2011

Eastern Maine Comprehensive Economic Development Strategy (CEDS)

Eastern

Maine

Development

Corporation

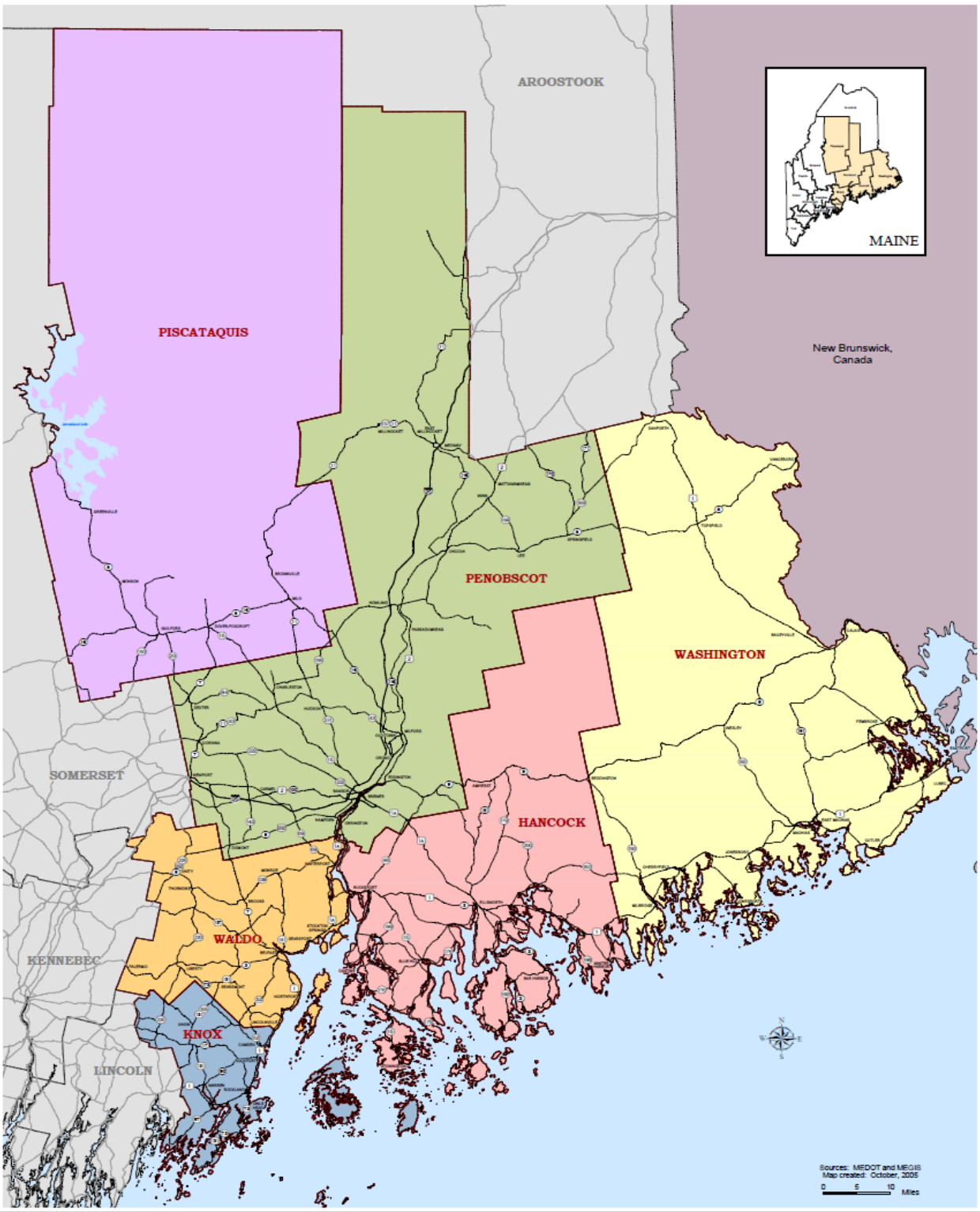
www.emdc.org

Mission Statement

"Leading Eastern Maine to a Strong Economic Future" – To this end, we commit ourselves to provide leadership to encourage partnership and collaboration that fosters creation of a thriving regional economic climate, always mindful of the need to balance economic, social and environmental considerations; while maintaining and enhancing the unique quality of place found throughout Maine.

EASTERN MAINE DEVELOPMENT CORPORATION

Hancock, Knox, Penobscot, Piscataquis, Waldo and Washington Counties



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Eastern Maine Comprehensive Economic Development Strategy (CEDS)
Executive Summary

Eastern Maine Development Corporation (EMDC) was established in 1967 as a regional economic and business development agency committed to guiding Eastern Maine to a strong economic future. As a function of being designated the economic development district for Eastern Maine by the United States Department of Commerce's Economic Development Administration (EDA), EMDC engages various stakeholders in a planning process to establish the region's Comprehensive Economic Development Strategy (CEDS), the region's vision for economic growth and development. The CEDS serves as one of the key tools employed by EMDC in working towards advancing the region's economic prosperity. Projects outlined in the CEDS are eligible for funding from the EDA.

The Eastern Maine CEDS sets forth a comprehensive economic development strategy for the six counties of Eastern Maine (Knox, Hancock, Penobscot, Piscataquis, Waldo and Washington). The plan is the result of a continuing economic development planning process developed with broad-based and diverse public and private sector participation, intended to ensure the long term economic vitality of the Eastern Maine region. The CEDS is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen our regional economy. The 2011 Eastern Maine CEDS Plan represents an update to the five-year strategy completed in 2007.

The CEDS relies on the hard work, input and support of a wide variety of regional partners from both the public and private sectors. Regional partners include public officials, community leaders, economic development professionals, representatives of workforce development boards and institutions of higher education, minority and labor groups and private individuals.

Over the last several months EMDC has cast a broad net to solicit information from a wide spectrum of stakeholders throughout Eastern Maine. Collectively, the Eastern Maine CEDS reached out to more than 300 stakeholders living and working in the six-county region. The process was designed to discover issues and projects from a broad cross-section geographically, as well as from a number of different economic sectors.

The list of issues and projects outlined below is comprehensive, but by no means exhaustive. The list reflects the participant's ideas, concerns, and efforts, and it is expected to be continually updated as new projects emerge and existing projects are completed. The CEDS is meant to be a dynamic and emergent process. EMDC sees the CEDS as a major component of its strategic plan and, through partnerships; we expect to achieve many of the key goals and projects.

To make the process manageable, the CEDS is organized by the following eight core themes:

- **Thriving Economic Climate**
- **Regional Leadership and Collaboration**
- **Energy**
- **Education and Workforce Development**
- **Research, Development, Entrepreneurship & Innovation**
- **Unique Quality of Life & Place**

- **Natural Resources**
- **Tourism**
- **Infrastructure**

Below is a summary of priority issues by theme and not in priority order. EMDC has not seen a shift in the major issues facing the region over the past two years.

Thriving Economic Climate Priority Issues

Diversity is the key to a thriving economic climate. Too much dependence on industries that have passed their prime threatens the region's overall economic stability. A good mix of business and industry allows Eastern Maine to be competitive.

- It is widely perceived that the "Business Environment" in Eastern Maine is poor; this is generally attributed to: the state's tax and regulatory structure; cost of and access to utilities and technology; and transportation and infrastructure challenges; Maine spends too much time with negatives and should concentrate on the positives.
- Through planning and strategic development, the region's business environment needs to be more proactive rather than reactive.
- "Micro businesses" and the creative economy are very important to our regional economy, particularly in the sparsely populated areas, yet there are challenges with respect to: access to markets; capitalization of small businesses; and access to broadband.
- The region's creative economy requires additional support in order for growth to be realized. Business assistance services, access to capital, and market development efforts need to be increased to improve the small business environment the creative economy operates within.
- There is a need to focus on "value-added" product development in and from traditional natural resource based areas (skilled trades).
- Business attraction efforts need to be coordinated, planned strategically, adequately supported, and sustained.
- The region continues to experience economic transition and should concentrate on certain economic clusters such as biotechnology, healthcare, and tourism industries, as well as "value-added" enterprises to help transition the area.
- A strong emphasis needs to be placed on tourism product development, particularly within the resort sector.

Regional Leadership & Collaboration Priority Issues:

Promoting regional leadership and collaboration can help lower costs and provide a more efficient way to deliver services.

- Major economic development issues facing Eastern Maine need to be addressed at the regional level such as allocation of scarce financial resources, the location of critical infrastructure, and business retention and attraction efforts.

- Limited municipal resources require better collaboration and coordination such as model zoning, cooperative purchasing, etc. among counties and municipalities in the region.
- The lack of regional land use planning threatens our quality of place, can encourage investments that are either redundant or unnecessary, and can weaken economic development efforts.
- There is a need for a collaborative regional vision as well as opportunities for creative collaboration processes.
- Regional trade corridors such as Atlantica present great opportunities for the broader region to successfully compete on a global scale.

Energy Priority Issues:
Rising energy costs have had a significant impact on Eastern Maine's economic vitality and trends suggest that energy will remain a forefront issue well into the future, providing both opportunities for the region, as well as presenting challenges, particularly with wind and tidal generation.

- Heating and transportation costs impact low and moderate income families.
- Rising costs of goods and services will reduce overall financial resources that drive much of eastern Maine's economy.

Education and Workforce Development Priority Issues
Research has shown that regions with a highly educated workforce also experience economic growth in terms of business attraction and development, as well as higher income levels for people in the region. Attaining a college degree or returning to school to receive advanced education and training is important to assure that skills match the needs of desired employers. To ensure workers don't leave the area it is crucial that there are jobs to support a well-educated, highly skilled workforce.

- There is a need to encourage lifelong learning and the methods to address this through transferability of courses, encouragement by business to advance skills, access to courses, and affordability.
- Despite increased opportunity for educators to partner with businesses in workforce training and development, there remains a disconnection between education provided and employment opportunities; need for curriculum development by region with consistency.
- The need for increased computer skills among the adult, entry-level workforce in order to compete; there is further need for basic skills and a greater willingness to learn.
- To retain highly qualified employees, the region needs to attract or create business opportunities in growth sectors of the economy.
- To attract quality employers that can help transform the economy, the region must raise education attainment levels of adults, particularly the percentage of the population with a bachelor's degree or higher, as well as increase the overall skill base of the workforce.

- Making investments in early childhood development and family support.

Research, Development, Entrepreneurship & Innovation Priority Issues

Regions that foster entrepreneurship and innovation grow at a much faster rate. To continue to develop and attract a well-educated workforce and compete on a global scale, the region must support entrepreneurship and encourage innovation at all levels of the economy.

- The education system needs to be better integrated with the business sector, as well as be agile and responsive to meet current and future workforce needs.
- Connectivity (i.e. broadband) is critical to attracting entrepreneurs that introduce innovations that spur economic growth in the new economy.
- Access to capital and targeted technical assistance remain limited at early stages of conceptualization through to product development, which adversely affects the success rate for viable technologies.
- A limited talent pool of experienced mid-level and senior managers exists throughout the region.
- Infrastructure challenges, particularly limited broadband and telecommunications capacity, adversely impact the region's research and development potential.
- The region's natural, institutional, and demographic resources present great opportunity for expanded research and development.
- A need exists for targeted market research to identify innovation opportunities that correspond to the assets of Eastern Maine, creating a clear emphasis on the region's competitive advantages.
- A significant gap continues between R & D and market implementation.

Unique Quality of Life & Place Priority Issues

Eastern Mainers from all walks of life cherish what is often referred to as our "Unique Quality of Place". People live and stay in Eastern Maine for a host of reasons other than economic ones. However, for people to stay and the region to continue to prosper the economy must perform at a higher level.

- Eastern Maine's rural downtowns are a critical component to the region's unique character and quality of place, therefore their upkeep and revitalization is essential.
- There is a need for value-added product development opportunities encouraging people to "buy local".
- It is crucial to our quality of place that affordable housing is available for workers in the communities in which they wish to work and live.
- Community character is being threatened by changing development patterns, such as big box development, condominium development, and suburban residential development.

- Major issues exist in balancing the various competing interests in our region, specifically economic development, industry, tourism, recreation, etc.
- The rising cost of waterfront property from second homeowner development is jeopardizing the traditional use of the working waterfront.
- Focus on the creative economy has spurred interest in the impact of the arts and culture on the region's economy - we need to continue to nurture this.

Natural Resources Priority Issues:
Eastern Maine's economy was built on and continues to be driven by abundant natural resources – fisheries, forest products, and agriculture. We must be mindful to appreciate both the potential and value that our natural resources represent to our economy.

- The region's natural resources provide great potential for the development of alternative energies.
- Traditional natural resource based industries – aquaculture, fishing, agriculture, and forest/wood products – have been the foundation for Eastern Maine's economy, continue to play a significant role in the economy, and need to be supported through various business and community programs.
- There is a need to support, improve, and diversify value-added natural resource-based industries.
- Given changing ownership patterns, a need exists to balance access and ownership rights.
- There is a need to develop sustainable and natural resource-based tourism opportunities, which take advantage of the region's natural resources.
- Limited state inspectors and out-of-date testing have adversely impacted the region's shell fishing resource.
- Maine's commercial fishing industry needs to be protected by fostering diversification and sound management of the resource.

Tourism Priority Issues:
Tourism has been an integral part of the Eastern Maine economy for nearly two centuries and continues to be a key driver of our economy. The tourism economy impacts nearly all geographic areas and many businesses throughout our region.

- There is a need to improve infrastructure that supports tourism product development, particularly quality roads, hotel facilities, and certain amenities such as signage and rest room facilities for visitors.
- There is a need to establish and increase dedicated state funding through the Office of Tourism that is indexed to market performance for tourism product development.
- Overriding need for vision, policies and funding for tourism that will transcend administrations and politics.

- Tourism product development presents serious challenges to the industry in Eastern Maine; collaboration, regional cooperation and thematic packaging are some possible solutions.
- There is a need to develop improved regional organizational capacity through the education of tourism leadership, area businesses, and the community at all levels.

Infrastructure Priority Issues:
The ability to efficiently and safely move people, goods, and information is a crucial element to the economic health of any region. Our region cannot thrive without a strong and reliable transportation and communication infrastructure.

- Current telecommunications infrastructure (broadband capacity – backbone – redundancy, connectivity and cellular service) is insufficient.
- The region's road infrastructure is not being maintained in a manner that is supportive of economic development goals, largely due to limited resources.
- High costs of energy transmission and distribution are adversely impacting business.
- Interstate weight limit presents economic, road maintenance, and safety concerns.
- Current carrying capacity of the road network is stressed along the coast during the tourist season and additional infrastructure is needed to ensure continued visitation.
- The region has inefficient intermodal transportation infrastructure.
- Lack of passenger and freight rail service adversely effects economic growth in certain areas across the region, particularly Washington County.
- New border crossing at Washington County should provide for a proper way to coastal U.S. and Calais.
- Lack of regional air passenger and freight service in Washington County

EMDC: A Collaborative Network Advancing Economic Growth and Opportunities

2011 marked two years of FairPoint Communication's commitment to the State of Maine, the regional Economic Development Districts and collaborative investors across Maine to support h Mobilize Maine and develop regional capacity throughout the state that will build a strong, growing and sustainable knowledge-based economy for all of Maine.

