San Antonio's competitive position and differentiation is captured in the strengths, weaknesses, opportunities, and threats (SWOT) analysis in Figure 10. The SWOT synthesizes the findings from the landscape and benchmark data analyses and qualitative stakeholder engagement conducted.

- **Strengths:** Assets and resources that can be built on to grow, strengthen, and diversify the local/regional economy.
- **Weaknesses:** Liabilities and barriers to economic development that could limit economic growth potential.
- **Opportunities:** Competitive advantages and positive trends that hold significant potential for the attraction of new businesses, investments, and skilled workers.
- **Threats:** Unfavorable factors and trends (often external) that could negatively affect the local/regional economy.

Figure 10. Summary of SWOT Analysis for the City of San Antonio

	High Degree of Control Local, Regional, State	Low Degree of Control National, Global
Strengths	• Community feel • Lower cost of living • Brooks, Port SA, and the Pearl developments • Small business ecosystem and support • Secured water and energy supplies • Texas Cyber Command • UT San Antonio merger and downtown development • Workforce programs: Ready to Work and PreK4SA • Affordable place to do business • The Americas Taskforce • Southwest Research Institute • Supportive arts community • Accessible elected officials	• Military and veteran population (tied to the presence of military installations) • Proximity to Mexico and Latin America
Weaknesses	• Stringent incentives policy • Long lead times for site development • Support for mid-sized businesses • Perception as not business friendly • Poverty • Perceived safety of downtown • Transportation • Lack of vision • Too many organizations operating in silos • Airport limitations • Access to capital for small businesses • Affordable childcare (infant to three years old)	• Perceptions of the United States on the global stage

	High Degree of Control Local, Regional, State	Low Degree of Control National, Global
Opportunities	• Flexible incentives policy • Mixed-use developments throughout the city • HQ and corporate attraction strategy • Micro-credentialing for workforce preparedness • Cultivation of business opportunities in Latin America • Defense health and translational care technology • Building and marketing the San Antonio story beyond military and tourism • Developing homegrown founders through university partners • Proving ground for flood mitigation, heat mitigation, and resilience technology • Phase 2 of Ready to Work • Better coordination across organizations • One-stop-shop clearinghouse for small business programs • Leveraging major investments to benefit local small businesses • Creating downtown livability	• Military presence in San Antonio • Tourism patterns (both conferences and visitors)
Threats	• Either/or mindset • Bureaucracy and silos within city government • Perception city government is not business friendly • Long lead times for site readiness • Perceived inflexible incentives • Segregated neighborhoods • Heavily resourced competitors in mobility sector	• Rising cost of living and growing wealth gap • Retiring workers in skilled trades • AI-driven workforce disruptions • Cybersecurity risks • Rising energy prices • Tariffs & international trade disruptions • Climate change & natural disasters • Political instability • Federal funding uncertainty • ICE raid impacts on workforce • Patterns in tourism (both conferences and visitors)

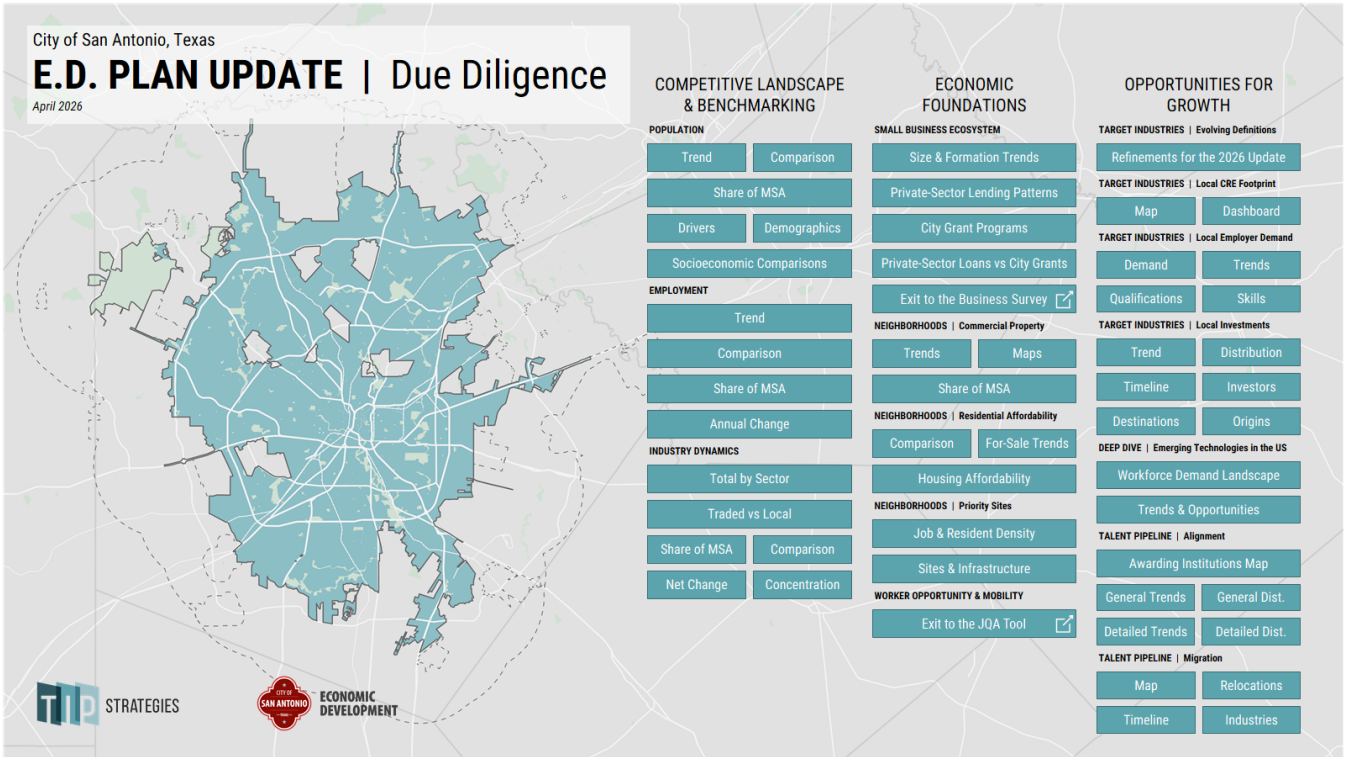
Source(s): TIP Strategies, Inc.

Appendix B: Quantitative Analysis

Benchmarking and Competitive Analysis

TIP conducted a strategic analysis of the City of San Antonio’s competitive position with comparisons to the metropolitan statistical area, state, and US, as well as a selection of peer communities. Initial data collection began in March 2026 during TIP’s discovery phase and the analytical work continued into the final phase of the engagement. An in-depth analysis, the *ED Plan Update Due Diligence*, was delivered to the City in July 2026 in an interactive data visualization, the menu of which is shown in Figure 11. Access to the full Tableau file is available [online](#).

Figure 11. Tableau Data Menu



Source(s): TIP Strategies, Inc.

The Competitive Landscape and Benchmarking analysis compared both the City of San Antonio and the San Antonio MSA to 17 different communities. This list of benchmark communities is consistent with the peer communities identified and assessed as part of the 2022 framework. The list includes other cities, MSAs, and the state and country. San Antonio and the MSA were compared to these benchmark communities across 23 distinct socioeconomic variables (see Figure 12).

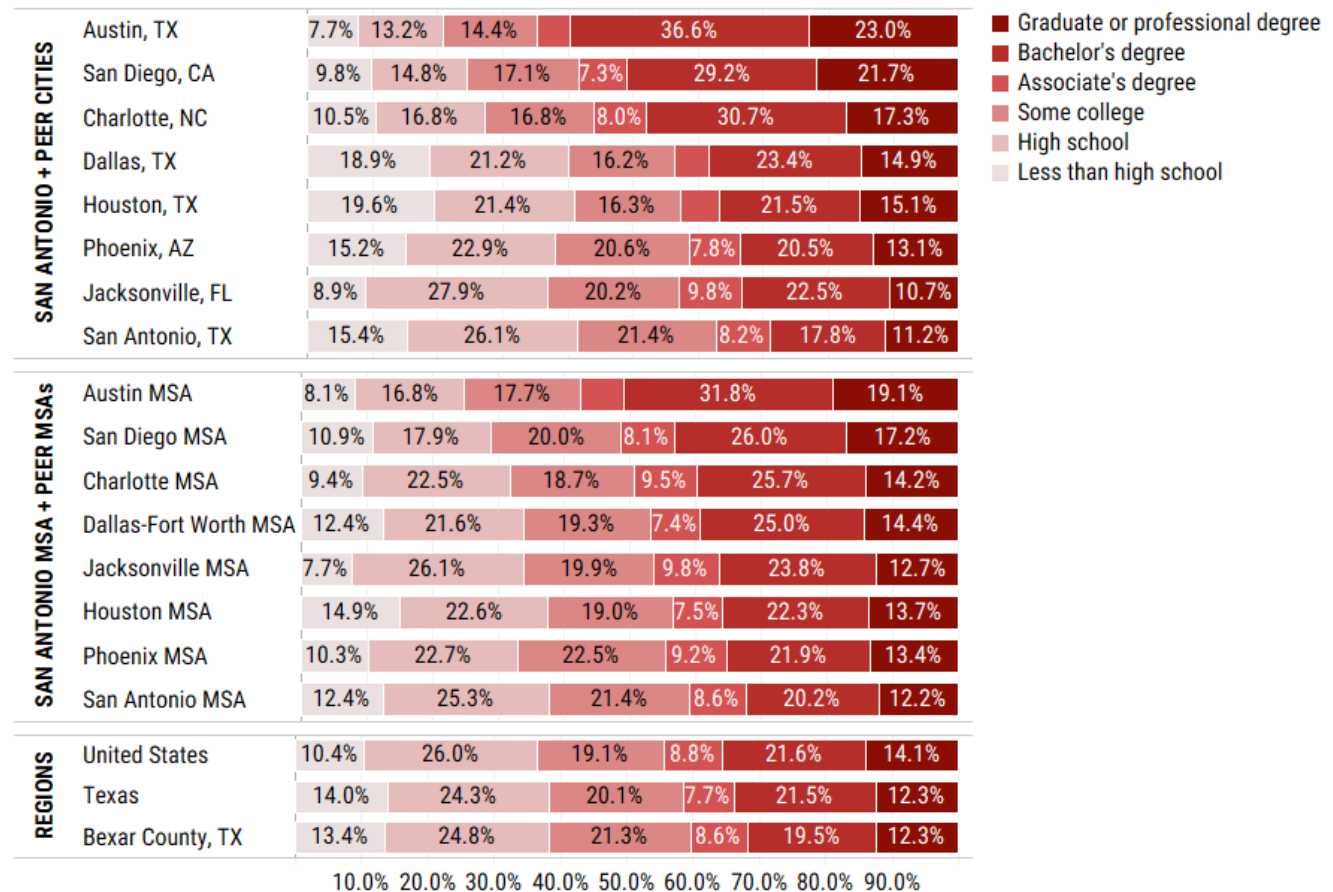
Figure 12. Benchmark Analysis Communities & Variables

Type	Communities and Variables		
Benchmark Communities	• City of Austin, TX • City of Charlotte, NC • City of Dallas, TX • City of Houston, TX • City of Jacksonville, FL • City of Phoenix, AZ • City of San Diego, CA	• Austin MSA • Charlotte MSA • Dallas-Fort Worth MSA • Houston MSA • Jacksonville MSA • Phoenix MSA • San Diego MSA	• Bexar County, TX • Texas • United States
Benchmarking Socioeconomic Comparison Variables	• Age Distribution • Commute Time • Educational Attainment • Foreign-Born Population • Health Insurance Coverage • Hispanic Population • Household Income • Household Income Distribution	• Household Sizes • Household Types • Labor Force by Gender • Labor Force Participation Rate • Labor Force Status • Languages Spoken at Home • Mobility • People with Disability Status	• Poverty Status • Race & Ethnicity • School Enrollment • Self-Employment Rate • SNAP Recipients • Unemployment Rate • Work from Home Workforce

Source(s): TIP Strategies, Inc.

Education. Compared to peer cities and metro areas, San Antonio has the lowest percentage of residents with a Bachelor's degree or more educational attainment. Just 29 percent of adults aged 25 and over in the City have a Bachelor's degree or more education, compared to 33.8 percent in the state and 35.7 percent in the nation. Since 2015, the percent of adults 25 and older with a degree, including an Associate's, a Bachelor's, or an advanced degree, has increased, though somewhat modestly. At the same time, the proportions of these adult residents who had less than a high school education or had some college education (but no degree) have declined, while the share with a high school education has remained roughly the same. This indicates that although San Antonio's educational attainment may be lower than peer regions, it is increasing slowly over time.

Figure 13. Educational Attainment of the Resident Population 25 Years and Over, 2024

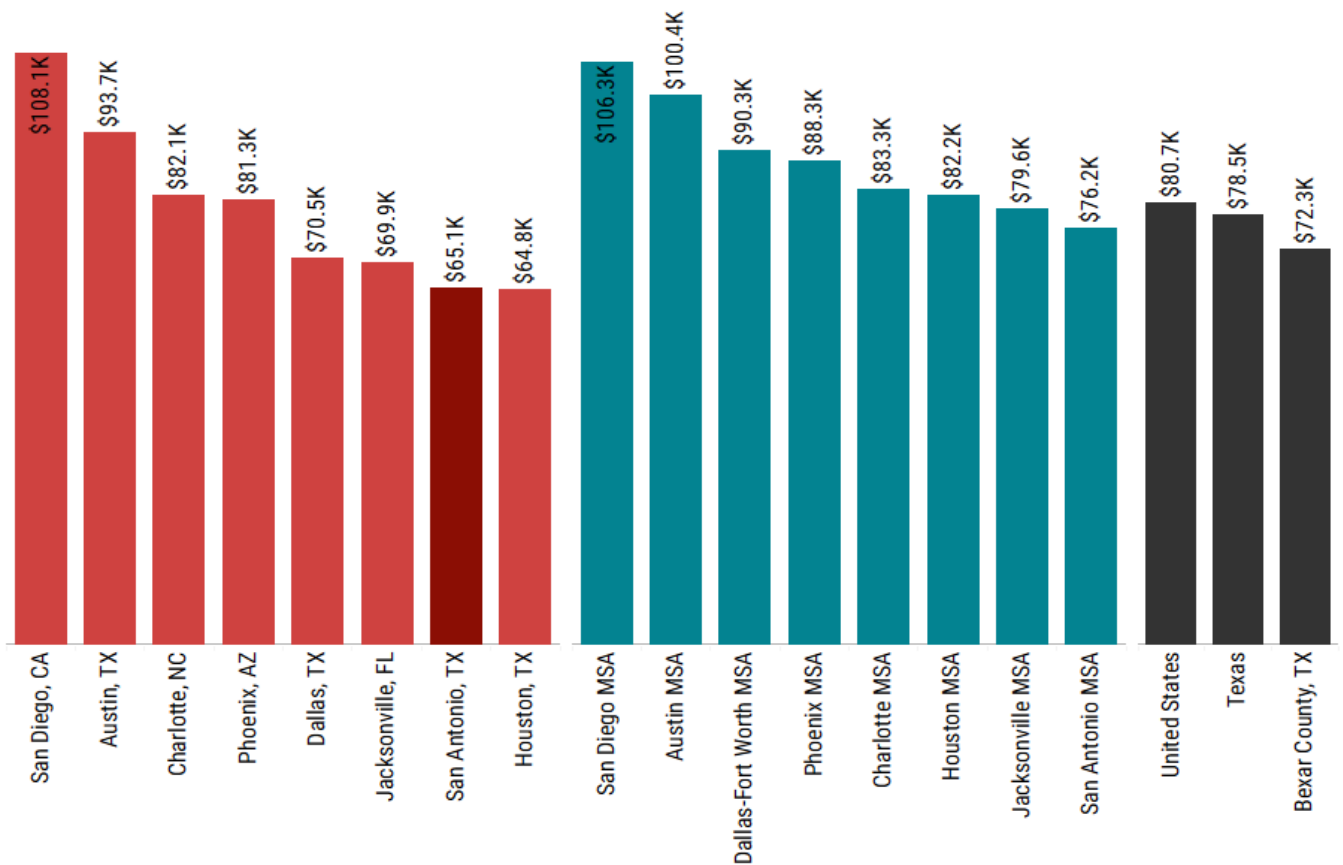


Source(s): 2024 American Community Survey (ACS) 5-year samples; TIP Strategies, Inc.

Note(s): Educational attainment only measured for population 25 and older. High school includes equivalency. Some college indicates no degree was received. Graduate degree includes professional degrees and doctoral programs. The San Antonio MSA consists of Atascosa, Banderita, Bexar, Comal, Guadalupe, Kendall, Medina, and Wilson Counties, TX.

Income. Lower educational attainment is often translated into lower earnings. This is generally the case in San Antonio as well with a relatively low median household income (\$65,056), which is just above Houston (\$64,813) but below other peer cities. The median household is earning more than it was in 2015 (\$61,865 in 2024 dollars), but the growth has been at a slower rate than other peer cities.

