STL 2030 JOBS PLAN:
DRIVING A DECADE OF INCLUSIVE GROWTH
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The next decade presents an exceptional opportunity for the St. Louis region. After decades of economic underperformance, population stagnation and racial division, the city and metropolis are poised to chart a different course, one that can combine growth in quality jobs and heightened global relevance with a steadfast and broad-based commitment to inclusive growth and racial equity.

The *STL 2030 Jobs Plan: Driving a Decade of Inclusive Growth* aims to catalyze a burst of private and civic initiative and investment, in close collaboration with the public sector. Commissioned by Civic Progress and stewarded by a broad cross-section of community economic leaders, *STL 2030 Jobs Plan* lays out a 10-year roadmap to advance inclusive economic growth in the metro region by expanding the number of high-paying jobs available to all St. Louisans. An action plan rather than an academic report, it puts forth a manageable number of concrete strategies, co-designed with local practitioners to ensure, to the greatest extent possible, that solutions are financed, delivered and measured rather than admired and put on a shelf.

For the first time in ten years, *STL 2030 Jobs Plan* provides a comprehensive, data-driven profile of the St. Louis metropolitan economy, its shape and structure, its performance and potential. It builds on recent reports such as the 2020 GeoFutures Strategic Roadmap that have begun to create a shared vision for inclusive economic possibilities in the region. Most significantly, *STL 2030 Jobs Plan* embraces exceptional efforts such as the work of Forward through Ferguson and its *Ferguson Commission Report* and *2020 Vision: An Equitable Economic Development Framework for St. Louis*, and deep research efforts like *For the Sake of All*, which detail the metro’s racial and ethnic disparities in income, health outcomes, and wealth and put forward concrete steps to build a more inclusive and broadly prosperous region.

*STL 2030 Jobs Plan* also reflects conversations held with hundreds of St. Louisans throughout the region over the past 12 months. In this year of pandemic and crisis, our discussions have been uniformly open and frank, particularly around the painful legacy of race and racial divisions. Racism has defined and distorted St. Louis as much if not more than any metropolis in the United States. It is simply impossible to disentangle racism and its long-term effects from the region’s economic and population growth patterns, its fragmented government, its residential segregation and inadequate public transportation, its entrenched racial disparities in household incomes, wealth building, health outcomes—in a word, everything.

**GREATER ST. LOUIS INC.**

*STL 2030 Jobs Plan* is now released under the aegis of Greater St. Louis Inc., the new business leadership group organized through the merger of five private-sector economic development organizations.
OUR VISION: A DECADE OF INCLUSIVE GROWTH

STL 2030 Jobs Plan makes a bold, unwavering declaration: it’s time to make St. Louis a recognized national leader on inclusive growth.

Two imperatives confront St. Louis as it begins the 2020s. Given the lagging economic performance of the past decade, boosting economic growth and increasing the volume of high-quality, well-paying jobs must be central priorities. But that growth must yield broadly shared prosperity that substantially reduces the racial disparities in household income, health outcomes and wealth building that have held the region back for decades.

The path to success starts with a sharp definition of inclusive growth that takes into account the needs and possibilities of the St. Louis metropolis. Informed by input from local stakeholders, STL 2030 Jobs Plan defines inclusive growth for the St Louis metro as follows:

Inclusive growth is broad-based economic growth that enables all stakeholders in the St. Louis metropolitan area (including residents, workers, entrepreneurs, companies, organizations and communities) to realize their full potential. Such growth enables the widest range of people and places to both contribute to and benefit from economic success.

Inclusive growth aims to produce more prosperity alongside greater equity in opportunities and outcomes by substantially increasing the number of quality jobs and radically reducing racial and spatial disparities in income, health and wealth that have undermined metropolitan performance for decades.

Defining inclusive growth is one thing; achieving it is another. To that end, STL 2030 Jobs Plan recognizes that unlocking St. Louis’ enviable assets and advantages requires a fierce determination to confront the region’s painful legacy and present-day realities of systemic racism and racial segregation head on, and a fundamental commitment to overcome fragmentation, embrace collaboration, and commit time, talent, and resources to bringing about transformative change.

STL 2030 Jobs Plan will serve as a specific roadmap for achieving these aims.
THE CHALLENGES AHEAD

STL 2030 Jobs Plan does not pull punches. It is cognizant and clear-eyed about the real systemic challenges facing this grand metropolis.

St. Louis has struggled economically. Corporate acquisitions and deindustrialization transformed the region’s economic landscape in recent decades. In 1970, St. Louis was the 10th largest metropolis in the nation; today it is the 20th largest. The region was slow to emerge from the Great Recession. Gross Metropolitan Product (GMP) in St. Louis grew by only 5.2 percent between 2008-2018, much slower than the U.S. economy as a whole, which saw nearly 20 percent growth in Gross National Product during the same period. The St. Louis metro lagged older industrial economies like Baltimore, Cincinnati and Pittsburgh as well as Heartland growth centers like Denver, Minneapolis and Nashville. Its sluggish economic performance helps explain why regional population growth between 2010 and 2017 hovered near zero (0.7 percent), compared to 5.5 percent for the nation as a whole. The region’s economic struggles have made it harder for companies to attract talent, for entrepreneurs to start businesses and for households to build wealth.

Decentralization has undermined performance. Nowhere are St. Louis’ struggles more apparent than in the heart of the metropolis. Downtown St. Louis bears little resemblance to other U.S. metros, many of which have seen substantial growth in core central business districts over the past 25 years. A desire for high-density residential options and easy access to urban amenities sparked a renewed interest in city life throughout the country that increased both population growth and commercial activity in urban areas. St. Louis, by contrast, continues to resemble a 1970’s style exit-ramp economy, with many major companies located on isolated suburban or even exurban campuses set away from a declining and increasingly depopulated urban core.

The contrast with the national average is stark: St. Louis would have an additional 130,000 jobs in its greater downtown if it had same level of employment concentration as the average U.S. metro.

Fragmentation has hampered collaboration. The mental map that residents and leaders use to describe St. Louis is crosshatched with rigid state, county and city borders and artificially drawn racial boundaries that divide rather than unify the region. The combination of this splintered landscape and the region’s dismal economic performance have created a culture of scarcity where growth is perceived as a zero-sum game that rewards only a few places at the expense of others. A plethora of organizations, programs and initiatives have sprung up to address key challenges such as educational attainment, entrenched poverty and entrepreneurial success, each with its own mission and activities. Though many deliver effective individual solutions, taken together they don’t add up to a cohesive whole. Of course, fragmentation is quite common in U.S. metropolitan areas. But older industrial cities like Pittsburgh and emerging tech hubs like Austin have created generative economies and cultures of collaboration where 2 + 2 = 5 and then some. For too long, St. Louis has been less than the sum of its parts, a place where 2 + 2 = 3.

Racial divisions and racial disparities have exacted an enormous cost. Entrenched patterns of residential segregation limit the life opportunities of Black St. Louisians in multiple, self-reinforcing and debilitating ways. Relegated to less prosperous neighborhoods, they must contend with circumscribed educational and employment opportunities that impede economic mobility. Limited job growth in the heart of the metropolis and a lack of transit-accessible jobs
reinforce the isolation of these disinvested communities. Predatory financial entities and limited access to conventional loans reduce Black residents’ ability to build intergenerational wealth through homeownership and business creation. As a result, St. Louis ranks 50th of the 50 largest metropolitan areas in terms of the size and longevity of its Black-owned businesses. Factors such as poverty, trauma, toxic stress, crime and difficulty meeting basic needs such as adequate housing, nutritious food and healthcare impose a physical and psychological toll that drives health disparities along racial lines.

Systemic racism has seriously compromised the regional economy, limiting its growth in almost every way. Economists estimate that the 2012 Gross Domestic Product (GDP) for the St. Louis region would have been 10 percent higher—$151.3 billion instead of $137.57 billion—if not for racial disparities in household income. These disparities extend to the small business community as well. By our calculations, if Black St. Louisans started and owned businesses at the same rate as white residents, the metropolis would have more than 8,000 additional employer businesses and approximately an additional 66,000 jobs in the economy. Racial disparities in virtually every aspect of the regional economy—including education, workforce training, access to quality jobs and career advancement, pay, leadership opportunities, startup activity, access to capital—harm regional economic growth and, more crucially, limit Black St. Louisans’ economic mobility and access to prosperity.

Race and space are intertwined. The interplay of race and space—reinforced by systemic racism and residential segregation—has had a devastating effect on the region. St. Louis is characterized by extraordinarily large areas of low-density Black communities that have long been disinvested and underserved. These concentrations of poverty in North St. Louis City, North St. Louis County, East St. Louis and elsewhere have hampered the virtuous cycle of development, business growth, job creation and asset building that have increased economic mobility for those living in other parts of the metropolis.

Patient and philanthropic capital needs to be unlocked. Accelerating inclusive growth requires capital to fund new small businesses, support organizational capacity-building and implement other needed interventions. Unfortunately, traditional sources of capital often view these investments as too risky, too slow, or too small to be worth their time. In St. Louis’ peer metros, a dominant corporation, sizable philanthropy or supportive state government will step in to provide the patient and/or philanthropic capital needed to propel inclusive growth. Without a similar entity to play this role, the St. Louis region will need to enlist major employers, financial institutions, philanthropies and thousands of potential investors willing to commit resources to this important work. In order to catalyze inclusive growth, St. Louis will need focused capital and leadership that are on par with existing efforts to address basic human needs and support highly regarded cultural institutions.
CAUSES FOR OPTIMISM

Other communities might see these challenges as insurmountable barriers to progress. Yet the overwhelming message we heard from St. Louisans is one of hope, unwavering commitment and genuine excitement about metropolitan possibilities and potential. That optimism is grounded in objective evidence:

The metropolis is awash in assets. St. Louis has a proud history of innovation, company formation and wealth creation in technology- and talent-fueled clusters and sectors. The metro’s significant and distinctive position in major industries—advanced professional services, biosciences, advanced manufacturing and transportation and logistics—are longstanding and deeply rooted. As domestic and global market dynamics revalue and restructure these areas of the economy, regional industry strengths offer great promise of growth, particularly for workers who receive continuous upgrading of technological skills.

St. Louis has also become a powerful convergence economy. Formed at the confluence of two great rivers, the metropolis now finds itself at the nexus of several emerging multi-industry clusters—geospatial, fintech, agtech, supply chain logistics—which are propelled by the invention, deployment and application of next-generation technologies. These cross-cutting technologies (and the talented workers behind them) are blurring traditional sector boundaries, inspiring entrepreneurs and driving innovation across a wide range of industries.

This convergence economy is taking root in a sizable metropolis where costs of living are reasonable, quality of life is high, universities are strong and the Midwestern ethic of hard work persists. The St. Louis metro has become a multi-faceted technology hub that generates constant demand in established companies for workers with up-to-date skills. It drives startup growth through an ecosystem that is growing in maturity and impact and provides enormous potential for the attraction and growth of new companies in a broad range of cutting-edge sectors.

Pre-COVID signs of an economic turnaround were real and fueled by a collection of exceptional practitioners. In recent years, the region scored some impressive victories, attracting major facilities such as the National Geospatial Intelligence Agency (NGA) West facility, Bunge’s global headquarters and Accenture Federal Services’ Advanced Technology Center as well as powering fast-growing firms like plant science innovator Benson Hill, contact-center management provider Balto and AI-powered helpdesk software firm Capacity (formerly Jane.ai).

These successes are not accidental. St. Louis has highly capable and distinctive organizations that routinely drive economy shaping, talent preparation and placemaking. Some of these organizations, including Ranken Technical College, BioSTL and Beyond Housing, are long established, with deep relationships with specific industries, companies and communities. Other organizations, such as Arch Grants, LaunchCode, Invest STL and the St. Louis Equity in Entrepreneurship Collective, are of more recent vintage. If properly resourced, all have the potential to drive inclusive growth at a much greater scale—particularly if they are more tightly coordinated within and across industry sectors.

Racial activism is one of the metro’s greatest assets. At a time when cities and metros throughout the country are grappling with racial division, St. Louis is poised to lead the nation by pressing for meaningful change that is rooted in civic dialogue and community organizing.
Since the fatal shooting of Michael Brown by a Ferguson police officer in August 2014, the St. Louis region has experienced an exceptional rise in civic engagement and collective action to address persistent racial disparities in policing, education, health, wealth and a whole host of other areas. Seasoned organizations like Beyond Housing, newer entities like WEPOWER, The Opportunity Trust, and Invest STL and efforts like the Business and Community Diversity, Equity and Inclusion Task Force organized by Civic Progress member companies, show a community moving from talk to action.

**St. Louis has done it before.** The metro has “muscle memory” of transformative change. Fifteen years ago, civic leaders William Danforth, John McDonnell and others, in collaboration with a number of anchor institutions, created BioSTL and the Danforth Plant Science Center and launched 21st-century innovation hubs Cortex and 39 North to make the most of the metro’s then-nascent strengths in biosciences. Danforth and McDonnell understood that the biosciences sector constitutes a purpose-driven economy, uniquely positioned to resolve some of the central challenges of our time by feeding and healing a growing global population during a time of rapid climate change. They also understood that global leadership in this sector would require deep competencies in and relationships across universities, companies, support organizations, talent providers and investors. They showed how to build an advanced economy with intentionality, patience and active collaboration. St. Louis has done it before—now is the time to do it again, but on a much larger scale.
Establishing ambitious but achievable goals—both in terms of programmatic metrics and overarching outcomes—is a critical step in any action plan and *STL 2030 Jobs Plan* is no exception. These goals help galvanize and guide stakeholder action within and across the solutions set out below. They signal priorities and provide mechanisms for holding key actors accountable. Setting explicit targets helps make the vision for the future more concrete and allows people to focus their creativity and energies on designing solutions capable of achieving the desired outcomes.

Traditionally, economic growth goal-setting begins with an assessment of the present-day baseline of the metro economy on a number of dimensions. These data are then used to estimate how much progress can be achieved in a given period of time if the region adopts certain solutions. For example, when Columbus, Ohio assembled goals for its Columbus 2020 plan, the region used baseline data to set specific numerical targets for net job growth, regional investment and personal per capita income.

This year, however, the process of setting goals is much trickier. The continued effects of the COVID-19 pandemic on the economy in general and small businesses in particular make an accurate baseline impossible to achieve. Without clear starting points, goal-setting becomes that much more difficult. The lack of baseline information particularly impedes the development of clear goals for two critical and related components of *STL 2030 Jobs Plan*—the *STL Pledge* and *Supply STL*.

At the same time, this economic upheaval may create opportunities for St. Louis to leapfrog past other U.S. metros that have been more deeply affected by COVID-19 (e.g., those more heavily reliant on downtown office workers or sectors such as tourism).

Given these uncertainties, we believe it best to sequence the setting of precise numerical goals. Once a clear baseline can be established, perhaps in partnership with the Federal Reserve Bank of St. Louis, the region will have the information necessary to identify bold but achievable goals for the coming decade. An initial assessment in the first half of 2021 will provide the insights needed to start the goal-setting process.

In the meantime, St. Louis will need to set directional goals focused on quality jobs, Black-owned businesses and other proven accelerators of inclusive economic growth. Development of an *Inclusive Growth Scorecard* will provide a reliable mechanism for tracking progress at regular intervals so that the region can figure out what’s working and course-correct to improve outcomes.

A commitment to eliminating racial disparities in median earnings, small business performance, educational attainment and other economic indicators underpins each and every solution included in this plan. *STL 2030 Jobs Plan* calls on the region to close these longstanding gaps by prioritizing inclusive economic growth that benefits all St. Louisans.
OUR SOLUTIONS

 Bringing about the inclusive growth that all St. Louisans deserve will require deliberate, coordinated action. *STL 2030 Jobs Plan* provides specific instructions that will allow the region to make progress on several key priorities at once. The five strategies outlined below combine a surge of progress on inclusive growth goals over the next three years with investment in systemic change over the next decade. Each strategy has been designed to avoid the mistakes of like-minded efforts that dream big but fail to deliver on implementation. *STL 2030 Jobs Plan*’s actionable strategies are specific and detailed, so that initiatives can be designed, financed, delivered and measured as quickly as possible. With a fully resourced Greater St. Louis, Inc. leading the charge, the region is poised to invest in and act on these strategies.

1. **STEWARD AN INCLUSIVE ECONOMY**

   In successful metros, business and civic leaders band together to steer and steward the economy with focus and discipline, using measures and metrics to set targets, gauge progress and nimbly adjust to market disruptions and new opportunities that arise. Drawing on best practices from successful metros such as Columbus, Indianapolis, Pittsburgh and Denver, St. Louis will develop a new approach to economic stewardship that prioritizes inclusive growth. With Greater STL, Inc. leading the charge, anchor institutions need to commit to the *STL Pledge*—buying local, hiring local, investing local (all with particular attention to those from historically underrepresented groups) and locating facilities near key nodes and districts. These commitments will help anchors set goals and determine how their internal processes need to evolve in order to make these aspirations a reality. Meanwhile, a STL Inclusive Capital Initiative needs to aggregate capital from families, corporations, universities and other investors to support critical elements of the *STL 2030 Jobs Plan*.

2. **RESTORE THE CORE OF ST. LOUIS AS THE JOBS AND CULTURAL CENTER OF THE METROPOLIS**

   In order for the region to thrive, the heart of St. Louis City must realize its full potential. To drive inclusive growth, the boundaries of the “core” will be expanded to include areas north of Delmar Boulevard that are emerging as major nodes of commerce and employment. Creating an additional 50,000 jobs over the next decade—with specific hiring goals for Black residents of the city’s north side—and committing to quality placemaking and placekeeping (e.g., the Brickline Greenway, regenerating commercial corridors) will require an all-in approach that brings together multiple sectors and major employers as well as institutional and impact investors.
3. BUILD A WORLD-CLASS ECOSYSTEM FOR SMALL BUSINESSES AND ENTREPRENEURS

To grow community wealth, St. Louis will need to ensure that all small business owners—regardless of race or gender—have ready access to reliable customers, quality capital, experienced advisors, an expanding network of investors and vibrant Main Streets and commercial corridors. The key is to build a system that seamlessly connects the substantial buying power of large corporations and anchor institutions with small businesses and fuels the growth of new companies and promising entrepreneurs with support and capital that are fit to purpose. The bold ambition: put St. Louis among the top metros for Black- and Brown-owned small businesses and startup activity.

4. BECOME A TALENT ENGINE AND MAGNET

With technological advancements changing the nature of work across the entire economy, St. Louis will need to connect individuals to the education, credentials and supports they need to succeed while simultaneously helping companies and clusters find the skilled workers they need to compete. STL 2030 Jobs Plan provides a roadmap for a three-year Talent Surge that will meet employers’ growing demand for technology skills and bring thousands of disadvantaged residents into the labor market. Meanwhile, a ten-year investment in systemic change will help build a robust, industry-led education and training ecosystem capable of meeting the projected skills needs of the regional economy.

5. MAKE STL A HUB FOR NEXT-GENERATION INDUSTRIES AND TECHNOLOGIES.

To remain competitive in the convergence economy, St. Louis will need to invest in healthy and resilient cluster ecosystems. Fortunately, it already has a strong model in its most distinctive competitive advantage—biosciences. Quadrupling down on what’s working in biosciences, when paired with focused efforts to adopt and adapt the biosciences approach for other next-generation industries such as advanced manufacturing and location sciences (geospatial), will help St. Louis realize the full potential of its investments and create thousands of accessible jobs that pay well in the process.

