

CEO Update

January 8, 2013



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FY 2013 Q2 Highlights

Client Activity

California

Rural Arizona

Innovation & Entrepreneurship

A&D Strategy

FY 2013 Q2 Client Activity

17 projects

2,048 jobs announced: 6,214 YTD

- Includes 1,250 jobs YTD in rural Arizona

\$183.1 million capital investment; \$681.5 YTD

Average salary approximately \$49,000



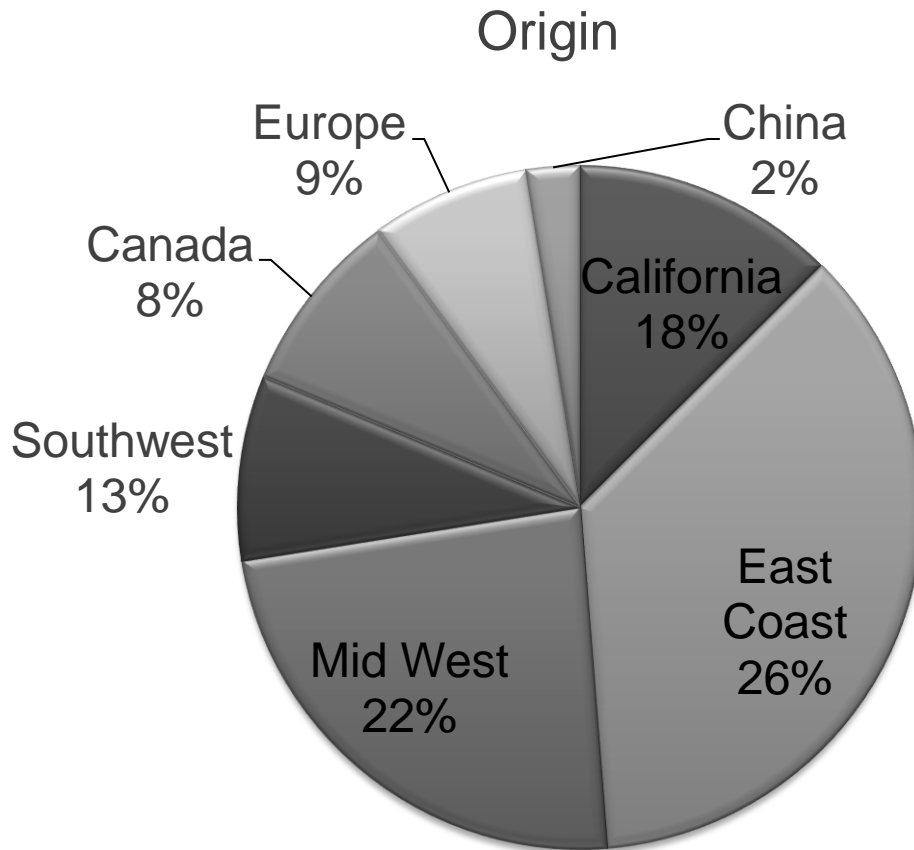
FY 2013 Q2 Client Activity



Genome Identification Corp (CSI)



Pipeline: 266 Projects



Industry

Advanced Manufacturing	25%
Bus., Financial Svcs	14%
Information Technology	12%
Renewable Energy	11%
Transportation & Warehousing	11%
Bioscience/Healthcare	10%
Aerospace & Defense	9%
Mining, Oil & Gas	4%
Other	4%



California Strategy

Two offices fully operational

Executing long-term, two-fold strategy:

- Assist California companies looking to expand outside of the state
- Serve as in-market resource for Arizona companies expanding their supply chains

65 new contacts in the last two months

Launching a targeted branding campaign



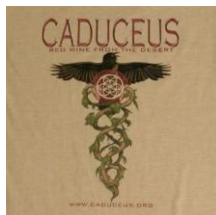
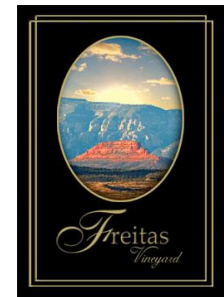
FY 2013 Rural Grant Recipients

COBHAM

Joy



Datepac, LLC



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Welcome to Innovation Arizona...
your axis of innovation.

Ranked #1 in the U.S. for Entrepreneurial activity, Arizona has fostered the innovative spirit in technology and startups for generations. That passion for innovation lives on in the Grand Canyon state, where an ongoing investment in the most talented entrepreneurs and cutting-edge technology is bringing to market products that are literally changing the world.

Today, Arizona is raising the bar — driving its success with lower taxes, a less regulating state government, and top entrepreneurial programs.

Arizona is a proven hot spot for innovators and entrepreneurs to start, expand and thrive. Join us.



"Arizona fosters the world's emerging technologies, encouraging and supporting business creativity and growth. We're number one for entrepreneurs for a reason. Join us in Arizona."

- GOVERNOR JAN BREWER

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Social Chatter

The world's largest military & training bases, top-ranked educational & research, 33 airports & incentives for companies looking to expand, relocate & thrive... see why the aerospace & defense sectors in Arizona. <http://now.ly/g/vL7>
Jan 3rd, 2012 10:55am • No Comments

Arizona Commerce Authority added a new photo.
Dec 24th, 2012 9:58am • No Comments

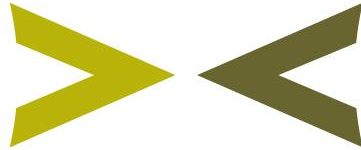
Arizona Commerce Authority tabs 6 companies for Innovation Challenge awards.
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THIS IS THE FUTURE.

From the discovery of Pluto to the production of unmanned aerial systems (UASs), Arizona has fostered the pioneering spirit in aerospace and defense for generations. That passion for innovation lives on in the Grand Canyon state, where more than 350 days of sunshine and cloudless skies – ideal for stargazing, testing and flying – have attracted industry giants such as Raytheon, Honeywell, Boeing, Lockheed Martin, General Dynamics and more.

Today, Arizona is raising the bar—driving its success with lower taxes, a less-regulating state government, a competitive incentives package, and exceptional aerospace and engineering programs at the university level. Arizona's impressive resume includes top 10 rankings in Department of Defense contracts, aerospace and defense manufacturing, aerospace exports and aerospace jobs.

Our state is a major global center for the aerospace and defense industry.

Join us in Arizona.

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ARIZONA, A PROVEN, RECOGNIZED LEADER IN TRAINING, TESTING AND DEVELOPING UNMANNED AIRCRAFT SYSTEMS.



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THIS IS THE FUTURE.

Hands down, Arizona leads the nation when it comes to testing, training and developing unmanned aircraft systems (UAS). Arizona is home to the world's largest UAS Training Center - Fort Huachuca - with close to 12,000 members of the military UAS trained and certified. Our test ranges accommodate small, medium and large-scale unmanned operations. Our world-class universities offer exceptional aerospace and engineering education and research. Our 350 days a year of perfect flying weather prove ideal for UAS development.

The Arizona Test Range Complex (AZTRC) represents the combination of these regional test ranges, ranges that are capable of testing all UAS in all altitudes and all types of airspace.

With more than 33,000 unmanned flight hours already integrated, no state flies higher than Arizona in UAS advancement readiness.

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