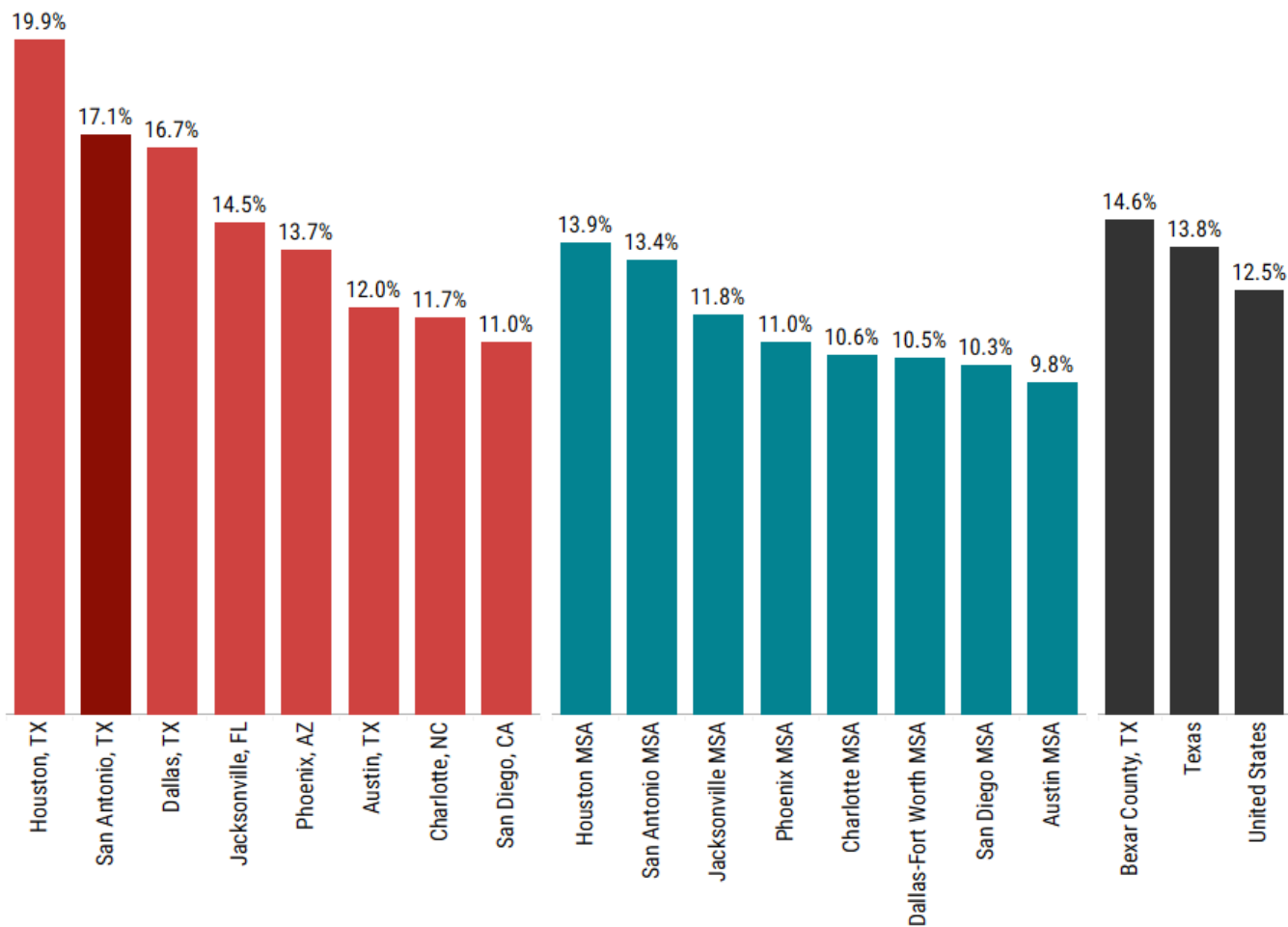
Figure 14. Median Household Income, 2024



Source(s): ACS 5-year samples; TIP Strategies, Inc.
Note(s): Median household income is calculated per household, which is composed of one or more people who occupy a housing unit.

Poverty. Likewise, San Antonio has the second-highest share of residents below the poverty line (17.1 percent), behind Houston (19.9 percent) and above state (13.8 percent) and national (12.5 percent) levels. However, this share has been declining slowly in recent years down from 19.8 in 2015.

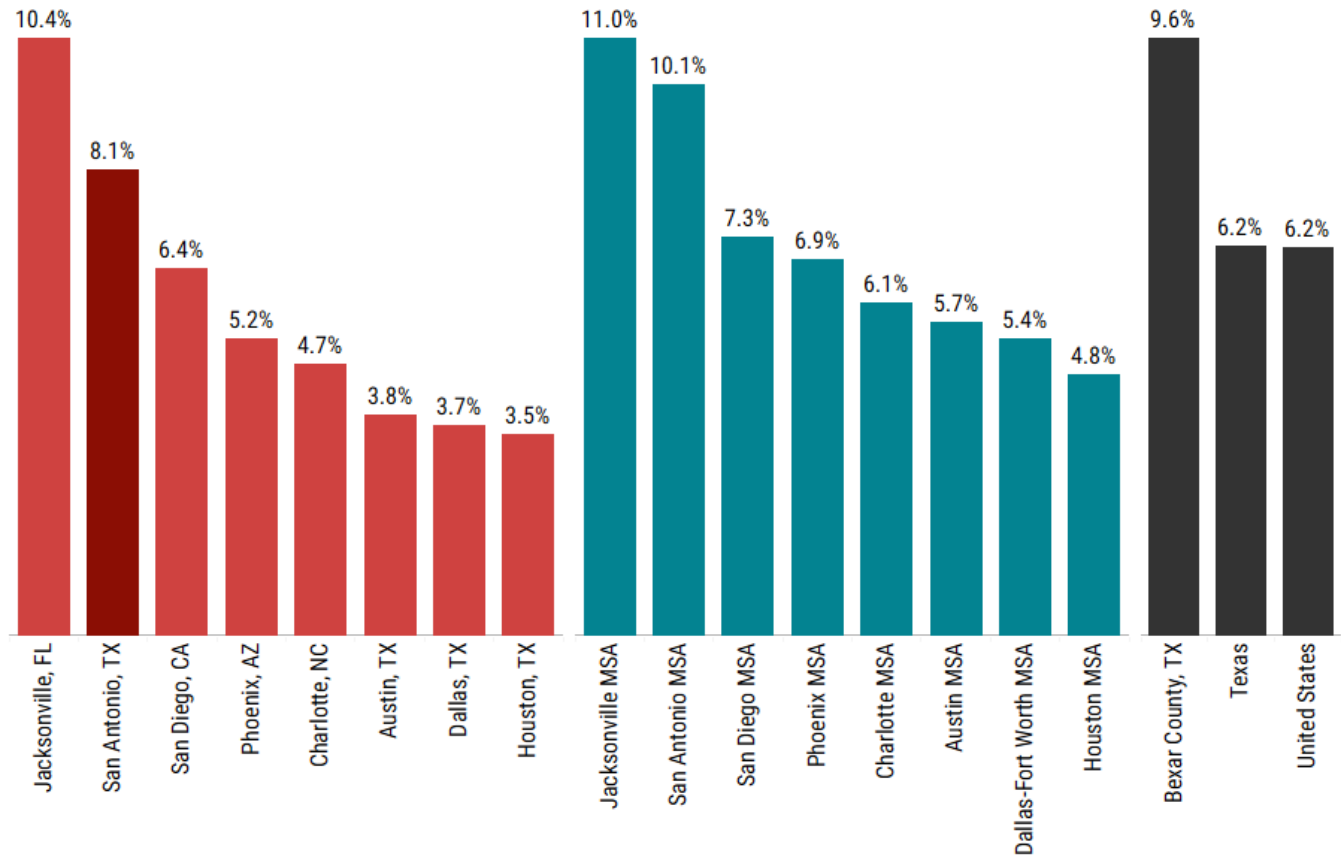
Figure 15. Poverty Status of the Resident Population, 2024



Source(s): ACS 5-year samples; TIP Strategies, Inc.
Note(s): A person’s poverty status is based on if the previous 12 months of income fell below the federal poverty level.

Veterans. Among peer communities, San Antonio is relatively unique in its number of veteran residents. Veterans account for more than eight percent of City residents, behind only Jacksonville, FL, with more than ten percent of residents with veteran status. This also puts San Antonio ahead of state and national proportions, both with about a six percent share of veterans. However, this proportion has shrunk slightly over the past decade down from 10.4 percent in 2015 as the number of residents grow and change. This is similar to that of other peers, the state, and nation, which have also seen declining veteran trends.

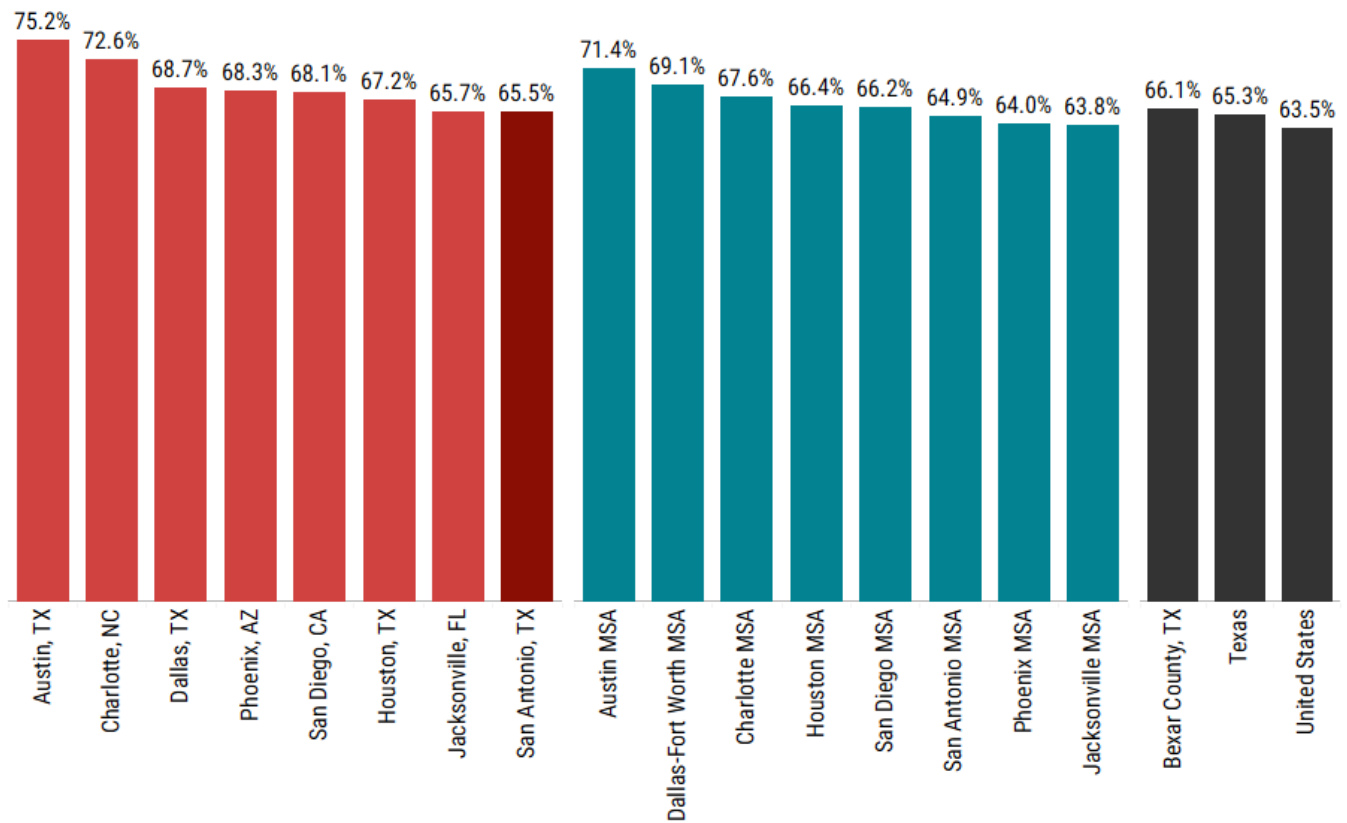
Figure 16. Veterans in the Civilian Population 18 Years and Over, 2024



Source(s): ACS 5-year samples; TIP Strategies, Inc.

Labor force participation. The labor force participation rate is the percentage of residents 16 and older who are employed or are unemployed and looking for work. Nationally, this rate was 63.5 percent in 2024. San Antonio had a slightly higher rate at 65.5 percent, which was above the US and TX (65.3 percent) but below other peer cities. The San Antonio rate has also stayed the same over the last 10 years, moving very little even amid changes to the population and economy.

Figure 17. Labor Force Participation Rate of the Resident Population 16 Years and Over, 2024



Source(s): ACS 5-year sample; TIP Strategies, Inc.
Note(s): Labor force participants include employed and unemployed persons. The participation rate is the ratio of participants to the resident population.

Target Industries

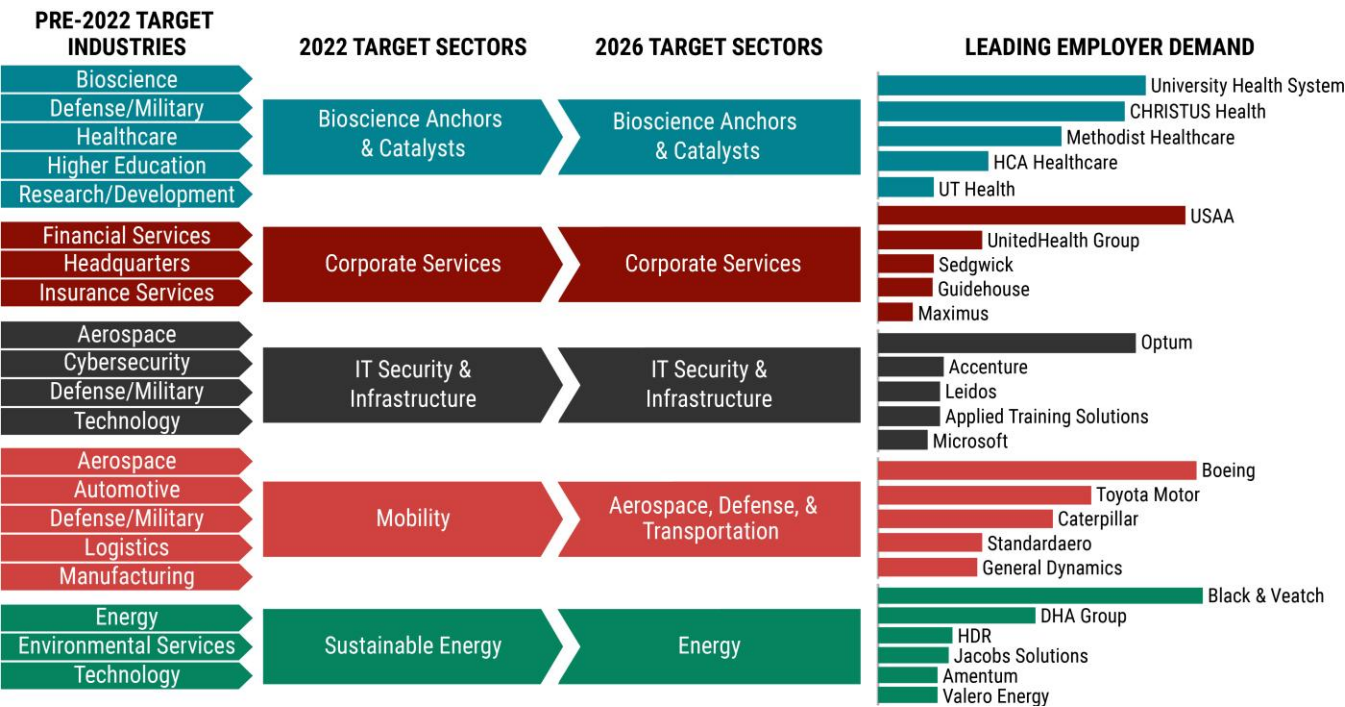
TIP revisited the City’s existing target industries (mobility, IT security and infrastructure, sustainable energy, bioscience anchors and catalysts, and corporate services). Through discussions with the City, the underlying target definitions were left unchanged for the framework update, though the names were tweaked slightly to align more broadly with the City’s opportunities. TIP assessed the continued relevance of the targets considering market dynamics, with an emphasis on supply chain and research and development opportunities.

Strategic Growth Area Analysis

TIP analyzed relevant job postings from representative employers for the twenty-four month period from July 2024 through June 2026 to identify in-demand occupations and specialized skills. Using data from Lightcast, TIP also assessed and analyzed the region’s workforce readiness for targeted investments and posed strategic questions about the alignment of the talent pipeline with the current needs of employers. Using data from CoStar Group, this analysis was further supplemented by mapping the scale and characteristics of each target industry’s real estate footprint in the MSA.

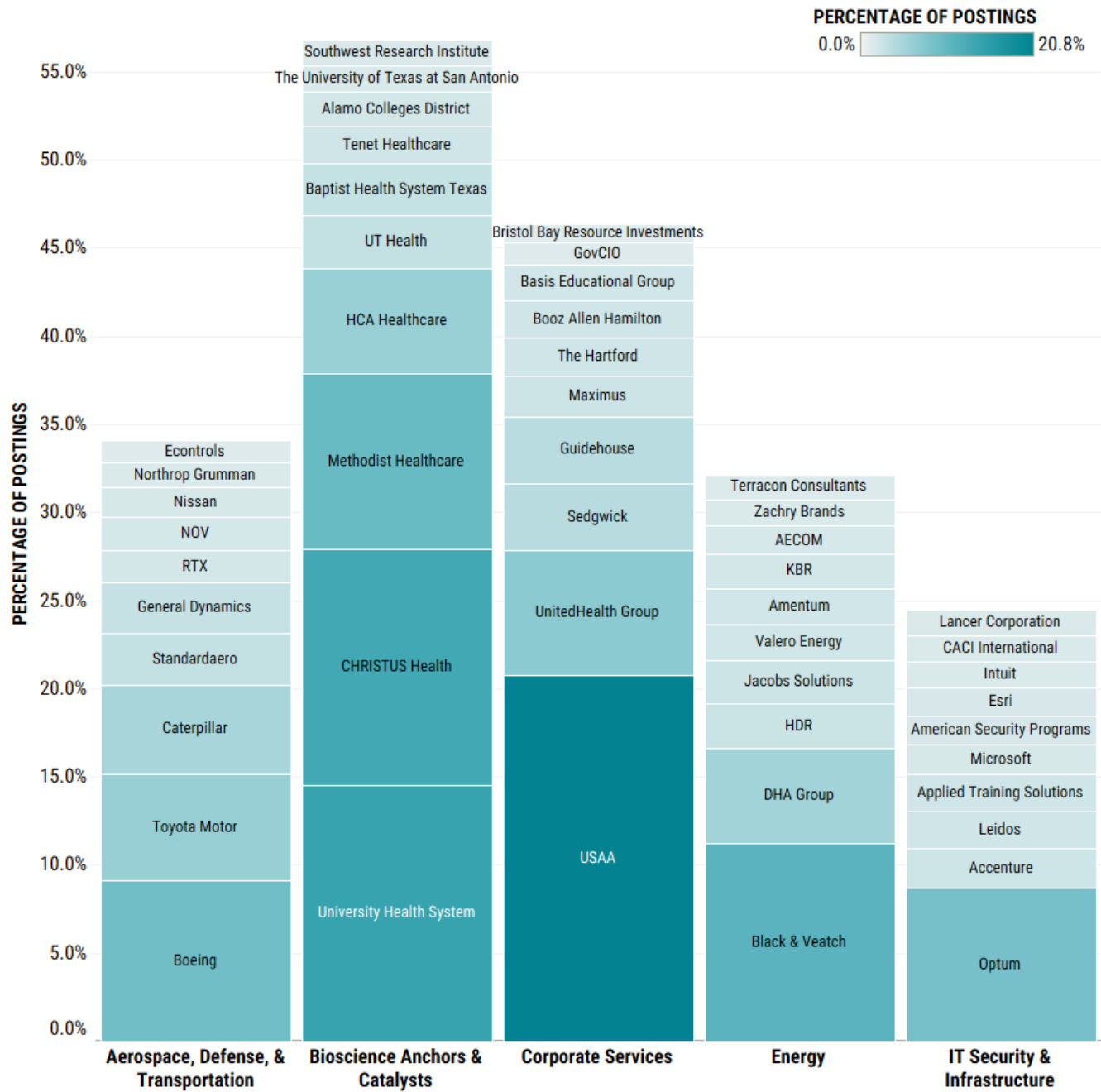
Two of the five target sector names from the 2022 plan were adjusted. Mobility was clarified to be Aerospace, Defense, & Transportation. Sustainable Energy was abbreviated to Energy. The underlying definitions were left unchanged. The analysis focused on the employer demand for physical space and talent. TIP found that employers in each of the five target sectors had a dominant real estate footprint in the City relative to the surrounding areas of the MSA. Among other things, TIP’s analysis of job postings across each of the five target sectors documented hiring demand among major employers, occupational patterns, job posting intensity, educational and work experience thresholds, and common and specialized skill requirements specified by employers in each sector. Figure 18 captures the target sector definitions and Figure 19 illustrates the job posting demand by the top ten employers in each target sector.