In the end, STL 2030 Jobs Plan embraces a hard truth: successful metros do their best in disruptive times to master the economy rather than let the economy master them. To that end, STL 2030 Jobs Plan sets a new standard for inclusive growth rooted in shared civic purpose and radical collaboration. It makes this unwavering assertion: St. Louis has the capacity, capital and cultural drive to turn the page after COVID-19 and propel its most prosperous decade in the past century.
Commissioned by Civic Progress before the onset of the COVID-19 pandemic, STL 2030 Jobs Plan lays out a 10-year road map to advance inclusive growth in the metro region with a focus on creating quality jobs. STL 2030 Jobs Plan provides an evidence-driven profile of the St. Louis economy, using objective data to assess the metro’s macroeconomic performance, distinctive industry cluster strengths and comparative position relative to peer metropolitan areas. A close reading of the excellent research on St. Louis conducted by local sponsored efforts as well as reputable outside research institutions, think tanks, and market and social analysts complemented this quantitative analysis.

STL 2030 Jobs Plan presents a framework for inclusive growth that is customized to the on-the-ground realities of the St. Louis region. It will ultimately commit the metro to a set of explicit 10-year goals, with companion indicators to measure progress over time. Five actionable strategies together explain how St. Louis will propel inclusive growth outcomes at scale over the next decade.

These goals, indicators and strategies were developed in close concert with local institutions and leaders. One-on-one interviews with over one hundred public, private and civic stakeholders offered insights into key challenges and important possibilities in the region. Meanwhile, working groups formed around critical economic focus areas to ensure that recommendations were co-created with dozens of local practitioners. Successful implementation will require broader ongoing conversations.

STL 2030 Jobs Plan has been an intentionally focused effort from the start. It began with a long-overdue assessment of the metro’s leading advanced industries, which have an outsized impact on regional growth. This assessment led to an evaluation of conditions for industry growth across multiple dimensions, including talent preparation, retention and recruitment, company expansion, spatial concentration and co-location, availability of quality capital and capacity of key intermediary organizations. Although primarily focused on private-sector and civic institutions, it has also sought out and welcomed engagement with various public-sector leaders, agencies and entities.

The St. Louisans we interviewed have respected the bounded nature of STL 2030 Jobs Plan, given its focus on catalyzing concrete action. At the same time, they have been insistent that public, private and civic leaders in the metropolis should not ignore the mostly self-inflicted challenges that undermine economic performance and shape perceptions of the region. Profound racial disparities, disinvested communities, under-resourced public schools in certain areas, high levels of crime and the large number of local municipalities all provide cause for concern. We fully acknowledge the seriousness of these challenges and understand they will only be resolved through holistic, ongoing efforts.

We believe that truly inclusive growth requires attention to diversity, equity and inclusion across every facet of the economy. STL 2030 Jobs Plan does not include a strategy focused exclusively on diversity, equity and inclusion because we believe that these critical concerns should not be siloed from the rest of the work. Every strategy needs to advance diversity, equity and inclusion.
With its 10-year perspective, STL 2030 Jobs Plan offers a long-term plan for leveraging the full inclusive growth potential of the St. Louis economy. It goes well beyond short-term responses to the multiple shocks currently affecting the United States and the rest of the world. That said, because near-term realities will determine opportunities for future progress, STL 2030 Jobs Plan takes into full account the broad implications and imperatives of the current situation.

Small businesses. The COVID-19 crisis is wreaking havoc on Main Streets across the United States. Millions of small businesses have been shuttered for the duration of the crisis. The hardest hit are Main Street enterprises living on the brink—restaurants, bars, coffee shops, barbershops, hair salons, auto repair shops, dry cleaners and others that provide face-to-face services. These entities, usually sole proprietorships or businesses with fewer than 20 or even 5 employees, are running out of cash or already broke. Given these impacts, STL 2030 Jobs Plan places a special focus on small businesses and the Main Streets and business districts where they tend to co-locate.

The transition to a 21st-century economy. The COVID-19 crisis is also re-scrambling the rules governing the performance of metropolitan economies in the United States and elsewhere. The accelerated push towards remote work has enhanced the competitive advantages of metropolitan areas that offer technological sophistication, high quality of life and lower cost of living. The rise in remote schooling and medicine has made internet connectivity and computer access an essential part of daily life, as critical as clean water and reliable power. The public health crisis has placed welcome attention on the importance of efficient and reliable supply chains and a need to reshore manufacturing in critical sectors. STL 2030 Jobs Plan takes into account how these dynamics affect talent recruitment, infrastructure priorities and manufacturing possibilities in the region.

Systemic racism and racial disparities. The health pandemic and the civil unrest following the murder of George Floyd have provided a renewed sense of determination to address the racial disparities that have plagued our country for generations. The pandemic has had a pronounced negative impact on Black and Latinx communities, which have higher incidences of medical pre-conditions due to unequal access to healthcare and face greater risk of repeated viral exposure as a disproportionately high percentage of frontline workers. The pandemic has also hit Black- and Brown-owned small businesses disproportionately hard since they tend to be under-capitalized, under-banked and over-represented in sectors shut down by quarantine. The heart of STL 2030 Jobs Plan is a commitment to inclusive growth, with an intense focus on substantially reducing racial and ethnic disparities on income, health and wealth through a series of scaled interventions.

Above all, STL 2030 Jobs Plan is an action plan forged during an unprecedented period that requires cities and metropolitan areas to be even more intentional and purposeful about their future. STL 2030 Jobs Plan asserts that fragmentation is a challenge, but not an excuse for inaction. Successful places see the fracturing of governments and institutions as a call to build and strengthen relationships. These regions understand the importance of swift action to connect large corporations with small startups, innovative ideas with new companies, talented workers with training and hiring opportunities, and promising entrepreneurs with quality capital. St. Louis can be one of those communities and use the COVID-19 crisis as an opportunity to leapfrog ahead on the central challenge of inclusive growth.
METROPOLITAN GEOGRAPHY

Because *STL 2030 Jobs Plan* is a 10-year metropolitan economic plan, a substantial amount of analysis has been conducted at the Metropolitan Statistical Area (MSA) level. Reflecting its origins as a river city, the St. Louis MSA encompasses both shores of the Mississippi River, stretching into Missouri and Illinois. It is composed of the City of St. Louis itself, Franklin County, Jefferson County, Lincoln County, St. Charles County, St. Louis County and Warren County on the Missouri side of the river and Bond County, Calhoun County, Clinton County, Jersey County, Macoupin County, Madison County, Monroe County and St. Clair County on the Illinois side. St. Louis is the 20th largest metropolitan statistical area in the United States by population.

![Map of St. Louis Metropolitan Statistical Area (MSA) with its corresponding counties and the 2018 population](image-url)
BUILDING ON STRONG FOUNDATIONS

STL 2030 Jobs Plan builds on an impressive collection of studies and plans that have been conducted over the past few years, many of which have involved deep community engagement. The recommendations made on such disparate issues as racial segregation, health inequities, workforce, innovation and infrastructure have all deeply informed our thinking and the strategies contained in this Action Plan.

Inclusive Growth

2020 Vision: An Equitable Economic Development Framework,
St. Louis Development Corporation, 2020

Design Downtown STL,
Design Downtown STL Advisory Committee, 2020

For the Sake of All: A Report on the Health and Well-Being of African Americans in St. Louis and Why It Matters for Everyone,
Washington University and St. Louis University, 2018

The State of the Report: Tracking the Ferguson Commission’s Calls to Action,
Forward Through Ferguson, 2018

The Ferguson Commission Report,
Forward Through Ferguson, 2015

Economic State

State of the St. Louis Workforce,
St. Louis Community College, 2019

Where We Stand – 8th Edition,
East-West Gateway Council of Governments, 2018

Industry and Infrastructure

GeoFutures Report: A Strategic Roadmap for Advancing the Geospatial and Location Technology Cluster in the St. Louis Region,
GeoFutures Advisory Committee, 2020

2021 Priority List of Freight Projects,
St. Louis Regional Freightway, 2020

Chouteau Greenway Framework Plan (now called Brickline Greenway),
Great Rivers Greenway, 2019

Connected 2045: Long-Range Transportation Plan for the St. Louis Region,
East-West Gateway Council of Governments, 2019

Advanced Manufacturing Innovation Center,
St. Louis Economic Development Partnership, 2017
Like any action plan, **STL 2030 Jobs Plan** builds on objective, independent research into the shape and structure of the St. Louis economy. Our findings show a region rich in assets, with a strong and growing collection of committed institutions, capable practitioners and proven solutions. Yet longstanding racial divisions have created deep disparities in income, health and wealth; unique spatial challenges; and a lack of the connection, coordination and collaboration needed to address common challenges and work toward shared goals.

Our central conclusion: The St. Louis metropolis is poised to unlock the full value of its assets and become a national model for inclusive growth—provided that it addresses significant racial, spatial and institutional challenges.

**Finding: After years of stagnation, the St. Louis economy was showing signs of improvement and significant potential in recent years**

The Great Recession affected communities all across the United States. Between late December 2007 and June 2009, the country’s real GDP (the total value of everything produced in an economy) dropped by $650 billion (4.3 percent). 8.7 million jobs were lost and unemployment reached 10 percent, with much worse rates for Black, Indigenous and other people of color (BIPOC). By multiple standards, St. Louis was slow to come out of the Great Recession. But recent progress suggests not only that the metro’s economy was getting back on track before the onset of the COVID-19 pandemic but also that the region possesses real potential for growth, given the emergence of highly competitive advanced industry clusters.

After the Great Recession, the performance of St. Louis’ economy lagged behind the nation and other metros. St. Louis recovered at a slower pace than every peer metro we analyzed: Baltimore, Cincinnati, Denver, Indianapolis, Kansas City, Minneapolis, Nashville and Pittsburgh. Macroeconomic performance stagnated between 2012-2016, with St. Louis experiencing a 1 percent decrease in total MSA GDP—a sharp contrast to the U.S. average of 11 percent growth. During this same period, worker productivity (GDP per worker) rose by nearly 3 percent nationally but declined by 5.5 percent in St. Louis. This indicator tells us that on average, the jobs added back to the St. Louis economy in the aftermath of the Great Recession had lower levels of productivity, which tend to be associated with lower pay.

In the years preceding the COVID-19 pandemic, however, St. Louis showed evidence of an economic turnaround. In 2017-2018 (the latest years for which data are available) the metro made progress on various measures of prosperity, with GDP growing 4.2 percent. Though still lagging behind the U.S. average of 5.8 percent GDP growth, this uptick represented important progress from just a few years earlier and brought the metro more in line with its peers. The region’s 4.2 percent GDP growth compares well to 3.39 percent in Baltimore, 7.9 percent in Cincinnati, 7.9 percent in Denver, 4.0 percent in Indianapolis, 3.89 percent in Kansas City, 4.7 percent in Minneapolis, 6.7 percent in Nashville and 4.8 percent in Pittsburgh.
During the same period, the average GDP per worker grew by 3.7 percent, powered by rising employment in high-productivity advanced industries, which grew substantially faster (4.0 percent) than in non-advanced industries (0.7 percent). The region also experienced a 3.2 percent increase in the average wage between 2016-2018. Furthermore, the Brookings Institution found that during the two-year period 2017-2018 the St. Louis metro area ranked 6th in the nation on key prosperity metrics, which take into account an area’s average standard of living, productivity and average annual wage. This ranking resulted from marked improvement in 2017-2018, given that the region ranked 44th from 2008-2018.

Taken together, these trends paint a clear picture: Compared to its peers, St. Louis has not been living up to its potential.

**Finding:** The strength of the St. Louis economy is disproportionately driven by growth in the metro’s distinctive advanced industries

Regional economies involve a wide range of industries, activities and occupations. While lower-skilled service industries provide substantial employment and represent an important segment of the area economy (particularly with regard to locally owned small businesses), advanced industry clusters anchor the U.S. economy and are essential for inclusive economic growth. Advanced industries play such a vital role because they grow exports and generate knowledge synergies that drive productivity growth across the entire economy. They also tend to pay higher wages. To take just one example, a strong
St. Louis' priority industry clusters all experienced employment growth between 2012 and 2018, ranging from 21 percent for Aerospace Vehicles, Automotive & Defense; to 9 percent for Advanced Business Services and Advanced Production; to 7 percent for Transportation, Distribution and Logistics; to 4 percent for Biomedical & Health Services. Overall employment growth for these five clusters was 7 percent.

A wage premium exists in high-tech industries nationwide, with workers earning more than they would in a non-high-tech industry, regardless of skill level required for their role.

Like all U.S. metros, St. Louis has a distinctive industry profile that grew out of competitive advantages forged in the 19th and 20th centuries. Our analysis revealed four advanced industries with strong growth potential—Advanced Business Services, Biomedical & Health Services, Advanced Production, Aerospace Vehicles, Automotive and Defense—as well as one critical supportive sector—Transportation, Distribution and Logistics. Taken together, these five priority clusters account for 40 percent of the region’s employment.

St. Louis can boost its growth prospects by targeting these high-potential priority clusters with initiatives that combat spatial and racial divides, increase the number of skilled workers and remove other barriers to growth.
Advanced Business Services

A large sector of finance, insurance and health management services that depend on close proximity to the software and information technology (IT) sectors

Subsectors: consulting, computer programming and systems design, data services, insurance, portfolio management, securities and commodity contracts

This sector consists of companies providing a broad array of finance, insurance and healthcare management services. These companies, while disparate, depend upon and benefit from a close connection to the IT and software industry.

The cluster employs over 244,700 people regionally and accounts for 15 percent of non-governmental employment. Between 2012 and 2018, the cluster experienced 9 percent employment growth and 11 percent productivity growth. Insurance agencies, brokerages and related activities have seen a particularly large jump in productivity, increasing by 43 percent from 2012-2018.

The advanced business services sector is defined by its application of relevant technologies and insights as well as its cooperation among actors. With few patentable discoveries, value in advanced business services tends to come from networks, expert knowledge and professional applications of innovations.

St. Louis’ position in advanced business sector is outsized in certain sub-sectors. According to the Missouri Department of Economic Development, St. Louis has the third highest concentration of Securities and Commodity Contracts, Intermediation and Brokerage firms in the nation (behind only New York City and Boston). Wells Fargo Advisors, a St. Louis-based subsidiary of Wells Fargo (California), was the 9th largest brokerage firm in the country in 2017. Ranked no. 1 in the St. Louis Business Journal for securities brokers-dealers, the company had 5,012 employees in St. Louis as of 2018. Stifel Financial Corp., another securities and brokerage company headquartered in St. Louis, employed 5,266 local workers in 2018 (the most recent available data).
This sector consists of healthcare services as well as advanced biomedical and pharmaceutical firms that benefit from connections with hospitals, universities and clinics. It has close relations with analytical industries, certain areas of IT such as imaging, nanoscience and the parts of the advanced production cluster focused on making prosthetics out of advanced materials. Convergences exist with insurance, law and finance as well.

Biomedical and health services include some of the longest and some of the shortest educations in the labor market. The cluster relies on close collaboration between basic research, translational and clinical research, industry development, IP attorneys, regulators and mass distribution networks. Its reach extends “from bench to bedside.”

The sector employs over 198,500 people regionally and represents over 10 percent of non-governmental employment. The sector experienced 4 percent employment growth from 2012-2018 and a 23 percent increase in productivity growth (higher than half of peer metros). There are rapidly growing industries emerging within the ecosystem, most notably within biopharmaceuticals.

The biomedical and health services sector capitalizes on the strong interplay between anchor institutions like Washington University and Saint Louis University, BJC HealthCare and other hospital systems, major corporations like Bayer, Pfizer and GlaxoSmithKline, focused investors like RiverVest and Cultivation Capital, and intermediaries like BioSTL and the Cortex innovation district.

St. Louis has a strong and expanding startup community in the biomedical and health services industry and even prior to the outbreak of COVID-19, there was a significant amount of research in pandemics and vaccines. A treatment for COVID-19 patients—developed in part in St. Louis by the BioTherapeutics Pharmaceutical Sciences team at Pfizer—is now seeking emergency approval. Public awareness and investment in the key area of vaccines is taking off. Examples include a recent $3 million investment in VaxNewMo, which specializes in next-generation conjugate vaccines against infectious diseases using proprietary technology. In September 2020, BioSTL was given federal resources to launch the Center for Defense Medicine through a $1.5 million grant awarded by the U.S. Economic Development Administration (EDA).

The interplay of biomedical innovation and leading health companies and hospital systems headquartered in St. Louis makes the metropolis a unique healthcare powerhouse.
St. Louis’ unusual strength includes the following companies and hospital systems:

- Ascension: The country’s largest nonprofit hospital system with $23 billion in revenue from 151 hospitals across 22 states
- Express Scripts: One of the country’s top pharmacy benefits management companies with $100 billion in revenue
- Centene Corporation: The country's largest managed care company with $100 billion in revenue across 50 states
- RGA (Reinsurance Group of America): A leading insurance company with $11.5 billion in revenues and $3.1 trillion in life reinsurance
- SSM Health: A network of 24 hospitals across 4 states with $6.5 billion in revenue
- BJC HealthCare: A top-tier integrated health delivery network with $5 billion in revenue from 15 hospitals and specialty networks

The cumulative impact: the St. Louis biomedical and health services sector has more purchasing power than such acknowledged health hubs as Boston, Chicago, Cleveland, Nashville and Philadelphia.

**Advanced Production**

*A broad cluster of small-scale production and manufacturing that includes advanced software engineering, consumer products, food production and manufacturing*

Subsectors: analytical instruments, downstream chemical products, food and livestock processing and manufacturing, information technology, lighting and electrical equipment, production technology and heavy machinery

This cluster includes small-scale production and manufacturing companies with specialization in a disparate set of industries ranging from environmental control and refrigeration to chemical production to food production and consumer products.

The cluster employs over 57,100 people regionally and is more geographically concentrated in the St. Louis region than in peer cities. From 2012-2018, the cluster experienced 9 percent employment growth and a 21 percent growth in awarded patents. Employment in the advanced production cluster is more spread out across the region than other advanced clusters, with a high concentration of jobs located in Franklin County. The advanced production cluster appears poised for growth in a post-COVID world as the U.S. seeks to re-shore some components of manufacturing. As such, combining a strength in advanced production with transportation, distribution and logistics infrastructure will be a must for the region moving forward.

The advanced production sector has the potential to undergird growth in other parts of the St. Louis economy as well. By leveraging the presence of strong agtech, aerospace and transport and logistics industries in the metropolis, advanced manufacturers can be close to their customers, develop new products more quickly than global competitors and act faster on concerns and needs of their customers.
St. Louis has historically been at the heart of the nation’s transportation economy because of its strategic location at the confluence of the Mississippi and Missouri Rivers. The metropolis is a significant multi-modal hub with six Class 1 Railroads, four major U.S. interstate highways, an inland port and multiple airports. Today, St. Louis’ TDL cluster remains a regional strength, particularly due to ease of switching between multiple modes of transportation (e.g., rail, boat/barge and truck).

This cluster employs over 23,400 regionally and experienced 21 percent employment growth from 2012-2018, though the sector’s comparatively smaller size makes double-digit growth easier to achieve. Aircraft dominates the cluster, representing 80 percent of cluster employment, followed by light truck and utility vehicle manufacturing. Aircraft manufacturing is unique to St. Louis among its peer MSAs and its only competitor in light truck and utility vehicle manufacturing is Kansas City. Geographically, employment is concentrated around manufacturing facilities in St. Charles County and St. Louis County.

St. Louis has played a substantial role in aircraft and auto manufacturing for the past hundred years. Today it is home to advanced manufacturing plants for two of the nation’s most well-known manufacturers: Boeing and General Motors.

Aerospace Vehicles, Automotive and Defense
Large-scale manufacturing, servicing and advanced production of defense technology
Subsectors: Aircraft manufacturing, light truck and utility vehicle manufacturing, nonferrous metal foundries

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TDL is performing well in St. Louis and employs 153,900 people regionally. The cluster provides middle-class job opportunities to those without a college degree and experienced 7 percent employment growth from 2012-2018. Its productivity growth surpassed that of half of St. Louis’ peer cities. TDL is the one sector that engages both sides of the Mississippi River equally, raising the prospect of a bi-state initiative to remake the mental map of the region by positioning the river as a central thoroughfare rather than a hard border.