Maine has seen a significant decline in traditional manufacturing and commodity-based industries over past decades and these losses have not been fully replaced with new, sustainable businesses and good quality jobs. As a result, Maine's per-capita personal income growth, compared to the national average, has declined from 28th to 35th in the U.S. since 19891.

Economic development efforts in the past have changed with every change of administration in Augusta and have been chronically fragmented, top-down, disconnected and under-funded, greatly limiting their success. These include programs such as tax subsidies, investment plans, tax reform and task forces.

Current economic development efforts focus largely on competition for business and jobs among Maine cities, towns and regions and are not clearly focused on how Maine as a whole may better compete in the global
economy.

Economic development as we practice it today is not getting the job done. Business as usual is getting us nowhere.

Governor John E. Baldacci on Mobilize Maine from the kickoff press conference for Mobilize Maine: "In these challenging times we must rely on creative partnerships to stretch limited resources," Governor Baldacci said. "With FairPoint Communications as our partner, we will focus on an asset based and regional based economic development strategy. Instead of our communities being in a reactive mode economically, Mobilize Maine will enable our distinctive regions to be proactive and to prepare and execute their own comprehensive development strategies."

<u>What Makes Mobilize Maine Different?</u>

Mobilize Maine is a needed, new, collaborative, bottom up approach to community and economic development that will help Maine grow and prosper now and in years to come.

Mobilize Maine is a fresh approach to community and economic development that builds on indigenous strengths and authentic assets of Maine's people, places, and businesses.

Mobilize Maine will identify and develop strategies to address Maine's unique assets which may be skills, businesses, activities or special places that have market leverage in the global economy, but may not have been previously recognized.

Mobilize Maine is a private/public/nonprofit partnership facilitated by FairPoint's Connect Northern New England Community and Economic Development Initiative (CNNE). Fairpoint's

commitment is unprecedented and will expand the number and kinds of investors committed to assuring economic prosperity for all of Maine.

What Will Mobilize Maine Do?

Establish long-term strategies for growth that will span successive state administrations, and be sustained by a broad mass of local, private, public and non-profit sector leaders and citizen volunteers.

Initiate a ground-up approach whereby citizens in each region will identify strengths and assets that will be the foundation of the new economy.

Identify regional priorities that will become the basis for private, public and philanthropic investment in each economic region.

Preserve and sustain Maine's unique Quality of Place, while growing good paying jobs and businesses.

Focus on measurable outcomes with firm timeframes, benchmarks, and assigned responsibility for getting things done.

Asset Based Approach	Needs Based Approach
Positive focus, appreciates, identifies and mobilizes unique talents, skills and assets as the foundation for growth	Negative focus on problems and needs, which require external resources to address
Community driven development- doing things ourselves	Development driven by external agencies/resources
Strengthens our confidence in our own capacities and inspires us to take action to control our economic destiny	Relies on others and presumes the cavalry from the state or federal government will be their salvation
Provides a consistent, holistic effort recognizing the role of human/social capital, quality of place capacity, and innovation in building & sustaining a healthy economy	Reacts to independent needs not connected to a holistic CED strategy. Responds to shifting priorities (squeaky wheel syndrome) in survival of the fittest economy
Identifies, leverages, and sustains indigenous assets while growing local experts and their capacity	Relies on outside resources as short-term solutions and fails to build capacity of local leaders
Collaborative, participatory, and grass roots empowered	Reinforces fragmented, disconnected efforts, staff led
Benchmarks the current economy, establishes measurable goals, which are business case based	Grant driven with only aspirational goals that have no defined time frames or measurement of success
Leverages assets & builds on strengths to speed growth	Highlights liabilities and 'gaps' ...limiting growth
Employs long-term collaborative funding model that expands critical mass of champions with skin in game	Depends on short-term government grant application requirements, which have ever changing objectives

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Top Projects—2011 CEDS
This year's Top Projects were prioritized into one of three different categories: a "Highest Priority" for the region, a "Priority" for the region and those projects that are "Consistent with Regional Goals and Objectives."

Highest Priority Projects
(In alphabetical order)

Bangor Regional Arena and Meeting Complex: the purpose of this project is to provide the show, event and meeting space infrastructure needed for new private investment through the development of additional hotel rooms and hospitality service businesses and facilities. The proposed development would also provide the necessary space and amenities to significantly enhance our community's ability to provide shelter and feeding in the event of a significant emergency. This complex is part of an integrated initiative, aimed at further developing the regional tourism economy, including 1) build a new athletic, entertainment and conference arena, 2) redevelop the City's downtown river waterfront, and 3) improve other attractions such as the municipal golf course and the Bass Park facility.

Bangor Waterfront Development: The City of Bangor's Penobscot River Redevelopment Project is in the final phase of its over $15 million process to achieve its vision. To date, the City's investment in the riverfront has led to over $20 million in private reinvestment in rehabilitation and reuse of vacant former factory buildings in the area and has helped revitalize Bangor by adding much needed jobs to the region. While much has been achieved, completion of the final phase of remaining public infrastructure improvements is needed to ensure the full success of this major effort to transform industrial area into an economic opportunity.

Brewer Business and Commerce Park: The City of Brewer is building a 400 acre energy-focused business park. The city's current industrial land is almost completely built out, with only a few, very small sites remaining. The new park's design is nearly complete and permit applications will be submitted in summer 2011. The city has already funded $2.5million in infrastructure improvement and the city would like to begin construction of phase 1 in spring 2012.

Katahdin Building Site Redevelopment: Public infrastructure, including parking, to support redevelopment of this central downtown Orono site for approximately 20,000 sq feet of finance, office, IT, and similar uses. Project will include an 88-car parking facility. It is anticipated that the occupant of this site will be the headquarters of a statewide financial institution with a strong regional presence in the Greater Bangor area.

Innovative Engineering: SAD 22 is interested in developing an innovative school that will represent a true partnership of education and economic development. The school will offer a unique educational experience for the region's youth that will help prepare them for careers in science and engineering as well as the emerging bioscience, energy and new media industries in Maine. The new Hampden Academy, approximately 50% completed, will dedicate a third floor to the innovative school.

MEEP: Energy and Enterprise Park located near the University of Maine in Orono and Old Town Fuel and Fiber Company. This project will allow spin off businesses from the University of Maine to remain in the area and allow Old Town Fuel and Fiber to have sites directly associated with their production of the bio-fuels in the vicinity.

Tomah Water: Tomah Water is looking to develop the only native American tribe spring water bottling facility. This project will have an extreme impact on the Passamoquoddy Tribe which has extremely high unemployment/underemployment. Engineering work, a business plan, and water tests have all been completed. Next steps include plant design and infrastructure development.

Priority Projects

(In alphabetical order)

Angel Fund/Commercialization: Development of a sidecar fund to focus on start up businesses in the region who are interested in starting, growing, and remaining in the region and need assistance with access to capital.

Aquaculture Facility at the Corea Navy Base: Acadia Capital Corporation looks to develop a land based aquaculture park at the former Corea Navy Base. Maine Halibut owns the first 12 acre parcel where the halibut farming for the restaurant market will occur. The Park's infrastructure requires access to the salt water through a pumping station that will have access points for future aquaculture businesses.

Biomed Cluster: The Cluster seeks to grow more biomedical companies in the region by combining the assets of EMMC, MIHGH, Jackson Lab, University of Maine Graduate School of Biomedical Sciences, Husson University Pharmacy School, and other entities.

Dover-Foxcroft LEED Redevelopment Project: The Town of Dover-Foxcroft seeks to redevelop a large commercial facility in its downtown into a mixed use residential and commercial facility. This project consists of 32 new residences, a 10,000 square foot green technology showroom, a café, and 10,000 square foot office space, all to be powered by renewable energy sources.

Downtown revitalization: this project would demolish the old police department building and allow for expansion of the adjacent public parking lot.

Kelley Road Business Park: 30 acre business park at Exit 191 off of I-95 intended for R&D, professional and business offices. Design, engineering and permitting are in process. Potential for 250 to 500 jobs.

Maine Business Park: City of Bangor owned and managed business park located at the deactivated Dow Air Force base on land turned over to the city by the University of Maine.

Maine Products Center: Project involves the design and construction of the Maine Products Marketing Center, a 36,000 sq foot building with space to be leased to a variety of vendors of high quality Maine-made products and services.

Meaningful Use: Eastern Maine Healthcare System is a leading institution in medical record keeping and use of technology to support this work. In 2010, EMHS hired 41 people to support this project, creating high tech jobs.

New Media Incubator: An incubator for the creation, innovation, and examination of content and messages and the effects of new media technologies and techniques. Partners in the Institute are 1) The New England School of Communications who provide academic and real life work in web engineering, audio and video development and new marketing, the 2) University of Maine who will be developing online communities to interactive games to animated, feature or documentary videos, and 3) Eastern Maine Community College whose program for training of new media technicians. The Institute seeks to tap into the region's growing talent pool of young professionals in this industry that can create new opportunities for small business and job creation.

UTC Aviation: United Technologies Center proposes to develop an aviation program consisting of aviation small engine mechanics, air frame repair, and interior restoration and airplane painting. This has been an identified skill needed in the region. The project is in the curriculum development stage.

Projects Consistent with Regional Goals and Objectives

(In alphabetical order)

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Bangor Business Park: The City of Bangor seeks to develop approximately 80 acres of land for a new business park. The proposed business park provides transportation access to Interstate 95 and Route 2, the major north-south and east-west highways in Eastern Maine. The build out will create 16 lots for development.

Comprehensive KWRED Region Business Inventory and Capacity Analysis: The Knox Waldo Regional Economic Development group seeks to conduct to expand the Gateway One Start-up project that provides an inventory and business capacity study currently being done for the Town of Camden to the entire KWRED region (with primary emphasis on Thomaston, Rockland, Rockport, Camden, Belfast, Searsport, Union, and Warren).

Penobscot River Corridor: This Penobscot River Corridor is working to promote the region from Belfast to Millinocket as a destination of activities, tourism, and quality of life. The goal is

to create a cohesive link with each Chamber and visitor's bureau in the region with common information, sample itineraries, and a calendar of events.

Renovation of Bangor Museum: The Bangor Historical Society's renovation of the Bangor Museum and History Center Historic building museum is driven by the need for sound space for its renowned historical collections of local, regional, and national significance.

Vaccine Project: The H1N1 global pandemic revealed serious weaknesses in the U.S. for addressing pandemics and other similar events. Subsequent congressional hearings have identified the need to bolster our national capability to respond to the threat of bioterrorism. This project seeks to build off of the region's biomedical research, development, and production assets, and urges the invested in a national "quick response" infrastructure to address natural and man-made bio-logical threats.

Video Library: this project would make educational videos created in response to federal and state contracts available throughout the country

Regional Overview

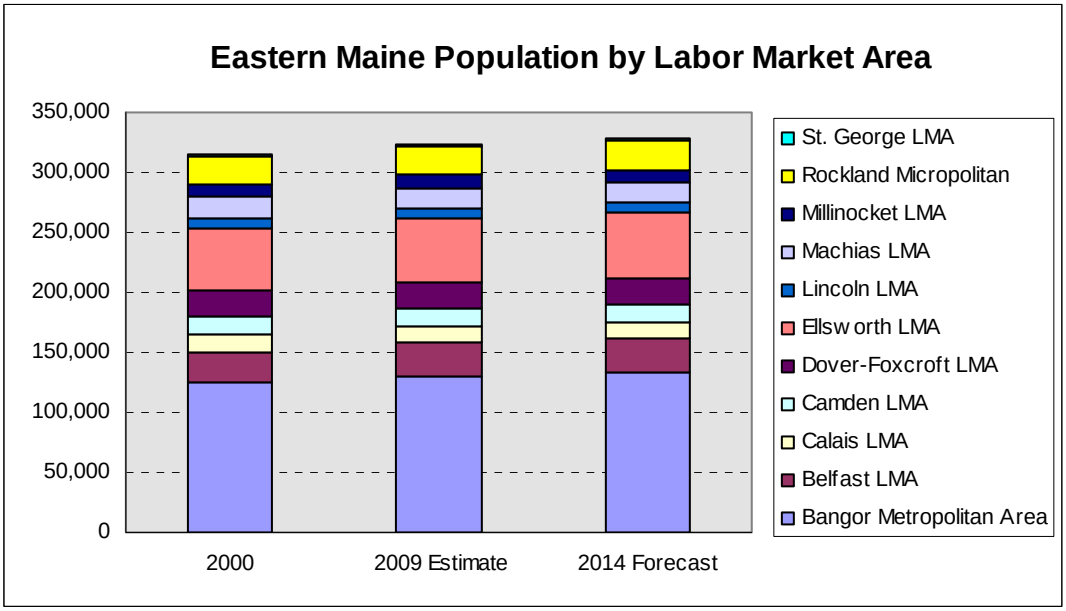
Eastern Maine Economic Data Overview and Analysis:
Where are we now? Where are we going?

The Eastern Maine region is comprised of six counties: Knox, Hancock, Penobscot, Piscataquis, Washington and Waldo. The region encompasses over 15,000 square miles, a landmass greater than Massachusetts and Connecticut combined. The diversity of the landscape creates great economic opportunity and provides a wonderful quality of place.

The following data provides an overview of general regional demographics. Unless otherwise noted, the data is based on the Labor Market Areas (LMA's) within the Eastern Maine region.