Figure 18. Target Sector Definitions



Source(s): City of San Antonio; US Economic Development Administration, Institute for Strategy and Competitiveness, Harvard Business School; TIP Strategies, Inc.

Figure 19. Job Posting Demand by Top 10 Employers
Based on an analysis of two years of job postings in the San Antonio MSA, July 2024 through June 2026



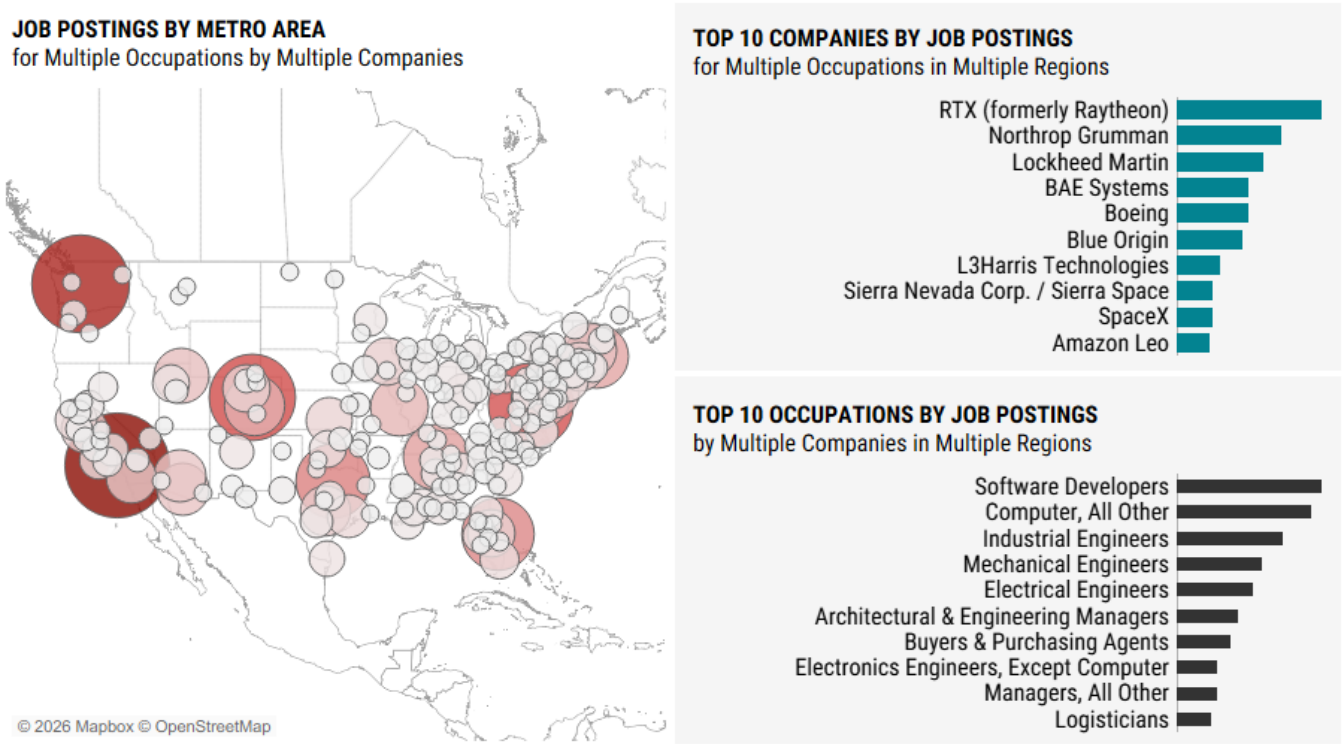
Source(s): Lightcast 2026.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.
Note(s): Notes: Job postings include non-staffing, unique, newly posted job postings for permanent full-time, part-time, and flexible positions, excluding internships, between July 2024 and June 2026. Only includes top 10 employers by job postings per target.

Emerging Technology and Innovation Trends

TIP gathered and analyzed information related to emerging national and international trends and technologies that could impact the City’s target industries. The analysis concentrated on four emerging technologies (artificial intelligence, bioscience, space/aerospace, and quantum computing) that overlap or otherwise have the potential to impact the City’s existing target industries. The process for this task was qualitative, and involved a deep dive analysis of business articles, industry reports and white papers, and SEC disclosure filings.

For each of the emerging technologies, TIP documented key players, customers and suppliers, upside and downside risks, and other drivers and trends such as labor, regulatory, and public policy challenges as well as new scientific innovations and general infrastructure requirements. Figure 20 shows a sample of the workforce demand data collected for emerging technologies, specifically within the space and aerospace industry. Figure 21 shows an example of trends and opportunities for emerging technologies, specifically within the bioscience industry.

Figure 20. Workforce Demand Landscape for Space and Aerospace
Job posting by Space and Aerospace Companies nationally, June 2024 through May 2026



Source(s): Lightcast 2026.1—QCEW Employees, Non-QCEW Employees, and Self-Employed; TIP Strategies, Inc.

Note(s): Job postings include unique, newly-posted job postings for full-time positions between June 2024 and May 2026 by space and aerospace companies that include the keywords, “Aerospace,” “Satellite,” “Orbit,” “Spacecraft,” “Astronautic,” “Launch Vehicle,” “Lunar,” “Space Systems,” “Space Exploration,” “Space Flight,” or “Deep Space,” along with other company-specific filtering parameters. Space and Aerospace companies are those identified among the industry’s top employers by national posting volume, broader industry leaders captured through AI-assisted market research, and organizations strategically supplemented for their specific economic relevance to the San Antonio region. Only includes the top 100 occupations per company, metro region, and date. Postings with unclassified occupations are also excluded. Map only includes metro areas with at least 10 postings in the selection.

Figure 21. Trends and Opportunities for Bioscience

Artificial Intelligence	Key Players	Bioscience Drivers & Trends Workforce issues A shortage of specialized scientific talent and an aging workforce are affecting the bioscience industry. Organizations are pivoting toward skills-based hiring, internal upskilling, and the integration of AI to augment data-driven research roles. Simultaneously, rising employee turnover and tightening global mobility restrictions have forced a shift in talent acquisition. Companies increasingly lean on flexible workforce models, including cross-border networks and contractors, while deploying equity-based incentives to retain key personnel. Regulatory & policy context The proposed creation of a National Biotechnology Coordination Office under the 2025 US National Biotechnology Initiative Act aims to centralize oversight across federal agencies. Biotechnology innovators face distinct operational and compliance variables. While the 2022 US Food and Drug Omnibus Reform Act (FDORA) introduced pathways for expedited reviews, enterprises must navigate regulatory fee structures and foreign facility inspections. The ecosystem is influenced by pricing frameworks, such as the 2022 US Inflation Reduction Act, alongside trade policies. These measures alter capital allocation and investor confidence, requiring domestic developers to balance manufacturing reshoring initiatives against the capital required to advance therapies. Innovation, science, & technology Capital investment is expanding advanced manufacturing facilities for complex biological treatments, supported by external production partners and research hubs. Generative AI tools automate the discovery of potential treatments by simulating molecular interactions, and predictive models assess safety and efficacy long before physical testing begins. In clinical development, intelligent systems are streamlining study design, automating protocol management, and analyzing real-world patient data. These tools allow researchers to shift from reactive processes to proactive, simulation-based decision-making. Infrastructure requirements Commercial wet and dry lab spaces form the physical foundation of the bioscience industry. The availability of these facilities is concentrated in a few US markets, such as San Diego, New York/New Jersey, and Boston. Real Estate Investment Trusts (REITs) like Pasadena, CA-based Alexandria Real Estate Equities reinforce this geographic concentration by focusing their capital within established clusters. These hubs require high-capacity, redundant power grids to protect experiments and isolated wastewater systems engineered to treat bio-waste. To support these facilities, the industry demands a digital backbone anchored by low-latency fiber-optic networks. This fiber connects local labs to shared supercomputers and cloud platforms, allowing early-stage companies to run AI models for molecular design without massive capital investments. Cold-chain logistics networks to distribute temperature-sensitive biological therapies are another infrastructural requirement.	Bioscience Glossary Active Components: The biological or chemical ingredients in a medicine that cure the disease, distinct from the inactive liquids, binders, or stabilizers mixed into the final pill or injection. Cell Therapy: A medical treatment where doctors harvest living cells (often from the patient's own immune system), genetically engineer them in a lab to fight a specific disease, and inject them back into the body instead of giving a patient a chemical pill. Molecular Testing: Automated lab tests that bypass symptoms and look directly at the molecular level of a biological sample to pinpoint exactly what virus or disease is present.
	Drivers & Trends		
	Markets & Suppliers		
	Risks		
Bioscience	Key Players		
	Drivers & Trends		
	Markets & Suppliers		
	Risks		
Quantum Computing	Key Players		
	Drivers & Trends		
	Markets & Suppliers		
	Risks		
Space & Aerospace	Key Players		
	Drivers & Trends		
	Markets & Suppliers		
	Risks		

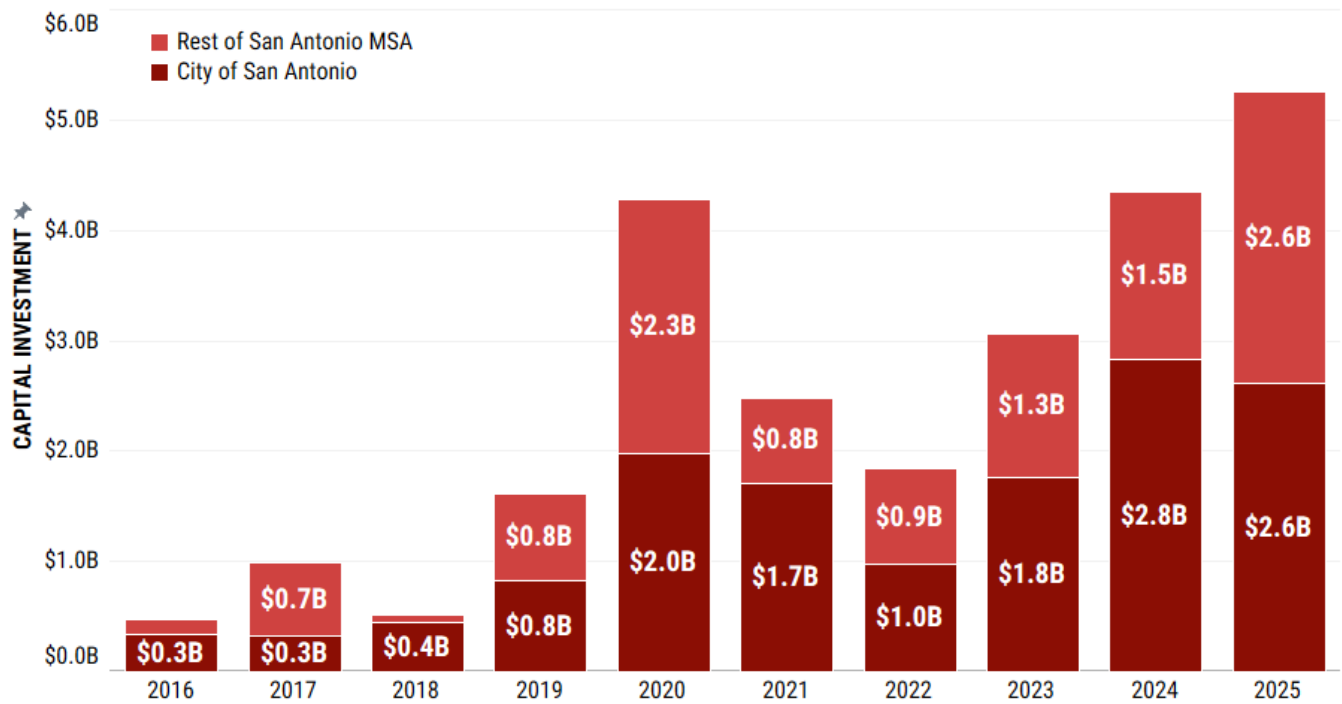
Source(s): Source: TIP Strategies, Inc.
Note(s): All research and writing was completed by TIP Strategies between May 2026 and July 2026. For more on our process, [see the Sources, Methods, & AI Usage page](#) in Tableau.

International and Cross-State Corporate Expansion Trends

TIP gathered information and analyzed patterns of foreign and cross-state industry site selections in the San Antonio MSA, including the use of data from fDi Markets, and a scan of investments in each of the City’s target sectors.

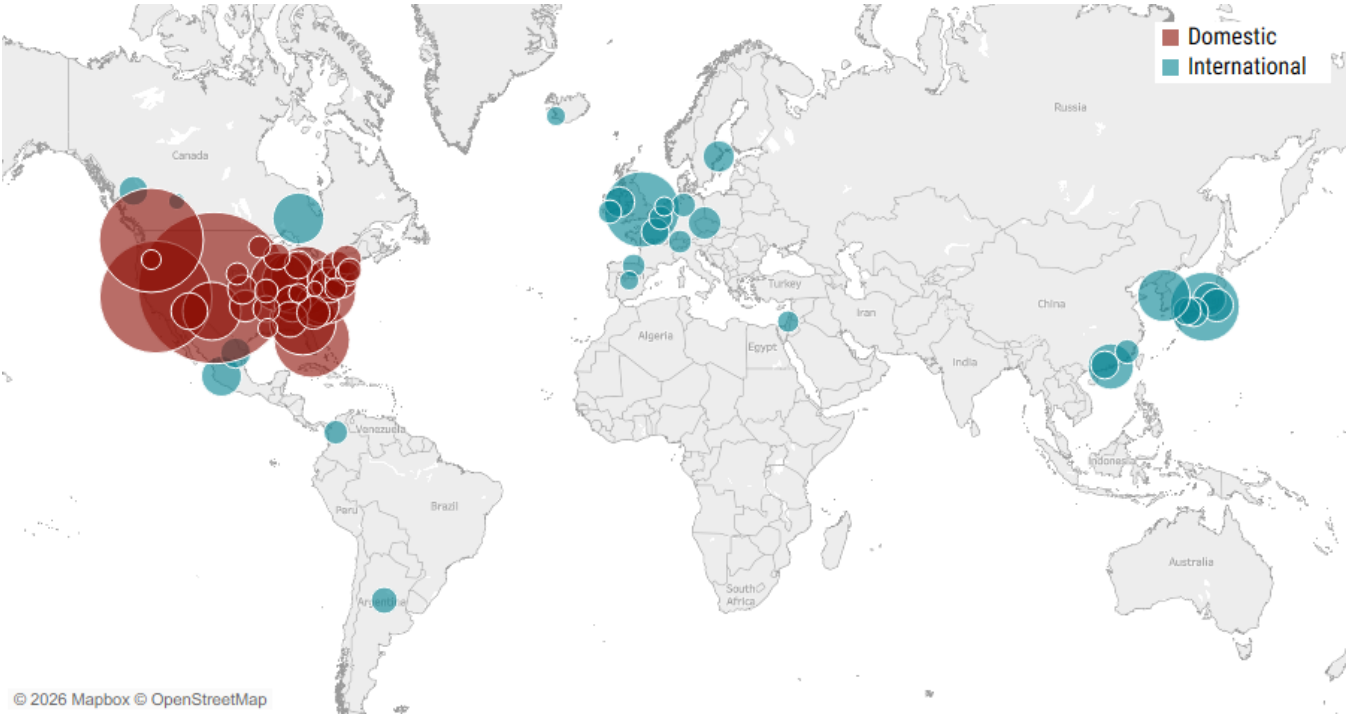
TIP found that over the past decade in the San Antonio MSA, the City garnered a majority of out-of-state capital investment announcements relative to the rest of the MSA in seven out of ten years. This work documented the companies making the announcements, the capital investment anticipated, the origin (i.e., headquarters location) of the investor, and the industry or activity of the investment announced in the San Antonio MSA. Figure 22 and Figure 23 capture the investment announcements by value and origins.

Figure 22. Out-of-State Investment Announcements by Value, 2016–2025



Source(s): fDi Markets; TIP Strategies, Inc.
Note(s): Some announced projects may be unconfirmed or unfulfilled. Company ownership may have changed since the original announcement was made. Some companies may no longer be in business or operating under the same name.

Figure 23. Out-of-State Investment Announcements by Place of Origin, 2016–2025



Source(s): fDi Markets; TIP Strategies, Inc.
Note(s): Circle size is proportional to investment value for the period shown. Some announced projects may be unconfirmed or unfulfilled. Company ownership may have changed since the original announcement was made. Some companies may no longer be in business or operating under the same name.

Talent Pipeline

TIP assessed the alignment of the area's current talent supply and educational infrastructure with the needs of employers in target industries using relevant data sources.

Talent Supply

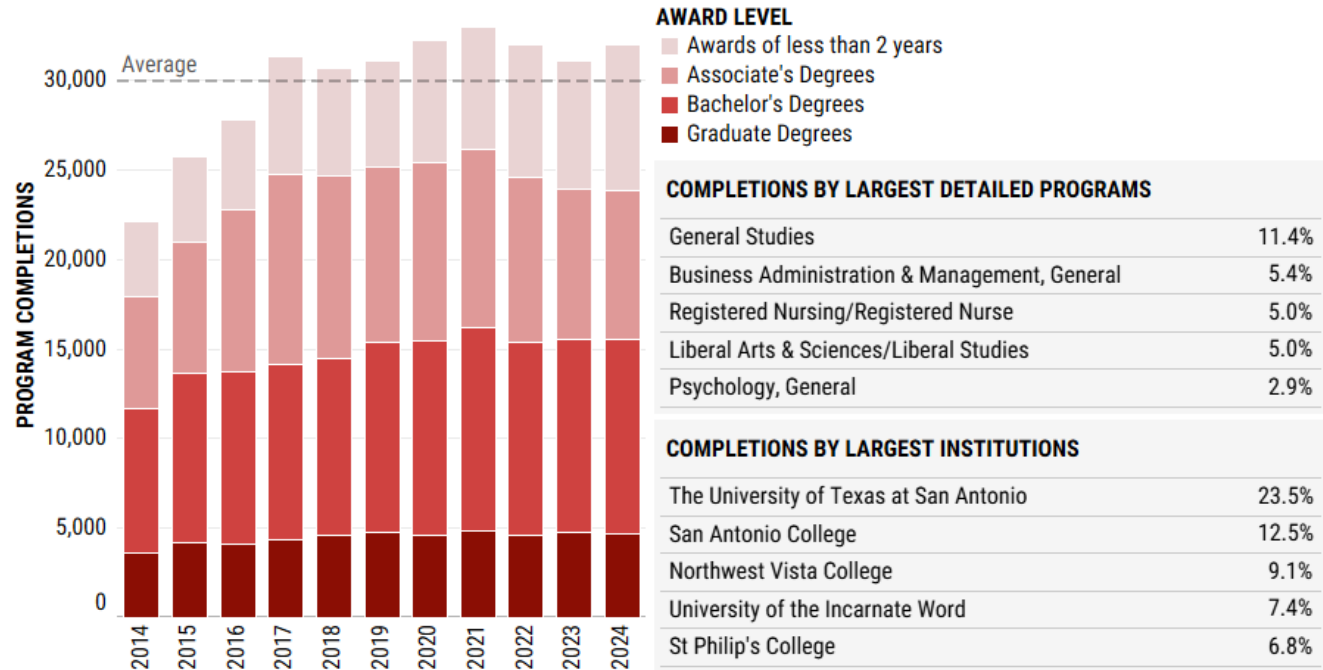
TIP documented existing postsecondary offerings in the region and illustrated the potential supply of graduates. The Integrated Postsecondary Education Data System (IPEDS) dataset assembled by the National Center for Education Statistics (NCES) was used to analyze higher education completion patterns for institutions in the San Antonio MSA.