The promise of the TDL sector resides in the opportunity to evolve from a 20th-century switching point for the distribution of goods (e.g., warehouse centers) to a 21st-century transportation hub that can realize the full potential for value-added advanced manufacturing and growth in logistics-related technology. On the manufacturing side, St. Louis’ vacant industrial properties are an underutilized asset for the

Transportation, Distribution & Logistics (TDL)
A multimodal cluster that serves the metro’s industries as well as the global transportation system
Subsectors: Rental and leasing of automotive equipment, commercial and industrial machinery and equipment, truck transportation, warehousing and storage

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Scott Air Force Base (Scott AFB) is one of the most important assets for the St. Louis region. Connected to downtown St. Louis by MetroLink, Scott AFB has a clear and direct impact on St. Louis and its economic competitiveness.

By the numbers: Scott AFB employs nearly 8,000 active duty, National Guard and Reserve officers as well as an additional 5,000 civilian employees, making it one of the region’s largest employers. Its impact is even greater, with a 2014 report estimating that Scott AFB indirectly contributes another 4,400 jobs in Missouri’s St. Louis region. Of the 18,000 military retirees in the region, a 2011 report estimated that more than 50 percent—nearly 10,000 retirees—live in Missouri’s St. Louis region. Accounting for military and civilian employment, indirect economic stimulus and the retiree population, Scott AFB has a significant impact on St. Louis’ economy.

Educational Connections: The St. Louis region has numerous institutions of higher education, many of which have strong links to Scott AFB. Maryville University, located in St. Louis County, actively recruits military veterans while also offering an MBA at Scott AFB’s Education Center. Other universities in Missouri and Illinois, such as McKendree University, Southwestern Illinois College, Southern Illinois University - Edwardsville and Webster University all offer undergraduate and graduate degrees at Scott AFB for civilian and military personnel. Many of these degrees are focused on management or cybersecurity, presenting a clear opportunity for entrepreneurial potential as these personnel enter into civilian life.

Goods and Services: According to the 2011 report, Scott AFB spent over $200 million in the St. Louis region in FY 2010, 47 percent of which was spent in Missouri. This number has surely grown, representing a clear opportunity for organizations in the region. Over $80 million was spent on local goods and services, while construction, operations and maintenance and healthcare also represented significant expenditures from the base.

Innovation: It is anticipated that Scott AFB will be closely tied to the new NGA West facility. In addition to new cybersecurity squadrons, Scott AFB plays a leading role around geospatial and cybersecurity intelligence.

Finding: The future of the St. Louis economy could be dramatically shaped by growth in three next-generation sectors

Our analysis also revealed three emerging sectors that are growing rapidly, powered by broader market dynamics, technological innovation and social and environmental challenges in the U.S. and abroad.

Geospatial
This sector collects, processes and analyzes data associated with location. Applications for geospatial intelligence reach across all types of industries (e.g., from precision agriculture to e-commerce to financial services) and potentially hold solutions to challenges ranging from food insecurity and climate change to pandemic prevention and global terrorism. The 2016 NGA decision to stay in St. Louis and construct a new facility north of downtown St. Louis and Delmar Boulevard will bring substantial economic benefit to the region. With its $1.7 billion price tag, NGA West is the largest federal investment project in the history of St. Louis. Early estimates suggest the cluster will create approximately 27,000 jobs in the geospatial sector, generating an additional $4.9 billion in regional economic activity. NGA has also shown a willingness to collaborate with the private sector, as evidence by its a plan to have non-secure workspaces for contractors in the new NGA West facility.

Fintech
This sector uses technology to increase the efficiency of financial systems and services. Fintech is a sector poised for growth, with startups receiving over $69 billion in funding in 2019, a 17 percent increase from the previous year. According to Findexable’s Global FinTech Index City Rankings 2020 Report, St. Louis ranks 26th worldwide out of more than 230 cities and 65 countries. Despite having substantial regional assets, St. Louis currently neither over- nor underperforms in fintech relative to its peers in the U.S. That said, the decision by Square to expand its operations north of downtown St. Louis and build a fintech innovation district holds great promise.

Agtech
This sector applies a wide variety of technologies to agriculture science and production practices with the aim of improving yield, efficiency and profitability. As in biosciences, the St. Louis advantage starts with research. The regional agtech community employs more than 15,000 people at over 400 research and development companies and has the highest concentration of plant science PhDs in the world. The Danforth Center, the nation’s largest independent plant science institute, anchors the 600-acre 39 North Innovation District and the corporate BRDG Park, giving researchers access to shared infrastructure to help advance innovation more quickly. The path to commercialization is enabled by the presence of strong corporations such as Bayer Crop Science, Bunge and Novus; investors such as Bayer Growth Ventures and Cultivation Capital; and supportive intermediaries like Yield Lab. The region’s location helps explain St. Louis’ first-mover advantage in this growing sector: Currently 50 percent of U.S. crops and livestock are produced within a 500-mile radius of St. Louis, including approximately 80 percent of corn and soybean acreage. Just as important as the production of food is its distribution across the globe and the St. Louis TDL sector provides a platform to address this demand.

Finding: The strength of the St. Louis economy is increasingly characterized by a growing mix of entrepreneurs and startup activity

Entrepreneurship and small business activity are important drivers of job growth, wealth creation and economic resilience. Fully 99 percent of all U.S. businesses are categorized as small, meaning that they have fewer than 500
employees. Of all businesses with employees, more than half employ just 1–5 workers total. Altogether, these firms employ almost half of all Americans.

Small businesses generate more new jobs than other businesses, making them vital engines for expanding employment nationwide. Between 2005 and 2019, small firms drove 64 percent of net private-sector job creation. Monthly job creation at small businesses typically exceeds job creation at large firms, with small firms generating more jobs in eight of the last twelve quarters with available data. And startups account for many of these jobs—roughly one-third of the total most years.

In the past decade, St. Louis has built a nationally recognized ecosystem for startups, building on the metropolitan area’s distinctive clusters, a robust grouping of entrepreneurial support organizations, institutions of higher education and a growing array of funders and funding opportunities.

Part of St. Louis’ success stems directly from outsized prowess in cutting-edge research and access to support and capital that are fit to purpose. Between 2013 and 2019, St. Louis-based biosciences companies raised over 70 percent of all capital invested in St. Louis startups, due in large part to BioGenerator’s sophisticated approach to fundraising. BioGenerator’s investment programs have some of the highest leverage of any venture development organization in the nation, with the portfolio raising roughly $40 for every dollar BioGenerator invests. Approximately $27 million in BioGenerator capital has been invested in over 80 startups, which together have raised nearly $1.1 billion from investors throughout the world.

Beyond biosciences, St. Louis is building a strong platform for tech-enabled startups that cross multiple sectors. In 2018, Fit Small Business found St. Louis to be the second-best city for entrepreneurs thanks to its high business survivability, lower-than-average tax rate and very low cost of living. In other words, “St. Louis’ affordability and undersaturation make it the ideal proving ground for new businesses.” In 2019, St. Louis similarly topped the Forbes rankings with its extensive financing options, supportive business culture and availability of skilled workers.

However, like everything else in St. Louis, entrepreneurial performance is replete with racial disparities. While some efforts have focused on creating, funding and scaling Black-owned startups, the overall ecosystem for Black-owned businesses is woefully thin, under-capitalized and primarily reliant on government and nonprofits rather than market investment. Black founders—and especially Black women founders—too often lack access to a consistent customer base, mentors, workspaces, quality capital and other resources needed to start and grow their businesses.

The data speak for themselves. According to a 2019 Lending Tree analysis, St. Louis ranked last out of 50 metropolitan areas on a range of critical indicators. It found that St. Louis Black-owned businesses are exceptionally small, with only 18 percent exceeding $500,000 in annual revenues. Black-owned businesses also tended to be younger; only 27.6 percent had been around for at least six years. By contrast, in Cincinnati—a comparable former industrial city—43.3 percent of Black-owned businesses exceeded $500,000 in revenues and 62.3 percent had been in operation for six years or more.

The next decade provides St. Louis an opportunity to scale and diversify startup activity by supporting a broader continuum of entrepreneurs—ranging from Main Street businesses to tech-enabled startups to R&D-driven companies—with an expansive array of flexible capital, customers, quality talent, distinctive innovation hubs and a fully engaged corporate community.
Finding: The past decade has seen the rise of a collection of capable organizations and practitioners that build on the metro’s inherent and emerging competitive strengths

The region’s economic progress is powered by a solid base of university research and corporate R&D, which together provide a platform for innovation in health, plant science, location technology, finance and, most recently, information technology. St. Louis has scored some impressive victories in the recent past that bode well for inclusive near-term job growth as well as long-term economic transformation.

Proven Economy-Shaping Capabilities

The region’s growing success is due to a collection of innovation districts and specialized intermediaries. This is particularly true in biosciences. Over the course of several decades, the region painstakingly built a globally significant platform for conducting and commercializing sophisticated research, growing startups, attracting domestic and foreign companies and co-locating firms, investors and researchers in geographically distinctive innovation hubs. The decades of the 2000s and 2010s were dedicated to building this platform and scoring early wins; this decade should focus on realizing the full technological, jobs, investment and company potential of these critical sectors, increasing the proportion of BIPOC and white women pursuing careers in the sector and cementing St. Louis’ position on the global stage.

The St. Louis biosciences ecosystem is distinctive and poised for growth. Unlike many other U.S. metros, St. Louis has strengths in both traditional biomedical clusters such as biopharma and medical devices as well as emerging clusters such as pandemic medicine and defense medicine. The ecosystem has a solid research base that attracts over 80 percent of the federal research dollars allocated to Missouri. Washington University consistently ranks among the top five medical schools receiving NIH funding. Other research assets include Saint Louis University and its medical school as well as the academic medical centers of both Washington University (Barnes-Jewish Hospital) and Saint Louis University (SSM Saint Louis University Hospital).

Most significantly, St. Louis has benefited from the efforts of an exceptionally effective intermediary, BioSTL, which has built a self-sustaining ecosystem that links up startups, capital, entrepreneurs and skilled workers, physical assets and placemaking investments, policy advocacy, global connectedness and corporate partnerships in a mutually reinforcing cluster. Over the course of several decades, BioSTL has launched a group of subsidiaries, including BioGenerator (to drive startup activity), GlobalSTL (to attract foreign companies), STEMSTL (to increase access to quality STEM education and training) and the Bioscience Inclusion Initiative and the St. Louis Equity in Entrepreneurship Collective (to promote inclusive pathways to company creation).

The ecosystem takes physical form in the Cortex Innovation Community, one of the world’s top innovation districts. It is a hub of innovation not only in biosciences but in technology more broadly and employs a distinctive governance model—a tax-exempt 501(c)3 formed in 2002 by Washington University in Saint Louis, BJC HealthCare, University of Missouri–Saint Louis (UMSL), Saint Louis University and the Missouri Botanical Garden in collaboration with the City of St. Louis. The presence of BioGenerator Labs and the new Washington University neuroscience research facility on the Cortex campus intensifies the co-location of researchers, startups and supportive entities.

The benefits of this cluster-oriented environment are sizable. In 2012, Cortex housed approximately 1,000 employees in 50 companies. Just seven years later, the number of jobs in the district has grown to 6,000 across 425 companies—a 600 percent increase in
on-site employment. By contrast, the number of jobs citywide in St. Louis only increased by 4 percent over the same period.

The biosciences sector includes an exceptionally strong presence in ag sciences and, increasingly, agtech. This cluster is gaining momentum, particularly given global pressures around climate change and food insecurity. Ag sciences already has a dense network of researchers, corporations, entrepreneurial support organizations, startup incubators and investors, all coalescing around its own innovation district, 39 North. The ag sciences sector is genuine and authentic, given the region’s proximity to Missouri’s strong agriculture sector.

The success of the biosciences cluster shows that St. Louis can build and steward a rich and textured industry ecosystem that is globally acknowledged as best in class and poised for substantial growth. The biosciences ecosystem is noteworthy for both its component parts (i.e., organizations that are able to perform discrete tasks with proven success) and its connective tissue (i.e., the ability of organizations to collaborate on common goals).

Beyond biosciences, St. Louis has a plethora of highly capable and distinctive organizations that routinely deliver economy-shaping services in an effective and efficient manner. Some of these organizations are long established, with deep relationships with particular industries and companies. Others are quite new, started over the past decade or even more recently. If funded at scale and coordinated in focus, these organizations could play a major role in driving inclusive growth across the region.

In other words, St. Louis has many of the individual puzzle pieces needed to leverage the potential of its sectors, companies and residents. But these pieces have yet to come together. With focused investment, disciplined execution and a holistic perspective, St. Louis can complete the picture and benefit from the full impact of its efforts.

Skilled Workers
Metro economies are fueled by skilled workers, which increasingly means those who are able to keep pace with rapid advances in technology. St. Louis benefits from a strong network of universities and colleges that offer 4-year and 2-year degrees in fields that meet rising demand from companies in advanced industries. These universities and colleges include public and private higher educational institutions located within the core city and county (e.g., Washington University, Saint Louis University, UMSL, Harris-Stowe State University, St. Louis Community College, Ranken Technical College) as well as universities located in other parts of the metropolis and beyond (e.g., Southern Illinois University - Edwardsville, Maryville University, Lindenwood University, Missouri University of Science and Technology). In addition to traditional postsecondary institutions, St. Louis is home to nationally recognized skills providers such as LaunchCode, which has a proven approach for equipping workers with specific technological expertise in a relatively short period of time.

Entrepreneurship
Metro economies are shaped by entrepreneurs. In recent years a number of organizations have emerged to address key challenges facing St. Louis founders and early-stage companies. A network of incubators, accelerators and organizations (e.g., ITEN, OPO Startups, T-REX, Washington University’s Skandalaris Center, Square One, Capital Innovators, The Yield Lab, The BALSA Foundation, UMSL’s DEI Accelerator, WEPOWER, Brick City Makes and others), innovation districts (e.g., Cortex, 39 North) and distinctive attraction/retention/growth models with proven track records (e.g., BioGenerator, Arch Grants) have helped create a richly textured innovation community with ready access to mentoring services.
These support entities provide a broad continuum of capital to a diverse array of entrepreneurs and enterprises. Some are industry-focused; others are industry-agnostic. Some are intent on commercializing university research; others have a broader definition of innovation. Some routinely connect mature corporations and young companies; others operate outside the advanced clusters described above.

The St. Louis entrepreneurial ecosystem has yielded positive results in a relatively short period of time and is uniformly characterized by positive momentum and the fierce dedication of its leaders. Strengthening this platform and making it more inclusive of those from underrepresented groups will contribute directly to more startup activity, healthier small businesses and more inclusive economic growth. Such investments will be particularly critical given the dramatic implications of the COVID-19 pandemic for small businesses in general and Black- and Latinx-owned businesses in particular.

Infrastructure and Placemaking
Metro economies are characterized by modern infrastructure, quality places and institutions and intermediaries that can catalyze the design, financing and delivery of these (often) public goods. There are some exceptional (although not comprehensive) efforts underway in St. Louis. The East West Gateway Council of Governments acts as the region’s metropolitan planning organization, with responsibility for strategic planning around surface transportation projects. The bi-state St. Louis Freightway effort has made a solid case for business attraction and expansion, given the strong infrastructure assets of the metro. Great Rivers Greenway has built a remarkable network of trails that link multiple jurisdictions and is currently at work on the Brickline Greenway, one of the most ambitious efforts to remake the core of an American city in decades. The region already has a network of innovation districts, including T-REX, Cortex, 39 North and OPO, with ample potential for stronger connections between these nodes.

Cultural and Civic Organizations
Lastly, metro economies are affected by the strength of cultural and civic organizations. St. Louis stands apart from many U.S. metros for its sustained public investments in the Metropolitan Zoological Park and Museum District. The cultural offerings in St. Louis are of the highest quality. Recent initiatives have created energy and momentum and unveiled new leaders around inclusive economic growth (e.g., SLDC’s Equitable Economic Framework) and racial equity (e.g., Forward Through Ferguson).

The bottom line is this: the economic progress of St. Louis pre-COVID was enhanced by local organizations and initiatives that drove critical aspects of economy shaping, talent preparing and placemaking. These activities are most mature in the biosciences cluster, particularly around Cortex and 39 North. The sector’s successes offer a roadmap for other sectors looking to build stronger, more resilient industry ecosystems.

**Finding: Structural racial, spatial and institutional challenges have impeded the metro’s performance and must be addressed going forward**

Given St. Louis’ ample assets, why has the metro stagnated for so long? A series of structural challenges, many but not all rooted in racism, have undermined the metro’s ability
to collaborate to compete. Recognizing and overcoming these challenges will be essential to secure long-term prosperity and inclusive growth.

**St. Louis has a deep history of racial segregation and severe racial disparities in across all aspects of daily life**

St. Louis is the sixth most segregated metropolitan area in the country, with many neighborhoods dominated by a single race. The impact of this racial and spatial isolation has multiple negative effects that harm both the life opportunities of Black residents as well as the economic performance of the entire metropolis.

The St. Louis region ranks 42nd out of 50 large metropolitan areas on economic mobility, defined as a person, family or group’s ability to improve their economic status by moving up in income. The City of St. Louis in particular is a site of extreme income inequality divided along racial lines, with a Black poverty rate of 26.4 percent standing in sharp contrast to a white poverty rate of 7.9 percent. In 2018, the average annual wages in the City of St. Louis were just $33,900 for Black workers, compared with $70,500 for white workers. St. Louis is not alone in its racial wage gap—the comparable national averages are $37,100 for Black workers and $61,200 for white workers—but the disparities in the City of St. Louis are particularly extreme. Economic and social outcomes are closely interlinked, with income, educational attainment, health outcomes, access to housing, reliable transportation and other factors influencing one another.

The city’s racial inequalities extend to housing and wealth building as well. Bias in financial services, lack of generational wealth, constrained finances and exploitation by mortgage originators all complicate the traditional American approach to wealth building: Buying a home. Just 42 percent of Black residents in St. Louis County and City of St. Louis own their homes, compared to 74 percent of white residents. In addition, a de facto “segregation tax” limits value appreciation in homes owned by Black residents, making re-sales less lucrative. The barriers which prevent many Black residents from fully participating in the region’s economy act as a brake on everyone’s prosperity. Lower Black wages mean less purchasing power, reduced tax revenues and higher social service costs. Everyone pays a price—and in St. Louis that price is severe.

**Racism and racial segregation have also helped drive excessive economic decentralization in the metropolitan area**

In 2010, just 13 percent of St. Louis’ jobs were located within 3 miles of the central business district, compared with an average of 23 percent for the country’s 100 largest metros. By the same token, 61 percent of St. Louis’ jobs in 2010 were located more than ten miles away from the central business district, compared with a national average of 40 percent. In a recent comparison of proportion of jobs within 3 miles of the central business district in large and mid-sized U.S. cities, St. Louis ranked 31st out of 34. Significantly, St. Louis would have an additional 130,000 jobs in the city’s greater downtown if it had the average employment concentration of U.S. metros.
The weakness of the core has multiple repercussions for innovative and inclusive economic growth. Decentralization has reinforced deep-seated historic patterns of economic and racial segregation. Over 280,000 residents and nearly 13,000 businesses are located in predominantly Black communities with poverty rates higher than 20 percent (Figure 1). This geography extends from just south of St. Louis City center into North St. Louis City and North St. Louis County. The persistence of concentrated poverty and racial inequities in the core of the metro, reaching across urban and suburban lines, is the singular characteristic of St. Louis’ growth and development for the past half-century.