Population

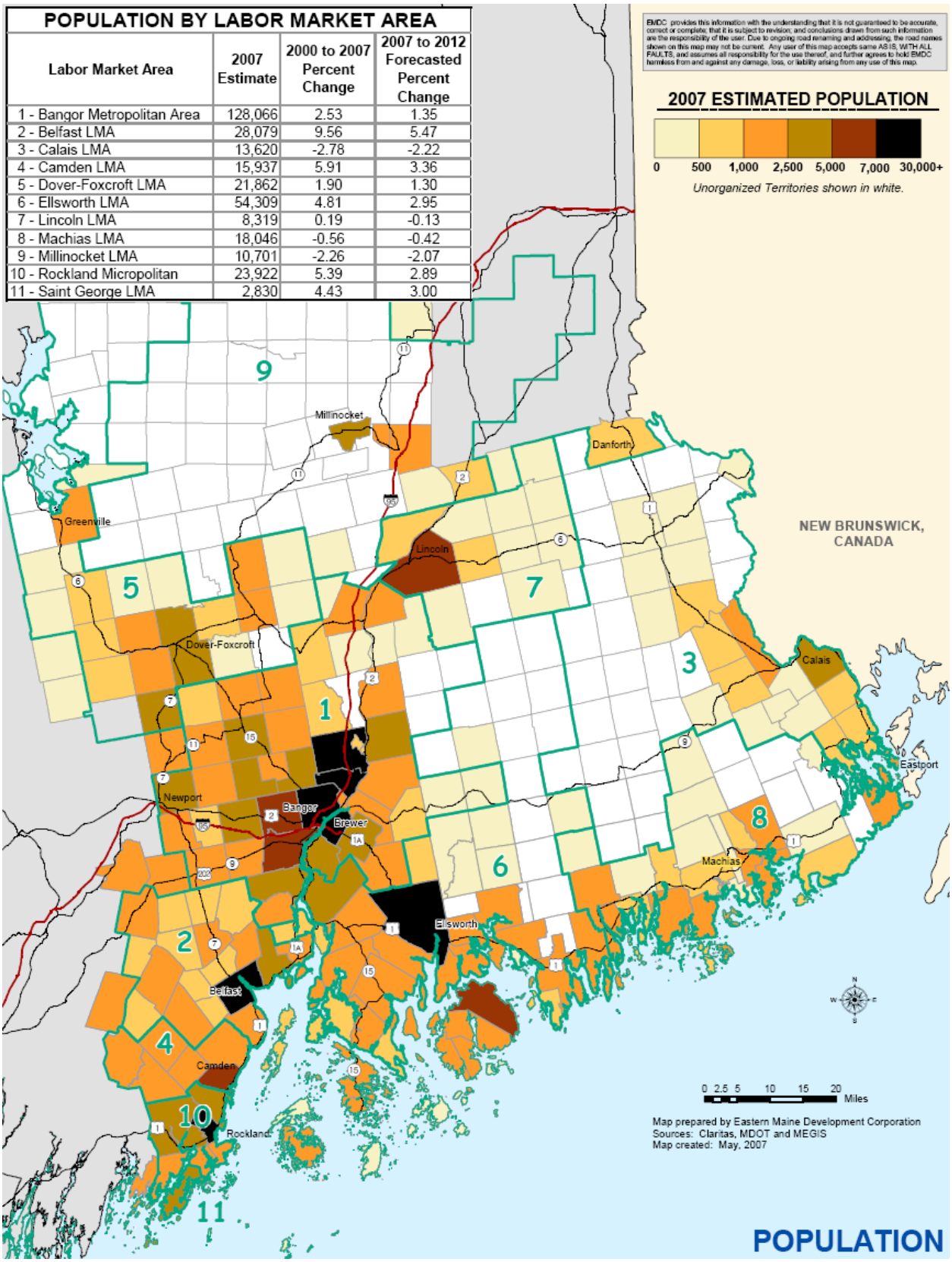
- The total population of the six counties comprising the Eastern Maine region is expected to rise to 331,540 by 2012, a 2.4 percent increase from the 2000 census population of 323,784.
- Continued population growth is projected in the following LMAs: Bangor, Belfast, Camden, Ellsworth, Rockland and St. George.
- Since 2000, there have been overall population declines in the Calais, Dover-Foxcroft, Lincoln, Machias and Millinocket LMA's.

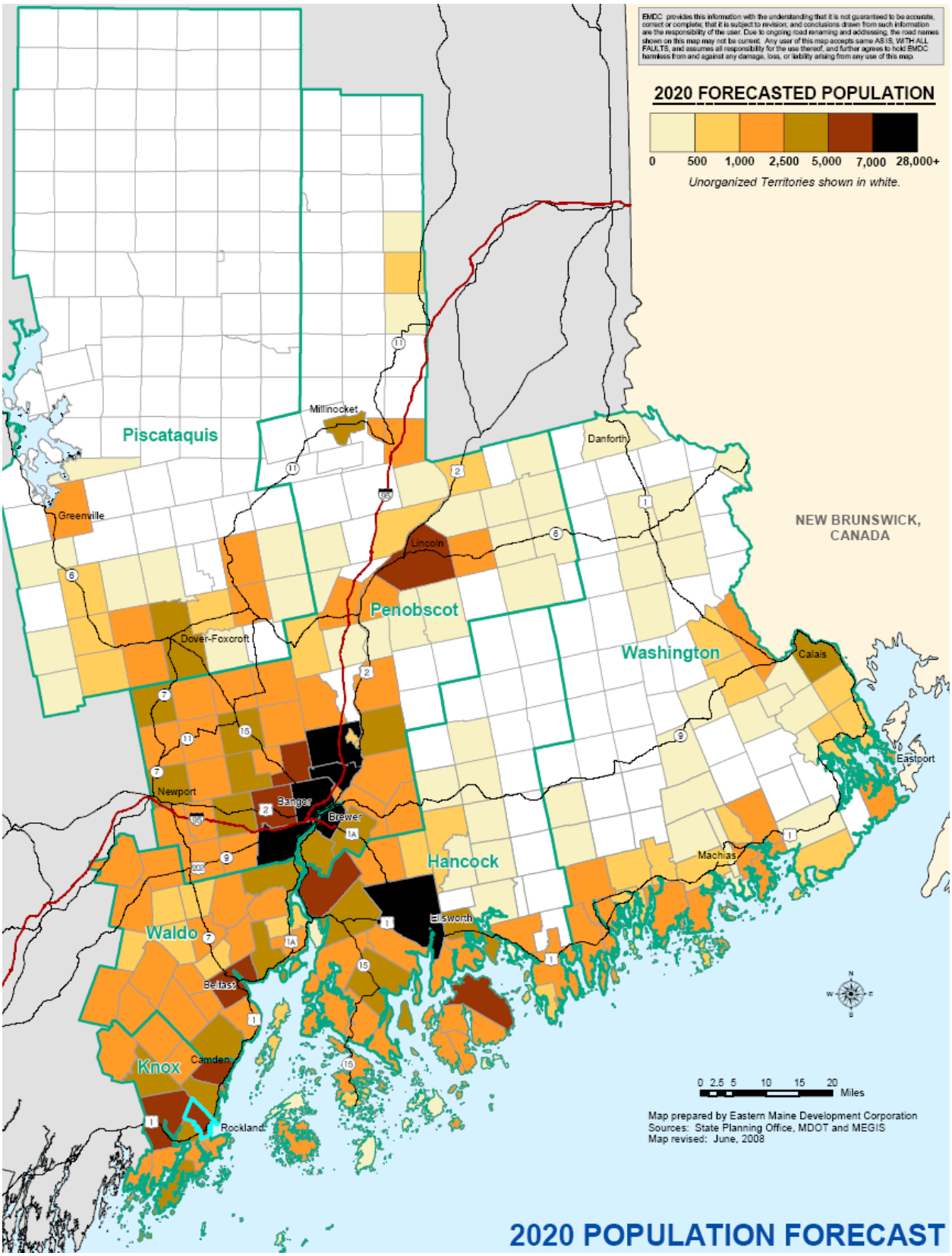


Source: US Census and Claritas
* Based on LMA boundaries as denoted from the US Department of Labor, Bureau of Labor Statistics (2005). LMA boundaries are configured from the 2000 Census.

POPULATION BY LABOR MARKET AREA

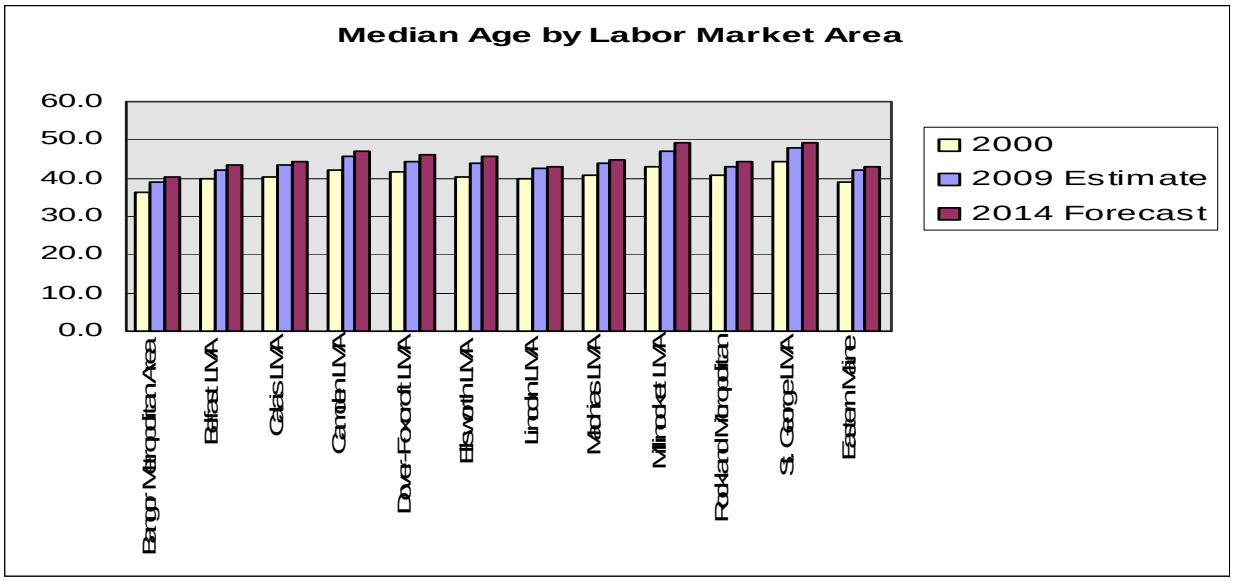
Labor Market Area	2007 Estimate	2000 to 2007 Percent Change	2007 to 2012 Forecasted Percent Change
1 - Bangor Metropolitan Area	128,066	2.53	1.35
2 - Belfast LMA	28,079	9.56	5.47
3 - Calais LMA	13,620	-2.78	-2.22
4 - Camden LMA	15,937	5.91	3.36
5 - Dover-Foxcroft LMA	21,862	1.90	1.30
6 - Ellsworth LMA	54,309	4.81	2.95
7 - Lincoln LMA	8,319	0.19	-0.13
8 - Machias LMA	18,046	-0.56	-0.42
9 - Millinocket LMA	10,701	-2.26	-2.07
10 - Rockland Micropolitan	23,922	5.39	2.89
11 - Saint George LMA	2,830	4.43	3.00




EMDC provides this information with the understanding that it is not guaranteed to be accurate, correct or complete; that it is subject to revision; and conclusions drawn from such information are the responsibility of the user. Due to ongoing road renaming and addressing, the road names shown on this map may not be current. Any user of this map accepts same AS IS, WITH ALL FAULTS, and assumes all responsibility for the use thereof, and further agrees to hold EMDC harmless from and against any damage, loss, or liability arising from any use of this map.
2020 FORECASTED POPULATION
0
500
1,000
2,500
5,000
7,000
28,000+
Unorganized Territories shown in white.
Piscataquis
Penobscot
Washington
Hancock
Waldo
Knox
NEW BRUNSWICK, CANADA
Millinocket
Danforth
Greenville
Lincoln
Dover-Foxcroft
Calais
Eastport
Newport
Bangor
Brewer
Machias
Ellsworth
Belfast
Camden
Rockland
0 2.5 5 10 15 20
Miles
Map prepared by Eastern Maine Development Corporation
Sources: State Planning Office, MDOT and MEGIS
Map revised: June, 2008
2020 POPULATION FORECAST

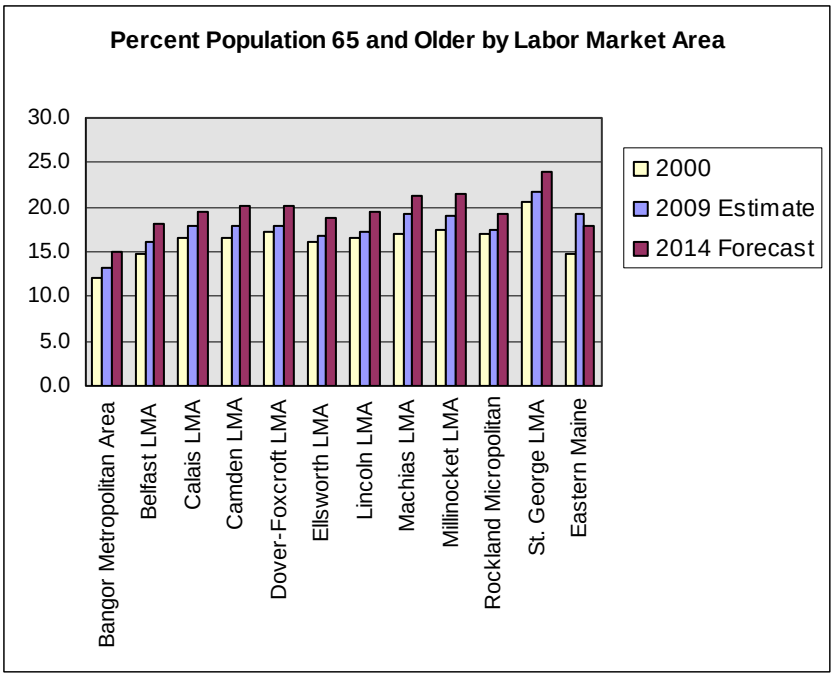
Age

- While our region's population is growing, it is also aging.
- The population in all Eastern Maine LMA's is aging.
- The youngest overall median age of population is in the Bangor LMA; with a current median age of 39, expected to rise to 40.6 in 2014.
- The oldest overall projected median age of population is in the Millinocket LMA with a projected median age of 49.3 by 2014.