TIP analyzed completions in the San Antonio MSA back to 2014. The analysis found that the volume of completions grew briskly in the 2014-2017 period, but since 2017 the volume has leveled off and become relatively steady year to year. Since 2014 Bachelor's degrees have consistently accounted for about a third of awards conferred. At the same time, the share of Associate's degrees has declined slightly, and the share of short-term awards (earned in less than two years) has increased to about one in four in 2024. This trend suggests short-term awards are becoming more popular among workers seeking to learn new skills rather than longer, more in-depth, and more expensive programs. Figure 24 captures the general program completion trends from 2014-2024.

Healthcare programs dominate the completions with more than 67,000 since 2014 (one of every five awards in the MSA) occurring in this field of study. In contrast to the general trend, the share of Bachelor's degrees and Graduate degrees within healthcare programs has increased from about 30 percent in 2014 to more than 40 percent in 2024. The prominence of healthcare programs broadly aligns with the needs of industry employers in the bioscience anchors & catalyst target industry. More than half (56.3 percent) of job postings in this target industry over a two-year period were for healthcare practitioner and technical occupations. These occupations are often fed by the popular health professions and related programs supplied by regional institutions including UT Health San Antonio, the Galen College of Nursing, and the University of the Incarnate Word. Figure 25 captures the detailed program completion trends in health professions and related programs from 2014–2024.

Other target industries are not as concentrated in their in-demand occupations as bioscience. About one quarter of job postings by the aerospace, defense, and transportation target industry were for transportation and material moving occupations and another 13 percent were for installation, maintenance, and repair roles. Some of these occupations, such as industrial engineers, are fed by graduates of 4-year engineering programs. Technician, production, and repair roles, such as Automotive Service Technicians, Aircraft Mechanics and Technicians, Maintenance and Repair Workers, and other Production Workers, can be filled by graduates of shorter-term engineering-related technology programs or mechanic and repair technology programs.

Figure 24. General Program Completion Trends, 2014–2024

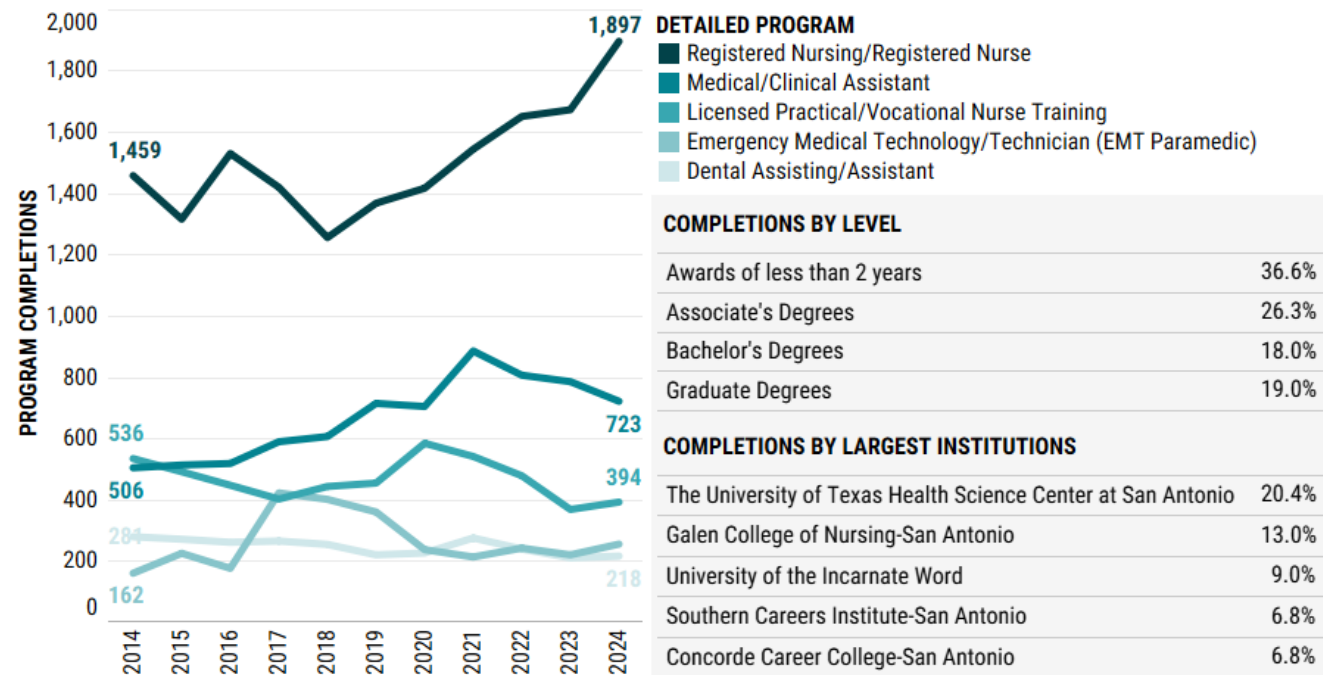


Source(s): National Center for Education Statistics (NCES), Integrated Postsecondary Education Data System (IPEDS); Lightcast 2026.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; US Department of Homeland Security (DHS), Student and Exchange Visitor Program; TIP Strategies, Inc.

Note(s): Includes only general programs with at least 25 average annual completions 2014–2024. Associate's Degrees include certificates earned in more than two and less than four years. Graduate Degrees include professional certificates, master's degrees, and doctoral degrees.

Figure 25. Detailed Program Completion Trends, 2014–2024

Health profession and Related program completions in San Antonio MSA institutions



Source(s): NCES, IPEDS; Lightcast 2026.1 – QCEW Employees, Non-QCEW Employees, and Self-Employed; BLS; DHS, Student and Exchange Visitor Program; TIP Strategies, Inc.

Note(s): Includes only general programs with at least 25 average annual completions 2014–2024. Associate's Degrees include certificates earned in more than two and less than four years. Graduate Degrees include professional certificates, master's degrees, and doctoral degrees.

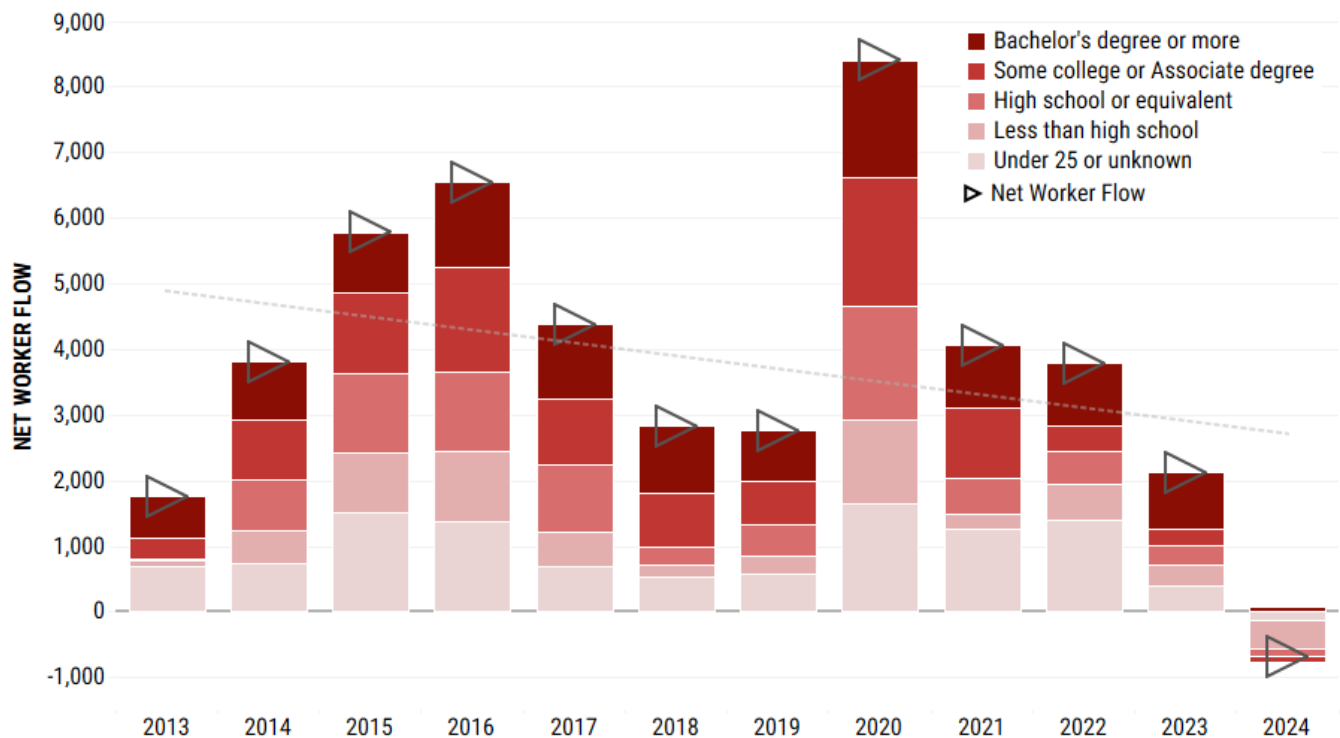
Worker Migration, Attraction, and Retention

TIP analyzed talent inflows and outflows and prepared a talent flow visualization tool to illustrate workforce movement patterns. Because talent attraction and retention are fundamental economic development concerns, TIP relied on the US Census Bureau's Longitudinal Employer-Household Dynamics' dataset for Job-to-Job Flows (J2J) to document movements of workers in and out of the San Antonio MSA.

The J2J dataset showed a rising net inflow of workers into the San Antonio MSA up until 2016 when the net inflow peaked and began subsiding. While there was a brief anomaly of in-migration to San Antonio in 2020 during the COVID outbreak, the slowing pattern otherwise resumed after the pandemic faded. By 2024, the net inflow had become a net outflow. The analysis further uncovered patterns in worker origins and destinations that may not have been previously documented. Net outmigration from San Antonio is mostly limited to the Austin MSA, and those migration numbers to Austin are extensive. The net inflows of workers to San Antonio are more geographically widespread, with new workers coming primarily from rural Texas and MSAs along the Texas border. Among out-of-state MSAs, Los Angeles has been the biggest cumulative source of new workers since 2013.

Figure 26 and Figure 27 capture the net flow of worker migration to and from San Antonio.

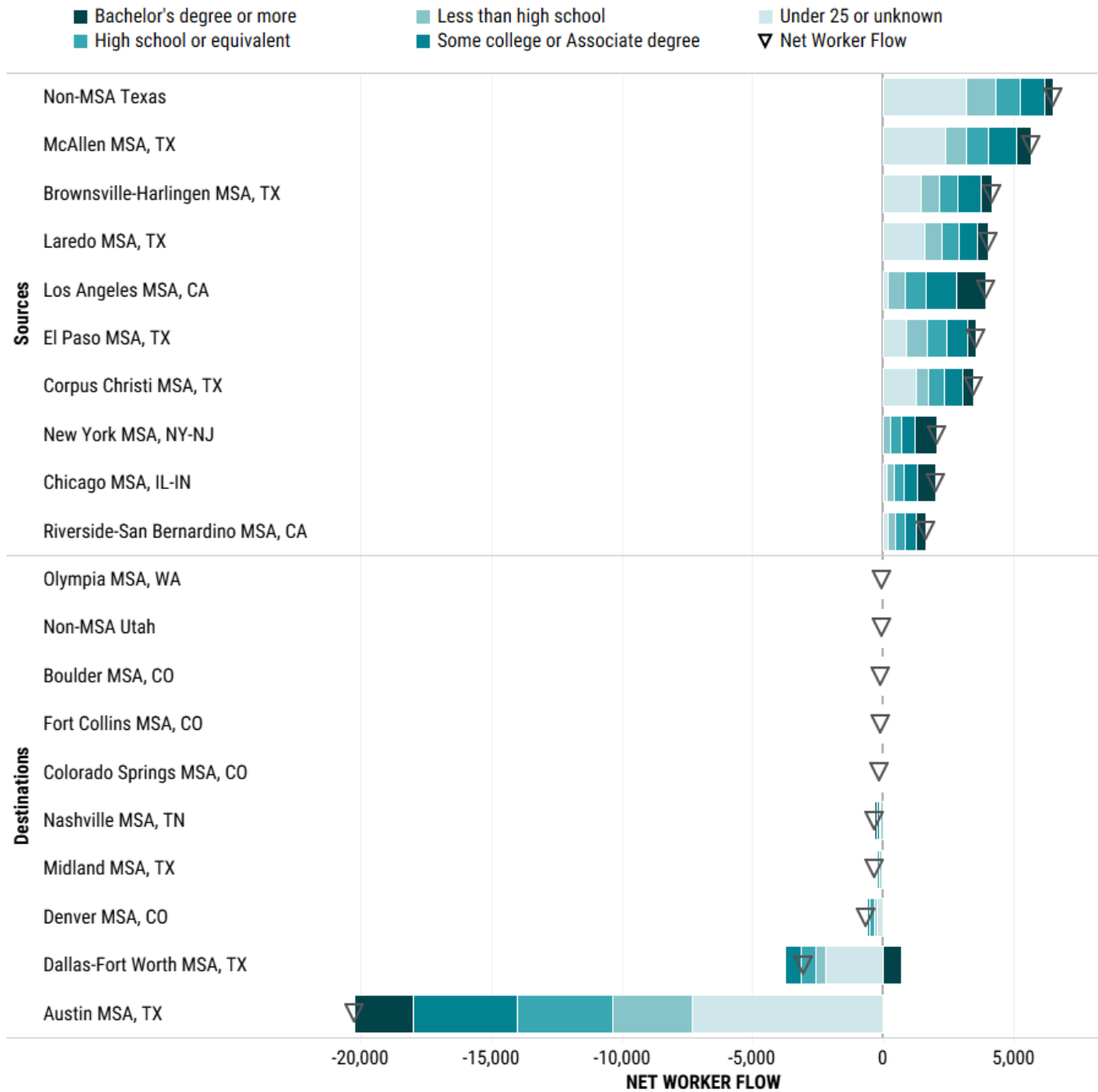
Figure 26. Net Flow of Workers to and from San Antonio MSA



Source(s): US Census Bureau's Longitudinal Employer-Household Dynamics (LEHD), Job-to-Job Flow (JSJ); TIP Strategies, Inc.

Note(s): Data includes hires and separations of workers between establishments who experienced brief unemployment (one quarter or less). Only establishments with unemployment insurance (UI) covered employees are included. The most recent data (R2025Q4) are used. Some states are missing data for the most recent period and are limited to previous quarters

Figure 27. Net Flow of Workers to and from San Antonio MSA by Top Sources and Destinations



Source(s): US Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD), Job-to-Job Flow (JSJ); TIP Strategies, Inc.
Note(s): Data includes hires and separations of workers between establishments who experienced brief unemployment (on quarter or less). Only establishments with unemployment insurance (UI) covered employees are included. The most recent data (R2025Q4) are used. Some states are missing data for the most recent period and are limited to previous quarters. Non-MSA regions include all counties in a state not part of a metropolitan statistical area (MSA); this includes counties in micropolitan and rural areas.

Worker Opportunity and Mobility

TIP conducted an analysis of worker opportunity and economic mobility to support development and implementation of workforce-related strategies and recommendations. Utilizing TIP's Job Quality & Access (JQA) analytical tool and relevant data sources, TIP has identified and evaluated occupations and career pathways for job quality based on earnings, stability, benefits, and opportunities for career advancement. This included an analysis of job access, measured by barriers to entry, job flexibility, and the demographic compositions of each occupation. Other relevant factors, such as the spatial distribution of workers across the City, estimating regional transportation access and demand patterns, and a focus on San Antonio Ready to Work's target occupations, also contributed to this analysis.

The JQA tool integrated data from a variety of public and propriety sources, including employment, earnings, unemployment, and turnover data from Lightcast and the US Bureau of Labor Statics; occupation characteristics (i.e., required education and experience, structure and flexibility, and related careers) from the US Department of Labor's Occupational Information Network (O*NET); employer-provided benefit data from the US Bureau of Labor Statistic's National Compensation Survey; and population, work-from-home rates, employer-provided health insurance, and other contextual social and economic metrics from the US Census Bureau. For each occupation, these metrics were compared to benchmarks to evaluate if the job scored higher or lower, informing factors of job quality and access. A key job quality measure compared each occupation's earnings to a regional living wage, provided by the Massachusetts Institute of Technology, that reflects the needs of a certain household type (e.g., a single adult, a household with one earner and one stay-at-home parent, a dual-income household, etc.). This feature allows for a multi-perspective approach to job quality, indicating that some occupations may be higher quality for some households and lower quality for others, depending on minimum living wage needs.