This low job density reflects the economic and demographic collapse of the city center. Racism has indubitably played a substantial role in distending and distorting the metropolitan geography, undermining tax revenue generation and property values within the central city (due to an overly diminished employment base), talent recruitment and innovation in companies (due to excessive dispersion) and basic access to jobs, especially for low-wage and entry-level workers (given the spatial mismatch between where people live and where jobs are located).

The metropolis has significant talent deficiencies that undermine industry growth and performance

The relentless competition to meet demand for skilled workers has yielded many bespoke relationships between industries, companies, postsecondary institutions and training providers in the region. These bilateral relationships contain a proven recipe for success. Companies co-design courses and curriculum with educators and training providers. Workers acquire skills for jobs that are available. Work-based learning grounds training in real-world practice. Companies provide expertise and access to facilities and in certain circumstances even commit to hiring program graduates.

Despite these often effective partnerships, the St. Louis metro lacks any structured alliance to bring together industry, high schools, skills providers, community colleges and universities. The result: a fundamental mismatch between business demand and labor supply.

The absence of an integrated education and workforce ecosystem has sectoral and racial implications.
On the sector side, the lack of IT labor in St. Louis poses a significant barrier to growth of advanced industries. The geospatial sector alone expects a 26 percent increase in demand for workers with skills in information systems. Three other industry groups have well-above average utilization of software skills: automotive rental and leasing (likely because of Enterprise headquarters activities) employs software tech workers at 43 times the national industry average; agricultural chemicals employ 37 times more; and aircraft and parts, almost five times more. Hospitals, too, have high demand for software tech occupations and employ 1,800 people in software tech in the region.

Finding workers with the right tech skills is hit-and-miss in the St. Louis metro. Some employers (and occasionally clusters) have forged close relationships with proven skills providers to upgrade the skills of incumbent or potential workers. But there is simply no systematic way to assess deficits in key occupations and skills, ensure that sectoral concentrations and employer needs inform university and college offerings, and match individual workers to in-demand occupations.

This lack of coordination and consistent investment across the region’s education and training ecosystem has profoundly negative effects on Black residents, who disproportionately are subjected to underfunded schools and lack access to the supports they need to pursue more advanced educational attainment. To take just one example, only 10 percent of Black students who start a two-year community college program in the St. Louis metro graduate within three years.

The low volume of philanthropic and patient capital is a binding constraint on inclusive growth
In St. Louis’ peer metros, a dominant corporation, sizable philanthropy or supportive state government will step in to provide the patient and/or philanthropic capital needed to propel inclusive economic growth. Absent such an entity, the region must rely on networked governance and collaboration, which are emerging but still nascent. Economic development is largely fractured along jurisdictional, sectoral and stakeholder lines. As a result, entities with capacity pursue their own initiatives and transactions, with the result often adding up to less than the sum of the parts.

The region’s underdeveloped philanthropic sector is particularly noteworthy. The St. Louis metro is widely seen as wealthy and generous; in 2017, St. Louis was named the third most charitable city in the U.S., after earning first place in 2016. In 2019, the United Way of Greater St. Louis raised over $76.3 million in its annual fall fundraising campaign; more than 100,000 individuals and 1,200 companies contributed to this success. And major partnerships of public and private funders have supported special projects like the $380 million Gateway Arch National Park.

The proven mechanisms for investing in social services and special projects do not exist for the kind of economic development strategies envisioned by STL 2030 Jobs Plan. In cities like Indianapolis and Pittsburgh, large foundations like the Lilly Endowment and the Hillman Foundation routinely use grants or concessionary market capital to build the capacity of business leadership groups and economic development organizations and invest in a broad array of university-related initiatives. In Detroit, a consortium of banks and philanthropies created a $130 million Strategic Neighborhood Fund to focus on the renewal of ten neighborhoods in the core of the city. In Cincinnati, major corporations have provided the Center City Development Corporation (3CDC) hundreds of millions of dollars in patient capital to enable the strategic revitalization of the Over-the-Rhine neighborhood. No such consistent or reliable source of capital exists in the St. Louis metro. For all its wealth, St. Louis simply does not have the same depth of assets available to comparably sized metros.
The diagnostic detailed above presents two imperatives for St. Louis as it begins the 2020s. Given the lagging economic performance of the past decade, boosting growth in quality jobs must be a central priority. But that growth must yield inclusive outcomes for a broad segment of the population and substantially reduce the racial disparities on income, health and wealth that have held St. Louis back.

A vision of inclusive growth is tailor made to the needs and possibilities of the St. Louis metropolis. Guided by a group of local stakeholders, *STL 2030 Jobs Plan* defines the term in ways that reflect the special circumstances of the St. Louis metro. It will ultimately use this definition to inform an Inclusive Growth Scorecard with clear 10-year goals that are customized to the region, as well as a set of indicators that can gauge metropolitan performance on a regular basis (ideally quarterly, depending on data availability).

The term “inclusive growth” emerged during the 2000s when the World Bank, International Monetary Fund and other global organizations realized that traditional measures of economic growth (namely, a focus on gross domestic product) were not producing sufficient reductions in inequality and increases in living standards. These entities decided that a more proactive approach was needed to ensure growth was shared more widely.

Over the past decade, efforts have been made to sharpen the definition of “inclusive growth” to ensure that smart policies can be enacted and a broader set of investments and investors can be mobilized.

The OECD provides this basic definition:

*Inclusive growth is economic growth that is distributed fairly across society and creates opportunities for all.*

In the UK, the 2017 RSA Inclusive Growth Commission expanded the definition:

*The Commission defines inclusive growth as broad-based growth that enables the widest range of people and places to both contribute to and benefit from economic success. Its purpose is to achieve more prosperity alongside greater equity in opportunities and outcomes.*

After much deliberation, *STL 2030 Jobs Plan* provides a definition that is even more expansive and specific.

*Inclusive growth is broad-based economic growth that enables all stakeholders in the St. Louis metropolitan area (including residents, workers, entrepreneurs, companies, organizations and communities) to realize their full potential. Such growth enables the widest range of people and places to both contribute to and benefit from economic success.*

*Inclusive growth aims to produce more prosperity alongside greater equity in opportunities and outcomes by substantially increasing the number of quality jobs and radically reducing racial and spatial disparities in income, health and wealth that have undermined metropolitan performance for decades.*
Inclusive economic growth is the North Star of STL 2030 Jobs Plan. It guides all elements of the 10-year action plan, including priorities, specific performance indicators, top-line branding and the content and delivery of actionable strategies. The definition of inclusive growth reflects the distinctive opportunities and challenges of the St. Louis metro economy identified through quantitative analysis and dozens of qualitative interviews. It is meant to last through a decade but also reflects the extraordinary moment for change that has been catalyzed by the COVID-19 crisis and our nation’s reckoning with racism and racial divisions. Finally, the definition builds carefully on previous studies and strategies developed for St. Louis, including the Ferguson Commission Report, 2020 Vision and For the Sake of All, as well as efforts by comparable metros and metro business groups and national and global research on inclusive growth.

The definition has been carefully constructed to include a dual emphasis on outcomes as well as opportunities. Connecting people to opportunities that exist in the labor market through better education, access to transportation and support for worker success is vital. But intervention also needs to attend to the growth side of the equation. An inclusive growth strategy must proactively influence both the number and nature of employment opportunities by growing jobs in advanced industries with competitive advantages, shaping the occupational and sectoral make-up of the economy and ultimately pushing up levels of pay and improving terms and conditions of employment contracts. It must also include, particularly given the nature and scope of the current economic downturn, ample support for small businesses and entrepreneurs in general and Black-, Latinx- and women-owned enterprises and entrepreneurs.

Although inclusive growth is much discussed today, it rarely is measured in ways that can inform actionable strategies and hold stakeholders accountable. To that end, STL 2030 Jobs Plan will develop an Inclusive Growth Scorecard as a central component of the action plan. This scorecard, created in collaboration with the Center for Civic Research and Innovation, will track a variety of indicators across key economic inputs and outcomes on a comparative, real-time basis.
Based on our assessment of the metro's economic position and industry strengths, we developed five actionable strategies to drive inclusive economic growth over the next decade. These solutions were designed in collaboration with a set of six working groups that formed to provide specific insights and guidance from a wide range of practitioners in the St. Louis region. They were also strongly informed by the Ferguson Commission Report, 2020 Vision, GeoFutures, Design Downtown STL and other excellent community-engaged plans intent on creating shared vision and action. These planning efforts saw thousands throughout the metro take part and were prepared in concert with nationally engaged practitioners. Whenever possible, solutions seek to leverage work already underway in the region. In many cases these recommendations also build on best practices and proven models from throughout the U.S. and abroad.

*STL 2030 Jobs Plan* argues that inclusive economic growth will not happen by accident. Only intentional, ongoing work will eliminate longstanding racial gaps in access to prosperity. We see diversity, equity and inclusion not as a separate strategy but rather as a new way of approaching the work of economic development. As such, each of the solutions outlined below attends to existing disparities by prioritizing racial inclusion and equitable outcomes.

Throughout the solution design process, we employed a holistic perspective that paid careful attention to the interconnected nature of the St. Louis metro economy. The five strategies and the individual actions within each should not be viewed as a collection of standalone efforts—rather, they are a comprehensive suite of activities that mutually reinforce one another in order to maximize inclusive economic growth in the region.
St. Louis needs to organize for success and make inclusive economic growth a routine part of private-sector and civic leadership. Realizing the full potential of *STL 2030 Jobs Plan* will require a collaborative ethos, flexible resources and a recognition that inclusion and equity are impossible without intentional, ongoing work on the part of all stakeholders. This is a new kind of 21st-century governance that harnesses the full energies of the public, private and civic sectors.

Over the past several decades, many U.S. cities and metropolitan areas have moved to networked governance models to steer and steward their economies. The most successful communities build multisectoral networks of public, private and civic institutions that can together navigate the complexity of challenges that cities face and work to advance inclusive, sustainable and innovative growth.

Indianapolis’ progress over the past twenty years, summarized in the box on page 42, was made possible by the ability of the Central Indiana Corporate Partnership to drive a cluster strategy that included a sustained focus on biosciences with steadfast resolve. Likewise, the Pittsburgh comeback was orchestrated by the nonprofit Allegheny Conference on Community Development and a remarkable network of public authorities, philanthropies, universities and healthcare institutions. Similar success
stories with strong governance models can be found in Cincinnati, Cleveland, Columbus, Denver, Minneapolis, Nashville and San Diego.

Each of these cities and metropolitan areas created ecosystems and networks that collaborate to compete. They recognized and leveraged their distinctive economic advantages—biosciences in Indianapolis, robotics in Pittsburgh—and found ways to make the most of these assets. They used local civic and corporate wealth to build partnership organizations with the capacity, capital and community standing to deliver transformative change. They invested in research and development, workforce development, infrastructure, entrepreneurial support and other building blocks of successful economies. In short, they banded together to guide their economies with purpose and intent, using measures and metrics to set targets, gauge progress and nimbly adjust to market disruptions and new opportunities that arise.

Successful metros, in short, don’t only focus on the what of policy and practice (e.g., leveraging a distinctive competitive advantage); they spend equal time and substantial resources figuring out how to deliver solutions in an effective manner. They also engage in continuous experimentation and learning, particularly given that traditional economic growth has not resulted in inclusive outcomes.

St. Louis now faces a dual challenge: boosting economic growth while acting with intention to ensure that the resulting prosperity is broadly shared.

Three mechanisms will harness the collective power of St. Louis’ public, private and civic institutions to unlock the region’s formidable assets and make the metropolis a national leader on inclusive economic growth:

**Greater St. Louis, Inc.**

First, *Greater St. Louis, Inc.* will provide the leadership and stewardship needed to keep stakeholders focused on *STL 2030 Jobs Plan’s* larger mission and goals. In a region defined by fragmentation, this new leadership group has the potential to be a new center of gravity for business and civic commitment to shaping its economy.

In October 2020, five St. Louis organizations announced that they would come together to form one flagship economic development institution. This merger of the St. Louis Regional Chamber, AllianceSTL, Civic Progress, Downtown STL, Inc. and Arch to Park combines the strengths of all five in a transformative move that will drive inclusive growth with a unified voice and a bold agenda that envisions inclusive economic growth in a more coordinated metropolitan area anchored by a vibrant urban core. This agenda will focus on creating jobs, expanding equity and improving St. Louis’ global competitiveness.

*Greater St. Louis, Inc.* will have principal responsibility for overseeing the design and execution of the *STL 2030 Jobs Plan*. It will oversee the *STL Pledge*, manage the *STL Inclusive Capital Initiative* and incubate other critical initiatives like *Supply STL* and the *Talent Surge*, spinning them out once they are mature. *Greater St. Louis, Inc.* will be the connective tissue that binds the disparate elements of inclusive economy shaping together.
Indianapolis is largely recognized as the leading U.S. example of networked governance. The Central Indiana Corporate Partnership (CICP) was formed in 1999 to bring together the chief executives of Central Indiana’s prominent corporations, foundations and universities (along with their entrepreneurial capacity and capital) in a strategic and collaborative effort dedicated to the region’s continued prosperity and growth. After intensive study, CICP decided to focus on Indianapolis’s central strengths in life sciences rather than trying to “become the next Silicon Valley.” They created BioCrossroads to steer hundreds of millions of private and civic resources towards recruiting talented researchers, building world-class centers of excellence, investing in STEM education in elementary and secondary schools, giving startup and scale-up companies access to risk capital and developing quality places. Over time, they expanded their focus to other competitive advantages including agriculture innovation, advanced manufacturing and logistics, energy technology and information technology.

Indianapolis has brought structure to the practice of collaboration. CICP has 59 members: 50 corporate CEOs, three heads of philanthropies and leaders from six universities. Members meet not only to discuss—they convene to decide and deploy capital resources. Multi-sectoral collaboration is treated as a serious business that advances the broader prosperity of the city and metropolis. Meanwhile the mission and modus operandi of the organization ensures that members focus on long-term impact rather than on the imperatives of four- or even two-year election cycles.

The cumulative effect of these efforts has been enormous. As of 2016, the state of Indiana’s life sciences was a $63.3 billion industry, second only to California for life science exports in the United States. The industry is diverse, covering not only pharmaceutical and medical device companies but also agriculture, biotech research and testing services and biologistics.


**STL Pledge**

**STL 2030 Jobs Plan** recognizes the power of anchor institutions—local governments, hospitals, universities and large corporations—to drive inclusive economic activity in their communities by changing how they hire, buy, invest and locate their operations. **STL 2030 Jobs Plan** includes a major, signature effort—the **STL Pledge**—to unlock this power and potential.

The **STL Pledge** will commit major employers to set and attain clear targets for buying local, hiring local, investing local and locating a portion of their workforce near key nodes and districts in the city’s core in order to create synergistic innovation and broadly shared prosperity. By maximizing their local impact, the region’s major employers will create a stronger, healthier, more vibrant community in which to grow their operations. Their engagement through these multiple channels will create a larger, more diverse and better skilled workforce, better places where employees can work and a more diverse and more reliable local supply chain.

The **STL Pledge** is a logical extension of the entire **STL 2030 Jobs Plan**. The actionable strategies detailed throughout **STL 2030 Jobs Plan** depend on anchor institutions making decisions that prioritize large-scale inclusive economic impact. The **Restore the Core** strategy anticipates that St. Louis corporations will locate a portion of their jobs in the core of the
city, thereby bringing the synergistic benefits that naturally occur from co-location to the St. Louis core as well as the entire metropolis. The Supply STL initiative urges anchor institutions to purchase goods and services at scale from locally owned businesses through targeted procurement and vendor strategies. The strategy to make St. Louis a magnet and engine for talent depends upon local employers establishing partnerships with education and workforce providers to create training programs that will put more people on pathways into careers that pay a living wage. And the Entrepreneurial Surge strategy positions anchor institutions as a platform for small business and entrepreneurial success by acting as reliable customers, active investors, creative co-innovators and capable mentors and advisors.

STL 2030 Jobs Plan includes multiple examples of anchor institutions that are deeply engaged in strengthening St. Louis’ capacity for inclusive economic growth. On supplier diversity, for example, individual corporations (e.g., Ameren and Boeing) and higher educational institutions (e.g., Washington University, UMSL) have developed strategies that use their purchasing of goods and services to support and grow the number of Black-, Latinx- and women-owned businesses in the region. On diverse hiring, there are numerous examples of companies that have worked with specialized providers and higher educational institutions to build a diverse, highly skilled workforce, including Emerson’s and Enterprise Holdings’ relationship with Ranken Technical College, Boeing’s successful efforts with St. Louis Community College and Square’s support for LaunchCode. And companies have invested in local entrepreneurial growth (e.g., support for UMSL’s Diversity Equity and Inclusion Accelerator supported by Ameren, Edward Jones and Express Scripts).

The examples cited above, however, are largely bespoke anchor commitments for discrete initiatives. The STL Pledge adds all this up into one unified initiative. Major employers that sign onto the STL Pledge will make tangible commitments to purchasing, hiring, investment and location decisions that simultaneously enhance regional economic competitiveness and address St. Louis’ economic, racial and spatial inequities.

The STL Pledge will build upon and extend the efforts of the recently organized Anchor Action Network. UMSL is leading an effort of five major institutions in the region (UMSL, Washington University in St. Louis, Saint Louis University, BJC HealthCare, the Saint Louis Zoo) to support local and diverse anchor procurement and hiring in a collective fashion, and foster the adoption and development of anchor practices. The Anchor Action Network is patterned after efforts underway in Baltimore, Chicago, Cleveland and Philadelphia.

Each corporation and institution that takes the STL Pledge will commit to:

- Gather data disaggregated by race and gender on employment and purchasing of goods and services in the region
- Set specific targets for using local vendors across hiring, purchasing, investing and location decisions
- Track metrics on hiring, purchasing, investment and location choices, which will be aggregated across all member institutions and reported annually
- Work together to increase hiring, purchasing, investments and location decisions in the focus geography described below
- Designate a senior leader (or leaders) to track progress on commitments and represent the institution in the STL Pledge working group
- Have the chief executive officer participate in governance of the network

Alongside committing to high-impact practices and investments within their organization, the STL Pledge will push institutions to act as a
collective. The *STL Pledge* aims to create a community of practice for institutions to learn from each other, to lift up and expand regional anchor institution initiatives and to scale efforts to increase opportunities for low-income residents and BIPOC in St. Louis City and County. The *STL Pledge* further aims to lift economic outcomes for households living in neighborhoods in St. Louis City and County (and East St. Louis) that have more than 20 percent poverty rates and are majority African American.

Greater St. Louis, Inc.

Greater St. Louis, Inc. will oversee the commitment process for the *STL Pledge*. It will also track and report progress of the signatories on an annual basis.

The *STL Pledge* will set St. Louis apart from all other U.S. cities and metropolitan areas. While other communities have collective efforts focused on certain areas of anchor activity (e.g., Chicago Anchors for a Strong Economy), no community combines corporate, university and hospital commitments across multiple dimensions as part of a larger inclusive growth plan.

**STL Inclusive Capital Initiative**

Alongside the *STL Pledge*, the *STL Inclusive Capital Initiative* will aggregate capital from families, corporations, universities and other investors to support critical elements of the *STL 2030 Action Plan*.

Our diagnostic found that St. Louis is a wealthy, charitable community. But unlike competitor metros, the region has been unable to harness this wealth for sustained, collective investment in inclusive economic development. A *STL Inclusive Capital Initiative* will remedy this deficiency by increasing the availability of patient and market-oriented capital to support the distinct but mutually reinforcing elements of the *STL 2030 Jobs Plan*.