Source: US Census and Claritas

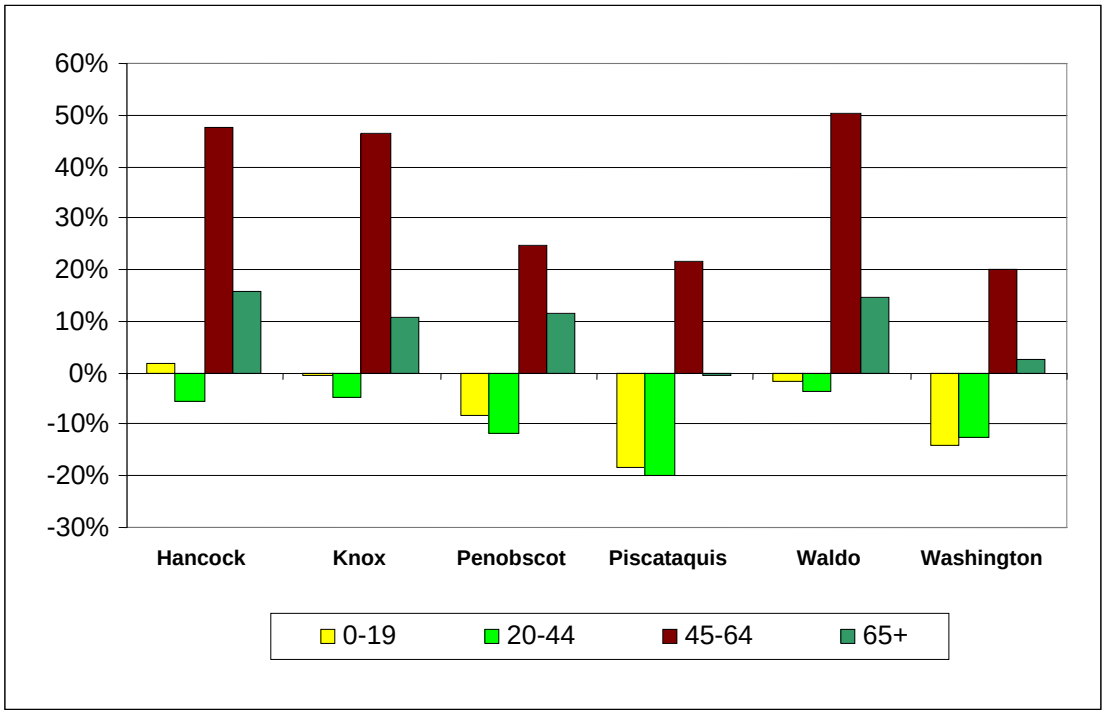
- It is estimated that the percentage of population 65 and older will grow from 14.8% in 2000 to 18.7% by 2014.



Source: US Census and Claritas

- The aging of Eastern Maine's population has been a trend for nearly two decades and shows no signs of abating; indeed, in-migration of retirees has hastened this trend over recent years.

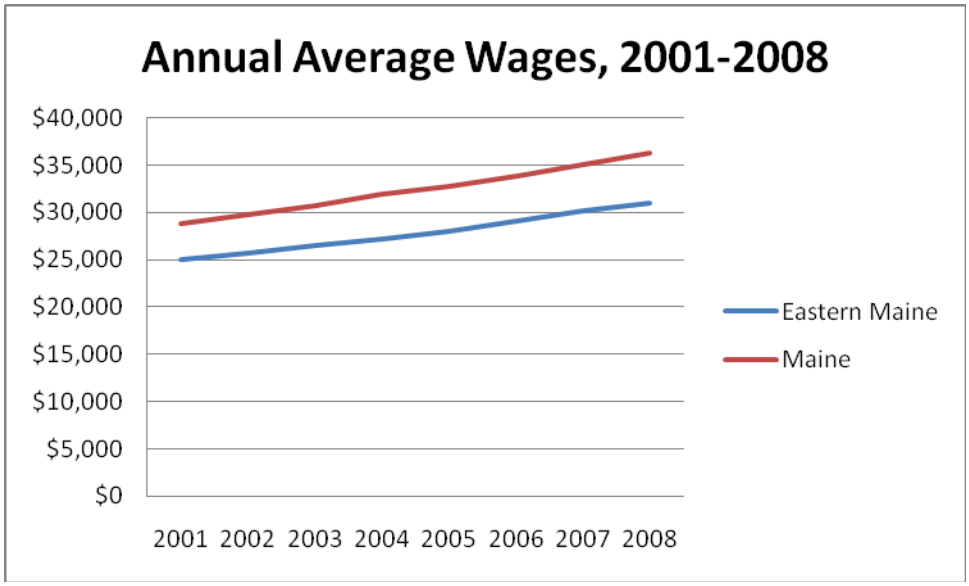
Population Change by Cohort by County (1990 - 2000)



Source: 2000 US Census

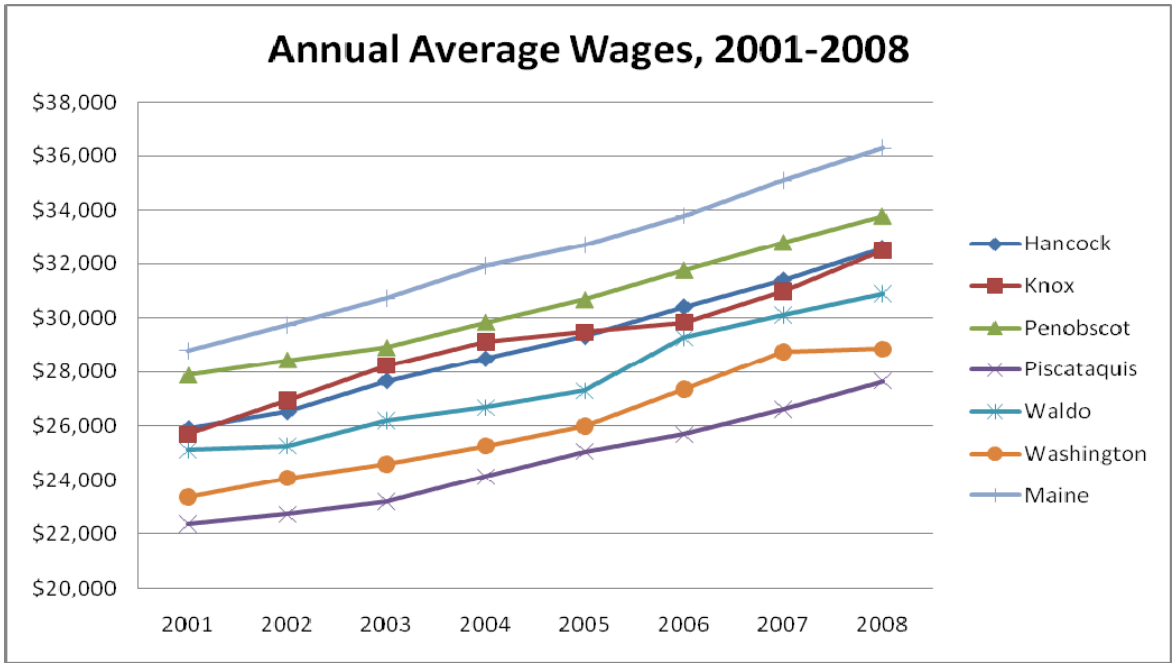
Income

- From 2001 through 2008, wages in Eastern Maine continued to lag behind the State of Maine and the nation as a whole.



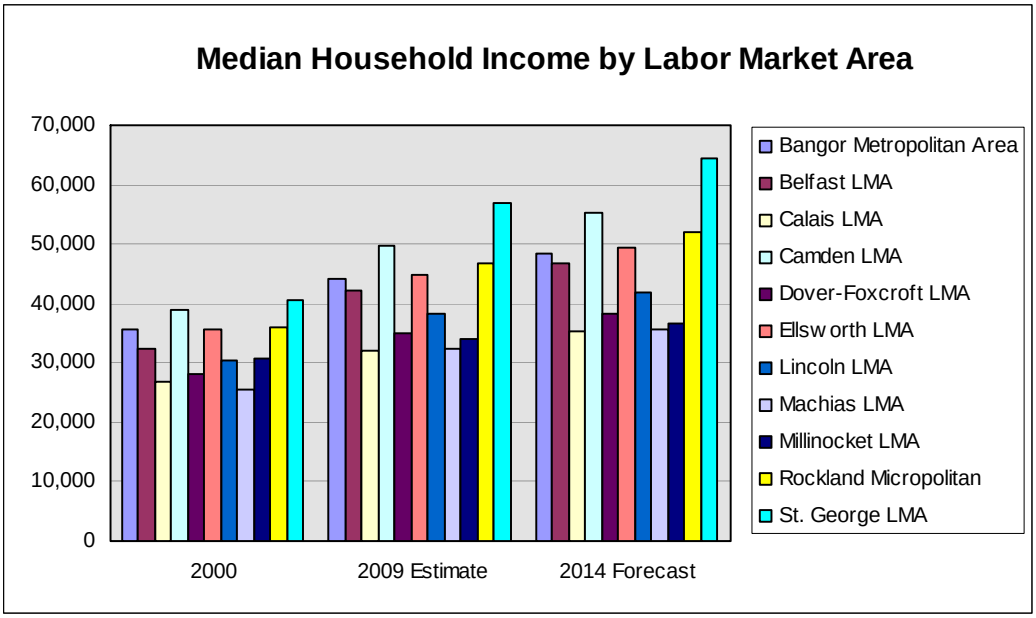
Source: Maine Department of Labor, Maine Employment Statistical Handbook

- From 2001 through 2008, wages were relatively stable with regular linear increases in all of the counties in Eastern Maine.



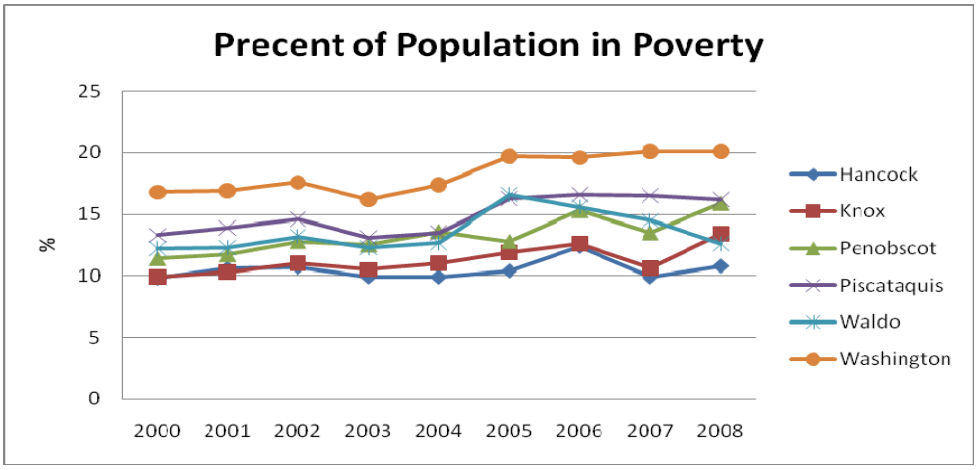
Source: Maine Department of Labor, Maine Employment Statistical Handbook

- Median Household Income is projected to grow in all Eastern Maine LMA's from $33,754 in 2000 to $45,574 in 2014 (based on current dollars, not adjusted for inflation).



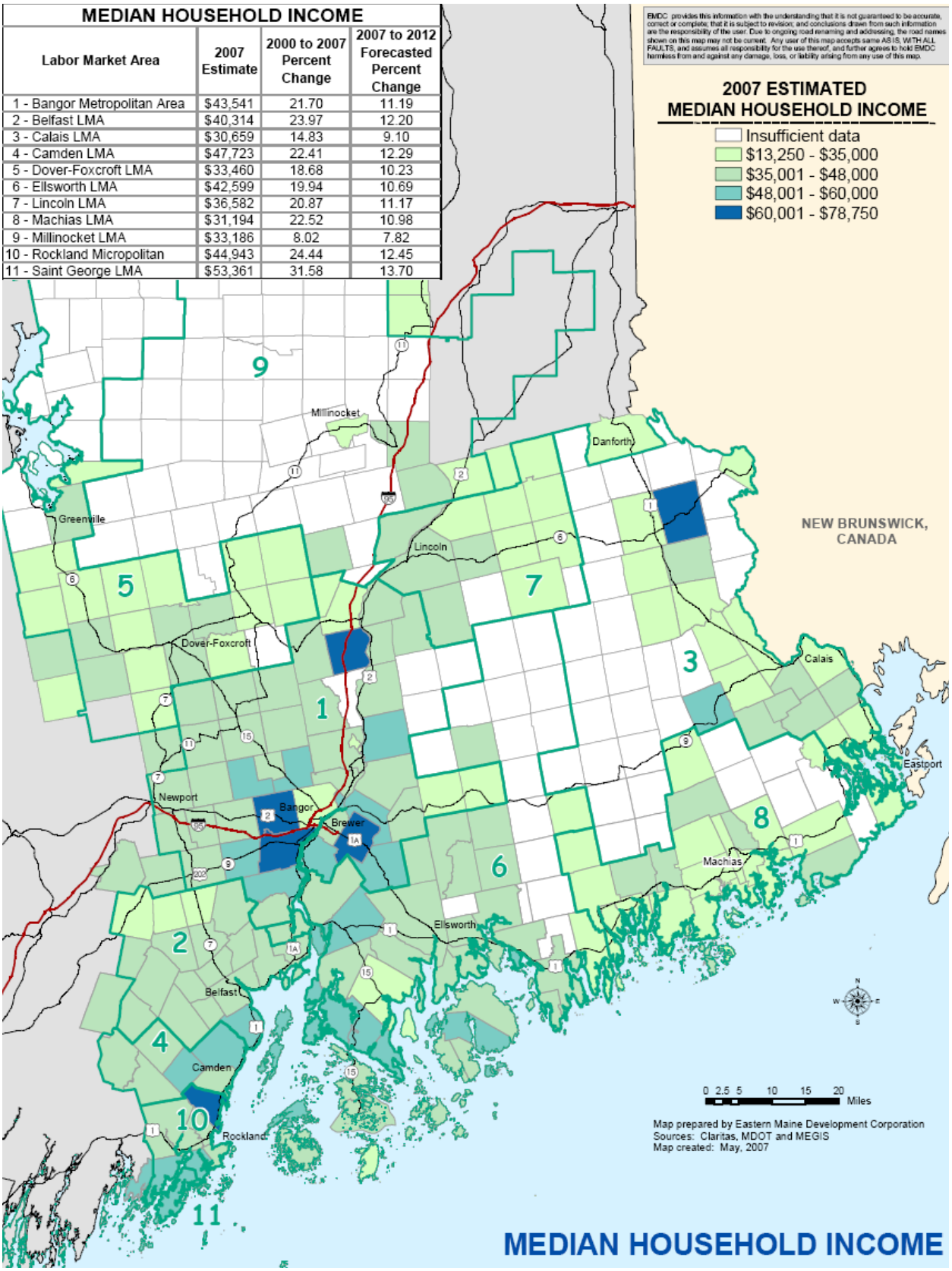
Source: US Census and Claritas

- From 2000 through 2008, poverty rates in Eastern Maine have varied by county, with the lowest overall poverty rates in Hancock and Knox Counties and the highest overall poverty rate in Washington County.
- In 2008, the percent of the population in poverty in Eastern Maine's counties were (in ascending order) Hancock County with 10.8%; Waldo County with 12.6%; Knox County with 13.4%; Penobscot County with 15.9%; Piscataquis County with 16.2%; and Washington County with 20.1%.