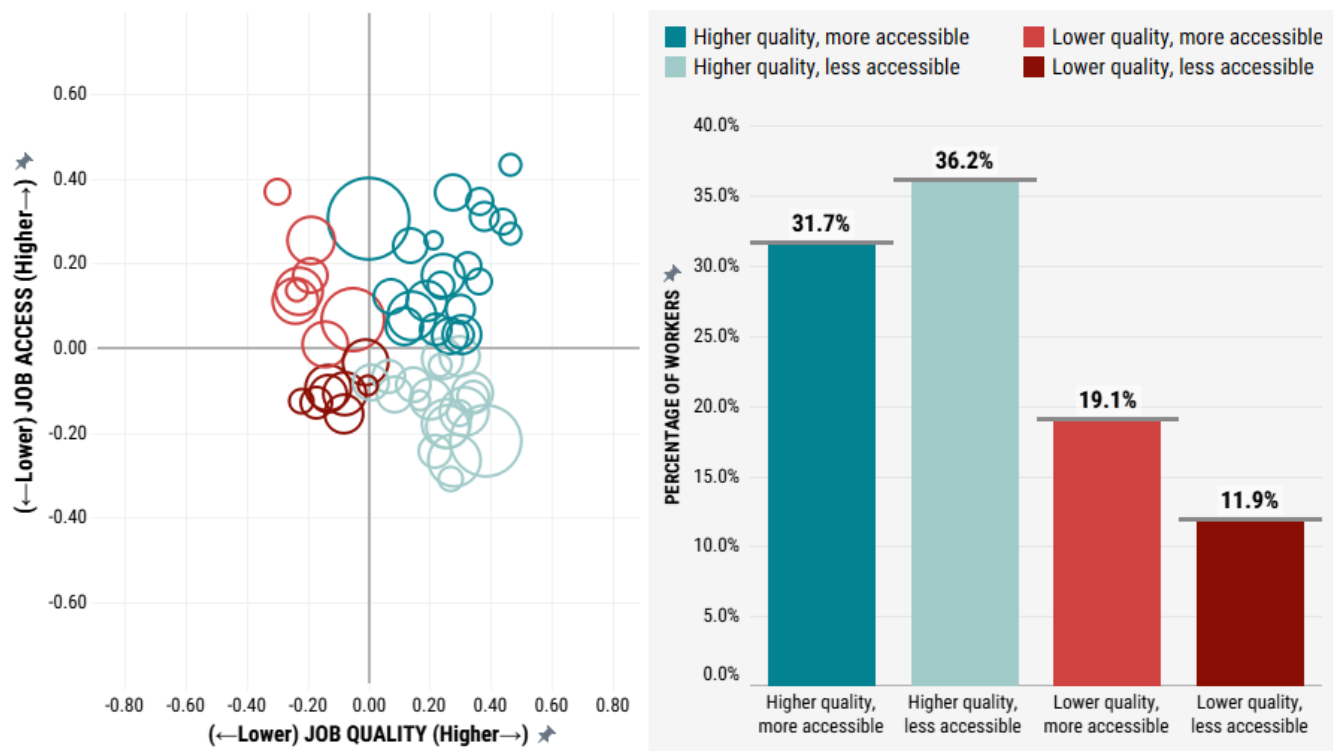
Figure 28 captures the occupation plot of the JQA tool, and Figure 29 illustrates the quality and accessibility of target occupations under the San Antonio Ready to Work Program.

Many occupations straddle the job quality threshold, indicating that shifts in household living wage needs may significantly alter the job quality and access landscape. More than 70 percent of San Antonio MSA residents work in occupations considered higher quality for a single adult, generally satisfying the hourly living wage of \$20.33, and nearly 40 percent of workers are in higher quality and more accessible occupations from this perspective, representing more than 500,000 workers. However, for a household with one working adult and one at-home parent with two children, the high-quality share drops to 58 percent and the high-quality and high-access share to 31 percent. This pattern repeats with more extremes within subgroups of occupations. For several occupations targeted by San Antonio Ready to Work, especially in the construction/trades/utilities and transportation/warehousing industries, shifting from the perspective of a single adult to a single-earner and at-home parent household changes the outlook. For a single adult, nearly 50 percent of the targeted construction occupations and all of the targeted transportation occupations are higher quality, but for a single earner and at-home parent household, those drop to 18 percent and 16 percent, respectively. While quality job opportunities exist, aligning workers with jobs that satisfy the quality definition for their household perspective requires understanding the needs and qualifications of individual job seekers.

Access to the full Job Quality & Access tool can be found at:

<https://public.tableau.com/app/profile/tipstrategies.1/viz/SanAntonioTXJobQualityAccessAnalysis/Menu>

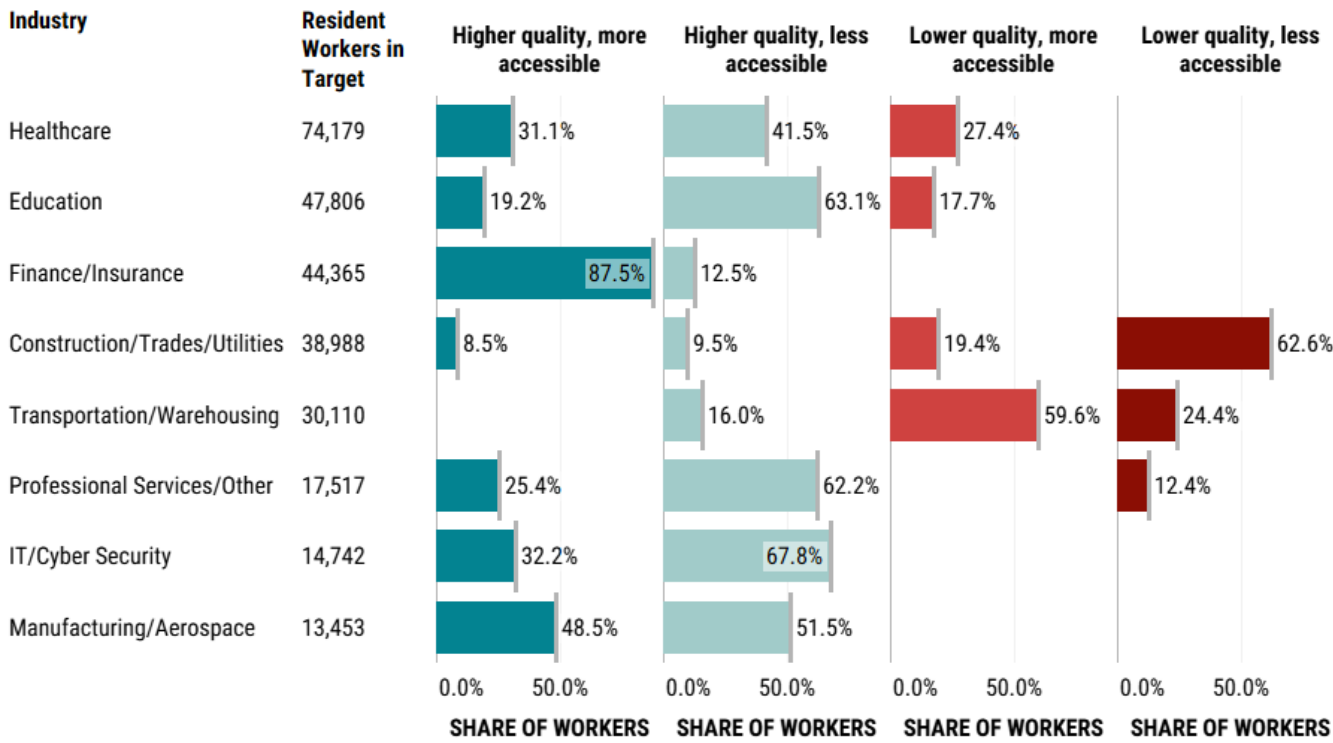
Figure 28. Job Quality & Access Tool Occupation Plot
San Antonio Ready to Work occupations in the San Antonio MSA, 2025



Source(s): City of San Antonio; San Antonio Ready to Work; Lightcast 2026.1—QCEW Employees, Non-QCEW Employees, Self-Employed; Massachusetts Institute of Technology, Living Wage Calculator, 2025; US Bureau of Labor Statistics (BLS), National Compensation Survey 2025; US Census Bureau, American Community Survey 2024 5-year aggregate sample; US Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement (ASEC) in 2025; US Census Bureau, Population Estimates Program 2024 Vintage; US Department of Labor (DOL), Employment and Training Administration, Occupational Information Network (O*NET) version 30.1; TIP Strategies.

Note(s): Occupations with fewer than 5 resident workers are excluded.

Figure 29. Job Quality & Access Tool by Ready to Work Target Occupations



Source(s): City of San Antonio; San Antonio Ready to Work; Lightcast 2026.1—QCEW Employees, Non-QCEW Employees, Self-Employed; Massachusetts Institute of Technology, Living Wage Calculator, 2025; US Bureau of Labor Statistics (BLS), National Compensation Survey 2025; US Census Bureau, American Community Survey 2024 5-year aggregate sample; US Census Bureau, Current Population Survey (CPS), Annual Social and Economic Supplement (ASEC) in 2025; US Census Bureau, Population Estimates Program 2024 Vintage; US Department of Labor (DOL), Employment and Training Administration, Occupational Information Network (O*NET) version 30.1; TIP Strategies, Inc.

Note(s): Occupations with fewer than 5 resident workers are excluded.

Placemaking and Real Estate

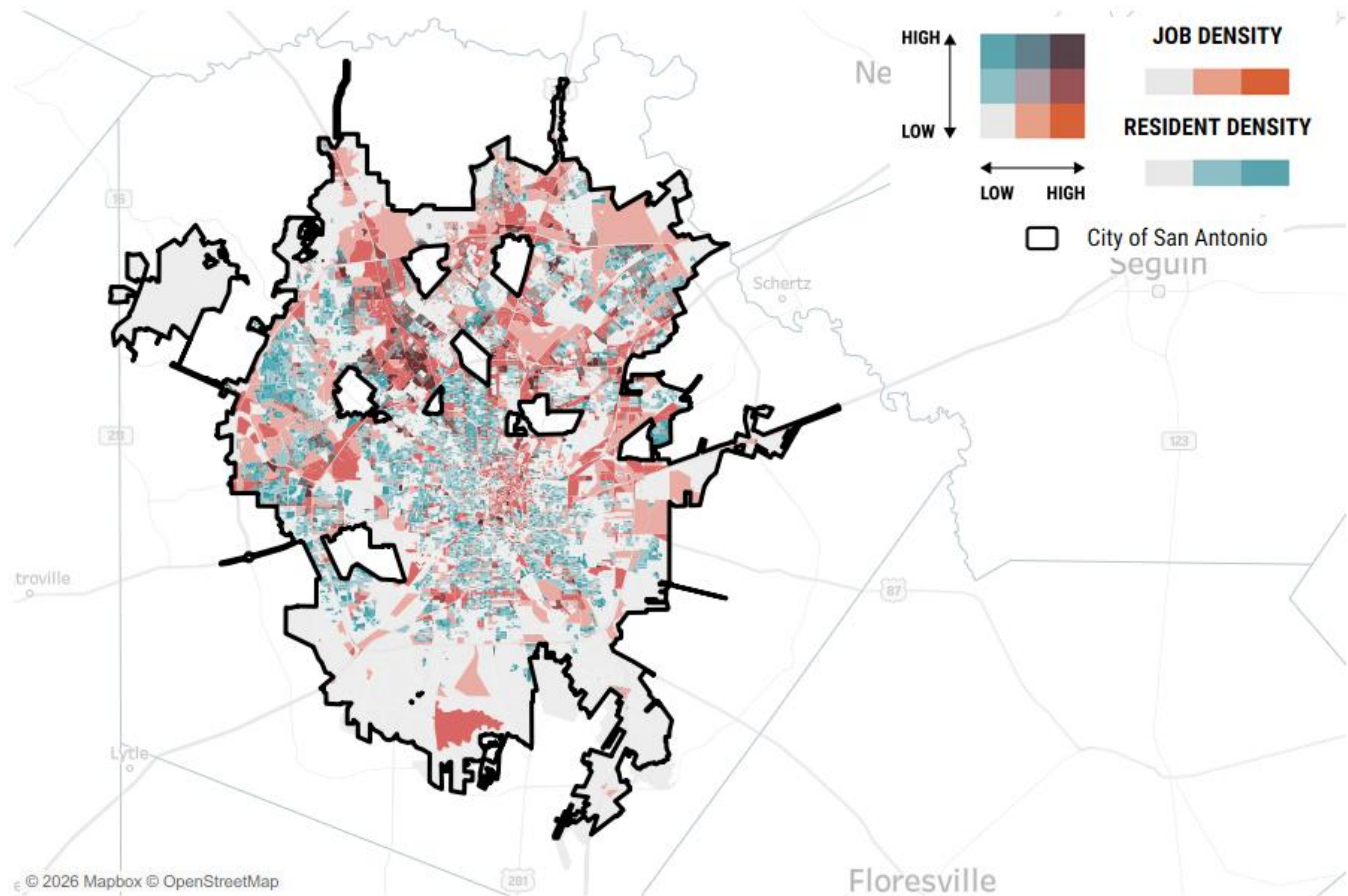
TIP conducted a comprehensive analysis of placemaking and real estate fundamentals to assess how market opportunities, priority areas, and connectivity align with strategic cluster growth and workforce strengths. Emphasis was placed on identifying neighborhoods with strong potential for economic revitalization and targeted investment.

Strategic Development/Redevelopment Opportunities

TIP conducted an analysis of strategic development sites where development and redevelopment opportunities align with industry investment trends and workforce capacity. This process began with a documentation of the City’s job density and resident density by using block-level data from the US Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD), Origin-Destination Employment Statistics (LODES) and supplemented by other data, tools, and resources from the City of San Antonio, Bexar Appraisal District, Guadalupe Appraisal District, Kendall Appraisal District, Wilson County Appraisal District, US Bureau of Transportation Statistics’ National Transportation Atlas Database (NTAD), QuickOSM by 3Liz, OpenStreetMap, CoStar Group, and the US Census Bureau’s TIGER/Line Shapefiles. Density is represented by percentile rank in terciles (i.e., thirds) as "low," "middle," and "high."

The density analysis documented the strongest overlapping concentrations of both job and resident density in the city's northwest quadrant in and around the medical center area (see Figure 30). The lowest densities for population and employment were generally in the neighborhoods skirting the city's southern and southwestern boundaries. These less dense areas also coincided with several sites identified by TIP as having developable potential (see Appendix D: Site Verification and Evaluation). Figure 31 maps the City's sites and infrastructure. See Action 2.2.3 on page 17 for opportunities related to transit-oriented development.

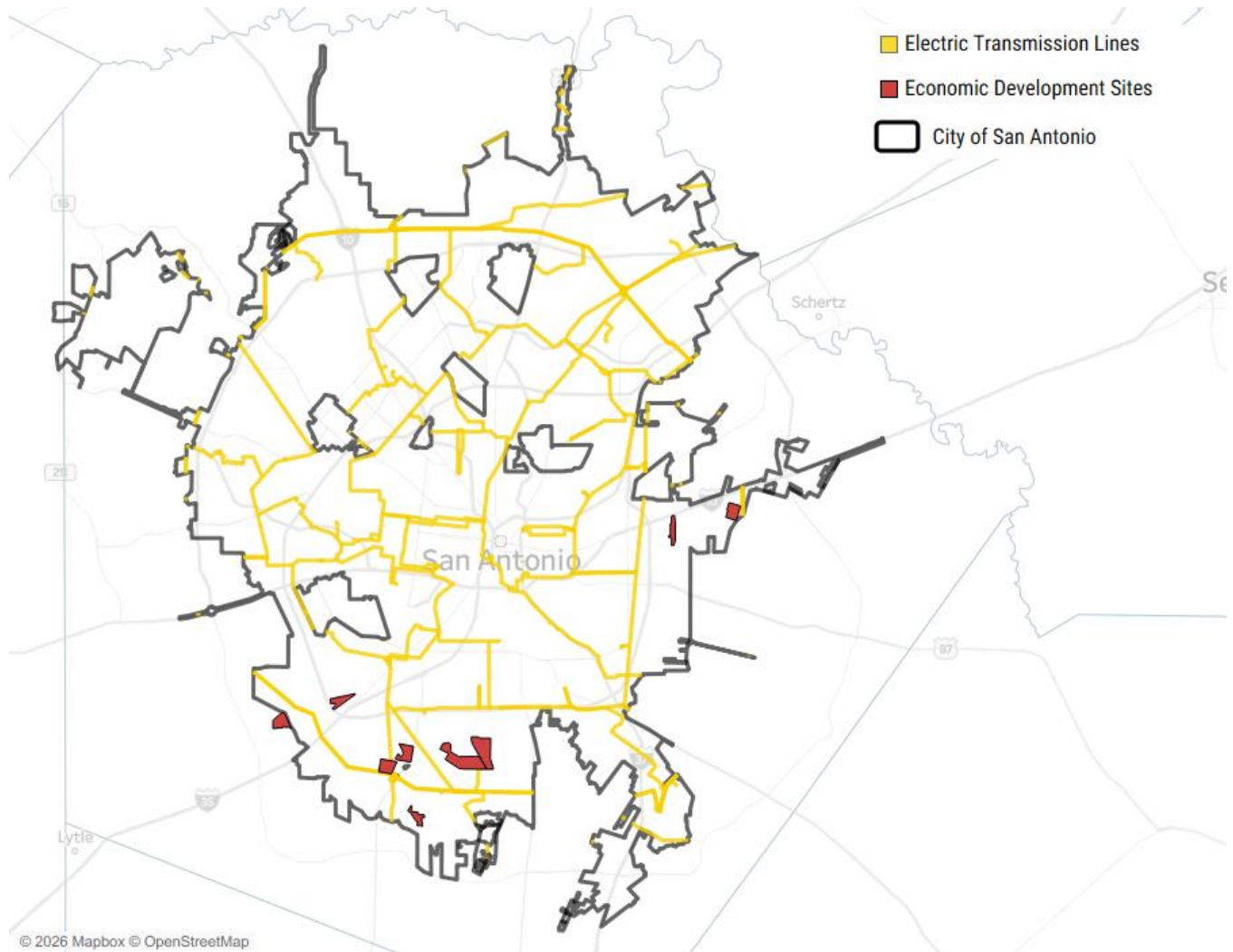
Figure 30. Job and Resident Density



Source(s): City of San Antonio, TX; CoStar Group; US Census Bureau, 2023 Longitudinal Employer-Household Dynamics (LEHD), Origin Destination Employment Statistics (LODES); US Census Bureau, 2025 TIGER/Line Shapefiles; TIP Strategies, Inc.

Note(s): Density is represented by percentile rank, where "low," "middle," and "high" represent blocks falling in the lower, middle, and upper thirds, respectively, of citywide residential and employment density. Blocks with 0 residents or jobs were excluded from their respective percentile rank calculation.