Creating a new mechanism for harnessing capital will secure funding for critical aspects of the *STL 2030 Jobs Plan*. In some cases, the funding will be philanthropic in nature, allocated through grants to build the capacity of organizations tasked with delivering key strategies. The importance of capacity-building investments is too often overlooked, despite the fact that such investments typically lead to the highest returns for the entire community. *STL 2030 Jobs Plan* counters this tendency by calling for new intermediaries to design and deliver both the *Supply STL* initiative and the *Advanced Manufacturing Innovation Center*. It also calls for bulking up the capacity of existing organizations like Arch Grants, Beyond Housing, BioSTL, Claim Academy, Greater Rivers Greenway, Invest STL, LaunchCode, WEPOWER and many others to carry out critical elements.

In other cases, funding will be market-oriented, investing in entrepreneurial funds that hold the promise of real market returns. *STL 2030 Jobs Plan*’s entrepreneurial strategies in particular will require traditional financial institutions and new investors to think differently about the terms, conditions and desired outcomes of the resources they provide.

In many respects, St. Louis has already created a solid model for collective investing. The United Way of Greater St. Louis is widely regarded as one of the most effective and impactful in the nation. Its community investment model assesses the prevalent needs of the community and then aligns funding decisions to help meet those needs. The *STL Inclusive Capital Initiative* will act in similar fashion, aggregating capital and deploying it an evidence-driven manner in close collaboration with other public, private and civic institutions and stakeholders. Given its longstanding expertise regarding investments in disadvantaged communities, the United Way should be a close partner.
NEW ECONOMY INITIATIVE (DETROIT, MICHIGAN)

Launched in 2007, the New Economy Initiative (NEI) is a collaboration of major funders (including the Ford, Kresge, Hudson Webber and Skillman Foundations) in Southeast Michigan. A special initiative of the Community Foundation for Southeast Michigan, NEI works to develop an inclusive entrepreneurial ecosystem for funders, entrepreneurs and community advocates. In its study of the Southeast Michigan entrepreneurial ecosystem, NEI identified 232 unique entrepreneurial efforts operating throughout the region. Since 2007 NEI has awarded nearly 500 organizational grants, assisted over 12,000 companies and launched almost 3,000 companies. These companies employ more than 30,000 workers and leveraged more than $1.34 billion in capital.

In 2018 alone, over 200 new companies were launched and more than 2,500 enterprises were assisted. 68 percent of these companies were minority-led, 49 percent were women-led and 17 percent were immigrant-led. Collectively, these companies employed over 5,600 people and leveraged $141.1 million in capital.

Sources: New Economy Initiative, https://neweconomyinitiative.org/
2. Restore STL Core as the Vibrant Jobs and Cultural Center of the Metropolis

Actions
- Brickline Greenway
- Neighborhood Transformation Initiative
- Innovation Districts

The core of St. Louis City must realize its full potential if the St. Louis metropolitan area is to thrive. Our diagnostic found that the share of metropolitan employment within the city’s downtown, particularly the central business district and its surrounding areas, is one of the lowest in the country. If St. Louis reflected just the average employment concentration for U.S. metros, the greater downtown would have an additional 130,000 jobs. The lack of a strong core depresses the economic performance and fiscal health of the city and undermines the ability of small businesses to grow and residents to build assets. It also fundamentally limits the ability of St. Louis to grow inclusively, with historically disinvested communities in the city and county paying the highest price.

The weakness of the core is also one of the central barriers to the growth of the metropolitan region. The restructuring of the American economy over the past several decades has given central cities a renewed economic function and purpose. The rise of a knowledge-based economy has bestowed new importance on universities, medical research centers and other institutions of knowledge—many of which are located in the heart of central cities and urban communities. More generally, the shift to an economy based on ideas and innovation changes the value and function of density.

The advanced, technologically sophisticated firms that now drive domestic and global economic growth crave proximity—to dense pools of qualified workers, to specialized legal and financial support that often require face-to-face interaction, to institutions of higher learning, to modern infrastructure, to quality urban places with the amenities that talented workers demand and to other firms so that innovations can be rapidly shared. Urban centers are uniquely suited to meet this increasing desire for co-location. These places have the physical “bones”—walkable streets and sidewalks, historic buildings and other established infrastructure—that can accommodate a range of residential, commercial, retail, governmental and cultural functions.

The regeneration of core cities is a prerequisite for inclusive growth, particularly for metropolitan areas as racially segregated and economically decentralized as St. Louis. Employment density within the core is a key driver of the fiscal health and stability of the municipality, which is critical, in turn, for sufficient tax revenue and the provision of educational, health and other services for the city population. It also concentrates high-quality employment opportunities that are accessible by public transit and open to residents who gain the necessary education and skills through the Talent strategies proposed in STL 2030 Jobs Plan. And employment density within the core helps counties, companies and households throughout the metropolis gain population, recruit workers and build wealth.

The STL 2030 Jobs Plan strategy to Restore the Core is literally meant to shock the market back into life. Our goal is ambitious but doable—to grow 50,000 jobs within the core of the city by 2030. A good portion of those jobs must be made available to residents of the historically disadvantaged neighborhoods in North St. Louis, north St. Louis County and East Saint Louis. Education and training proposed in the Talent section of STL 2030 Jobs Plan will help
residents acquire the skills they need to get hired. If the metropolis is to prosper, the metro’s core must become a magnet for innovation, employment density and population growth. This will put St. Louis on a par with peer cities like Charlotte, Indianapolis, Nashville and Pittsburgh.

As a starting point, the “core” of St. Louis needs to be redefined. The central business district or even Greater Downtown area seems too limiting. On one hand, the Cortex Innovation Community is a proven model for regeneration and equitable job creation, with some of the greatest in-migration of business activities and attraction of net new jobs from outside the region—all with a strong entrepreneurial ecosystem that is generating new homegrown companies. At the same time, the city has both historic and new economic assets north of the “Delmar Divide,” including Ranken Technical College, NGA West and the emerging fintech district. As shown below, the diversity and density of assets within the metro’s urban core forces a reevaluation. The final version of STL 2030 Jobs Plan will include an asset-driven definition and map of the core, co-developed with key stakeholders.

Any effort to Restore the Core must build on the recently released Design Downtown STL plan, which affirms the outsized role that central business districts can play in the regional economy. The plan envisions the St. Louis downtown as a vibrant and diverse walkable community and offers concrete plans for achieving that vision. It calls for an expansion of entrepreneurship, construction of affordable housing and investment in public transit infrastructure, green space and cultural amenities.
At the same time, *Restore the Core* must be an all-encompassing strategy. It requires anchor institutions to expand their presence and maximize their commercial impact in the service of inclusive economic growth. It requires major employers located outside the core to consider relocating a portion of their jobs in the city. It requires a scaling-up of small businesses, particularly Black- and Latinx-owned businesses, to populate the core, bringing vibrancy to the streets and confidence to residents, consumers, lenders and investors. It requires the smart execution of transformative placemaking and placekeeping initiatives like the *Brickline* strategy outlined below. There is no one philanthropic investment or corporate decision or public commitment that will bring back the core of St. Louis. Everyone must engage and everything must be on the table.

This strategy builds on the substantial assets already present in the downtown and beyond. St. Louis has an impressive collection of anchor universities and colleges (Washington University School of Medicine, Saint Louis University, Harris-Stowe State University, Ranken Technical College), museums and cultural destinations (e.g., Gateway Arch National Park, Union Station, St. Louis Symphony, Grand Center arts district) and sports stadia (e.g., Busch Stadium, Enterprise Center) co-located in the core. Forest Park alone is replete with world-class institutions and venues.

*Restore the Core* also leverages the signature planning and development efforts that are already underway. These include the recent publication of *Design Downtown STL*, the first comprehensive plan for downtown St. Louis in nearly decades. They also include the placement
of a fintech innovation district and NGA West to the north of the downtown, the construction of a new major league soccer stadium near Union Station and the rise of the City Foundry district in the Midtown. And they include important neighborhood scale projects, including Delmar Divine, McCormack Baron’s Preservation Square and the Urban League’s Community Resource Center.

Finally, Restore the Core and every other strategy detailed in the STL 2030 Jobs Plan mutually reinforce one another. Many of the specific recommendations described elsewhere will take physical form in the core of the city, either by providing a reliable and steady customer base for the growth of local enterprises (e.g., Supply STL) or by constructing new centers of excellence around which jobs will grow (e.g., National Center for Location Sciences, Advanced Manufacturing Innovation Center).

Perhaps most significantly, the STL Pledge will commit major employers to locate jobs to the core. This increase in the number of workers in the heart of the city will help fill the vacuum left by decades of job sprawl and economic decentralization. These relocation decisions will not be acts of philanthropy but rather a recognition of the value proposition that urban employment density holds for the ability of companies to recruit talent, innovate more rapidly and stay competitive.

Yet even all these efforts, as dramatic and imaginative as they are, will not be sufficient to realize the audacious goal that STL 2030 Jobs Plan sets. St. Louis’ history of radical depopulation and deindustrialization has opened up large portions of the city of St. Louis for reimagination and reuse. Today, the city needs a new physical platform for large-scale regeneration. Land and real estate must become a positive rather than a negative. Although Arch to Park’s patient capital fund of $190 million provides a good start, the city will need substantial investments of patient capital to build stronger, more capable institutions with community standing as well as a mix of philanthropic, public and market capital to propel the transformational redevelopment of large areas.

St. Louis particularly needs an integrated set of authentic quality-of-place strategies that can become a substantial driver of inclusive growth. Small geographic nodes of commerce and civic life have an outsized impact when they colocate a mix of enterprises, uses, activities and amenities in authentic (often historic) places. Most of these smaller nodes are Main Streets, business districts and commercial corridors that primarily house restaurants, retail shops and small offices serving the neighborhood and local community. Some are true innovation districts that boost productivity and exports with a synergistic mix of research institutions, mature companies, startups and scale-ups incubators and accelerators.

To that end, we recommend three signature and synergistic strategies.

Brickline Greenway

First, St. Louis must accelerate the build-out of the Brickline Greenway, one of the most ambitious and inclusive placemaking efforts in the country. Inclusion of this initiative in STL 2030 Jobs Plan underscores its relevance to the plan’s broader aims of neighborhood revitalization, placekeeping, job creation and small business growth. As such, it is vitally important to raise capital for this exceptional project (perhaps through federal infrastructure funds) and seek out ways to enhance the public benefits of the project through local hiring, value capture and other innovative mechanisms.

Over the past 20 years, a growing number of cities have transformed underutilized infrastructure into new urban landscapes. These efforts, which range from the High Line in
New York City to the Belt Line in Atlanta to the Dequindre Cut in Detroit and the Waterfront in Seattle have redefined what a 21st-century park can be. These hybrid spaces are public squares, open-air museums, botanical gardens, walkways, transit corridors and more. The best of these efforts engage in not only placemaking but also placekeeping to preserve the cultural memories of area neighborhoods, particularly those damaged by urban renewal interventions decades ago.

The $245 million Brickline Greenway project has the potential to take placemaking to a new level of inclusive impact. The project proposes up to 20 miles of greenway connections through 17 neighborhoods in the core of the city, including the restoration of Fairground Park in North St. Louis. St. Louis is already home to Great Rivers Greenway, a 128-mile network of trails and outdoor space that connects neighborhoods throughout the region. Construction of the Brickline Greenway will expand this growing greenway system by creating easily accessible greenspace corridors that run from Fairground Park south to Tower Grove Park and from Forest Park east to Gateway Arch Park.

The Brickline Greenway will strengthen St. Louis’ reputation as a city of parks by linking greenspaces north to south and east to west. These 20 miles of new urban greenway are intended to transcend traditional racial divisions and build new connections among the city’s diverse communities, resources and amenities. Once complete, the 20-mile greenway will become a part of everyday life in St. Louis, helping residents reach their schools, jobs and daily activities. This distinctive civic investment will
turn a present-day liability—vast vacant lots and disinvested neighborhoods—into an asset for the city and the metropolis.

The success of the Brickline Greenway project depends on the inclusive participation of city residents. The track record to date has been highly encouraging. From its inception, the Brickline Greenway has put community engagement at the center of the design process. Listening sessions, pop-up events, neighborhood canvassing, outreach to businesses and digital surveys let Great Rivers Greenway connect with more than 2,000 St. Louisans before any real planning for the Brickline began. A Community Advisory Committee (CAC) of neighborhood residents and community leaders provided community representation and local insight that supported a focus on diversity, equity and inclusion. The CAC also helped formulate community goals that were used to inform and assess the strength of potential greenway designs.

After an extensive design competition process, an Artists of Color Council organized to support the selected design team in identifying opportunities for art along the greenway that reinforces each neighborhood’s unique history, culture and character while strengthening residents’ sense of identity and belonging. A steering committee and working groups also formed to guide the planning process. These 125 volunteers hail from 17 different neighborhoods and reflect the diverse demographics of St. Louis. They include representatives from civic and community organizations, public sector officials, real estate developers, economic development practitioners and industry leaders. Community engagement will continue to be a driving force as this project progresses.

However, inclusive community participation does not always lead to inclusive outcomes. In too many cases, major investments in public greenspace have accelerated gentrification, alienating long-time residents and increasing turnover and displacement. Every effort must be made to avoid this eventuality and make the Brickline a best-in-class example of community wealth building.

Keeping generated wealth in the community will take several forms. Contracts for the work must favor locally owned small businesses, particularly construction firms, that are owned by people of color. Hiring processes should preference residents from disinvested communities in the city. And new legal structures, financial mechanisms and governance arrangements must be created to enable renters, workers and entrepreneurs to benefit from the value appreciation that naturally occurs when formerly disinvested communities begin to gain a foothold in the mainstream economy. Community land trust models, for example, can be used to ensure that value created by the Brickline Greenway project is captured and reinvested in the community in ways that reflect the needs and priorities of local residents (e.g., boosting the supply and availability of affordable housing).

KENSINGTON CORRIDOR TRUST

Shift Capital is a social impact real estate firm seeking to positively change under-served urban neighborhoods while producing attractive returns for investors. In North Kensington, Philadelphia, the firm has purchased former industrial spaces in the community and remade them as outposts for maker firms and creative entrepreneurs. With seed funding from the Ford Foundation, the firm is now seeking to purchase a substantial portion of the Kensington commercial corridor and test the proposition of a Neighborhood Trust, to ensure that value appreciation can be captured and deployed by a community, in the service of the community. Neighborhood trusts are able to source investable projects and support entrepreneurs on a continuous basis as well as cooperative financial structures that enable land value appreciation to be captured by the many rather than the few.

Sources: Shift Capital, http://shiftcapital.us/
Neighborhood Transformation Initiative

Second, St. Louis must embrace a Neighborhood Transformation Initiative and supercharge support for the regeneration of historically Black neighborhoods that have been the subject of disinvestment for decades.

As Jane Jacobs observed nearly 60 years ago, the co-location and concentration of economic and social activities has a synergistic effect that naturally comes from the density and diversity of uses. Revitalized street corners and commercial corridors offer disinvested communities the opportunity to grow jobs that can be filled by local residents of all ages, creating a virtuous cycle of business growth and employment. Furthermore, creating a dense ecosystem of businesses and activities can also weed out unscrupulous businesses that prey on low-income residents and undermine neighborhood revitalization as well as local wealth building.

Strategically located street corners and commercial corridors can concentrate locally owned small businesses, startup companies, health clinics, community amenities and housing within walking distance of each other. The “street corner” thesis focuses on creating a dense ecosystem of businesses, properties and residences—mixed-income, mixed-purpose and mixed-use—at vital intersections and along historic business corridors. St. Louis has dozens of street corners with the potential to be turned on, reanimated and re-energized.

The Neighborhood Transformation Initiative demands an evolution from intermediaries that are federal program-driven and domain-dependent to institutions that are locally-driven, interdisciplinary and have the capital, capacity and community standing to bring development projects and businesses from ideation through to raising capital and executing. Building on Cincinnati’s successful model detailed below, St. Louis is ripe for the creation of a development corporation to use patient capital (already present with Arch to Park) to drive inclusive development and the activation and management of quality places at scale.

CINCINNATI CENTER CITY DEVELOPMENT CORPORATION (3CDC)

3CDC is a private, nonprofit real-estate development and finance organization focused on strategically developing Cincinnati’s downtown urban core in partnership with the City of Cincinnati and the Cincinnati corporate community. Over the past 15 years, 3CDC has driven a profound physical transformation of a 110-square-block area of Cincinnati’s Over-the-Rhine neighborhood. With a total investment of $1.4 billion, 3CDC has restored 166 buildings and 14 acres of civic space and enabled a dramatic increase in quality affordable housing and housing for the homeless. The corporation has achieved success through an innovative finance model that has organized and imaginatively deployed public, private and civic capital. The corporation has leveraged substantial patient capital contributions from Cincinnati corporate partners multiple times with conventional bank loans, public funding and additional private, market-oriented investment to complete large-scale redevelopment projects.

At the same time, St. Louis should create a pool of funds targeted to drive regeneration in disinvested communities. The revitalization of commercial corridors in such areas and the production of affordable homeownership opportunities at scale will only happen if capital is made available for such activities and managed by organizations like Invest STL that are fit to purpose.

**Detroit Strategic Neighborhood Fund**

The Detroit Strategic Neighborhood Fund is a funding source that combines philanthropic contributions and public subsidies to improve historically disinvested neighborhoods in Detroit. It is managed by a CDFI, Invest Detroit, which also takes the lead on fundraising.

In 2016, the fund raised $42 million to target three neighborhoods. In each of the three neighborhoods, it focused on an eight to twelve block microdistrict, providing gap-financing for development projects. So far, funding for the three neighborhoods has been used for tax credits toward affordable housing in the Islandview-Greater Villages area and kickstarting the Fitzgerald neighborhood project, which includes renovation of several homes owned by the Detroit Land Bank Authority and a new greenway that runs through the neighborhood.

In 2018, the Strategic Neighborhood Fund raised $130 million for seven additional neighborhoods. Funders include a wide range of public and philanthropic funders (notably the CDFI Fund and JP Morgan Chase). Communities that adopt models like the Strategic Neighborhood Fund will be best positioned to make the most of federal COVID-19 relief investments that become available.

Sources: Invest Detroit, https://investdetroit.com/

**Innovation Districts**

Finally, St. Louis must realize the full potential of its innovation districts for inclusive economic growth.

_Innovation districts_ in the United States and beyond have emerged as a 21st-century economic geography. These relatively compact areas co-locate research institutions, mature companies, startup enterprises, workforce training, incubators, accelerators and amenities in a dense urban environment. They run counter to the more prevalent geographic decentralization seen in metropolitan areas and offer possibilities for progress on a wide range of issues, including urban regeneration, company formation, commercialization of research, talent preparation and community engagement.

Our diagnostic found that St. Louis is a global leader in the creation and stewardship of innovation districts. The Cortex Innovation Community is globally recognized as a best-in-class example for its collaborative governance model, its proven impact on startups and firm attraction and its evolving strengths in next-generation technologies. Nearby, the downtown is emerging as an innovation hub for tech startups in general and geospatial firms in particular while the near downtown area has the potential to concentrate and co-locate fintech enterprises.

_STL 2030_ contains multiple strategies for growing innovation districts within the city and the broader metro. One of the most intriguing ideas involves attracting a diverse set of talented workers to the city, where they would benefit from not just access to extraordinary amenities but being part of an inclusive urban turnaround.
The disruptions wrought by the COVID-19 pandemic have prompted a sharp increase in remote work that is pushing some to reconsider why they live where they live. An attraction strategy can help St. Louis capitalize on this shift in work patterns, provided that those considering relocation see the city as a more attractive alternative to their current location. The proposition: give talented workers currently living in other parts of the country cash incentives to move to St. Louis, with the requirement that they co-locate in one of the city’s innovation districts.