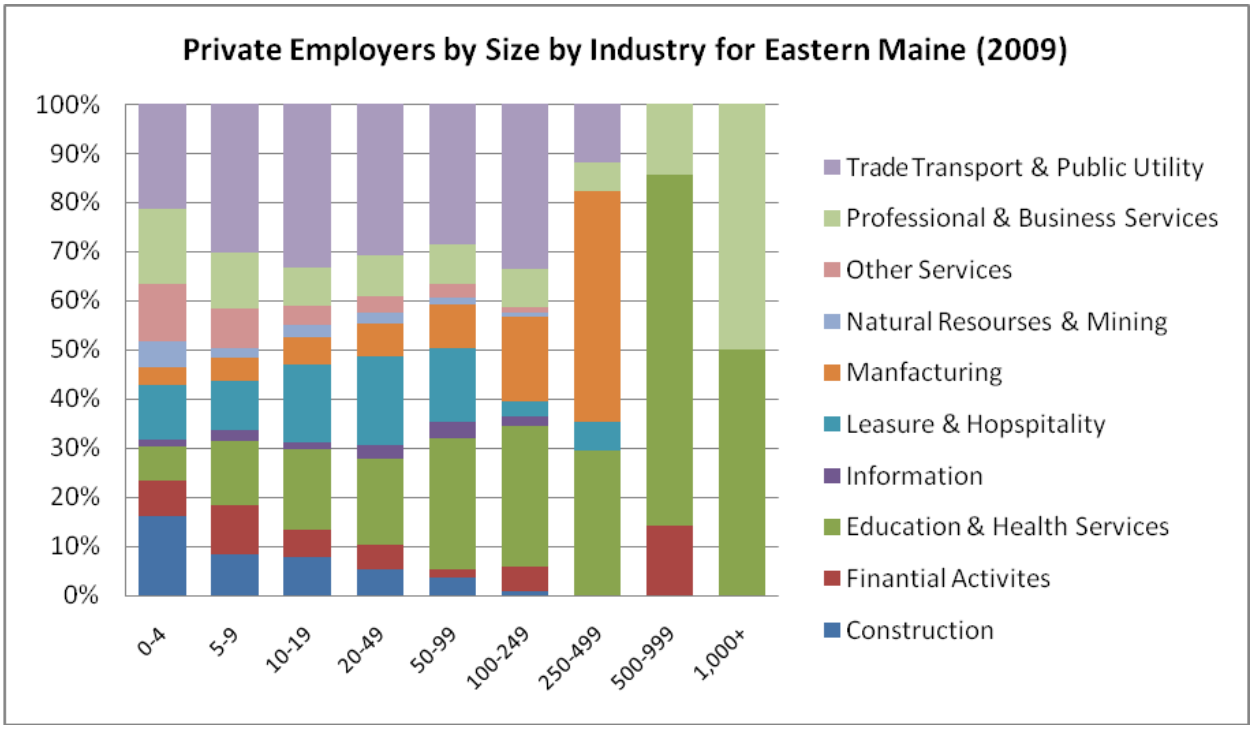
Source: US Census, Small Area Income & Poverty Estimates

MEDIAN HOUSEHOLD INCOME			
Labor Market Area	2007 Estimate	2000 to 2007 Percent Change	2007 to 2012 Forecasted Percent Change
1 - Bangor Metropolitan Area	$43,541	21.70	11.19
2 - Belfast LMA	$40,314	23.97	12.20
3 - Calais LMA	$30,659	14.83	9.10
4 - Camden LMA	$47,723	22.41	12.29
5 - Dover-Foxcroft LMA	$33,460	18.68	10.23
6 - Ellsworth LMA	$42,599	19.94	10.69
7 - Lincoln LMA	$36,582	20.87	11.17
8 - Machias LMA	$31,194	22.52	10.98
9 - Millinocket LMA	$33,186	8.02	7.82
10 - Rockland Micropolitan	$44,943	24.44	12.45
11 - Saint George LMA	$53,361	31.58	13.70



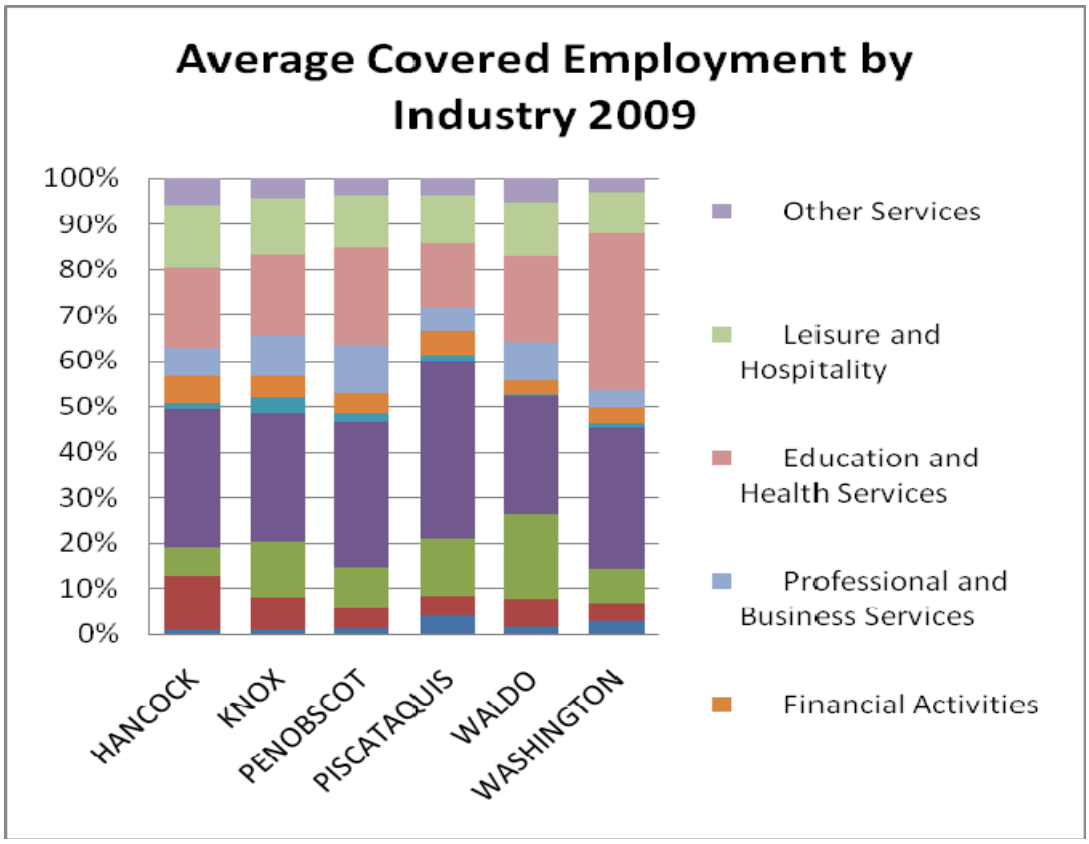
Employment

- In the private sector, small employers (under 20 employees) are dominated by: miscellaneous services; leisure and hospitality; trade, transportation and utilities; and construction businesses.
- In the private sector, large employers (over 500 employees) are dominated by: education and health services and professional and business services.



Sources: Maine Department of Labor

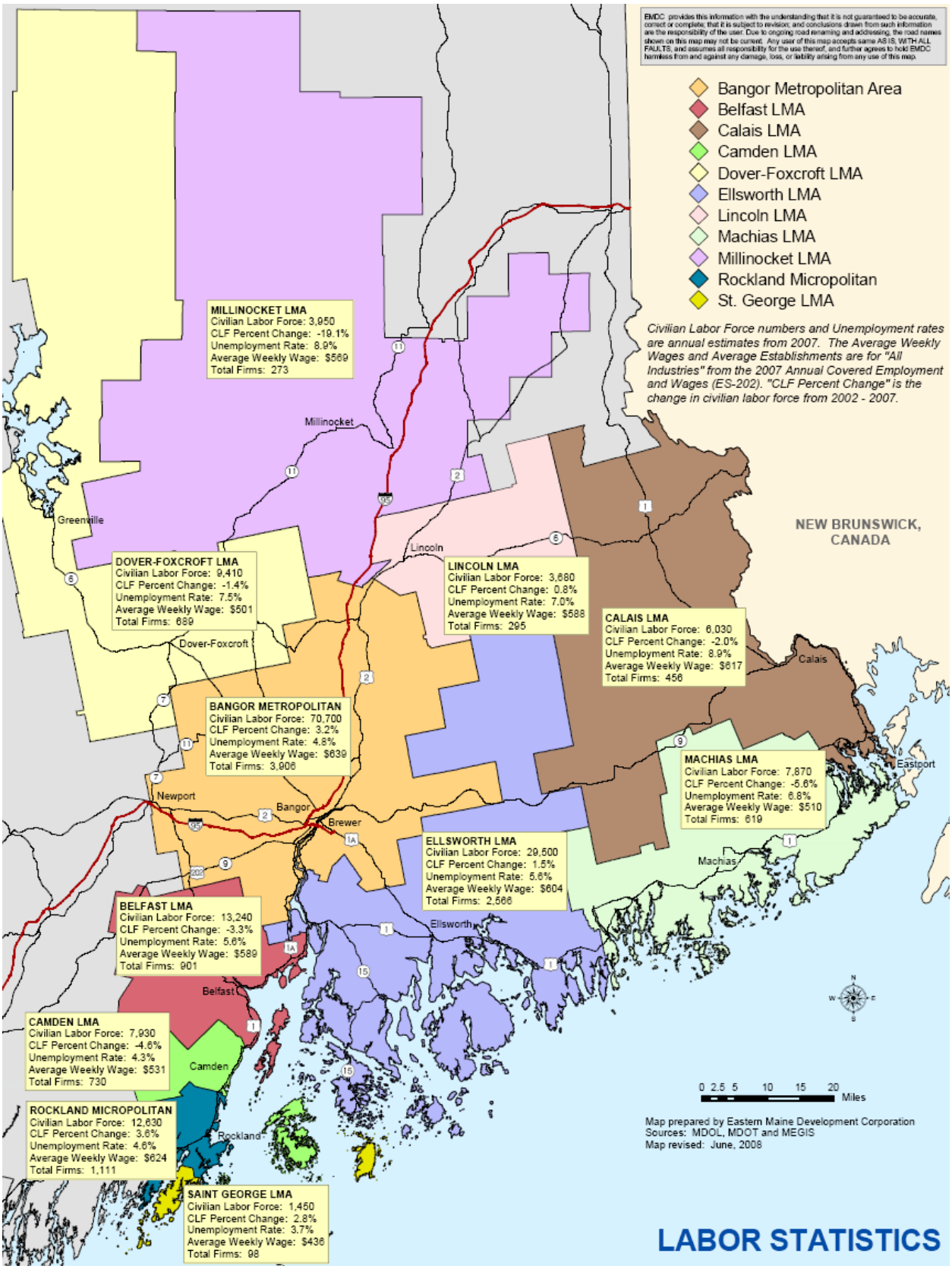
- The largest percentage of employees is in the trade, transportation and public utilities (30.99%) and education and health services (21.12%) sectors.
- The smallest percentage of employees is in the Natural Resources and Mining (1.49%) and Information (1.72%) sectors.

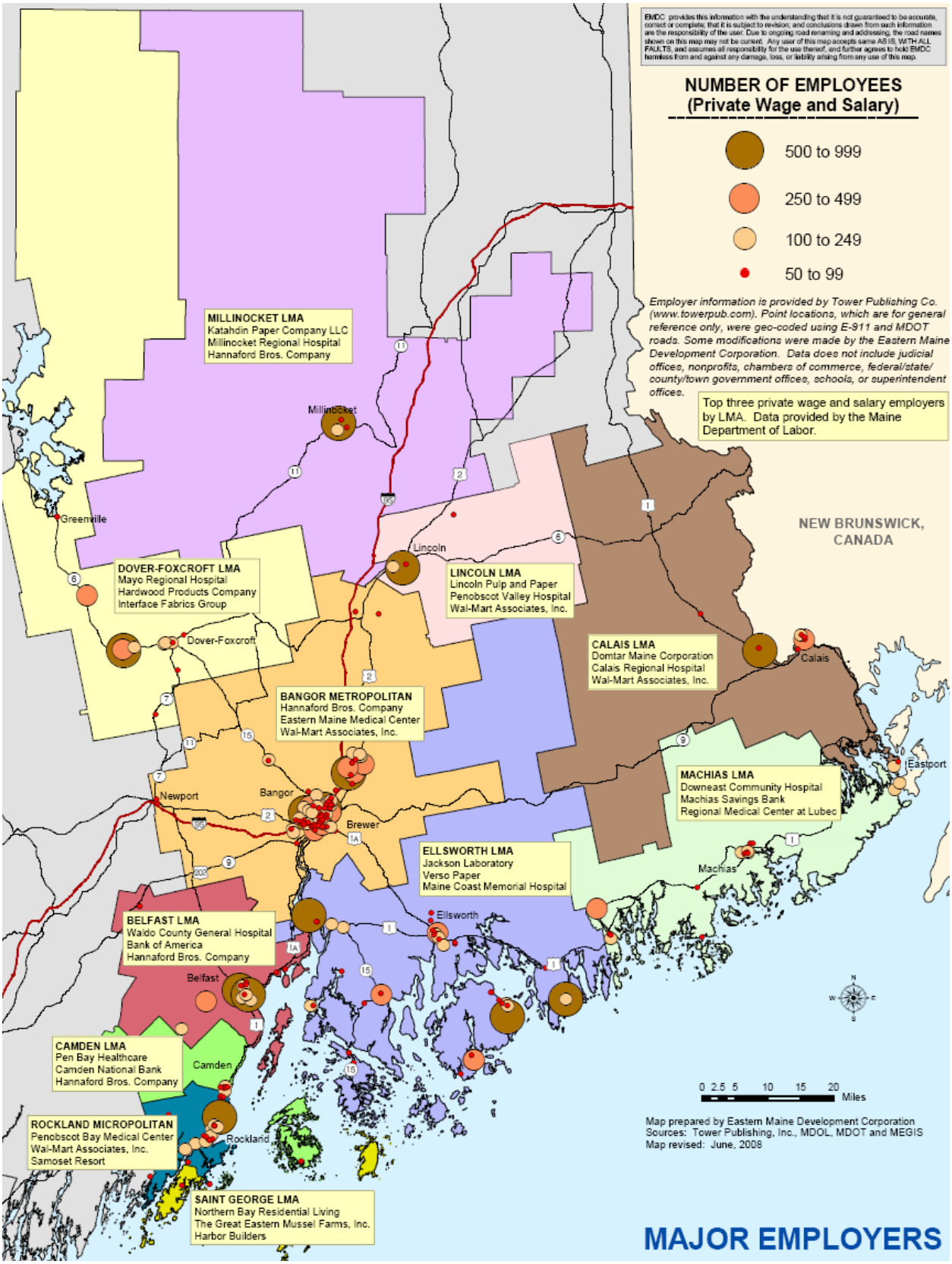


Sources: Maine Employment Statistical Handbook, Maine Department of Labor

Unemployment

- According to the Maine Department of Labor and the US Bureau of Labor Statistics, the average, non-seasonally adjusted, annual statewide unemployment rate for January 2010 was 8.2%.
- The 2010 unemployment rate LMA's in the Eastern Maine region fell above the statewide average (8.2%) for that year: Belfast (11.2%); Calas (14.5%); Dover-Foxcroft (12.6%); Ellsworth (12.4%); Lincoln (10.7%); Machias (12.6%); Millinocket (15.9%)
- Four LMA's fared better, being above the state average by about 2% or less: St. George (9.4%); Camden (10.4%); Bangor Metro (8.4%) and Rockland (9.9%).
- As the 2010 statistics indicate, those LMA's with more diversified year-round employment opportunities faired better than LMA's with more traditional manufacturing and seasonal employment patterns.