Figure 31. Sites and Infrastructure



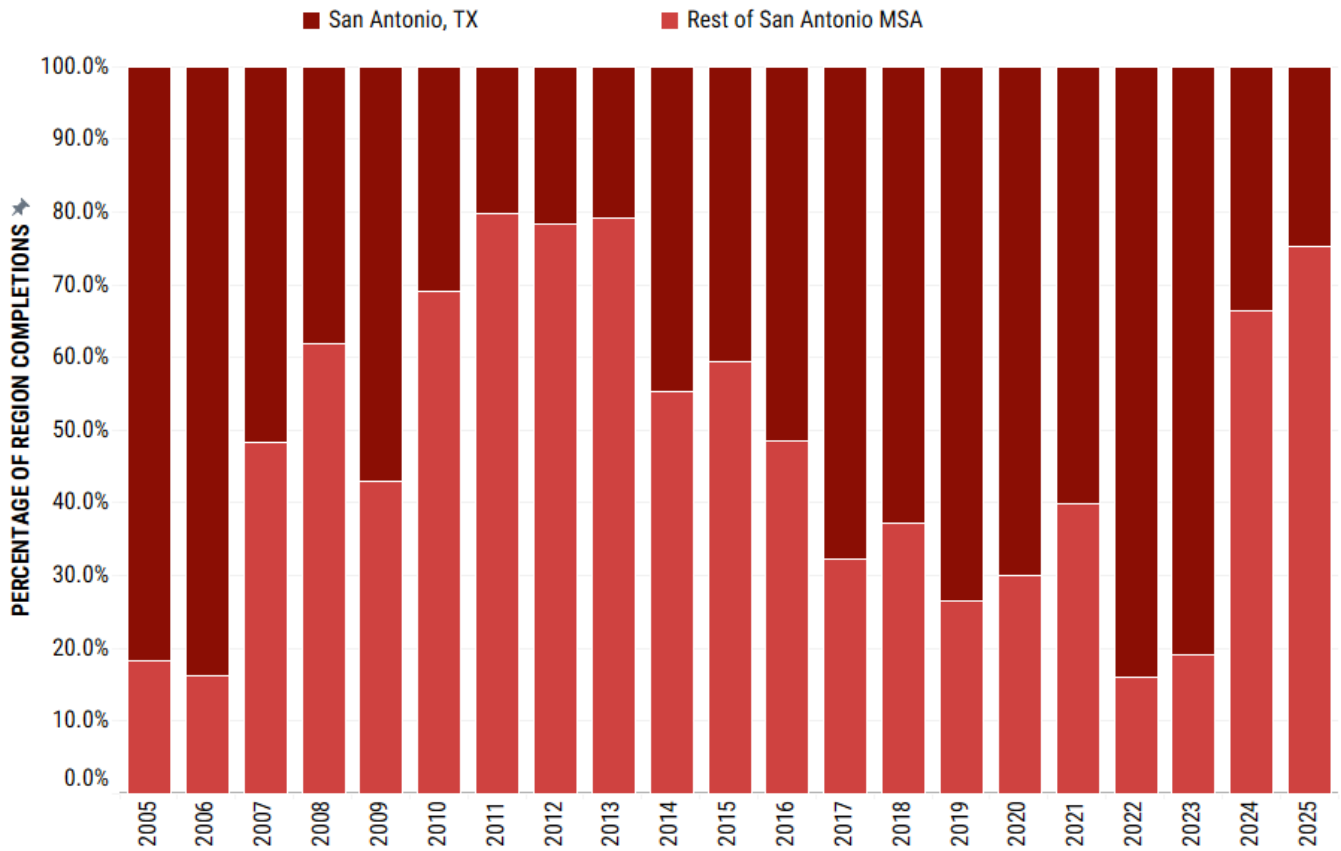
Source(s): CoStar Group; City of San Antonio, TX; Bexar Appraisal District; Guadalupe Appraisal District; Kendall Appraisal District; Wilson County Appraisal District; US Census Bureau, 2025 TIGER/Line Shapefiles; US Bureau of Transportation Statistics (BTS), National Transportation Atlas Database (NTAD); 3Liz, Quick OSM; OpenStreetMap; TIP Strategies, Inc.

Commercial Real Estate

TIP analyzed commercial real estate supply and demand trends to identify commercial development and redevelopment patterns across the City of San Antonio and the San Antonio MSA, identifying long term trends for rent, vacancy, and construction rates across several property types: office, industrial, retail, flex, apartment, and hotel. Additionally, these properties were mapped for San Antonio’s neighborhoods and the City’s extraterritorial jurisdiction (ETJ), with multiple variables—rent, inventory, and ago—providing an in-depth look at the City’s spatial pattern of development. San Antonio’s commercial property was also evaluated as a component of the larger San Antonio MSA to reveal the City’s commercial completions and inventory relative to its surrounding communities. This data was supplied by CoStar Group, a commercial real estate data vendor, and was current as of March 2026 when the analysis was undertaken.

Though the City of San Antonio represents the majority of the San Antonio MSA’s inventory in every analyzed commercial property type, some commercial real estate trends indicate a shift towards the region’s outlying communities. In each of the past two years of data, and for a stretch of several years in the early 2010s, most of the industrial square footage in the San Antonio MSA was being built outside of the City of San Antonio (see Figure 32). Further, average rent is lower in the City than in the MSA for office, industrial, retail, and flex real estate. Other trends hold for both the City and MSA.

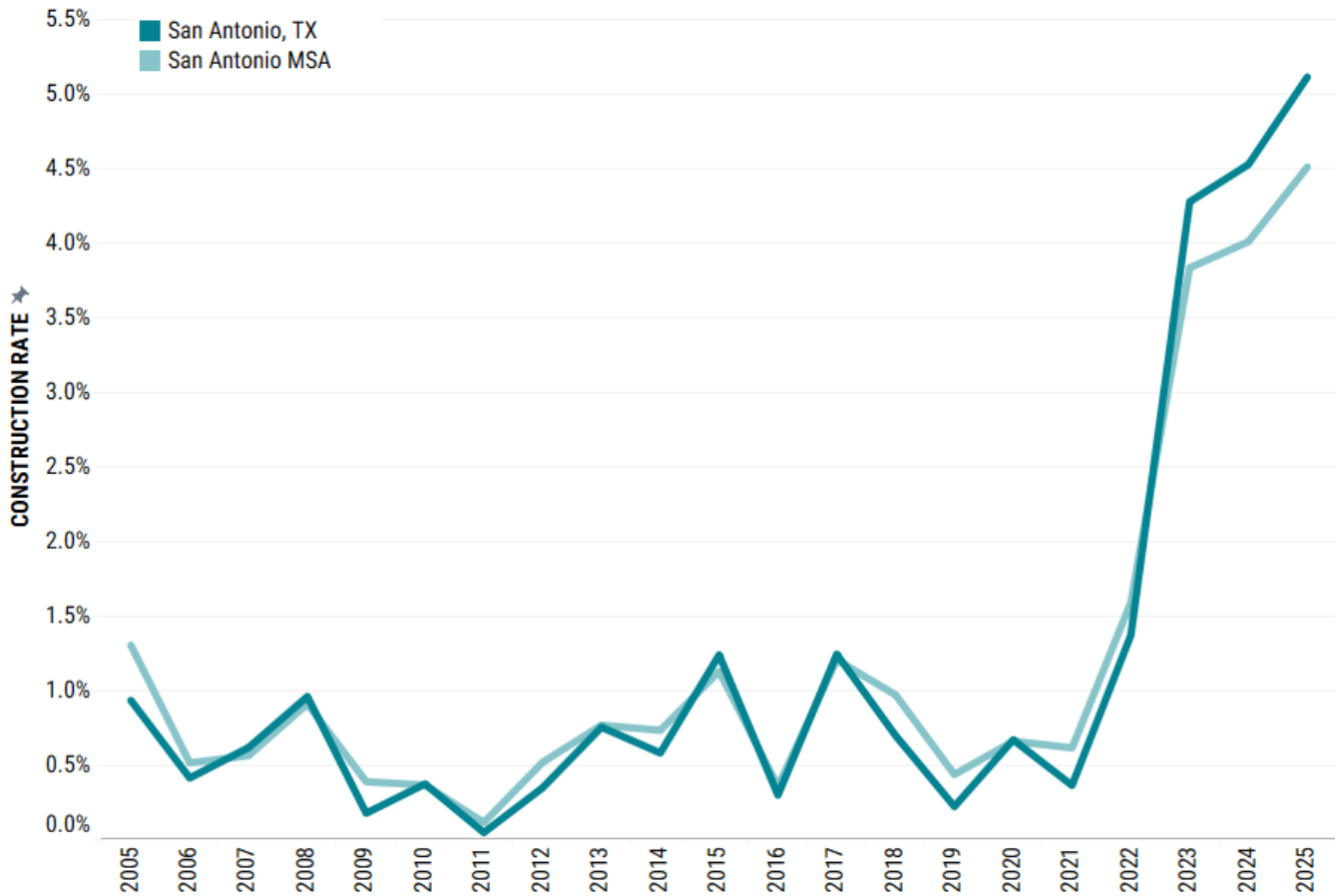
Figure 32. San Antonio’s share of completed industrial square footage relative to the MSA by year



Source(s): CoStar Group; TIP Strategies, Inc.
Note(s): All data are estimated by CoStar as of March 2026. The spatial units of analysis for industrial properties is square feet (SF). The San Antonio MSA consists of Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina, and Wilson Counties, TX.

Despite a declining construction rate, both San Antonio and the MSA's office inventory have seen climbing vacancy rates over the past several years. Additionally, in both the City and MSA, flex properties have experienced a notable uptick in construction throughout the first half of the 2020's (see Figure 33). Retail rent estimates vary substantially across the City of San Antonio. At the neighborhood-level, many of San Antonio's higher-rent retail markets are located in the northwestern portion of the City. On the other hand, each of its lowest-rent markets are located within or along Loop 410, though several neighborhoods—including Downtown, Southwest, and Brooks—are notable outliers in this area, painting a nuanced picture of the City's retail market (see Figure 34). For opportunities related to place-based investment and redevelopment, see Strategy 2.1 on page 16.

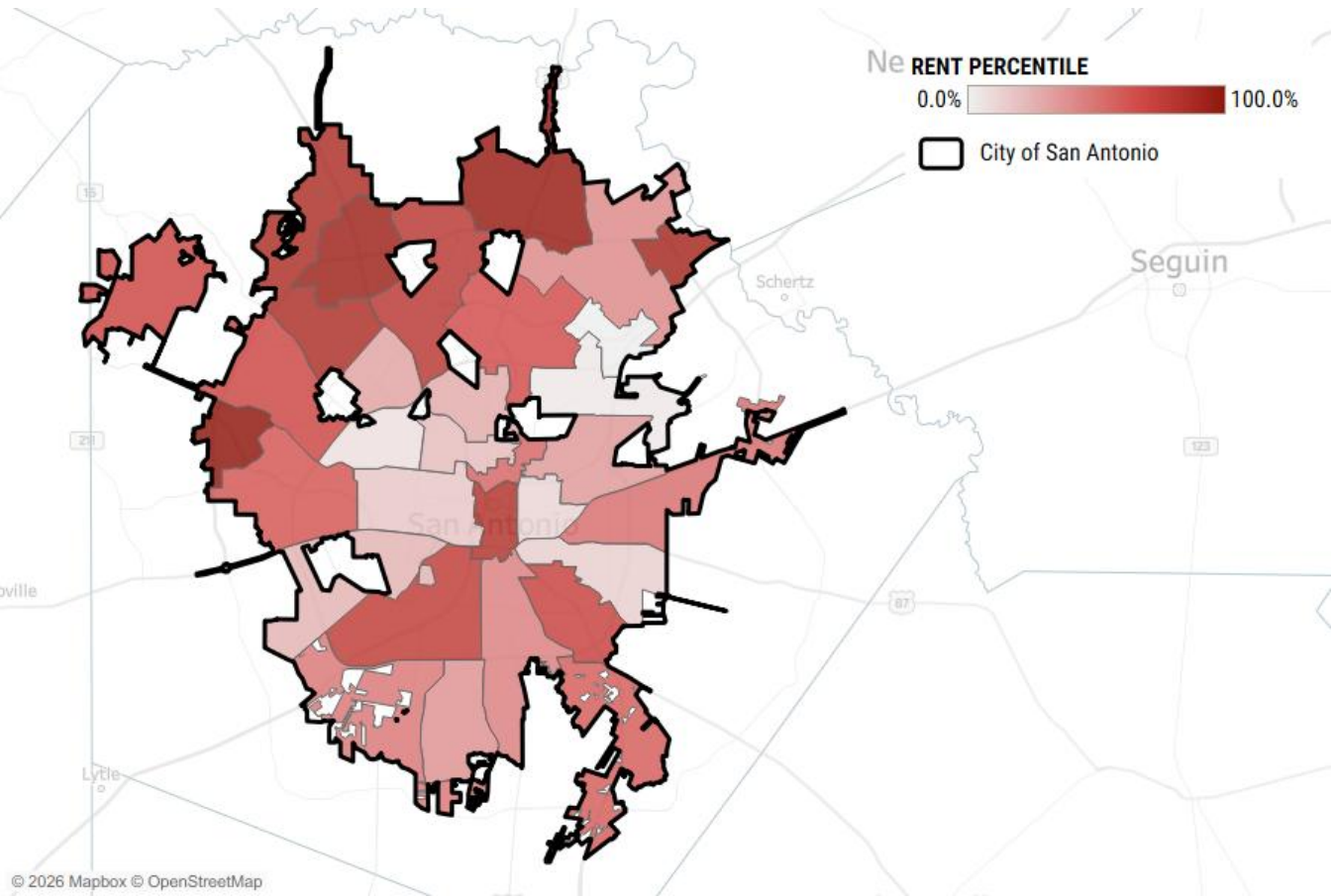
Figure 33. San Antonio's construction of flex space by year



Source(s): CoStar Group; TIP Strategies, Inc.

Note(s): All data are estimated by CoStar as of March 2026. The spatial units of analysis for flex properties is square feet (SF). The construction rate for any given property type is calculated as the total amount of space underway divided by the inventory of space in the same market. Flex represents a versatile type of commercial real estate that typically combines light industrial uses with office or retail activity. The San Antonio MSA consists of Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina, and Wilson Counties, TX.

Figure 34. Neighborhood-level retail rent percentiles



Source(s): CoStar Group; City of San Antonio, TX; TIP Strategies, Inc.
Note(s): Neighborhood-level retail rent estimates are depicted in terms of percentile rank, from dark red (higher rent cost) to white (lower rent cost). All data are estimated by CoStar as of March 2026 and represent a snapshot in time. Rent estimates reflect neighborhood property averages, in US\$ per square foot per year, weighted by inventory. For properties where only a rent range is available, a midpoint is used.

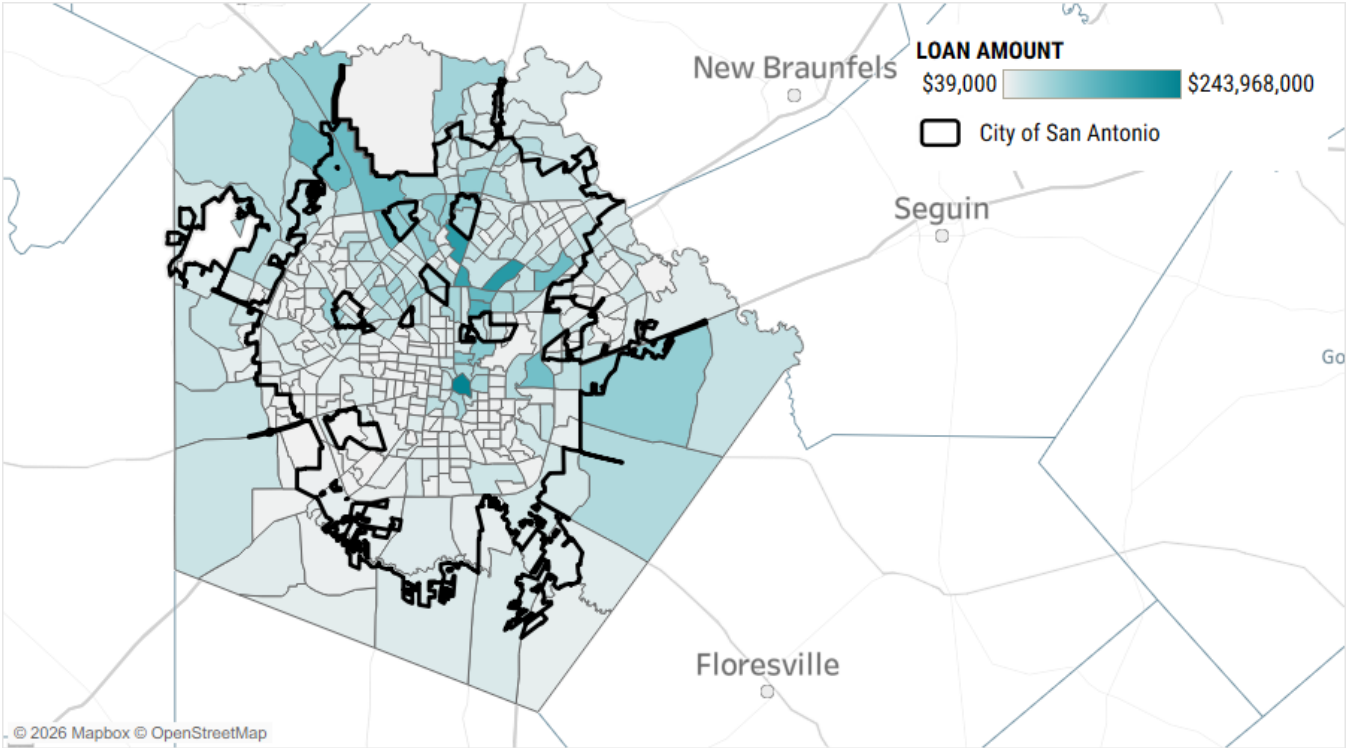
Appendix C: Small Business Ecosystem

The small business ecosystem assessment includes an assessment of investments and the ecosystem, an analysis of small business lending patterns, the identification of barriers and opportunities, and findings from the small business survey.

Small Business Lending Patterns

TIP documented and analyzed the small business lending environment in the San Antonio MSA since 2020, with a focus on Bexar County and a tract-level analysis of the City of San Antonio. For private-sector lending patterns, TIP examined Community Reinvestment Act (CRA) Aggregate Reports available from the Federal Financial Institutions Examination Council for years since 2020 through 2024. The CRA requires the Office of the Comptroller of the Currency, the Federal Reserve, and FDIC-regulated institutions meeting asset-size thresholds to report periodically on how they serve all communities, including low- and moderate-income neighborhoods. CRA defines small business loans as loans of \$1 million or less made to businesses. Commercial property completions from CoStar Group were included in this analysis solely as context for patterns of recent business growth and development and cover the period from 2020 through February 2026. (These new developments are not necessarily the recipients or locations of CRA lending.) This analysis of private-sector lending was juxtaposed with data on programmatic initiatives by the City of San Antonio, including both COVID-19 and non-COVID-related public grants and zero-interest loans awarded to support local economic development. Several grant programs are featured in the data, specifically: Façade Improvement, Façade Improvement (non-profit), Outdoor Spaces (opened in 2023 and closed early 2024), and Noise Mitigation.