**TULSA REMOTE**

Tulsa Remote is a unique recruitment initiative aimed at attracting talented individuals to Tulsa. The highly competitive program, funded by the George Kaiser Foundation, invites remote workers and digital nomads into the community, with $10,000 grants and numerous community-building opportunities to ease the adjustment process. The City of Tulsa and other community organizations lend support to ensure program participants are fully immersed and engaged in the community. 36 Degrees North, a dynamic coworking space in Downtown Tulsa, provides a centralized hub where Tulsa Remote transplants can get work done and collaborate with other local entrepreneurs, remote workers and digital nomads. Community building programming, events and meetups help the transplants engage with local civic organizations, nonprofits and other individuals working to make Tulsa the best it can be.

Sources: Tulsa Remote, https://tulsaremote.com/

**3. Build a World-Class Ecosystem for Small Businesses and Entrepreneurs**

*Actions*

- Entrepreneurial Surge
- Supply STL
- Small Business Support Collaborative
- St. Louis Option
- Main Street STL
- Small Business STL Scorecard

Over the next decade, St. Louis will build and steward the nation’s strongest and most innovative ecosystem for small businesses and entrepreneurs. St. Louis needs to take what it has built in the technology startup sector to the next level, with audacious goals around company formation, jobs created, revenues grown and investment secured. At the same time, St. Louis needs to become a recognized national leader in the growth of successful businesses owned by people of color across multiple industries.

Many metropolitan economic plans focus almost exclusively on promoting growth in advanced industries, relying on the wage premium often associated with these sectors to lead to more broadly shared prosperity. But small businesses represent the vast majority of St. Louis businesses and employ almost half of the metropolitan workforce. They are key players in industries ranging from retail to healthcare to construction. They form the backbone of civic and community life and represent a tested path to economic mobility and wealth building, particularly for Black and Brown communities. Meanwhile, technology startups enable larger companies and clusters to innovate more and recruit talent, both of which can lead to meaningful job creation.
Entrepreneurial Surge

STL 2030 Jobs Plan sees entrepreneurship as a critical engine of inclusive growth rather than a separate part of the economy. A ten-year Entrepreneurial Surge invests in this notion by supporting growth across a broad continuum of St. Louis enterprises and entrepreneurs that require nurturing and support. Main Street businesses that serve local consumers and anchors, new startups that deploy advanced technologies, new enterprises that commercialize research emerging from universities and institutes—though these enterprises seem radically different, they are in fact all limbs of the same tree. Incredibly, this perspective is uncommon in the U.S., which defines innovation narrowly and tends to overvalue a small set of deep tech firms to the detriment of everything else. By nurturing entrepreneurial activity across all three domains, St. Louis can bolster inclusive economic growth and differentiate itself with its more expansive vision of what counts as a startup.

The Entrepreneurial Surge reflects a broader commitment to “increase the pie” of available capital by enabling a broad array of residents, corporations, financial institutions, philanthropies and anchor institutions to make significant investments in the startup continuum. STL 2030 Jobs Plan will leverage the region’s strengths in advanced financial services to pioneer new financial products and business models that meet the needs of entrepreneurs in the region. At the same time, STL 2030 Jobs Plan aims to break down barriers between startups and established companies and institutions in order to engage the full range of anchors’ economy-shaping capabilities—procurement policies, talent recruitment, internal practices, senior leadership—in the service of entrepreneurial growth.

The Entrepreneurial Surge will build on the ample progress already made in the tech startup ecosystem, highlighted in our diagnostic above.

Similarly, actions to boost biosciences startup activity (detailed in the Make STL a Hub for Next Generation Industries and Technologies strategy below) will contribute directly to the Entrepreneurial Surge.

A significant feature of the Entrepreneurial Surge will be the substantial time, attention and resources dedicated to growing the number and size of Black- and Brown-owned businesses in high-wage sectors of the economy. If pursued with deliberate attention to supporting Black and Brown founders, this strategy will not only reduce racial and ethnic disparities in income and wealth but also provide a much-needed boost to metropolitan economic performance.

Consider this:

Employers of color are more likely than white employers to hire people of color. According to a national survey of 350 CEOs of Black-owned businesses conducted by Gazelle Index in 2007, Black-owned businesses hire Black Americans for two out of every three jobs.

According to the Association for Enterprise Opportunity (AEO), Black business owners have 12 times more wealth than Black peers who are not business owners. And the wealth gap between whites and Blacks decreases from a factor of 13 to a factor of three when comparing the median wealth of white and Black business owners (as opposed to white and Black adults in general).

AEO also found that if just 15 percent of Black-led businesses hired an additional employee, the result would be 600,000 new jobs and approximately $55 billion for the economy.

The overarching objective of STL 2030 Jobs Plan is to create strong ecosystems that give small businesses and entrepreneur (irrespective of sector) ready access to information, customers, services, capital and locations.
Effective small business and startup ecosystems do five things:

- Use anchor purchasing demand to grow the number and size of local vendors, particularly Black-, Latinx- and women-owned businesses, that can meet these needs
- Identify, nurture, mentor and assist firms working to develop intentional business strategies and improve access to providers that offer up-to-date information on key business practices
- Provide quality capital, both debt and equity, that is fit to purpose and aligned with the needs of small businesses in different sectors and stages of growth
- Manage and market the business districts and commercial corridors where many small businesses co-locate
- Maintain real-time information on the number, size, sector, owner demographics and median wage of small businesses in general and Black-, Latinx- and women-owned businesses in particular

Many cities and metropolitan areas focus on just one aspect of a healthy small business ecosystem, usually the availability of quality capital. But successful enterprises need more than just capital; timely information, reliable customers, customized management and financial advice and sound locations are equally vital to growing a prosperous business.

The *Entrepreneurial Surge* sets out concrete actions designed to reinforce each component part of the entrepreneurial ecosystem. As of the writing of *STL 2030 Jobs*, Common Future and Next Street have undertaken an effort, funded by JPMorgan Chase, to assess the small business ecosystem. The *Entrepreneurial Surge* builds on Next Street’s dynamic approach, which aims to ensure that Black-, Latinx- and women-owned businesses have access to quality customers, capital and services as they start and grow their businesses.

The following elements of a robust ecosystem, along with other efforts identified in *STL 2030 Jobs Plan*, seem most pressing:

**Supply STL**

First, the *Supply STL* initiative will channel the local purchasing power of large companies, universities, hospitals, utilities and governments for the purpose of growing Black-, Latinx- and women-owned businesses.

Anchor corporations and institutions have long been viewed as a potential catalyst for economic development, as seen in the anchor strategy put forth by Michael Porter’s *Initiative for a Competitive Inner City (ICIC)* and *Democracy Collaborative’s Anchor Mission Playbook*. More recently, a number of metros have come to see the value in helping anchors collaborate on economy-shaping efforts. To that end, local initiatives have sprung up to help regional anchors cooperate, identify shared needs and create collaborative strategies to increase inclusive economic growth in the region.

Importantly, anchor institution procurement has moved towards a focus on organization-wide procurement, beyond the historic purview of construction and development. These initiatives are exemplified by the Chicago Anchors for a Strong Economy (CASE), the Baltimore Integration Partnership (BIP) and BLocal and the Philadelphia Anchors for Growth and Equity (PAGE), among others. CASE, housed at the World Business Chicago, matches anchor institutions to small and local businesses through a process called SCALE. CASE solicits small and medium-sized businesses in the Chicagoland region to become part of the anchor procurement ecosystem using their online platform SCALE and matches vendors with anchors based on contracting opportunities and vendor capacity.

St. Louis is not new to this effort. Ameren and other corporations have pursued independent supplier diversity efforts for years. More recently,
UMSL has led an effort to create a St. Louis Anchor Action Network, which would bring together many of the region’s universities and hospitals to support diverse local anchor procurement.

A new Supply STL initiative will build on these efforts and expand the ongoing work that is occurring in the St. Louis region. Supply STL will revolve around four main components: data disclosure, common goal setting, internal policy design and collaboration through an intermediary. Each of these four elements is crucial to increasing anchor spend with local and Black-, Latinx- and woman-owned suppliers and boosting local job creation.

A new Supply STL intermediary will be created to lead the initiative. Initially launched within Greater St. Louis, Inc., this effort will have a professional staff of 3-4 FTEs to handle day-to-day operations and support communication and coordination among member anchors.

Supply STL’s first task, perhaps with outside assistance, will be to conduct an initial assessment of anchor purchasing demand as well as current procurement policies and practices. This information will provide a better understanding of the situation on the ground and highlight pain points to address and opportunities to explore. Detailed information on current vendor demographics will provide a baseline on racial and/or gender disparities in firm ownership and other factors that impede inclusive growth. A survey of existing supplier diversity strategies and goals will complement these assessments, affirming work underway and encouraging coordination of activities to avoid duplicative efforts.

At the same time, Supply STL will assemble an inventory of vendors in the region, with data collected on inclusive growth indicators such as proprietor demographic info, median annual corporate revenue, number of jobs supported, existing contracts with anchors and median unemployment rates and household income in the surrounding community. This inventory should be organized with an eye toward helping member anchors find vendors that can meet their procurement needs.

With this comprehensive picture of the local procurement ecosystem to guide them, Supply STL will then work with member anchors to increase the number and size of anchor purchasing contracts with local small businesses. This work will cover a broad array of activities, including a collective focus on goal setting, improvements in practice and anchor-vendor matching. Lessons from other cities show that these efforts only succeed when there is a new mindset at all levels of the organization with regard to the importance of using anchor procurement to increase supplier diversity.

The creation of a well-resourced anchor procurement initiative will set St. Louis apart from other cities. Supply STL will work on both the demand side of the equation—understanding what goods and services anchor institutions actually purchase—and the supply side—understanding which small businesses actually provide those goods and services, or could be given adequate support and capital.

Capacity creates its own possibilities. Thus, the intermediary would seek to scale the capacity of local Black-, Latinx- and woman-owned vendors as demand grows. Such scaling could also include financing and capital investment for firms, engaging other firms in joint ventures and having Supply STL serve as an incubator or accelerator for existing local businesses. This effort could also leverage the federal presence in the region by ensuring appropriate firms are ready and able to compete for federal contracts.

As with hiring and location decisions, buy local commitments could become part of a broader STL Pledge taken by leading employers in the metropolitan area.
PHILADELPHIA ANCHORS FOR GROWTH AND EQUITY (PAGE)

In late 2013, a report from the City of Philadelphia’s Office of the Controller revealed that only half of the $5.3 billion that area anchors spent on procurement each year remained in Philadelphia. The report called on the city’s anchor institutions to consider what they might do to shift the balance toward local vendors. To advance this goal, the Office of the Controller began incubating a new initiative: Philadelphia Anchors for Growth and Equity (PAGE). Initially launched in 2014, it spun off as an independent entity in 2017.

Today PAGE brings together the City of Philadelphia, the Economy League of Greater Philadelphia and area hospitals, universities and leading corporations “to increase local purchasing by large institutional buyers to grow Philadelphia businesses, strengthen the local economy, create jobs and build wealth.” Powered by the analytics capabilities of the Economy League, the collaborative uses data and stakeholder insights to understand “institutional purchasing practices, reduce barriers to participation for local businesses, engage major suppliers and catalyze the creation of a supportive ecosystem.” It hosts an annual summit to connect procurement managers with area vendors and matches anchors with local companies. It also maintains a pooled list of local vendors that it shares with anchors, knowing that a vendor that is already working with one anchor could easily contract with others as well.


Second, the Entrepreneurial Surge will strive to give traditional small businesses and tech entrepreneurs alike access to the guidance and mentoring they need to start and grow their businesses. Our diagnostic found a stark imbalance in the support provided tech startups (strong but not yet at capacity) and the support provided the broad array of Main Street businesses (woefully weak and undercapitalized). Founders of color faced challenges in both areas and remain underrepresented among entrepreneurs in the region. The path forward, therefore, needs to carry out two fundamentally related actions.

On one level, St. Louis should invest in what works around tech startups so that entrepreneurship support organizations can realize their full potential. Cortex is world class, as are BioSTL, BioGenerator and the Danforth Plant Science Center. Arch Grants has emerged as a national model that has been as successful as any in attracting and retaining companies that would have otherwise relocated elsewhere. These organizations need the resources, capacity-building support and connective tissue be able to function at scale.

The existing startup ecosystem is making concerted efforts to support Black- and Brown-owned tech firms. Approximately 20 percent of Arch Grants companies are led or co-led by a Black founder and ITEN, Square One and T-REX have also made positive movement in this front. In addition, the St. Louis Equity in Entrepreneurship Collective, launched in 2016, knits together a network of entrepreneurial support organizations in the area.
Small Business Support Collaborative

The same level of patient, focused support will be needed to build a strong Small Business Support Collaborative. This effort will recognize that the formation and expansion of Black- and Brown-owned enterprises in the aftermath of COVID-19 will require the following:

- Access to affordable back-office support to help small businesses improve their operations and fiscal management in accounting, borrowing, leasing, legal, tax, hiring, technology, marketing and customer and supplier relationships
- Specific guidance on business planning to assist vendors winning new or expanded contracts from anchors (which in many cases involves a shift from business-to-consumer relationships to business-to-business relationships)
- Accessible capital products and training programs designed to help small business owners of colors increase their financial acumen, build credit and secure capital
- Culturally competent business services and capital providers that more effectively support small businesses of color by understanding their unique experiences and needs

Providing these resources to Black and Brown founders at scale will require, at a minimum, sizable investments in existing organizations that form the nascent backbone of a strong small business ecosystem.

- WEPOWER, a community-based non-profit in North St. Louis, has established the Elevate/Elevar Accelerator to provide St. Louis based founders with access to grant capital, business mentoring and access to professional services and co-working space.
- Invest STL is making concerted efforts to be an umbrella for multiple aspects of urban redevelopment, including support for homeownership, commercial corridor regeneration and entrepreneurial support.
- CDFIs like Justine Petersen provide credit building counseling small dollar credit building loans and a secured credit card to help individuals build their credit and enable them to start or expand a business.
- The Heartland Black Chamber of Commerce, the St. Louis African Chamber of Commerce and the Hispanic Chamber of Commerce provide focused, culturally competent support for businesses owned by Black and Latinx St. Louisans.

All of these organizations can help drive inclusive economic growth if and only if they receive consistent and sustained support.

The Small Business Support Collaborative will establish a center of academic and practice excellence at Harris-Stowe State University. This center will bring rigor, discipline and national attention to the issue of Black entrepreneurship and business success. It will be patterned after best practices such as the Bowie Business Innovation Center (Bowie BIC), an award-winning hub for business acceleration at Bowie State University in Prince George’s County, Maryland. Technology companies and government contractors scale-up resources at Bowie BIC, which offers customized business support, professional counseling, mentoring and competitively priced office and collaborative workspace.
St. Louis Option

Third, the Entrepreneurial Surge would strive to make St. Louis a hub of effective alternative financing models for startups and young firms. The concentration of wealth management firms and financial services in St. Louis makes this goal a credible option. Imagine if asset managers could offer their clients a St. Louis Option that invested in the broad continuum of enterprises started and scaled in St. Louis. Asset managers (e.g., family offices, philanthropies, corporations) could offer clients opportunities for early-stage investing in proven entities like Arch Grants and BioGenerator. Asset managers could also offer opportunities for investments in a broad range of angel investing groups (with different niches) as well as funds that are testing new financial products (e.g., revenue-based financing, shared profit) that are critical to bring traditionally underrepresented founders—who often lack access to capital—into the startup space. Finally, investors could have the option to invest platform capital for capacity-building in key entrepreneurial support organizations.

In many respects, the St. Louis Option could make St. Louis a pioneer in the next-generation entrepreneurial investment. It would provide a new way to leverage the Environmental, Social and Governance (ESG) movement in institutional investing for domestic markets. ESG has its roots in the 1960s era movement around socially responsible investing, which called for divesting from companies that engaged in environmentally or social irresponsible practices.

By the early 2000s, the risks associated with global population growth, climate change and pressures on natural resources made clear that embedding ESG factors in capital markets was good business sense. What has emerged is a sophisticated field led by the United Nations, the International Finance Corporation and major institutional investors, asset managers, stock exchanges and philanthropies.

Main Street STL

Fourth, launch of a Main Street STL initiative will provide the resources and connections necessary to accelerate the revival of Neighborhood Business Districts in the region that have been hardest hit by the COVID-19 pandemic.

The St. Louis metro is characterized by a network of Main Streets, business districts and commercial corridors that act as nodes of commerce and centers of civic life in municipalities across the region. Missouri Main Street Connection, for example, points to 32 separate commercial districts located on the Western side of the Mississippi River alone. The 2020 Vision report also identified multiple business districts in the city that would benefit from efforts to strengthen Main Streets in the region.

The economic impact of the COVID-19 induced collapse of small businesses is having devastating impact on Main Streets and Neighborhood Business Districts throughout the St. Louis metro. If left unchecked, diminished commerce and growing vacancy rates will precipitate a series of domino effects—on consumer confidence (given the central role that these places serve as hubs of community and civic life), on owners of commercial real estate (given the cessation or diminution of rent payments) and on tax revenues (given the role that business districts play in local fiscal health). Each of these factors alone will slow an eventual recovery, together they will make it exceptionally painful.

The stabilization and revival of small businesses and Neighborhood Business Districts will require intense collaborative action among local stakeholders to develop new models and financing mechanisms capable of addressing neighborhood-specific needs. Main Street STL will be a 36-month “Strike Force” to accelerate
the revival of Neighborhood Business Districts. Organized and staffed by leading public, private and civic institutions, *Main Street STL* will serve as matchmaker, linking small businesses and business districts to the services, customers and capital they need to succeed.

*Main Street STL* will build on the rich and textured web of institutions and intermediaries that already exist in the metro, including business chambers and support organizations, banks, community development finance institutions, microlenders, universities, corporations, philanthropies, public authorities, community development corporations and business district associations. By working with these and other organizations, *Main Street STL* will speed the stabilization and growth of small businesses by connecting them to new opportunities and quality capital. At the same time, *Main Street STL* will help small businesses find real estate opportunities in neighborhood business districts in order to further accelerate the comeback of these local commercial centers.

The *Main Street STL* effort will stand apart in its metropolitan focus, creating possibilities for collaboration and bridging divisions across city, suburban and rural lines. The role of entities like Invest STL and the Missouri Main Street Connection could also be dramatically enhanced through this effort.

### CINCINNATI REGENERATION ALLIANCE

A group of cross-sector local leaders in Cincinnati has been working to establish the Cincinnati Regeneration Alliance (modeled on a call for Main Street Regenerators). The Alliance, once established, will serve as a coordinating council to ensure that small business recovery is geographically equitable and that city Coronavirus Relief Fund money is spent effectively. The Alliance will have seven core functions that will be carried out over its 36-month lifespan: (1) leveraging anchor procurement; (2) supporting black-owned business; (3) maximizing real estate usage; (4) increasing access to capital; (5) driving quality place making; (6) diminishing the impact of the parasitic economy; and (7) building wealth.

Sources: Bruce Katz et al., “Needed: Main Street Regenerators” (2020)
Small Business STL Scorecard

Finally, a Small Business STL Scorecard will give St. Louis the timely and relevant information it needs to set reasonable targets for recovery, measure progress at regular intervals and identify challenges to address.

Currently, data collection on small businesses in the United States is spread across numerous federal agencies, including the U.S. Census Bureau, Federal Reserve, Small Business Administration, Bureau of Labor Statistics and U.S. Department of Agriculture, among others. Collectively, these agencies gather information on owner demographics, employment numbers, revenues, financing, firm size and payroll at varying levels of geography.