EMDC provides this information with the understanding that it is not guaranteed to be accurate, correct or complete; that it is subject to revision; and conclusions drawn from such information are the responsibility of the user. Due to ongoing road renaming and addressing, the road names shown on this map may not be current. Any user of this map accepts same AS IS, WITH ALL FAULTS, and assumes all responsibility for the use thereof, and further agrees to hold EMDC harmless from and against any damage, loss, or liability arising from any use of this map.
Bangor Metropolitan Area
Belfast LMA
Calais LMA
Camden LMA
Dover-Foxcroft LMA
Ellsworth LMA
Lincoln LMA
Machias LMA
Millinocket LMA
Rockland Micropolitan
St. George LMA
Civilian Labor Force numbers and Unemployment rates are annual estimates from 2007. The Average Weekly Wages and Average Establishments are for "All Industries" from the 2007 Annual Covered Employment and Wages (ES-202). "CLF Percent Change" is the change in civilian labor force from 2002 - 2007.
MILLINOCKET LMA
Civilian Labor Force: 3,950
CLF Percent Change: -19.1%
Unemployment Rate: 8.9%
Average Weekly Wage: $569
Total Firms: 273
DOVER-FOXCROFT LMA
Civilian Labor Force: 9,410
CLF Percent Change: -1.4%
Unemployment Rate: 7.5%
Average Weekly Wage: $501
Total Firms: 689
LINCOLN LMA
Civilian Labor Force: 3,680
CLF Percent Change: 0.8%
Unemployment Rate: 7.0%
Average Weekly Wage: $588
Total Firms: 295
CALAIS LMA
Civilian Labor Force: 6,030
CLF Percent Change: -2.0%
Unemployment Rate: 8.9%
Average Weekly Wage: $617
Total Firms: 456
BANGOR METROPOLITAN
Civilian Labor Force: 70,700
CLF Percent Change: 3.2%
Unemployment Rate: 4.8%
Average Weekly Wage: $639
Total Firms: 3,906
MACHIAS LMA
Civilian Labor Force: 7,870
CLF Percent Change: -5.6%
Unemployment Rate: 6.8%
Average Weekly Wage: $510
Total Firms: 619
ELLSWORTH LMA
Civilian Labor Force: 29,500
CLF Percent Change: 1.5%
Unemployment Rate: 5.6%
Average Weekly Wage: $604
Total Firms: 2,566
BELFAST LMA
Civilian Labor Force: 13,240
CLF Percent Change: -3.3%
Unemployment Rate: 5.6%
Average Weekly Wage: $589
Total Firms: 901
CAMDEN LMA
Civilian Labor Force: 7,930
CLF Percent Change: -4.6%
Unemployment Rate: 4.3%
Average Weekly Wage: $531
Total Firms: 730
ROCKLAND MICROPOLITAN
Civilian Labor Force: 12,630
CLF Percent Change: 3.6%
Unemployment Rate: 4.6%
Average Weekly Wage: $624
Total Firms: 1,111
SAINT GEORGE LMA
Civilian Labor Force: 1,450
CLF Percent Change: 2.8%
Unemployment Rate: 3.7%
Average Weekly Wage: $436
Total Firms: 98
Millinocket
Greenville
Lincoln
Dover-Foxcroft
Newport
Bangor
Brewer
Calais
Eastport
Machias
Ellsworth
Belfast
Camden
Rockland
NEW BRUNSWICK, CANADA
0 2.5 5 10 15 20 Miles
Map prepared by Eastern Maine Development Corporation
Sources: MDOL, MDOT and MEGIS
Map revised: June, 2008
LABOR STATISTICS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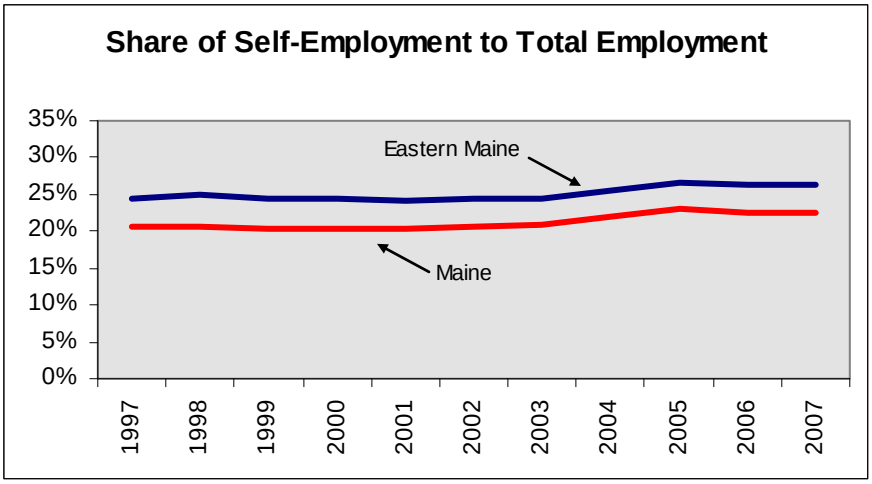
NUMBER OF EMPLOYEES
(Private Wage and Salary)
500 to 999
250 to 499
100 to 249
50 to 99
Employer information is provided by Tower Publishing Co. (www.towerpub.com). Point locations, which are for general reference only, were geo-coded using E-911 and MDOT roads. Some modifications were made by the Eastern Maine Development Corporation. Data does not include judicial offices, nonprofits, chambers of commerce, federal/state/county/town government offices, schools, or superintendent offices.
Top three private wage and salary employers by LMA. Data provided by the Maine Department of Labor.
NEW BRUNSWICK, CANADA
MILLINOCKET LMA
Katahdin Paper Company LLC
Millinocket Regional Hospital
Hannaford Bros. Company
Millinocket
Greenville
DOVER-FOXCROFT LMA
Mayo Regional Hospital
Hardwood Products Company
Interface Fabrics Group
Dover-Foxcroft
Lincoln
LINCOLN LMA
Lincoln Pulp and Paper
Penobscot Valley Hospital
Wal-Mart Associates, Inc.
CALAIS LMA
Domtar Maine Corporation
Calais Regional Hospital
Wal-Mart Associates, Inc.
Calais
BANGOR METROPOLITAN
Hannaford Bros. Company
Eastern Maine Medical Center
Wal-Mart Associates, Inc.
Newport
Bangor
Brewer
Eastport
MACHIAS LMA
Downeast Community Hospital
Machias Savings Bank
Regional Medical Center at Lubec
Machias
ELLSWORTH LMA
Jackson Laboratory
Verso Paper
Maine Coast Memorial Hospital
Ellsworth
BELFAST LMA
Waldo County General Hospital
Bank of America
Hannaford Bros. Company
Belfast
CAMDEN LMA
Pen Bay Healthcare
Camden National Bank
Hannaford Bros. Company
Camden
ROCKLAND MICROPOLITAN
Penobscot Bay Medical Center
Wal-Mart Associates, Inc.
Samoset Resort
Rockland
SAINT GEORGE LMA
Northern Bay Residential Living
The Great Eastern Mussel Farms, Inc.
Harbor Builders
0 2.5 5 10 15 20 Miles
Map prepared by Eastern Maine Development Corporation
Sources: Tower Publishing, Inc., MDOL, MDOT and MEGIS
Map revised: June, 2008
MAJOR EMPLOYERS

Self-Employment

- As of 2007, over 59,000 people in Eastern Maine were self-employed, representing, on average, 28% of total employment in the region.
- The level of self-employment to total employment in Eastern Maine runs about 5% above the state as a whole.



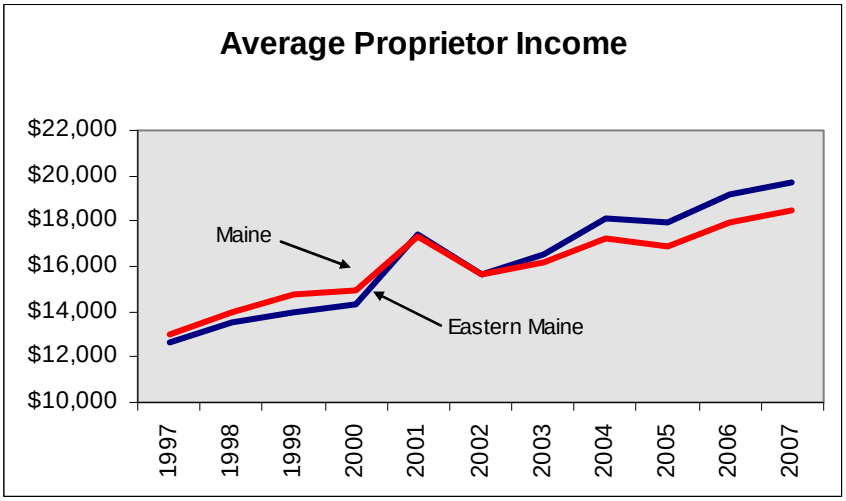
Source: Bureau of Economic Analysis, US Department of Commerce

- The level of self-employment in the region has remained relatively stable in each of the six counties with the highest levels of self-employment found in Hancock, Knox and Waldo Counties and the lowest level in Penobscot County which is the home of Bangor, the region's largest metropolitan area with more mature industry and commerce.

Source: Bureau of Economic Analysis, US Department of Commerce

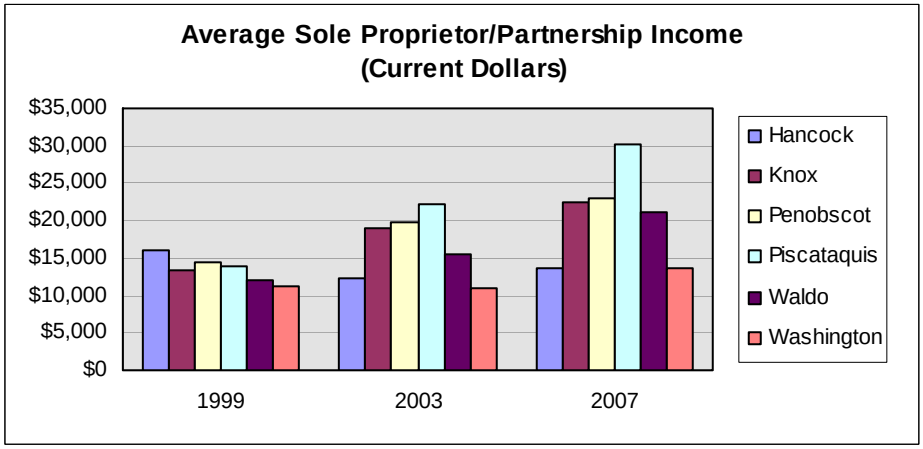
- The average income for Sole Proprietors/Partnerships in Eastern Maine has tracked that of the State as a whole, increasing slightly above the statewide average beginning in 2003 and sustaining that increase into 2007.

- In 2007, average statewide Sole Proprietor/Partnership income was $17,942 while the average in Eastern Maine was $19,150.



Source: Bureau of Economic Analysis, US Department of Commerce

- In 2007, Average Sole Proprietor/Partnership income varied throughout the Eastern Maine region with a high of $30,020 in Piscataquis County to a low of $14,538 in Hancock County, variations in types of businesses that utilize the Sole Proprietor/Partnership model likely account for the variation in average salary range.

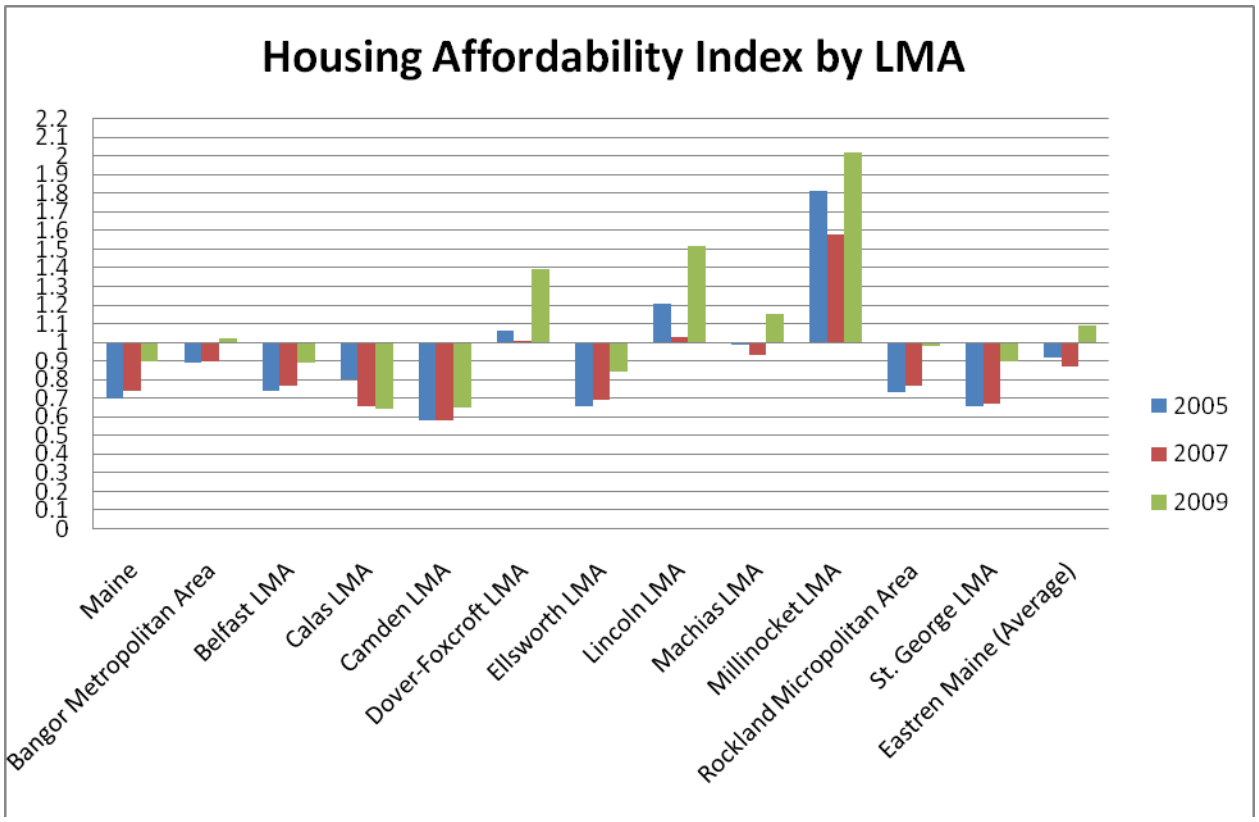


Source: Bureau of Economic Analysis, US Department of Commerce

Housing

Housing Affordability

- Housing affordability has consistently declined throughout Eastern Maine since 2003, but recent data indicates a increase in affordability.
- Of Eastern Maine's Labor Market Areas, generally affordable housing was available only in the Lincoln, Millinocket, and Dover-Foxcroft areas.
- The biggest affordable housing challenges were found in the Camden, Ellsworth and St. George LMA's.
- Overall, from 2005 – 2009, housing affordability has increased throughout the entire six county region in Eastern Maine's LMA's.