Figure 35. Lending Patterns |
Loan amount for all small business loans by tract between 2020 and 2024 in San Antonio and Bexar County



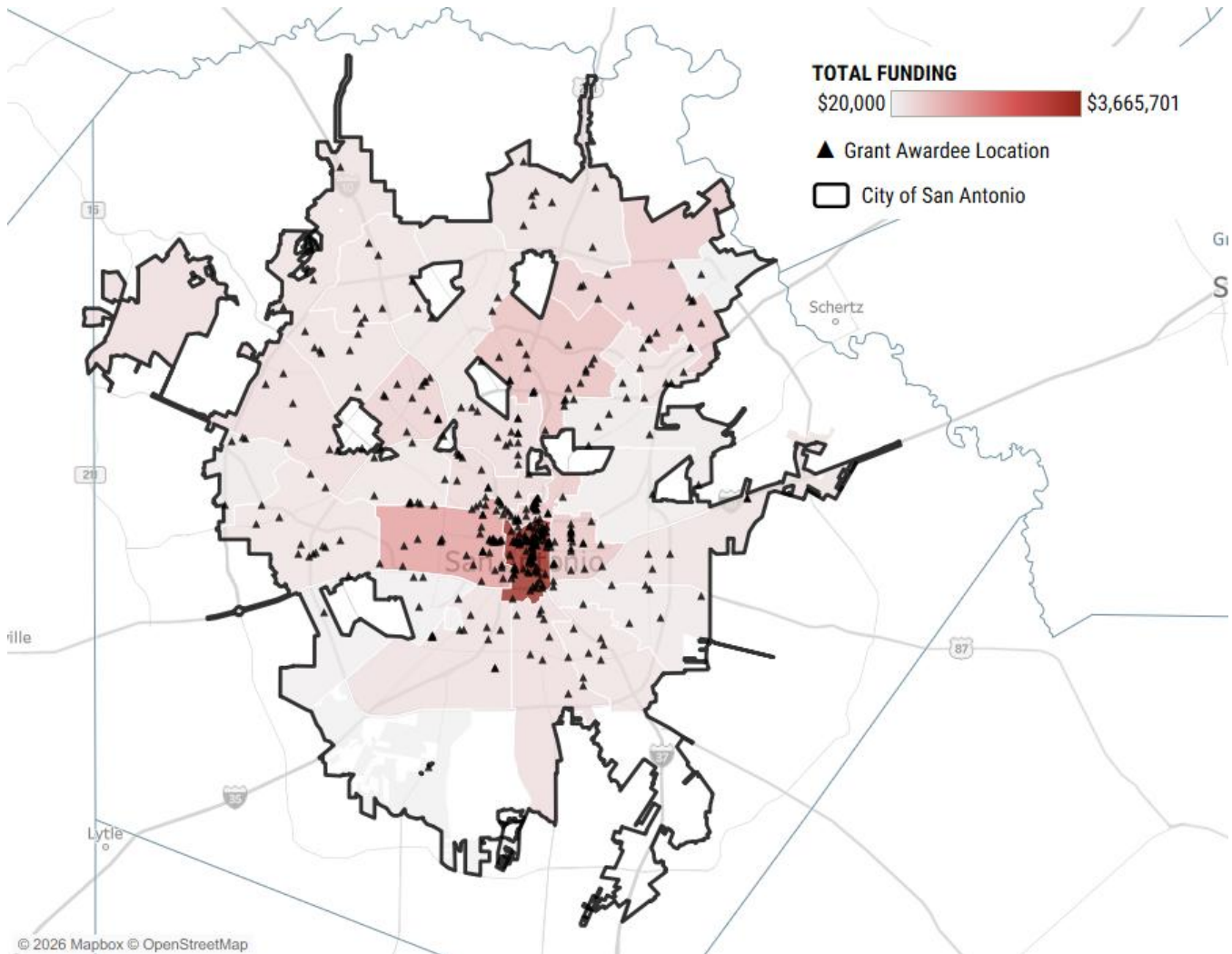
Source(s): Federal Financial Institutions Examination Council, Community Reinvestment Act Aggregate Reports; CoStar Group; TIP Strategies, Inc.

Key findings of the analysis included a concentration of private-sector lending in the northern parts of the City, particularly tracts near major thoroughfares. This geographic pattern is generally consistent with the City's growth and development trends. The City's programmatic initiatives were generally more concentrated in and around the City's central business district, although this varied considerably across individual programs.

The Figure 35 and Figure 36 map the lending patterns for small businesses in San Antonio since 2020, with Figure 35 illustrating small business loans and Figure 36 illustrating City grant funding commitments.

Figure 36. Lending Patterns | City Grant Funding Commitments

Total grant program funding by neighborhood in San Antonio between 2020 and 2024



Source(s): City of San Antonio; CoStar Group; TIP Strategies, Inc.

Small Business Survey

As part of the strategic planning process, TIP conducted an online survey of small businesses and entrepreneurs in San Antonio. The survey was open from May 13 through June 26, 2026, and drew 182 respondents. The survey instrument opened with basic questions about business location and characteristics. The remainder of the survey included 14 questions directed at respondent perceptions of and business outlook for the City of San Antonio. All responses were confidential. The survey was not designed to be a scientific sample, though the pool of respondents was large enough and stratified enough to provide convincing strategic feedback. As a result, the survey yielded valuable and relevant input from business establishments in the San Antonio community.

Complete question-by-question survey results were delivered to the City in an interactive data visualization using Tableau Reader. The key findings of this survey, summarized below, were used to guide the direction of the strategic framework update.

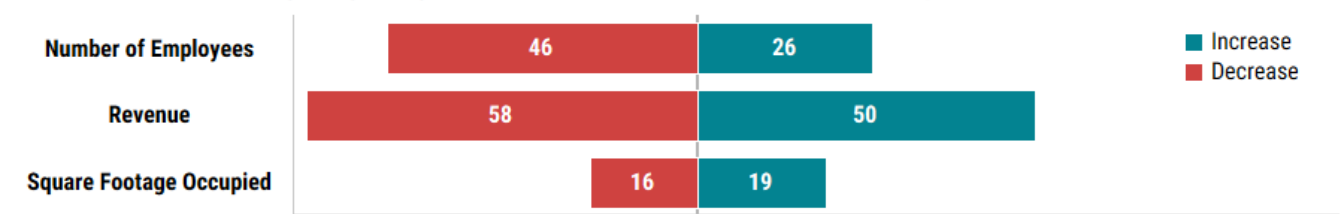
Positive attitudes around growth

Throughout the survey, respondents expressed largely positive attitudes around San Antonio’s existing business environment. Responses consistently assigned a strong score to the City’s growth prospects, while also rating the local business environment as closer to “excellent” than “poor.” Optimism around the local economy is more clearly demonstrated in respondents’ expectations for the next 12 months: the number of businesses that anticipate an increase in revenue is triple the number that expect a decrease. Likewise, the number of those expecting increases in their number of employees and square footage occupied are more than double those forecasting decreases. Echoing positive sentiments around business growth, respondents highlighted San Antonio’s high quality of life as a retaining factor, as well as the region’s relatively low operating costs when compared to other major Texas markets. In fact, given its location within the Texas Triangle megaregion, San Antonio’s relative affordability represents a distinct advantage over its statewide counterparts and major competitors, Austin, Houston, and Dallas-Fort Worth. This is especially relevant amid respondent concerns over rising operating costs.

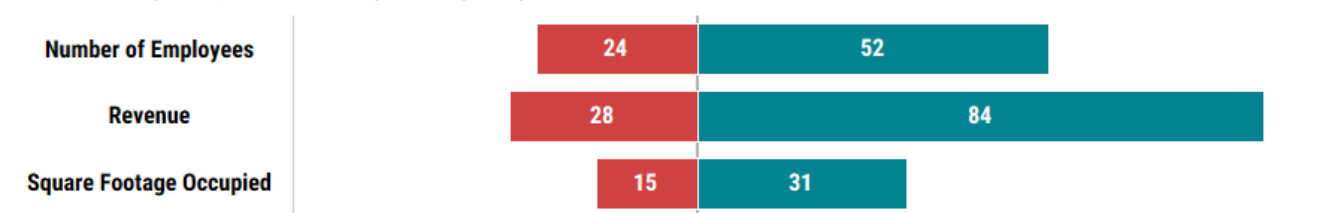
Figure 37. Recent and Expected Changes in Local Small Businesses

Q10 | How have the following changed for your business site or location in San Antonio over the past twelve months?

Q10 | How have the following changed for your business site or location in San Antonio over the past 12 months?



Q11 | How do you expect the following to change for your business site or location in San Antonio over the next 12 months?



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 182 respondents, 157 answered question 10; 156 answered question 11. Due to limited responses, some respondent types have been aggregated within the filter.

Improving small business support

Improving support for local employers was a recurring theme throughout survey responses, reflecting the respondent profile of largely small businesses. Respondents noted the challenges to success presented by a lack of support from local government, and accordingly highlighted opportunities for the City to promote local business and expand resources available to local entrepreneurs. National economic trends like rising operating costs, as well as region-specific concerns like poverty and economic segregation within the San Antonio region, were presented as barriers to business success. Considering this, respondents expressed a positive perception of several local business development programs, like the Fee Waiver Program and 0% Interest Rate Loan Program, as well as national entrepreneurial supports like the SBIR/STTR Grant Program. In multiple places, respondents identified difficulties hiring and retaining qualified talent, specifically noting a gap in desired workforce skills and regional training programs. To this end, respondents noted opportunities to both better align regional education offerings with employer needs and pursue skilled talent attraction. Notably, respondent businesses indicated a need to reevaluate the City of San Antonio's procurement process to create opportunities for contracting with small businesses (as well as incentivizing large corporations to utilize local subcontractors).

Figure 38. Suggested Actions for the City to Pursue

Q21 | What actions should the City of San Antonio pursue that would positively impact your business success?



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 182 respondents, 73 answered this question. Larger fonts indicate higher frequency of responses. Open-ended responses were grouped into categories of comparable sentiments. Respondents were allowed to provide more than one response.

Target industries and redevelopment

In identifying the City's biggest economic opportunities, respondent businesses placed major emphasis on target industry development. Respondents noted the City's potential in several industries—cybersecurity and IT, healthcare and biosciences, advanced manufacturing and logistics, and AI and data centers—that have the potential to drive future business attraction. Additionally, respondents noted San Antonio's existing emphasis on tourism and professional sports—strengths that can be leveraged for transformative development efforts like Project Marvel and related downtown redevelopment. While the City's poor marketing and lack of national and international promotion were identified as challenges to business success, these revitalization opportunities represent launchpads for the City to improve its perception, as it also works to address street-level issues regarding public safety and community aesthetics.

Figure 39. Target Industry Opportunities

Q15 | What are San Antonio's biggest opportunities for economic growth?



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 182 respondents, 89 answered this question. Larger fonts indicate higher frequency of responses. Open-ended responses were grouped into categories of comparable sentiments. Respondents were allowed to provide more than one response.

Local government and available resources

Though most respondents have previously done business with the City, the majority of those that have not would like to do so. This high level of interest corresponded to high expectations, with respondents expressing various concerns about San Antonio's leadership and management throughout the survey. These included frustrations with a lack of transparency regarding the vision of City leadership and disagreements with local government spending. Additionally, the City's policy environment scored as a poor retaining factor for local businesses, with respondents noting a need to ease the development process. A relatively low share of respondents received support from local workforce, economic development, or community development organizations. Navigating a siloed economic development ecosystem was noted as a challenge, with respondents expressing a need to consolidate economic development efforts while increasing local businesses' awareness of available resources. Broadly, improving communication and collaboration between government and business was identified as a way to create a shared, unified economic development vision for the City.

Figure 40. Challenges Faced by Small Businesses

Q16 | What are the most daunting challenges for business success in San Antonio?



Source(s): Survey results compiled by TIP Strategies, Inc.

Note(s): Of the 182 respondents, 76 answered this question. Larger fonts indicate higher frequency of responses. Open-ended responses were grouped into categories of comparable sentiments. Respondents were allowed to provide more than one response.

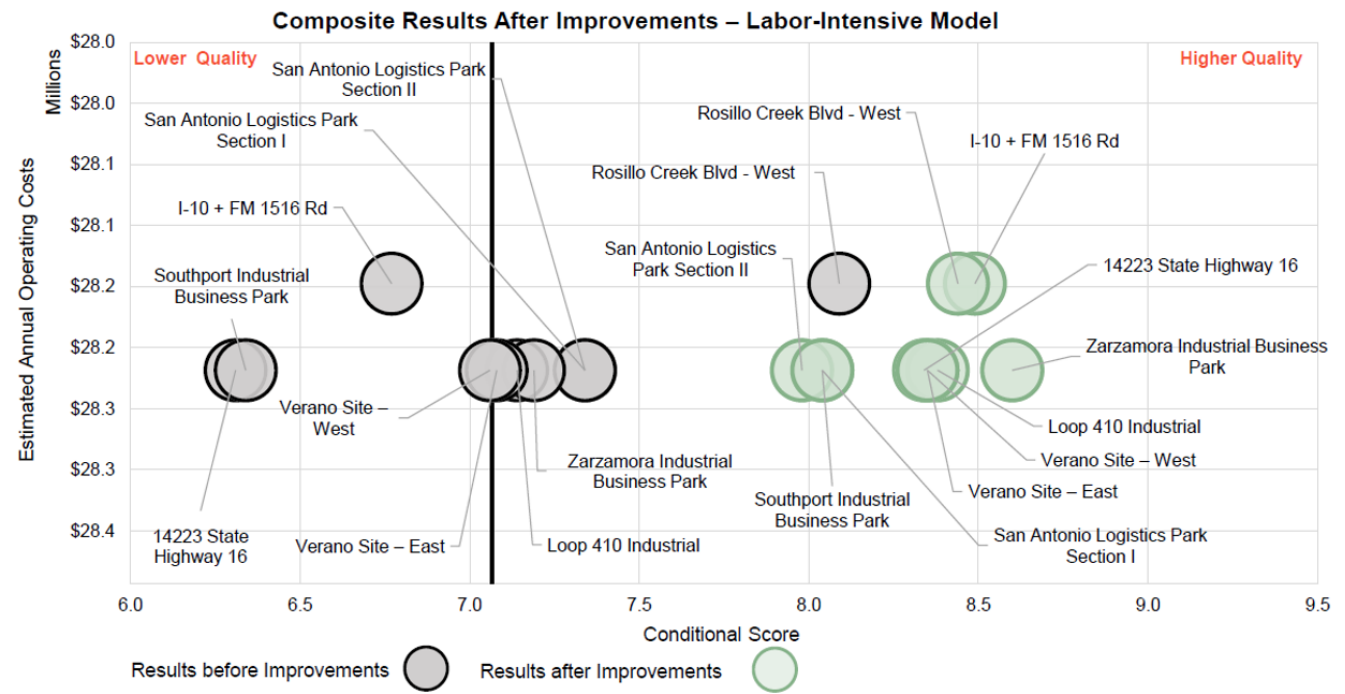
Barriers and Opportunities

Through stakeholder engagement, TIP identified small business services not currently available or insufficiently available in the San Antonio region and identified high-opportunity services. Based on the findings from relevant roundtables and interviews, San Antonio small businesses face significant barriers. It is important to note that the majority of small business roundtable participants did business with the City and therefore offered specific feedback on the procurement process with the City. Barriers included, extensive delays in permitting and City contract awards straining their pricing and resources. Furthermore, a fragmented landscape of small business resources force owners to navigate complex compliance without a centralized guide. Additional obstacles include workforce gaps, disproportionate insurance requirements passed down from prime contractors, delayed payments that harm cash flow, and a lack of affordable workspace. Participants supported the creation of an entrepreneurship center that provides streamlined education, affordable incubator spaces, and procurement assistance. The City can further improve the business climate by relaxing insurance mandates for smaller subcontractors, continuing to tailor workforce training programs like Ready to Work to include small business input, and incentivizing local firm participation in major developments like the Sports and Entertainment District. Finally, expanding initiatives like Supply SA to standardize RFP processes, assist with legal document review, and connect small businesses with prime contractors will improve their access to lucrative government contracts. Recommendations related to supporting the small business ecosystem can be found in Strategy 1.3 on page 11.

Labor-Intensive Model

All San Antonio sites evaluated through the Site Identification Program are expected to require some level of site preparation before being marketed for industrial investment. Opportunities to improve each site's investment readiness were identified, along with estimated costs and the anticipated impact of each improvement. These opportunities are detailed in the Site Overview section of this report. The updated composite model below shows the projected site scores in the labor-intensive model if all feasible improvements are implemented, representing the maximum anticipated score for each site.

Figure 42. Labor-Intensive Evaluation of Sites

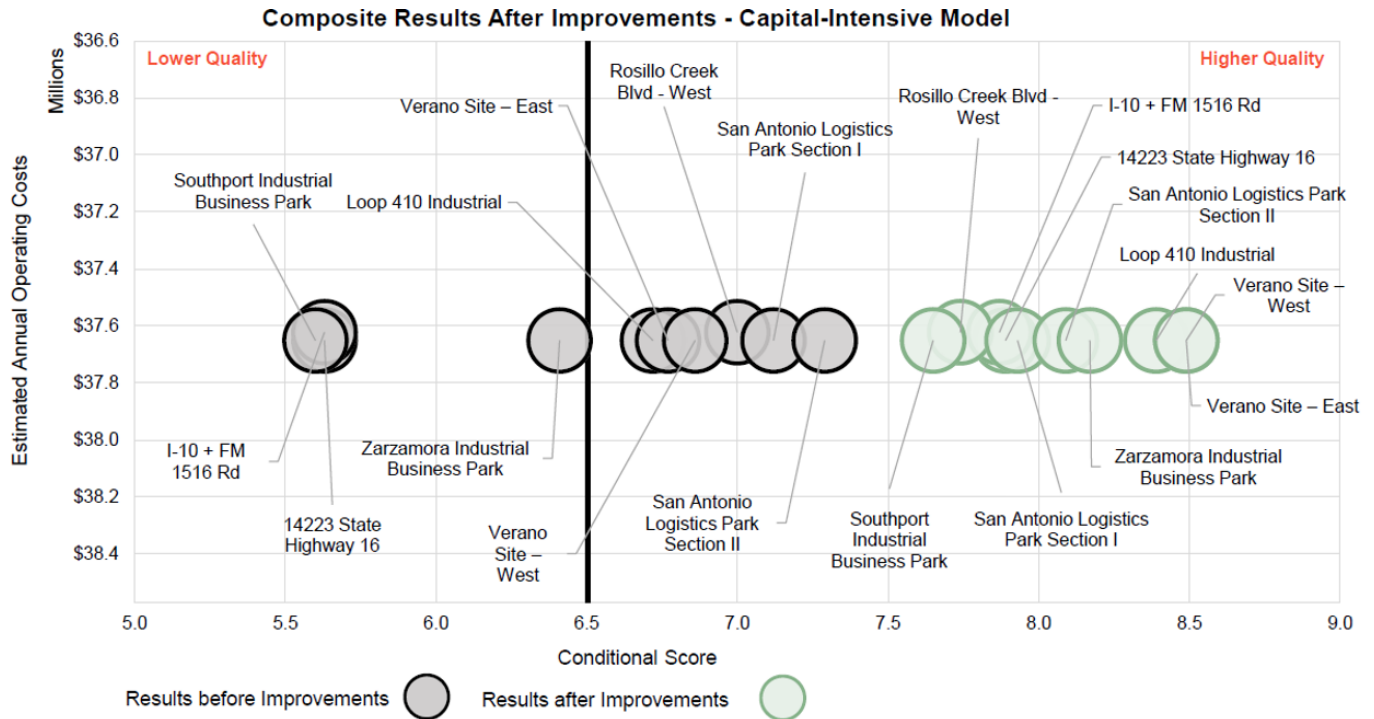


Source(s): Global Location Strategies.