The COVID-19 pandemic has laid bare the structural deficiencies of public small business data. As a massive small business-led recession unlike anything our nation has ever experienced unfolds, the full extent of the damage remains poorly understood, particularly at the city and metropolitan level. Part of the problem stems from the fact that public data is often time lagged, in some cases by years. To take just one example, the Annual Business Survey, the most comprehensive inventory of small businesses, was last conducted in 2017!

At the same time, critical information on issues such as firm sector is not available at the census-tract, zip code, city or even county level and cannot be filtered across multiple variables at once. Thus, unlike many other aspects of the economy, researchers can at best assemble only a limited snapshot of the successes and difficulties facing American small businesses.

STL 2030 Jobs Plan calls for a bottom-up approach to data collection and analysis, in close collaboration with the St. Louis Federal Reserve Bank (which has responsibility for maintaining the national FRED economic database). This effort should start by assessing the number, size and sector representation of Black- and Brown-owned businesses in the metro in order to have a baseline for goal-setting, evidence-driven strategy design and continuous improvement.

4. Become a Talent Engine and Magnet

**Actions**

Three-Year Talent Surge

Build Industry-led Workforce Collaboratives

Strengthen the STEM Education and Training Ecosystem

A regional economy is a collection of intricate ecosystems. Nowhere is this more apparent than in the realm of talent. When companies struggle to find workers with needed skills, positions sit unfilled and productivity declines. Over time, the lack of an appropriately skilled workforce can depress regional economic growth as companies poach highly skilled workers from each other and postpone growth plans when they can’t find the right candidates. Meanwhile, area residents who after some training could fill these roles never learn of the possibility.

Our research and interviews indicate that certain sectors in the St. Louis region face acute skilled labor shortages. In many industries, difficulty finding skilled workers is the new normal. Positions in digital fields such as software development, data management and data analytics often sit empty for want of skilled workers to fill them. These shortages not only hurt firms in St. Louis; they can force local firms to move away in search of talent and deter firms outside the region from considering St. Louis as a relocation option. Meanwhile, innovations...
in machine learning, cryptography, geospatial technology, cloud-based data storage and a whole host of other fields are transforming how we interact with the world and intensifying demand for specialized skills. In biosciences, advanced manufacturing and other key clusters, skilled workers are highly sought after but hard to find.

Highly technical industries aren’t the only ones confronting a skills gap. As technology has become ubiquitous in the workplace, even previously non-tech occupations like restaurant staff, agricultural workers and nursing assistants now need some level of tech skills.

These technical skills gaps tend to get the most attention, but many employers report that human skills are in short supply as well. Sometimes referred to as “soft skills,” in reality these skills are anything but. They encompass abilities such as critical thinking, cooperation, growth mindset, working within a diverse team and even appropriate use of personal devices at work. Human skills also include leadership and people management, which together support career advancement and implementation of succession plans. From improved productivity and teamwork to creativity and critical insights, workers with strong human skills provide real benefits to the companies that employ them.

One human skill set of particular importance for the 21st-century workforce involves understanding how to contribute to an inclusive work environment. As companies take steps to hire a greater proportion of workers from traditionally underrepresented groups (including BIPOC, white women, veterans, foreign-born St. Louisans and people with disabilities), cultural competency and the ability to work well with different people will be more important than ever. Potential and incumbent worker training on these skills will help employers develop a culture of inclusion and mutual support that boosts worker retention and engagement, improves productivity and enhances competitiveness in the global marketplace.

Whether we’re talking about human skills or technical training, the lack of a coordinated system for education and workforce development means that skilled workers remain in short supply. As a result, employers face difficulty finding the right people to hire. Incumbent workers aren’t getting the training they need to keep their skills current and advance in their careers. Potential workers are left to wonder which career pathways offer the best shot at a career they’ll enjoy that pays well. For those with child care needs, financial insecurity and other challenges, even the very idea of career training can feel out of reach. Fortunately, the status quo is not the only option.

The alternative? Using the education and workforce system as an engine for inclusive growth. They cultivate deep, mutually beneficial relationships between education, workforce training and industry that lead to strong alignment between program offerings and projected skills needs. They ensure that every student receives quality STEM education and exposure to various occupations beginning in pre-K and continuing through high school. They invest in success—by forming industry collaboratives, by connecting potential workers with support services, by making workplaces both diverse and inclusive, by improving the region’s ability to attract and retain skilled workers. They create clear, supported pathways into high-demand careers and take deliberate action to increase the number and proportion of traditionally underrepresented groups. These efforts bring significant benefits for the entire region: Inclusive growth that boosts economic mobility, especially for the most disadvantaged communities and helps companies find the skilled workers they need, when they need them.

As it stands, the St. Louis education and workforce system is ill-prepared to support inclusive growth. The region’s many municipalities and school districts create an uneven patchwork where a child’s ZIP code
can dictate their future. For those living in historically disadvantaged areas like the north side of St. Louis, pathways into careers that pay well are scarce. Lack of coordination—across jurisdictions and public-private divides, between P-12 and postsecondary institutions, among companies and workforce training and education (WTE) providers—leads to duplicated efforts and disjointed programs that are difficult for people to navigate (if they know about them at all).

Amidst this fractured landscape, a handful of effective programs stand out:

- **St. Louis Community College (STLCC)** has developed a number of accelerated job training programs in partnership with local firms to address pressing skills needs in areas such as aviation manufacturing, cybersecurity, life science and patient care.
- **Ranken Technical College** offers 2-year and 4-year degrees as well as certificates and custom training programs in architecture, automotive, construction, electrical, IT and manufacturing. Located in the heart of the north side, it boasts a 93 percent retention rate and a 96 percent job placement rate.
- **Harris-Stowe State University**, a historically Black public university in midtown St. Louis, partners with St. Louis University and BJC HealthCare on accelerated dual degree programs in high-demand fields such as nursing and engineering.
- **University of Missouri—Saint Louis** offers a wide range of degree programs, with many students completing early coursework at STLCC before transferring. UMSL partners with Washington University on the Joint Undergraduate Engineering Program, an important source of engineering talent for the region.
- **Maryville University** has a wide range of degree programs and works with employers to develop tailored training programs for new and incumbent workers. In recent years, Maryville focused on strengthening and expanding its online offerings—today its online student population represents more than half of all students enrolled.
- **Southern Illinois University - Edwardsville (SIUE)** School of Engineering recently launched a dual degree program in partnership with Changshu Institute of Technology (CIT). Through this program, CIT students will spend two years in SIUE’s mechatronics and robotics program, which is also home to ongoing research on autonomous vehicle technologies.
- **Missouri University of Science and Technology** has long had a close relationship with Boeing and is one of the company’s preferred providers for engineering education. A recent alumni gift of $300 million will fund a number of activities, including the creation four new research centers on advanced manufacturing, AI, autonomous systems and infrastructure.
- **LaunchCode** provides free tech and job readiness training as well as apprenticeship placements for qualified program participants. It is several years into a partnership with the National Geospatial Intelligence Agency to grow the agency’s tech development team using curriculum tailored to the agency’s skills needs.
- **NPower and Claim Academy** both help people acquire high-demand skills and find work in fields such as software development and cybersecurity.
- **The Opportunity Trust** works to improve P-12 coordination and access to resources as public education evolves to meet 21st-century needs.

In some cases, employers have taken matters into their own hands by working directly with WTE providers. Bayer, Boeing, Express Scripts and Mastercard are among the major employers in the region that have launched successful training partnerships. These collaborative efforts benefit
from strong engagement from a single employer, which simplifies communication, demand forecasting and program alignment.

Boeing’s collaboration with STLCC offers a case in point. Facing a shortage of aircraft assembly mechanics, Boeing teamed up with STLCC to create an accelerated pre-employment training program to provide a pathway into a career on the production floor. Since its inception, over 85 percent of all assembly mechanics hired by Boeing graduate from the STLCC program, with more than 900 program graduates starting their careers at Boeing.

These bespoke programs—however successful they may be—are limited in impact because they tend not to include other firms with similar skills needs. At the end of the day, even the most effective corporate training partnerships exacerbate the fragmented nature of the education and training ecosystem.

Inclusive growth will remain out of reach unless the region commits to building a stronger and more effective talent development ecosystem. Existing skills shortages and limited access to opportunity in the St. Louis region will only intensify without deliberate action on the part of employers and education and training providers.
Three-Year Talent Surge

Given the need for immediate action, we recommend a three-year surge in worker training to ensure that companies are able to find the skilled workers they need to grow. St. Louis has several training programs that are already putting people on pathways into high-demand fields. Expanding the capacity and reach of these solutions will provide a short-term surge of skilled workers in priority sectors such as advanced manufacturing, agtech, biotech, healthcare and software development and engineering.

The STL Pledge will propel this initiative by committing anchors to hire local and set ambitious but achievable targets for hiring (both in terms of absolute numbers and demographic diversity). A well-resourced Talent Surge Fund is needed to provide grants for program expansion in high-demand fields. Grants will be awarded on a competitive basis with an eye toward expanding the capacity, reach, diversity, inclusivity and success of proven solutions in the region. Similar efforts in other regions suggest that grants of up to $500,000 are sufficiently large enough to drive change at scale.

The region will also need to invest in supporting potential and incumbent workers’ success. Too often, barriers such as limited career awareness and guidance, poor study skills, unreliable transportation and lack of childcare prevent people from completing (or even enrolling in) training programs. Those from lower-income households and historically disadvantaged communities often face more pronounced challenges, particularly when they are first in their family to seek training beyond a high school diploma.

Although St. Louis has a number of support service providers, trainees and workers may find it difficult to know where to start. Providing access to on-site resource coordinators will help individuals identify and obtain the support services they need. Resource coordination not only improves training completion rates but also can have a positive effect on retention and worker engagement. Potential and incumbent workers alike have greater peace of mind knowing that someone is available to help them problem-solve so that they can be present while at work and appreciate employers’ willingness to invest in their success.

St. Louis should also take advantage of any federal workforce investments that become available. The region’s past successes with the federal Trade Adjustment Assistance Community College and Career Training (TAACCCT) competitive grant program offer a strong model on which to build. This program, launched as part of the 2009 Recovery Act, invested in community colleges that worked directly with major employers to develop curricula aligned with regional skills demand.

Build Industry-led Workforce Collaboratives

But sustaining inclusive growth for the long haul will require more than near-term efforts. Over the next ten years, St. Louis will need to develop a constellation of industry-led collaboratives that draw together stakeholders from the private sector, P-12 and postsecondary education, workforce training, support services and community organizations to align programming with employer demand. These groups combine robust employer engagement, deep collaboration and data-driven approaches to great effect.

Taking well-researched forecasts of skills needs as their starting point, workforce collaboratives bring together relevant stakeholders to create clear pathways into occupations in the regional labor market. The result: potential workers receive the training and support they need to find work that pays well, incumbent workers develop new skills that lead to career advancement and employers have the skilled workforce they need to innovate and grow.
Workforce collaboratives ensure better communication, coordination and transparency across the education and training ecosystem. By strengthening existing relationships and building new connections among stakeholders, these industry-led efforts will bring a degree of stability and agility to the regional labor market. They will also take deliberate action to increase the training, hiring and retention of workers from traditionally underrepresented groups, with particular attention to Black residents of North St. Louis and North St. Louis County. Collaboratives will attend to the entire talent development spectrum, raising career awareness in P-12, connecting potential workers to supported career pathways and helping incumbent workers acquire the skills they need to advance in their careers.

**DAUGHERTY BUSINESS SOLUTIONS AND CIO ALLIANCE: WORKFORCE PLANNING POWERED BY EMPLOYER INSIGHTS**

The line that divides the tech sector from the rest of the economy grows fainter by the day. In industry after industry, technology has become a core competency. As the use of cloud computing, software development and data management become more common, demand for workers trained in these fields will continue to rise. As a result, access to talent is a key limiting factor for economic growth.

The St. Louis region has the potential to become a technology hub with particular strength in agtech, fintech and geospatial—but only if employers can find enough workers to meet their skills needs. Amidst growing concern about the size of the St. Louis tech labor pool and its ability to keep up with expected growth, Daugherty Business Solutions partnered with CIO Alliance and Civic Progress to learn more about likely skills demand and explore how best to meet it.

Having CIOs and CTOs at the table meant that Daugherty got firsthand insight into needed skills, expected job growth, company workforce priorities, lessons learned and best practices. Working together, industry leaders identified general skills requirements necessary for different tech occupations. They shared expectations for future growth and likely job opportunities. Together they agreed that the key to future success hinged on their ability to cultivate “a premier technology workforce that not only supports the growth of St. Louis businesses, but also represents a national sourcing alternative for technology jobs.”

Through their conversations, the group realized that reaching the scale they needed to achieve would require a new approach. Making St. Louis “a uniquely strong, nationally recognized Technology Hub” would necessitate going well beyond traditional sources of labor to attract and retain workers from currently underrepresented groups. With this in mind, the group agreed to take deliberate action to increase the number of workers from underrepresented communities and set out to learn how best to do so.

The initial recommendations produced by the group propose a 10-year effort with specific actions for the near term, mid-range and long term. To help drive progress, the group set a goal of 4,000 new jobs added in the first three years, with individuals from underrepresented communities holding at least one-third of the jobs created. Many of these jobs will be open to graduates of accelerated training programs, which prepare workers for entry-level tech positions in two years or less. When combined with revised job descriptions that weed out unnecessary four-year degree requirements, this programming will make these careers more accessible to those without a four-year degree. Meanwhile, deliberate efforts to create a more inclusive work environment will improve worker engagement and, by extension, retention and productivity.

The vision that guides this group of CIOs and CTOs is ambitious but critically needed. Other industries facing labor shortages should look to the work of this group as a model for improving labor market projections and devising solutions to meet those needs.

Strengthen STEM Education and Training Ecosystem

With so many high-demand occupations in the region requiring STEM-related skills, STEM education must be a top priority. Local intermediary STEMSTL is already working with educators, employers and families to improve STEM education in terms of quality, access and connection to expected skills needs in the regional labor market. Designating STEMSTL as lead organization in the development of a coordinated and collaborative regional STEM education and training ecosystem will help ensure that every St. Louis student has access to high-quality STEM learning opportunities from pre-kindergarten to high school and beyond. As lead organization, STEMSTL will be empowered to convene key stakeholders to align the many disparate efforts in the region, with a particular focus on those schools and students with the least access to STEM learning. Meanwhile, expansion of STLCC’s successful two-year lab-tech training program and the launch of a new summer STEM program for college students of color will help put more people on pathways to careers in bioscience.

St. Louis has significant challenges to address in terms of developing a diverse skilled workforce, expanding access to opportunity and supporting potential and incumbent workers’ success. A three-year Talent Surge, a long-term commitment to industry-led workforce collaboratives and redoubled attention to STEM education and training, when paired with focused actions to increase diversity and cultivate inclusion and belonging at work, will increase economic mobility and inclusive growth throughout the region.
REAL JOBS RHODE ISLAND: INVESTING IN EFFECTIVE INDUSTRY-LED WORKFORCE COLLABORATIVES EMPLOYER INSIGHTS

Alignment between education and training and expected skills needs is critical for healthy talent ecosystems. Programs that align with employer demand and provide clear, well-supported pathways into careers in the regional economy make it easier for people to find work that pays well while also ensuring that area employers can find the talent they need when they need it. This alignment is a baseline necessity—without it, companies struggle to find the skills they need and potential workers often end up guessing which program might give them the best shot at steady work.

Workforce collaboratives are a proven model for improving this alignment and developing a most efficient and more effective talent ecosystem. These industry-led cooperative efforts bring together stakeholders from across the spectrum—employers, P-12 and postsecondary, other WTE providers, support services, community organizations and public-sector education and workforce practitioners—to assess projected demand and align program content and capacity to meet those projections.

The state of Rhode Island saw the value that these cross-sector coalitions could provide. In 2015 it created a competitive grant program to encourage the emergence of strong workforce collaboratives in sectors with high potential for job creation and continued growth. This focus on specific industry clusters played to the region’s strengths in order to maximize return on investment.

State officials designed the entire program with the success of grantees in mind. Award criteria—e.g., requirements that the proposed collaboratives be data-driven and employer-led, include at least five firms and two non-industry stakeholders and conduct regular performance assessments to drive continuous improvement—help ensure that grantees had the right stakeholders in the room and the right info in hand to craft workforce solutions that align industry, education and workforce development. Each grantee is assigned a RJRI Advisor who provides “technical and practical assistance at every step of the process.” Proposals for sustainable collaborative solutions receive priority, which reflects the state’s desire to cultivate more durable infrastructure for industry-oriented workforce development.

With the private sector at the helm, these groups often co-design customized curricula so that training programs are able to meet specific employer skills needs. Having all of the stakeholders involved allows for seamless connections across high school career and technical education (CTE) programs, 2-year colleges, intermediaries such as the Manufacturing Extension Partnership and 4-year colleges and universities.

As of January 2020, Real Jobs Rhode Island had trained over 6,000 people. More than 80 percent of trainees have job offers by graduation, a testament to the value of aligning with industry skills needs.

5. Make STL a Hub for Next Generation Industries and Technologies

**Actions**

Quadruple Down on Biosciences
Freight Infrastructure
Advanced Manufacturing Innovation Center
GeoFutures/National Center for Location Services
Transit and Digital Access

Advanced industries—those sectors that prize innovation, invest in R&D and boost productivity, exports and pay—offer the greatest benefit to regional economies. They foster entrepreneurialism and a vibrant startup community. They create jobs that pay well for all skill levels, with a significant proportion requiring only an associate degree or completion of an accelerated training program. Over time, this job growth attracts transplants to the region and encourages undergraduates and graduate students in the area to stay on after graduation. With high-value economic activity and a wage premium that extends to non-technical as well as technical roles, advanced industries offer regions the best chance for sustainable and inclusive economic growth.

Historically and today, these STEM-intensive industries have not done well on diversity and inclusion measures. Deeply rooted cultural biases about who can excel in STEM fields deter countless BIPOC and white women from pursuing careers in these industries. Those with the courage and stamina to disregard such beliefs press on but often have trouble feeling that they truly belong in their chosen profession. Although a number of firms have launched efforts to increase diversity through hiring, retention remains an issue. A sizable proportion of BIPOC and white women leave these occupations mid-career, exhausted from coping with microaggressions and a workplace culture that excludes them.

These pernicious patterns effectively exclude BIPOC, white women and other traditionally underrepresented groups from high-value, high-demand occupations. This, in turn, limits their access to opportunity and economic mobility.

The lack of diversity and inclusion in advanced industries also undermines innovation and economic growth. Clusters are deprived of the creative solutions that emerge from teams informed by different perspectives and life experiences. Without deliberate efforts to create inclusive workplaces, these industries also miss out the higher productivity, increased employee engagement and improved recruitment and retention that come from a strong sense of professional belonging.

Advanced industries’ proven ability to increase the number of living-wage jobs means that these sectors must be part of any plan for inclusive economic growth. But intentional action to increase diversity and inclusion in these industries must be a priority as well. If the region commits to using its advanced industry strengths to create broadly shared prosperity, St. Louis will be better equipped to eliminate longstanding racial disparities in income, health and wealth.

St. Louis sits at the intersection of several powerful advanced industry clusters. Some—such as biosciences and advanced production—have been strongholds for some time, while others—such as geospatial/location sciences—are only now emerging. These industries drive innovation within and, increasingly, across sectors, enabling company growth, creating jobs and inspiring startup activity.

A wealth of industry assets suggest that St. Louis has significant potential for inclusive economic
growth powered by its advanced industries. In biosciences, innovation campuses Cortex and 39 North represent an enormous advantage for the region. Together they provide an environment rich in R&D, startup activity and knowledge spillovers. These physical spaces have seen tremendous startup activity and job creation over the years, with Cortex growing from roughly 1,000 employees across 50 companies in 2012 to 6,000 across 425 firms by 2019. The region’s central location, its sizable presence in transportation, distribution and logistics and its long-time strengths in manufacturing open up new opportunities for innovation in advanced production. Meanwhile, the planned NGA West facility in North St. Louis will provide a new home for innovation in geospatial and location sciences.