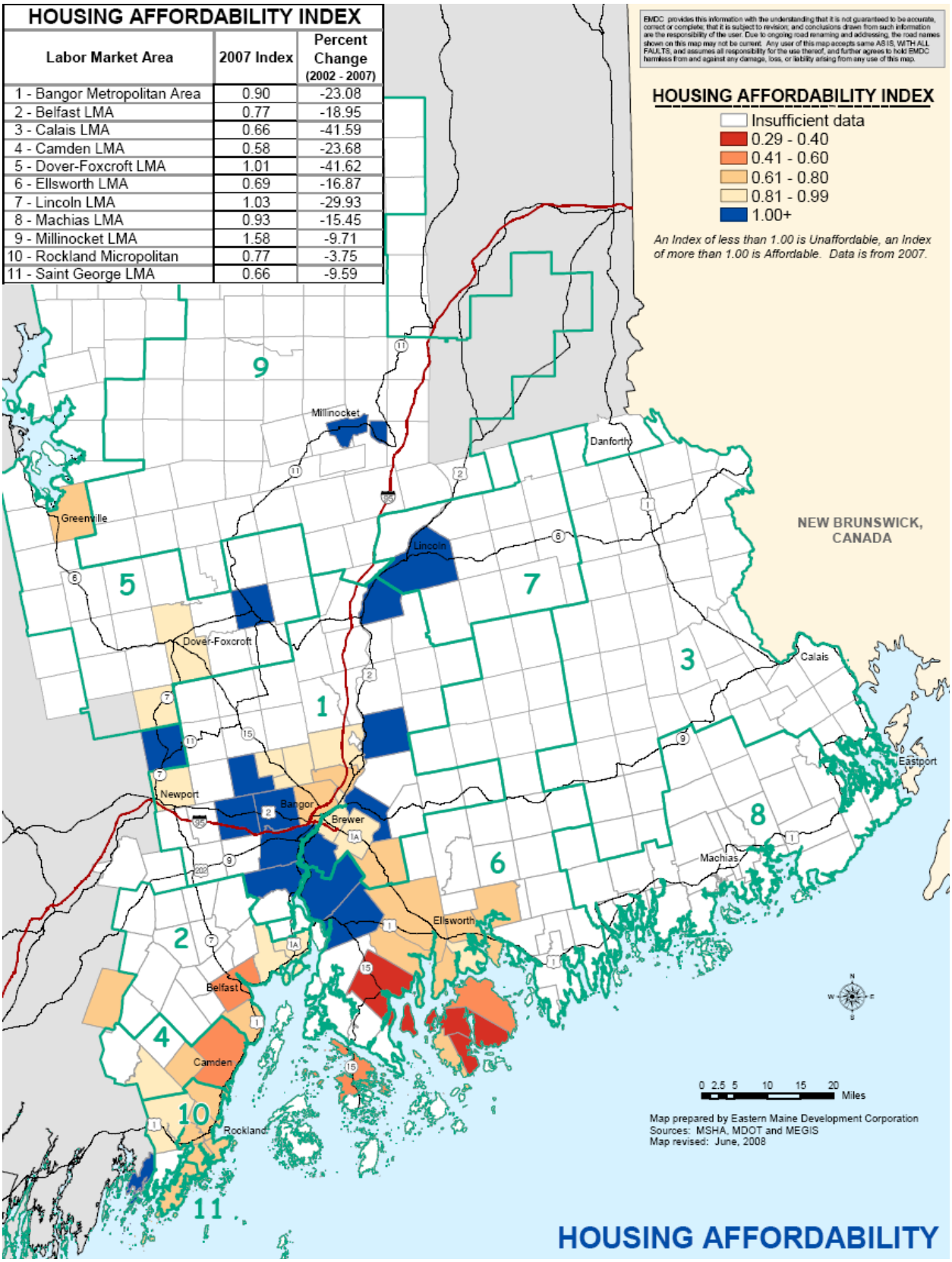


Source: Maine State Housing Authority

Note: An Index of less than 1 is Unaffordable; an Index of more than 1 is Affordable.

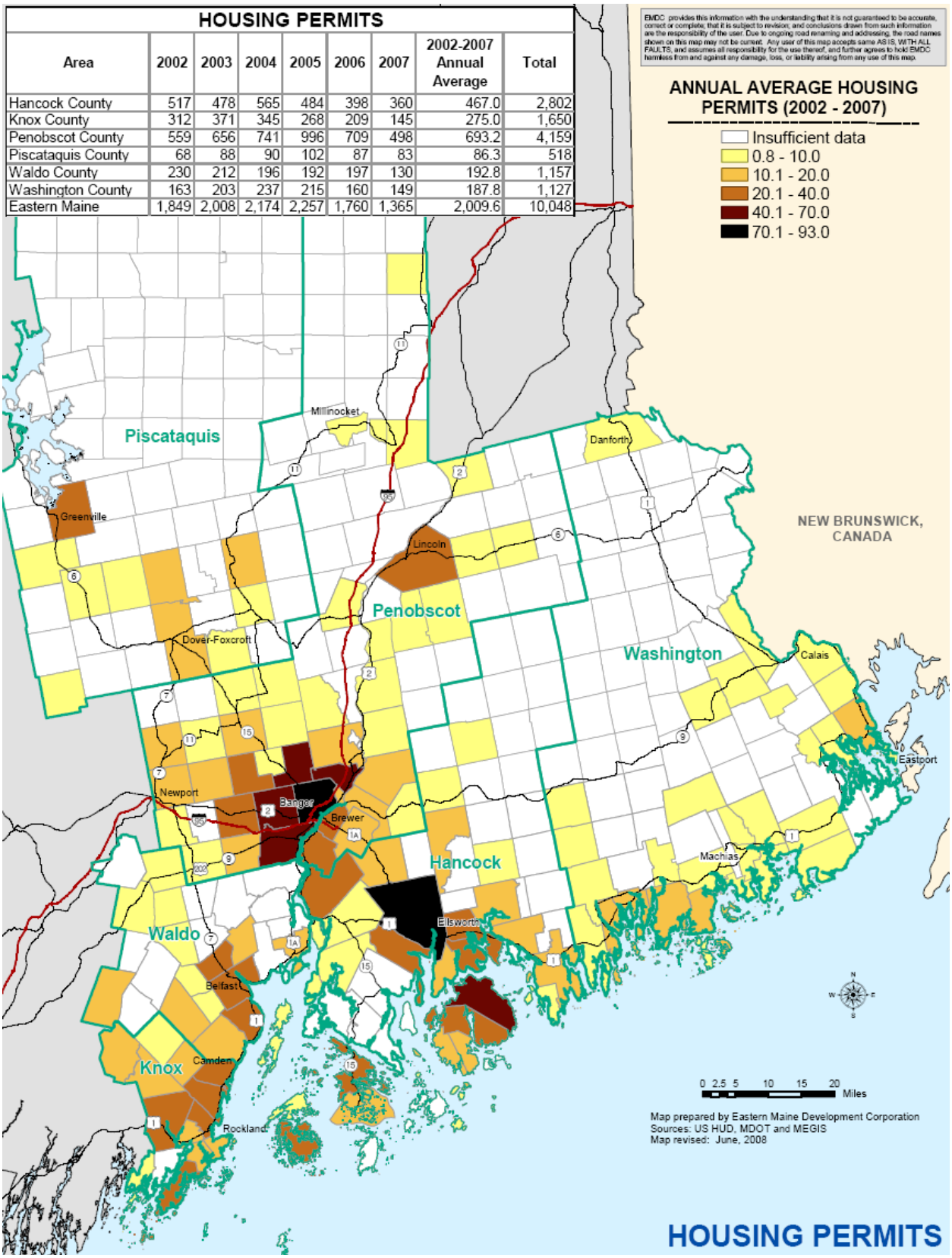
HOUSING AFFORDABILITY INDEX

Labor Market Area	2007 Index	Percent Change (2002 - 2007)
1 - Bangor Metropolitan Area	0.90	-23.08
2 - Belfast LMA	0.77	-18.95
3 - Calais LMA	0.66	-41.59
4 - Camden LMA	0.58	-23.68
5 - Dover-Foxcroft LMA	1.01	-41.62
6 - Ellsworth LMA	0.69	-16.87
7 - Lincoln LMA	1.03	-29.93
8 - Machias LMA	0.93	-15.45
9 - Millinocket LMA	1.58	-9.71
10 - Rockland Micropolitan	0.77	-3.75
11 - Saint George LMA	0.66	-9.59



HOUSING PERMITS

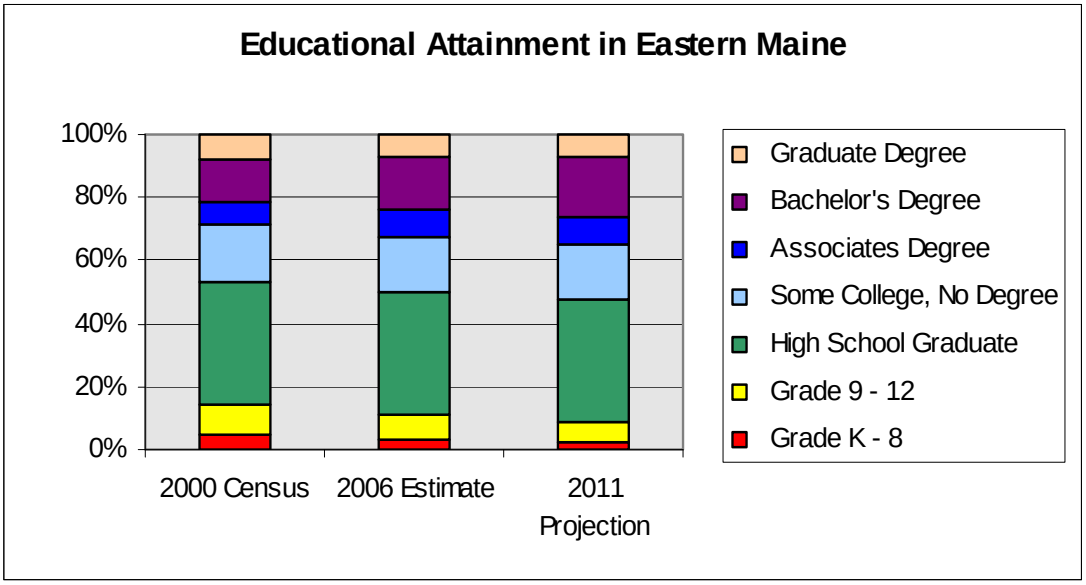
Area	2002	2003	2004	2005	2006	2007	2002-2007 Annual Average	Total
Hancock County	517	478	565	484	398	360	467.0	2,802
Knox County	312	371	345	268	209	145	275.0	1,650
Penobscot County	559	656	741	996	709	498	693.2	4,159
Piscataquis County	68	88	90	102	87	83	86.3	518
Waldo County	230	212	196	192	197	130	192.8	1,157
Washington County	163	203	237	215	160	149	187.8	1,127
Eastern Maine	1,849	2,008	2,174	2,257	1,760	1,365	2,009.6	10,048



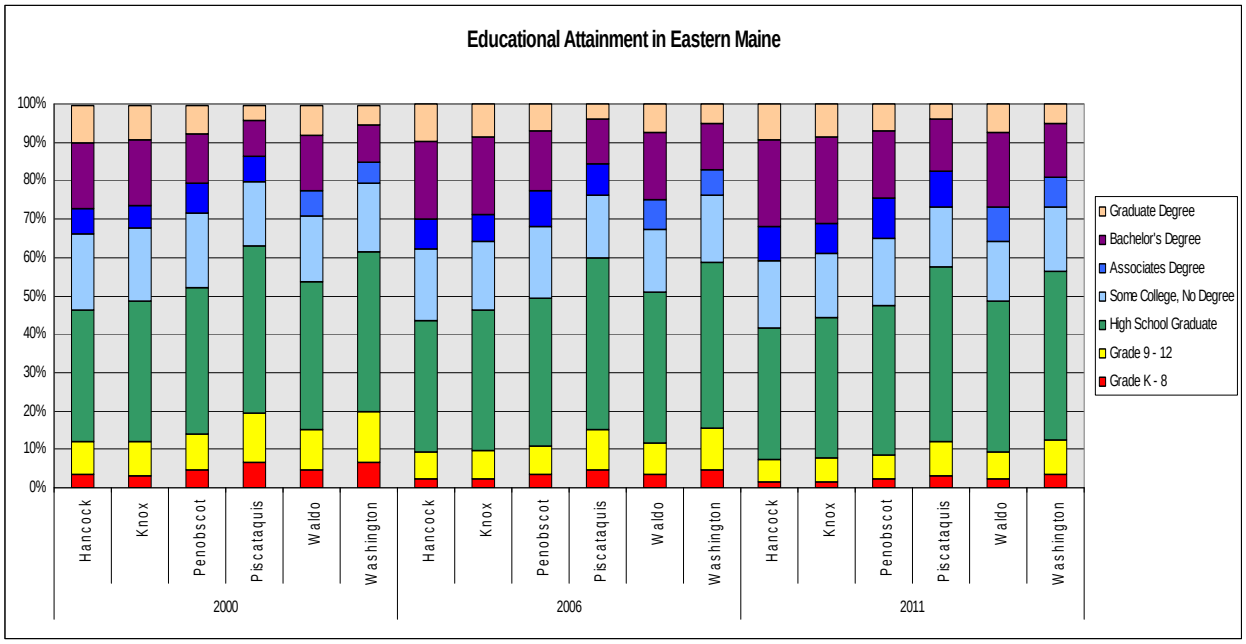
Education Attainment

Across the Eastern Maine region, educational attainment for adults age 25 and over is projected to increase from 2000 to 2011:

- The percentage of Eastern Maine's population with a bachelor's degree is anticipated to grow slightly in each of the six Eastern Maine counties during this period (from 17.1 to 22.5% in Hancock and Knox Counties, 12.9 to 17.4% in Penobscot County, 9.4 to 13.5% in Piscataquis County, 14.5 to 19.6% in Waldo County and 9.6 to 13.8% in Washington County).
- Still, even in the counties with the highest projected attainment, it is anticipated that less than one-quarter of adults aged 25 and over will hold a bachelor's degree by 2011.
- High School graduation rates are projected to remain relatively stable during the same period, with counties with lower bachelor's degree attainment (Penobscot, Piscataquis and Washington) projected to experience higher high school attainment.
- Little change is projected in the percentage of adults attaining graduate degrees in Eastern Maine with a high of 9.4% in Hancock County (down from 10.1% in 2000) and a low of 4.1% (up from 3.9% in 2000) in Piscataquis County.
- In 2006, the attainment of graduate degrees in Hancock (9.6%), Knox (8.8%) and Waldo (7.6%) Counties is in part attributable to the in-migration of early retirees into these areas, the county with the next highest graduate degree attainment level, Penobscot County (7.2%) is the home of the University of Maine in Orono.
- High School drop out rates are projected to decrease throughout the region.