Capital-Intensive Model

All San Antonio sites evaluated through the Site Identification Program are expected to require some level of site preparation before being marketed for industrial investment. Opportunities to improve each site's investment readiness were identified, along with estimated costs and the anticipated impact of each improvement. These opportunities are detailed in the Site Overview section of this report. The updated composite model below shows the projected site scores in the capital-intensive model if all feasible improvements are implemented, representing the maximum anticipated score for each site.

Figure 43. Capital-Intensive Evaluation of Sites



Source(s): Global Location Strategies

The matrix in Figure 44 identifies the most competitive sites for labor-intensive and capital-intensive projects today, as well as sites with the strongest future potential following targeted improvements.

Figure 44. Most Competitive Sites

	Labor-Intensive	Capital-Intensive
Most Competitive Today	Rosillo Creek Blvd. - I-1 zoning + due diligence studies complete 78 contiguous developable acres - Water + wastewater adjacent with sufficient capacity	San Antonio Logistics Section II - Rail-served with adjacent UP intermodal - No zoning restrictions 117 contiguous developable acres - Utilities available with line extensions San Antonio Logistics Section I - Rail-served with adjacent UP intermodal - No zoning restrictions ~100 contiguous developable acres - Utilities available with line extensions
High Potential with Targeted Improvements	Zarzamora Industrial Business Park - I-1 zoning - Western acreage is covered in floodplain, but 115 acres are still currently contiguous and developable - Sufficient utility infrastructure within 1 mile - Only Phase I ESA has been completed I-10 + FM 1516 Rd - I-2 zoning and primarily industrial neighbors - Only 35 contiguous and developable acres; Wetlands delineation study not completed - Strong electric capacity currently available - Requires significant wastewater + natural gas extensions	Verano Site – West - Can be rail-served by Union Pacific 182 currently contiguous developable acres - Strong utility infrastructure within 1 mile Verano Site – East - Can be rail-served by Union Pacific 183 contiguous developable acres - Strong utility infrastructure within 2 miles Loop 410 Industrial Site - Can be rail-served by Union Pacific 110 contiguous developable acres - Strong utility infrastructure within 1 mile

Source(s): Global Location Strategies.



www.tipstrategies.com

+1 512 3439113

contact@tipstrategies.com

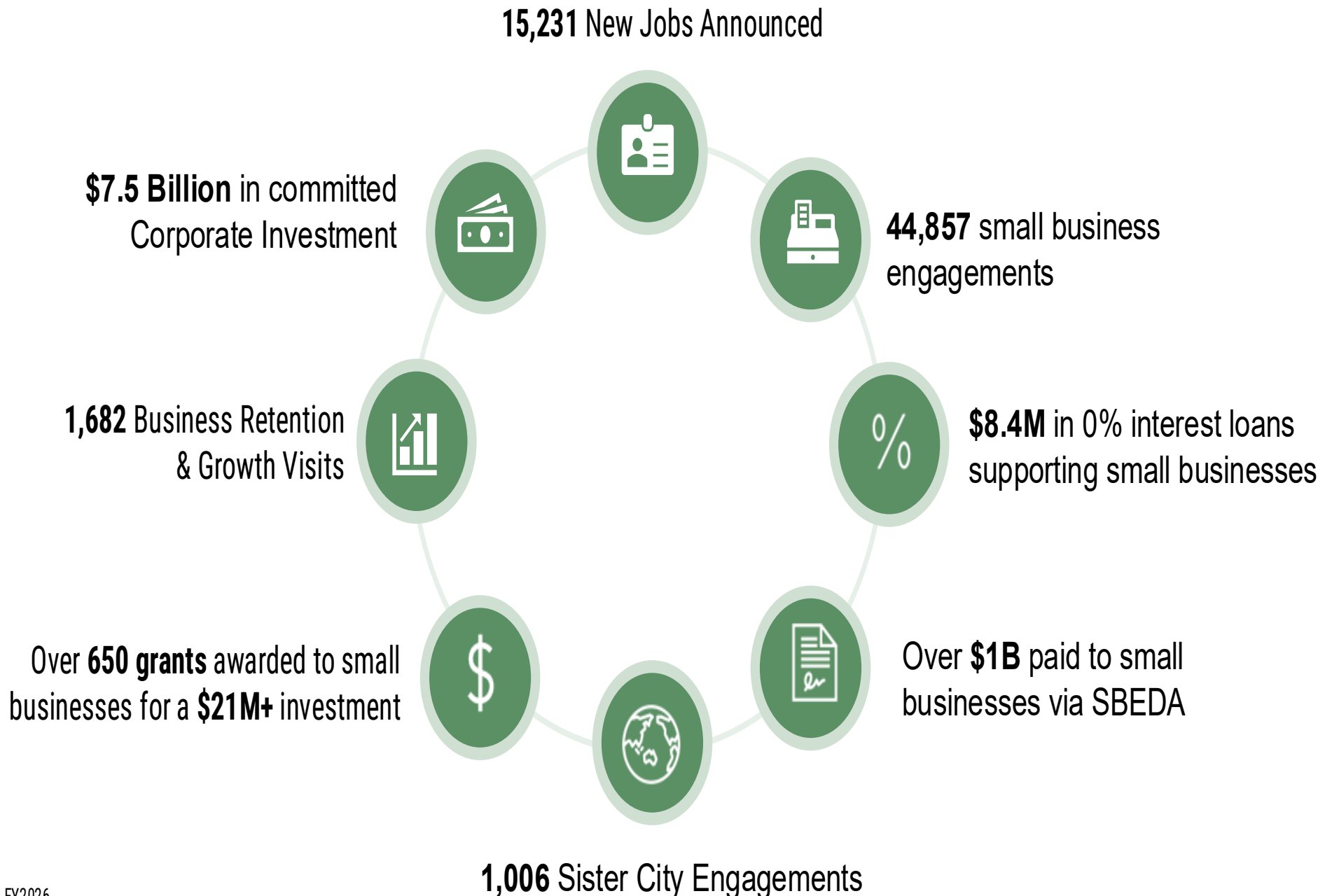
ECONOMIC DEVELOPMENT STRATEGIC FRAMEWORK AND NELSON W. WOLFF MUNICIPAL STADIUM REDEVELOPMENT

**CITY COUNCIL BRIEFING
ITEM #6
OCTOBER 15, 2026**



Presented by: Brenda Hicks-Sorensen, CEcD, Director,
Economic Development Department; and
John Karras, VP of Business Development, TIP Strategies, Inc.

2022 FRAMEWORK HIGHLIGHTS & PERFORMANCE*



*FY2023- FY2026

Includes some of the \$33.9M APRA-Funded Small Business Implementation Plan

Advisory
Committee

20+
Roundtables

180+
Small Business
Survey Responses

25+
Interviews

Site Selector
Feedback*

WHAT WE HAVE LEARNED

1. San Antonio is building momentum with **major catalyst investments** making downtown, placemaking, and quality of life priorities for San Antonio's economic competitiveness.
2. The region's strongest differentiators are defense innovation, cybersecurity, healthcare, bioscience, and advanced manufacturing, but there are opportunities to capitalize on **emerging sectors**.*
3. Talent retention and **workforce development** to support quality and accessible jobs are among the region's most important long-term challenges.*
4. Infrastructure is key to developing **competitive sites** for new and expanding business.*
5. Small business and entrepreneurship stakeholders want stronger pathways to procurement, capital, and scale.
6. San Antonio needs to be better at **sharing its story**.
7. Many stakeholders believe San Antonio has the ingredients of a nationally **competitive innovation economy** but has not yet fully translated its assets into economic outcomes.*
8. There is broad concern about **balancing growth, affordability, and inclusive opportunity**.
9. Stakeholders consistently called for greater focus, accountability, and implementation discipline.*
10. San Antonio must leverage its strong links to Latin America, Asia, and beyond.

TARGET INDUSTRIES

 Aerospace, Defense, & Transportation • Automotive Manufacturing • Aerospace Manufacturing • Logistics Technology • Defense/Military	 IT Security and Infrastructure • AI Software and Hardware • Aerospace • Cybersecurity • IT • Defense/Military	 Energy • Technology • Energy • Environmental Services • Defense/Military	 Bioscience Anchors and Catalysts • Bioscience • Healthcare • Higher Education • Research/Development • Defense/Military	 Corporate Services • Financial Services • Insurance Services • Corporate, Regional, and Divisional HQs
--	---	--	---	--

GOALS AND UPDATED GOAL STATEMENTS



GOAL 1 Innovation and Industry

Strengthen San Antonio's position as a globally competitive destination for business investment and innovation.



GOAL 2 Placemaking and Real Estate

Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.



GOAL 3 Talent and Workforce

Improve economic mobility for San Antonians through developing a workforce with the skills to access good jobs.



Capacity and Resources

Refine the City's economic development tools, align partners, and pursue new funding options to activate the updated framework.

GOAL 2. PLACEMAKING & REAL ESTATE

Invest in amenities and infrastructure to stimulate private sector investment in place-based redevelopment areas and employment districts.

2.1. PLACE-BASED INVESTMENT AND REDEVELOPMENT

2.1.1. Regional Centers

2.1.2. Port San Antonio and Brooks **NEW**

2.1.3. Community Areas

2.1.4. Corridors

2.2. BUSINESS SITE DEVELOPMENT **NEW**

2.2.1. Market-Ready Site Portfolio **NEW**

2.2.2. Utility Infrastructure

2.2.3. Transportation

2.3. TOURISM AND CULTURE

2.3.1. Community Heritage

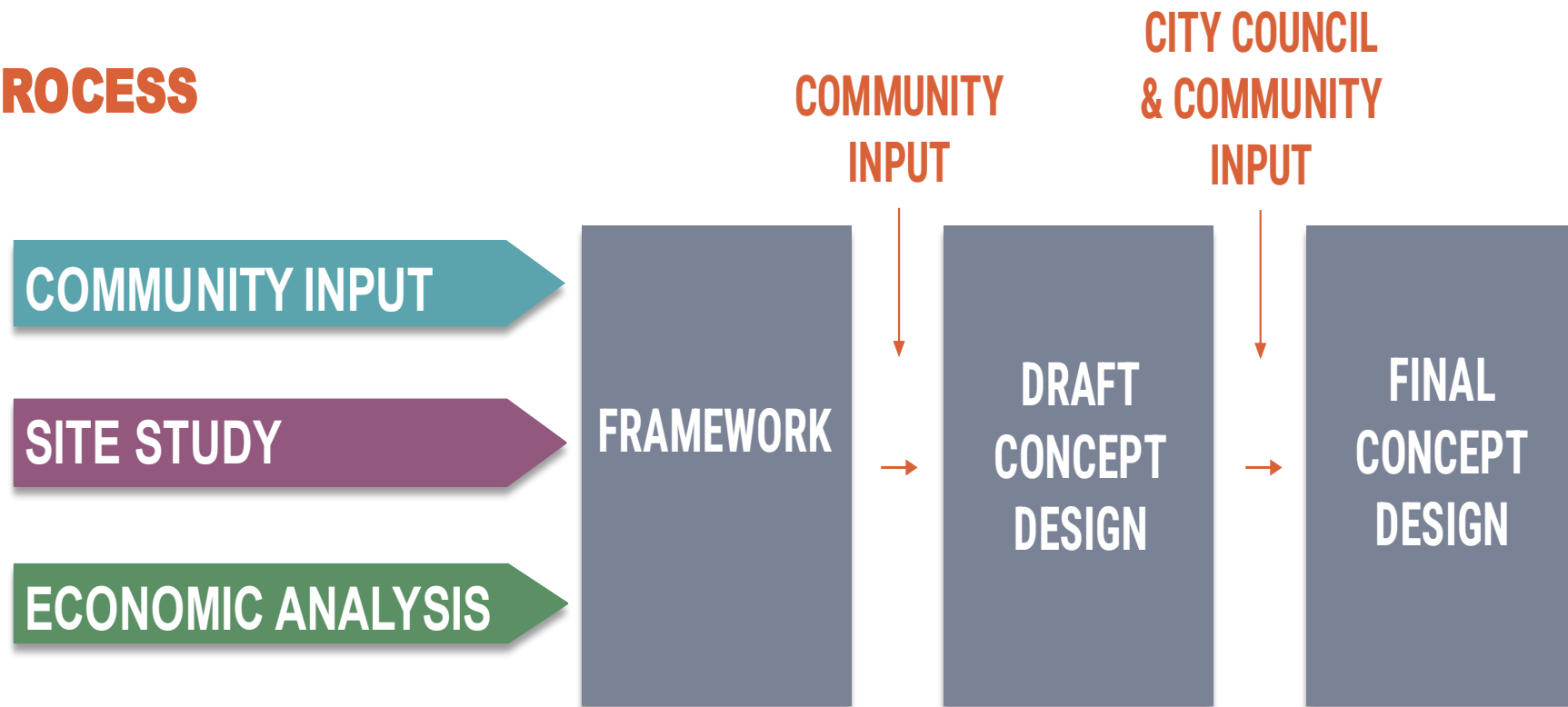
2.3.2. Arts and Culture

2.3.3. Tourism

BACKGROUND

Develop a concept design for the future redevelopment of the Nelson W. Wolff Municipal Stadium (Wolff Stadium) site.

PROCESS



COMMUNITY ENGAGEMENT & MARKET ANALYSIS

Online Survey

Public Meeting 1

August 6, 2026

Community input on ideas and programming

Public Meeting 2

August 20, 2026

Community input on uses, locations, density, and distribution

Public Meeting 3

September 12, 2026

Community feedback on proposed Master Plan framework

Stakeholder Sessions

Neighborhood Associations, Evergen Equity, Council Districts, School Districts

Use	Market-Supported	Early Phase Delivery
Market-Rate Multifamily	X	X
Single-Family	✓	✓
Industrial / Commercial Flex	✓	✓
Retail	✓	✓
Office	X	X
Medical Office	✓	✓
Urgent Care/ Emergency Room	X	X
Hospitality	X	X
Community/Recreation	✓	✓

LEVI STRAUSS
TRAIL

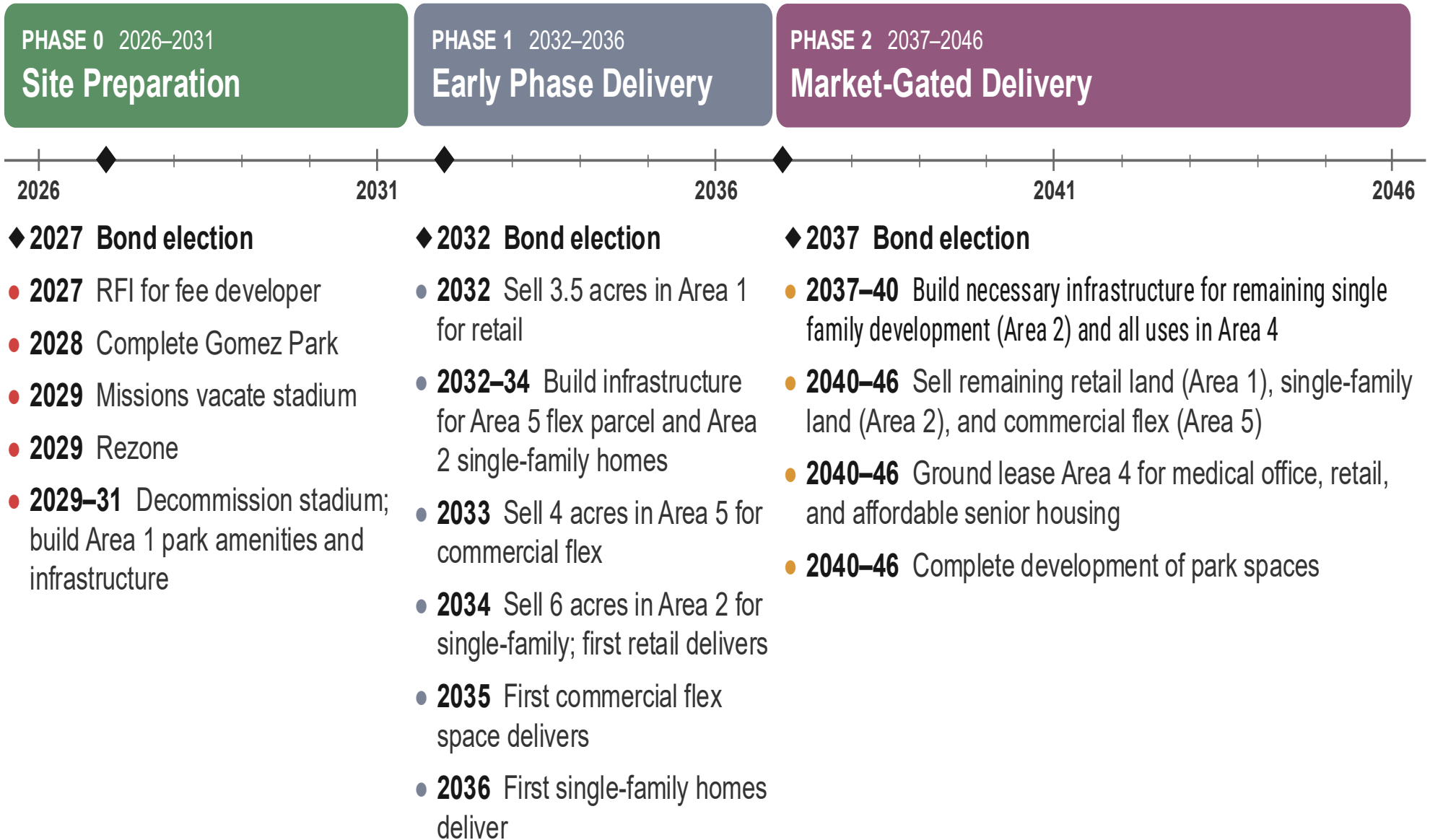
DARNER HQ

NELSON W. WOLFF
COMMUNITY
COMMONS

LUIS GOMEZ PARK
& MIRACLE LEAGUE



POTENTIAL PHASING



ECONOMIC DEVELOPMENT STRATEGIC FRAMEWORK AND NELSON W. WOLFF MUNICIPAL STADIUM REDEVELOPMENT

**CITY COUNCIL BRIEFING
ITEM #6
OCTOBER 15, 2026**



Presented by: Brenda Hicks-Sorensen, CEcD, Director,
Economic Development Department; and
John Karras, VP of Business Development, TIP Strategies, Inc.