Unlocking the region’s full potential for inclusive growth will require a deliberate combination of investment in the region’s competitive industries and a steadfast commitment to the well-being of all St. Louis communities. These twinned priorities underpin our recommendations for expanding on past successes and building out the innovation infrastructure of key cluster ecosystems.

Of the region’s various industry strengths, biosciences is an established calling card for St. Louis. This broadly defined sector encompasses medical sciences and healthcare, agricultural sciences and agtech, geospatial and food/nutrition. It is emblematic of a new kind of a purpose-driven economy that has the potential to feed the world, heal the sick and counteract race- and ethnicity-based health inequities.

Over the past twenty years, the St. Louis region has built a robust bioscience ecosystem that supports innovation, fosters entrepreneurship and nurtures long-term growth. Its solid infrastructure and sophisticated capabilities and programming offer a supportive environment for conducting research, developing new products and services, launching startups and growing companies.

The success of the ecosystem stems in large part from the sector’s collaborative ethos and holistic approach to innovation-oriented economy-building. St. Louis bioscience stakeholders understand the strength that comes from common goals and a shared vision for the future. They have seen firsthand how transformative investments in the built environment can create new possibilities for creative collaborations and knowledge spillovers. They work to create a supportive environment for companies across the entire growth continuum—from initial research and early-stage startups to mature firms and established multinational corporations. In essence, the St. Louis bioscience sector has figured out how to make $2 + $2 = 5. Its successful efforts over the past twenty years offer a proven approach that other sectors can emulate.

At the same time, the sector is not without its challenges. BioGenerator’s innovative entrepreneurial supports and investment capital programs are over-subscribed and in need of expansion. Demand for access to core facilities and affordable lab/office space exceeds the current supply, making it harder for early-stage firms to find their footing as they grow. Corporate recruiting efforts lack the staff and resources needed to respond to site selection inquiries and proactively attract firms to the region. AllianceSTL is a promising new effort to address this issue, but the specialized nature of biosciences requires recruiters with a solid grounding in the field. Existing education and workforce training programs are not sufficient to meet growing employer demand and can be difficult to access for those living in historically disadvantaged communities. As a result, many St. Louisans find themselves cut off from critical pathways to greater economic prosperity. And although workforce diversity and inclusion in the workplace are receiving more attention, progress remains limited, to the detriment of individuals from traditionally underrepresented groups.
Quadruple Down on Biosciences

Today bioscience stands at the doorstep of a new stage of growth. With a solid foundation now in place, St. Louis needs to quadruple down on biosciences by investing in what works, increasing diversity and inclusion and reinforcing St. Louis’ reputation as a global hub for bioscience innovation and a healthy environment for bioscience companies to grow.

One key source of this cluster’s strength is BioSTL’s BioGenerator. What began as an effort to increase access to seed-stage capital has evolved into a multifaceted strategy to help entrepreneurs start and grow a business. Over the past ten years, this cluster intermediary has developed a comprehensive suite of support and investment programs for entrepreneurs and early-stage firms. It has invested roughly $27 million in more than 80 startups that collectively went on to raise nearly $1.1 billion in outside investment, more than 80 percent of which came from outside St. Louis.

Its programs have some of the highest leverage of any venture development organization in the country, raising approximately $40 for every BioGenerator dollar invested. Strengthening and expanding BioGenerator’s offerings will enhance its ability to serve early-stage firms, which in turn will increase entrepreneurial activity and help make St. Louis a target destination for bioscience startups and talent. Adding capacity to this proven intermediary will expand entrepreneurs’ access to the knowledge and capital they need to get their ventures off the ground while also ensuring that St. Louis is well positioned to take advantage of new opportunities as they arise.

BioSTL is also home to GlobalSTL, a homegrown recruitment program that plays a vital role in bringing innovative bioscience companies to St. Louis. This intermediary acts as a proactive business developer, attracting businesses outside St. Louis by connecting them with the cluster ecosystem. These efforts attract high-growth firms that in turn bring innovation capacity, jobs, investment capital and quality of life improvements to the region. Expanding GlobalSTL’s bioscience recruitment capacity at home and abroad and launching a bioscience talent recruiting and business development platform with global reach will enhance the impact of this proven program for innovation-oriented economic development.

Corporate recruitment activity in the St. Louis bioscience sector has been largely reactive in nature, with new inquiries answered by economic development professionals who lack specialized knowledge of the bioscience sector. A coordinated, proactive bioscience recruitment strategy will increase the region’s competitiveness in site selection efforts, resulting in more proposals accepted by site selectors and more companies deciding to locate in the region. As these firms move to St. Louis, they will bring innovation, economic growth and job creation, with positive effects for the regional economy as a whole.

Like other advanced industries, the St. Louis biosciences sector relies on a skilled STEM workforce. As these sectors grow, so, too, does employer demand for skilled STEM workers. As such, access to quality STEM education will determine who is able to take advantage of the job opportunities that these industries create. Every student in the region deserves access to high-quality STEM learning opportunities throughout their academic career. The development of a coordinated and collaborative STEM education and workforce training ecosystem can help make this goal a reality.

Led by regional intermediary STEMSTL, this ecosystem will align the many disparate efforts in the region, with a particular focus on those schools and students with the least access to STEM learning. At the other end of the education and workforce continuum, expansion of STLCC’s
successful lab-tech training program and the launch of a new summer STEM program for college students of color will put more people on pathways to careers in bioscience.

St. Louis is home to a number of incubators and shared lab facilities that support the early stages of commercialization and help firms get off the ground. However, as companies start to outgrow these spaces, they have trouble finding new spaces that fit their budget. An increase in the stock of affordable lab/office space, particularly in innovation districts and near anchor institutions, will create new options for startups that outgrow early-stage locations such as incubators and co-working spaces. This space can also support regional need for additional workforce training space.

Creating and commercializing innovation in the biosciences requires deep knowledge and access to expensive research facilities and equipment. Shared core facilities for bioscience research have helped drive growth in the sector by giving young companies lower-cost access to lab space, expensive research equipment and expertise. These facilities accelerate commercialization of innovation, help startups grow and attract companies to the region.

Expanding existing core facilities to include additional capacity and capabilities will allow more companies to grow while making the region an even more attractive location for existing and emerging bioscience firms.

Given bioscience’s proven track record for commercializing innovation, St. Louis has a unique opportunity to develop Centers of Excellence that drive commercialization at the intersections of bioscience and other sectors. Building two new Centers of Excellence focused on intentional collaboration between biosciences and other industries will provide much-needed infrastructure to support innovation in the region. Alongside the planned Centers of Excellence for defense medicine and pandemic resilience, the new centers will attract investment, talent and companies from outside St. Louis that want to take advantage of the region’s expertise and industry opportunities. Over time, these centers will help entrepreneurs turn multidisciplinary ideas into new ventures that drive innovation, create jobs and expand regional economic growth.

Competitive industries outside the biosciences cluster merit attention as well. Advanced production continues to play a substantial role in the St. Louis economy, particularly in the realm of aerospace and automotive. This sector relies on continuous innovation in product design and production processes made possible through applied research, large-scale capital investments in facilities and equipment, automation and a highly skilled workforce.

High-value production means higher economic productivity and jobs that pay well. Many advanced production jobs are accessible without a four-year degree, a necessity for inclusive economic growth. This sector also fosters startup activity and company growth, with dense networks of small and medium-sized enterprises (SMEs) that specialize in making particular components for larger original equipment manufacturers (OEMs). These SMEs create jobs and, if locally owned, contribute to wealth building in the region. Furthermore, close physical proximity between SMEs and large-scale manufacturers speeds the transportation of goods, which in turn saves OEMs time and money.
Freight Infrastructure

As the COVID-19 pandemic continues to disrupt global freight movement, the need for a strong domestic manufacturing sector has never been more apparent. The St. Louis region is uniquely positioned to make the most of this shift. In addition to strengths in advanced production, the region sits in the center of the country halfway to virtually anywhere in the continental United States. Its multimodal assets allow freight to move easily, whether by barge, rail car airplane, or semi. What’s more, the region already has programs in place to prepare a workforce skilled in transportation, distribution and logistics (TDL). TAACCCT funds helped STLCC, Lewis & Clark Community College in Illinois and seven other community colleges invest in training for truck driving, logistics and other high-demand TDL occupations.

Organizations like the Bi-State Development Agency and the East-West Gateway Council as well as initiatives like the St. Louis Regional Freightway have put together multi-year plans detailing needed infrastructure investments in the region. These plans position St. Louis well for any federal infrastructure funds that become available in the years ahead. The recommended freight infrastructure investments detailed in the plans—replacement of the Merchants Memorial Mississippi Rail Bridge, improvements of I-70 and I-64, additional cargo capacity at Lambert International Airport—will make it easier for St. Louis manufacturers to obtain needed materials and ship out finished products.

Advanced Manufacturing Innovation Center

In addition to needed freight infrastructure improvements, St. Louis will need to invest directly in the region’s capacity for innovation in the advanced production sector. Construction of an Advanced Manufacturing Innovation Center (AMIC) offers an opportunity for St. Louis to do just that. Located in the heart of St. Louis, not far from Cortex, NGA West and Ranken Technical College, this globally significant facility would house cutting-edge R&D as well as intentionally inclusive accelerated training programs that provide pathways into careers that pay well. In addition, it would be designed with the needs of SMEs in mind so that these vital links in the supply chain can have access to the latest research and technology.

AMIC would ensure that St. Louis plays a significant role in the future of advanced production. The facility would feature three main spaces: specialty labs where individual companies can do bespoke testing and research, shared-use space that provides access to advanced technology and equipment (a key asset for area SMEs) and workspace for collaborations and meetings. From production programs to sector-specific initiatives to workforce training programs, AMIC would provide a center of gravity for the region’s advanced production sector, concentrating innovation, talent and economic activity alongside NGA West, Cortex and other sector-specific innovation centers nearby.
ADVANCED MANUFACTURING RESEARCH CENTRE: ANCHORING INNOVATION IN SHEFFIELD

The University of Sheffield’s Advanced Manufacturing Research Centre (AMRC) shows the outsized impact that a research-intensive anchor institution can have on regional economic growth. What began as a £15 million partnership between Boeing and the University of Sheffield in 2001 has become the core of a vibrant hub for applied R&D, startup activity and workforce training.

Situated as a key anchor for Sheffield’s Advanced Manufacturing Park, AMRC is organized into a collection of centers, each with a particular focus. From design and prototyping and structural testing to composite and metal additive manufacturing, these centers bring together the expertise and equipment that drive innovation in companies large and small.

This innovation powerhouse represents a vital resource for small manufacturers in the region. AMRC features a suite of facilities designed to drive SME adoption of innovations in precision engineering, machining, materials science and other production-oriented fields. Easy access to world-class production equipment and deep expertise help these smaller firms take advantage of the latest in production and process design. Meanwhile, seminars, forums and conferences keep SMEs informed about advances in high-value production. An on-site incubator provides needed support for young companies working to establish themselves.

AMRC also plays an important role in regional workforce development. Its robust apprenticeship program has put over 1,000 people on pathways into high-demand production roles since its launch in 2013. To ensure a steady supply of potential workers, AMRC’s Training Centre conducts outreach to area secondary schools to raise awareness about career possibilities in advanced production. And for employers, AMRC offers industry-oriented incumbent worker training programs to strengthen existing skills and build new competencies.

Taken together, AMRC’s facilities and offerings represent a boon to Sheffield’s manufacturing sector. From preparing skilled workers to conducting cutting-edge research and keeping SMEs current on the latest innovations, AMRC strengthens Sheffield’s advanced production ecosystem and helps keep all manufacturers in the region—regardless of size—at the forefront of manufacturing innovation.

Source: “About AMRC,” University of Sheffield AMRC, https://www.amrc.co.uk/pages/about
National Center for Location Sciences

The emerging geospatial cluster represents another opportunity for the region. Plans for a new NGA headquarters—NGA West—in North St. Louis are now underway. Once completed, the $1.7 billion NGA West will serve as a vibrant hub of geospatial research, talent development and commercialization. This state-of-the-art facility will attract a new base of federal workers, defense contractors, private-sector firms and university research that will fuel sector growth in the years ahead. Though much of NGA’s work involves classified national security concerns, the agency expects to collaborate with academic researchers and private-sector firms on unclassified efforts and is including dedicated space for collaborative work on the facility’s 97-acre campus.

As a major anchor situated north of downtown across the Delmar Divide, NGA West will play a key role in driving inclusive economic growth in the surrounding neighborhoods. Project Connect, a community engagement and economic development initiative, is working to coordinate activity and investments in redevelopment, transportation infrastructure, neighborhood revitalization and other projects in eight of the city’s most disinvested neighborhoods near NGA West: Carr Square, Columbus Square, Downtown West, Hyde Park, JeffVanderLou, North Riverfront, Old North and St. Louis Place.

Ongoing community engagement and inclusion of area residents in project planning and leadership roles will prioritize community needs and inclusive economic development around the new headquarters. Furthermore, the GeoFutures Strategic Roadmap calls for a neighborhood-driven plan to empower residents and take deliberate action to foster inclusive growth.

To further expand the cluster ecosystem, St. Louis should build a National Center for Location Sciences (NCLS) near NGA West. Based on the model of the Danforth Center, this public-private partnership will bring the latest in location sciences to bear on pressing challenges in fields ranging from plant science to biomedicine to manufacturing, transportation and logistics. NCLS will serve as an anchor for a geospatial innovation district in the blocks surrounding it and NGA West. It will transform an area scarred by decades of disinvestment, replacing vacant lots and abandoned buildings with new state-of-the-art facilities devoted to innovation in location sciences.

With an advanced manufacturing innovation center and core facilities that are accessible to early-stage firms, NCLS would provide a supportive environment for applied R&D and commercialization of innovation. Deliberate actions to support founders of color—particularly those living in North St. Louis—will contribute to broader efforts to increase the number of Black-owned businesses in the city’s core.

Building a stronger geospatial cluster is a key goal of NCLS. Partnerships with Saint Louis University, Harris-Stowe State University, UMSL, Washington University, T-REX, GeoFutures, Greater St. Louis and others will create space for collaborative problem solving and strengthen working relationships among stakeholders.

As is the case for the Brickline Greenway project, the construction of NCLS must include safeguards to prevent gentrification and displacement of long-time residents. Mechanisms that keep generated wealth in the community will be essential in order to ensure that the economic benefits that result from NCLS are truly inclusive.
Robotics technology has forever transformed U.S. manufacturing. Production tasks that used to require the work of several people can now be completed by a machine with a single operator. The benefits are significant—higher productivity, lower costs, faster and more precise production—but they come at a cost, displacing workers from living-wage jobs.

The Advanced Robotics for Manufacturing (ARM) Institute believes that there is an alternative to widespread worker displacement. By pairing robotics R&D with workforce development, the ARM Institute is working to build a manufacturing sector “that elevates—not eliminates—the human roles in manufacturing.”

What began with just six universities and eleven companies, led by Carnegie Mellon University, now includes over 260 member organizations from the private, public and academic sectors. Institute members commit to collaborate on applied research and workforce development efforts, united by the shared goals of advancing innovation and preparing enough skilled workers to meet expected demand.

The 90,000 square-foot Mill 19 facility in Pittsburgh’s Hazelwood neighborhood houses the institute, Carnegie Mellon’s Manufacturing Futures Initiative and the local Manufacturing Extension Partnership. This co-location of major industry assets invites collaboration and knowledge spillovers among the three anchor tenants. Built on the site of an old munitions plant, Mill 19 features classrooms, conference rooms, collaboration space and a high bay for applied research.

In addition to increasing regional capacity for manufacturing innovation, Mill 19 is also providing a catalyst for neighborhood revitalization efforts. In November 2019, the Greater Hazelwood neighborhood received approval of its development plan from the City Planning Commission. Taking development without displacement as its goal, a community-led process engaged a wide range of area residents and produced a plan that centers the needs and dreams of current residents. The plan includes strategies for priority issues such as zoning and land use, affordable housing, commercial corridors, placekeeping and improving mobility within the neighborhood. Through this plan, Greater Hazelwood has positioned itself to make the most of the arrival of Mill 19, the surrounding Hazelwood Green development and the economic growth that both will inspire.


Transit and Digital Access

Lastly, inclusive economic growth powered by advanced industries will require thoughtful investments in transit and digital access. Insufficient public transportation infrastructure isolates the city’s historically disinvested neighborhoods, preventing residents from accessing education, training and employment opportunities in other parts of the region. Lack of digital access has a similarly isolating effect that has only grown more pronounced with the COVID-19 pandemic. With most classroom instruction now online, students in households without consistent internet access find themselves at a profound disadvantage that will have lasting effects on their academic careers and future earning potential. Regional investment in the expansion and modernization of broadband networks and in residents’ acquisition of basic digital skills will drive adoption and decrease the number of St. Louis households without sufficient internet service.
CONCLUSION

At the outset of this Action Plan, we made an ambitious claim: The next decade presents an exceptional opportunity for the St. Louis region. That assertion, coming in the midst of a global pandemic and in the aftermath of decades of economic underperformance and population stagnation, may seem pollyannish to some.

But *STL 2030 Jobs Plan* has shown, through quantitative evidence and qualitative assessment, that St. Louis is a globally significant metropolis rich in institutional assets and competitive advantages. Leveraging these assets and advantages requires a fundamental commitment to overcome excessive fragmentation and a fierce determination to address head on the painful legacy of racial segregation and division.

*STL 2030 Jobs Plan* provides a concrete roadmap for driving the growth of quality jobs while substantially reducing racial and ethnic disparities on income, health and wealth. We fundamentally believe that the city and metropolitan area has the ability, capacity and capital to lead the nation on inclusive economic growth.

Disruptive periods enable communities that are organized and focused to leap frog ahead of others. This is one of those periods—and St. Louis is one of those places. The region can do grand things, together.
ACKNOWLEDGMENTS

The authors are grateful to the many St. Louisans who have overseen this work, informed our understanding of the St. Louis economy and co-designed the actionable strategies.

Special thanks at the outset go to Civic Progress, which commissioned this action plan, and Greater St. Louis, Inc. which will inherit it. These organizations play a central role in the purpose-built civic infrastructure of St. Louis and are helping guide the next chapter of this grand city and metropolis.

The result has been an action plan grounded by local experience and expertise. We have listed below the individuals who dedicated their time and energy to participate with us in this journey.

New Localism Associates is a firm focused on helping cities and metropolitan areas design, finance and deliver inclusive growth. The firm draws on the expertise of a broad network of practitioners in the United States and beyond. The *STL 2030 Jobs Plan* work was guided by Bruce Katz, Jessica A. Lee, Courtney Kishbaugh and Ben Preis.

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Due to the maturity of the region’s bioscience ecosystem and the metro’s globally significant and distinctive position, a larger group of stakeholders was engaged to focus on the bioscience sector in St. Louis.

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<thead>
<tr>
<th>Name</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Ron Fox</td>
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<td>Hillary Frey</td>
<td>STL Youth Jobs</td>
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<td>Philip Payne</td>
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<td>Mike Steenhoeck</td>
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<td>Phil Taylor</td>
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ACKNOWLEDGMENTS

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ACKNOWLEDGMENTS

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**Driving A Decade of Inclusive Growth**


**The Challenges Ahead**


**On Setting Goals**

**STL 2030 Jobs Plan Origin and Approach**


**Our Diagnostic: A Metropolis Rich in Assets but Divided Against Itself**


Our Vision: A Decade of Inclusive Growth


Our Solutions


**General**