Data provided by: © 2006. WITS for WIRED by New Economy Strategies and Decision Data Resources. Demographic data © 2006 by Experian/Applied Geographic Solutions.



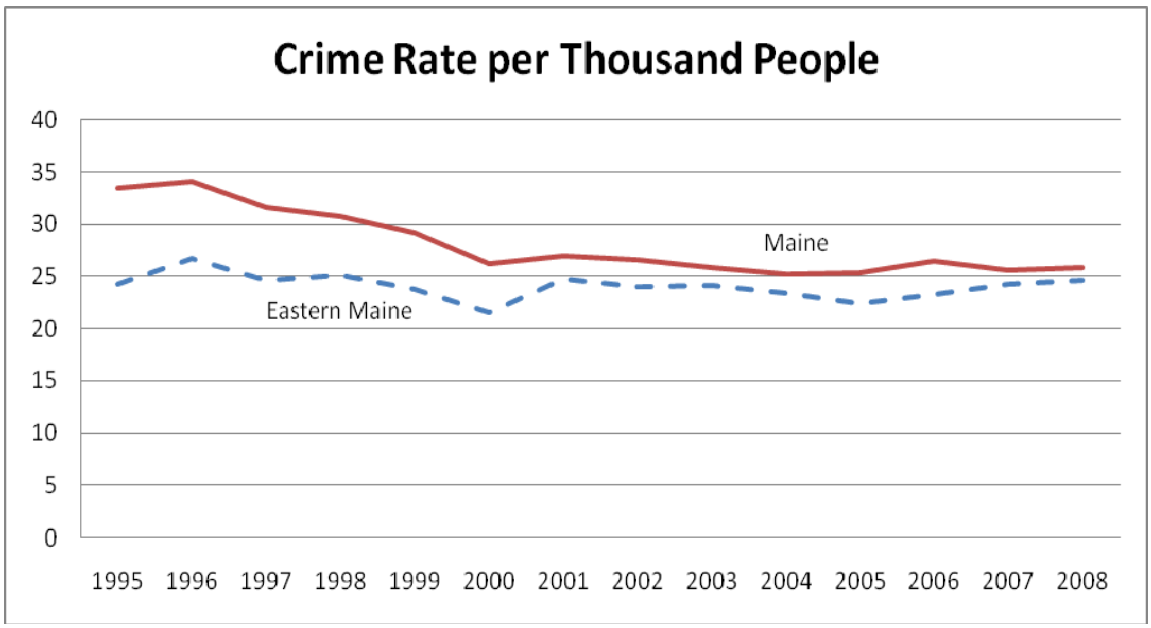
Data provided by: © 2006. WITS for WIRED by New Economy Strategies and Decision Data Resources.
Demographic data © 2006 by Experian/Applied Geographic Solutions.

Retail Sales

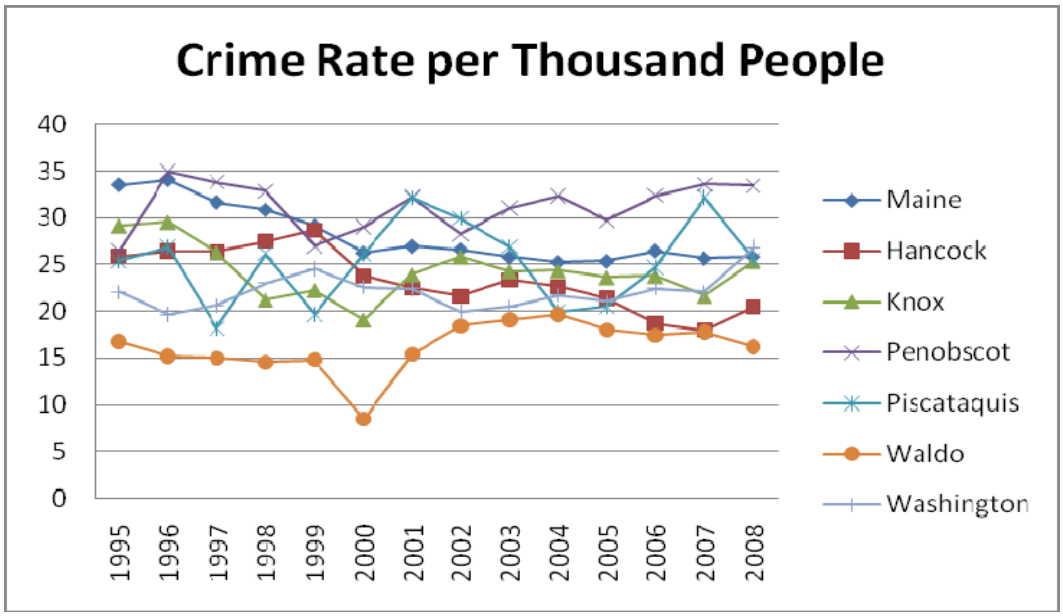
- Service Center Taxable Sales as a proportion of regional Taxable Sales has been steadily increasing from 73% in 2000 to 79% in 2007.
- Retail sales in Eastern Maine have experienced a decrease in the last two years from 3.89 billion dollars to 3.57 billion dollars; this is opposed to the previous trend of increasing.

Safety

- Crime Rate: With the exception of Penobscot County and Piscataquis County, and more recently Knox County, the crime rate in Eastern Maine is consistently below the statewide average; it should be noted that Maine is a relatively low crime state.



Source: Crime in Maine reports by the Maine Department of Public Safety.



Source: Crime in Maine reports by the Maine Department of Public Safety.

2010 CEDS: A Shared Vision for Eastern Maine

The 2010 Eastern Maine Comprehensive Economic Development Strategy (CEDS) is intended to articulate a shared vision for the future. Eight critical subject areas ("Topics") have been identified that must be addressed in order to reach that vision. Various issues and key projects have surfaced for each topic and are outlined below. During the forum each participant engaged in a focused discussion on two topics, further developing issues and projects for consideration in the CEDS process. Finally, participants prioritized both the issues and projects, thereby establishing the steps that helped us to articulate our common vision and the projects that will permit us to realize this vision going forward. This process has provided the foundation the 2010 Eastern Maine CEDS, which in turn will serve as a tool for regional economic development initiatives. Since the CEDS is a living document, it will continue to be refined annually in each of the coming five years.

TOPICS:

During the 2010 CEDS process, the following subject areas were clearly and consistently articulated as being of the most significant interest to stakeholders in Eastern Maine's economic future. These Topics are not meant to be exhaustive or to suggest that we are to ignore how issues are related to one another across categories. Rather, they provide a practical framework that enables articulation of issues, goals and projects to assure that the 2010 Eastern Maine CEDS is a meaningful document and tool for economic development in Eastern Maine.

Thriving Economic Climate

Regional Leadership and Collaboration

Energy

Education & Workforce Development

Research, Development, Entrepreneurship & Innovation

Unique Quality of Life & Place

Natural Resources

Tourism

Infrastructure

Thriving Economic Climate

Diversity is the key to a thriving economic climate. Too much dependence on industries that have passed their prime threatens the region's overall economic stability. A good mix of business and industry allows Eastern Maine to be competitive. Investing in manufacturing that is more competitive helps to secure a strong economic future. This coupled with a vibrant small business climate, particularly support for small business start-ups, provides the economic mix necessary for a thriving economic climate.

Thriving Economic Climate Issues & Projects:

Thriving Economic Climate Priority Issues

- It is widely perceived that the "Business Environment" in Eastern Maine is poor; this is generally attributed to: the state's tax and regulatory structure; cost of and access to utilities and technology; and transportation and infrastructure challenges; Maine spends too much time with negatives and should concentrate on the positives.
- "Micro businesses" and the creative economy are very important to our regional economy, particularly in the sparsely populated areas, yet there are challenges with respect to: access to markets; capitalization of small businesses; and access to broadband.
- The region's creative economy requires additional support in order for growth to be realized. Business assistance services, access to capital, and market development efforts need to be increased to improve the small business environment the creative economy operates within.
- There is a need to focus on "value-added" product development in and from traditional natural resource based areas (skilled trades).
- Business attraction efforts need to be coordinated, planned strategically, adequately supported, and sustained.
- The region continues to experience economic transition and should concentrate on certain economic clusters such as biotechnology, healthcare, and tourism industries, as well as "value-added" enterprises to help transition the area.
- The region needs to shift to a more proactive business climate that draws on sound economic planning.
- A strong emphasis needs to be placed on tourism product development, particularly within the resort sector.

Additional Thriving Economic Climate Issues Articulated during the CEDS Process:

- The region continues to experience an economic transition away from a strong manufacturing economy in traditional industries like paper, shoes, and textiles to other technology and service sector economies.
- The region's boat building industry has been a longstanding traditional occupation that continues to present great opportunity.
- The cost of living, particularly affordable housing along the coast, has outpaced wages.

- There is a need to focus on "value-added product development" in forest/wood products, fishing, agriculture, and specialty foods.

Thriving Economic Climate Goals

GOAL:
Provide targeted technical assistance to build the capacity of distressed areas to respond to change and implement development programs.

GOAL:
Encourage and promote programs to provide access to markets, particularly those focusing on value-added local agricultural and other traditional local value-added artisan products.

GOAL:
Sustainable agriculture and specialty foods programs – Create a regional support mechanism to advance agricultural growers and specialty foods producers.

GOAL:
Provide support to the region's non-profit leadership, which is frequently under-funded and understaffed yet carries a substantial responsibility for the health and well being of the region's populace.

GOAL:
Encourage the development of infrastructure to enable the development and nurturing of various business enterprises throughout Eastern Maine.

Maine's longstanding tradition of strong local government is integral to the character of the region. However, economists have found that having too many fragmented governments at the regional level can hurt overall economic competitiveness. While government is a good source of quality jobs, Maine taxpayers carry a significantly higher financial burden as a result. Promoting regional leadership and collaboration can help lower costs and provide a more efficient way to deliver services.

One indicator of Regional Leadership and Collaboration is the level of activity of the various Councils of Government and Planning Commissions. There are three such entities in the Eastern Maine region:

- MidCoast Regional Planning Commission
- Washington County Council of Governments
- Hancock County Planning Commission

Each of these entities is quite active within their respective regions, with participation levels generally in excess of 60% of eligible communities.

Regional Leadership & Collaboration Issues:

<u>Regional Leadership & Collaboration Priority Issues</u>

- Major economic development issues facing Eastern Maine need to be addressed at the regional level such as allocation of scarce financial resources, the location of critical infrastructure, and business retention and attraction efforts.
- Limited municipal resources require better collaboration and coordination such as model zoning, cooperative purchasing, etc. among counties and municipalities in the region.
- The lack of regional land use planning threatens our quality of place, can encourage investments that are either redundant or unnecessary, and can weaken economic development efforts.
- There is a need for a collaborative regional vision as well as opportunities for creative collaboration processes.
- Regional trade corridors such as Atlantica present great opportunities for the broader region to successfully compete on a global scale.

Additional Regional Leadership & Collaboration Issues Articulated during the CEDS Process:

- Some large-scale development proposals can have a huge impact on the entire region (LNG, Sears Island) and it is important to bring interested parties to the table while moving the processes forward.
- There is a need to realize that future success depends on taking a comprehensive view of economic development which considers both regional and sub-regional collaboration, particularly in the Midcoast and Downeast areas.

Regional Leadership & Collaboration Projects

GOAL:
Encourage and support regional approaches to transportation, natural resource and land use planning.

GOAL:
Encourage and support the development of trade corridors to more efficiently and effectively move goods and people through Eastern Maine and beyond.

GOAL:
Seek and obtain funding to enable the encouragement and support of regional community and business development initiatives.

GOAL:
Support and encourage programs and projects that seek to nurture emerging regional leaders.

Energy

Energy issues were of great interest during the 2010 CEDS process given the pressure on fuel costs and the projected instability of energy markets. These increases have eastern Maine stakeholders concerned about economic vitality, as well as the health and welfare of the disproportionate number of low and moderate income households living in rural communities. Much of the discussion focused on alternative energy opportunities that exist in the region, particularly with wind, wood/biomass, and tidal.

Energy Priority Issues

- Heating and transportation costs and the impact on the low and moderate income families.
- Rising costs of goods and services will reduce overall financial resources that drive much of Eastern Maine's economy.

Energy Goals

Goal:
Raise public awareness of the importance of energy efficiency.

Goal:
Foster business innovation in the energy sector through new technologies.

Goal:
Leverage Maine's natural resources for the benefit of increasing energy independence and economic growth.

Education & Workforce Development

Research has shown that regions with a highly educated workforce also experience economic growth in terms of business attraction and development, as well as higher income levels for people in the region. Attaining a college degree or returning to school to receive advanced education and training is important to assure that skills match the needs of desired employers. To ensure workers don't leave the area it is crucial that there are jobs to support a well-educated, highly skilled workforce.

Education and Workforce Development Priority Issues

- There is a need to encourage lifelong learning and the methods to address this through transferability of courses, encouragement by business to advance skills, access to courses, and affordability.
- Despite increased opportunity for educators to partner with businesses in workforce training and development, there remains a disconnection between education provided and employment opportunities; need for curriculum development by region with consistency.
- The need for increased computer skills among the adult, entry-level workforce in order to compete; there is further need for basic skills and a stronger work ethic.
- To retain highly qualified employees, the region needs to attract or create business opportunities in growth sectors of the economy.
- To attract quality employers that can help transform the economy, the region must raise education attainment levels of adults, particularly the percentage of the population with a bachelor's degree or higher, as well as increase the overall skill base of the workforce.

Additional Education & Workforce Development Issues articulated during the CEDS Process:

- The nonprofit sector makes up roughly 20 percent of the employment base in the Eastern Maine region, yet this sector is often under funded and staffing is problematic as a result.
- There is a need to make investments in early childhood development and family support.

Education and Workforce Development Goals

GOAL:
Support and encourage projects focused on workforce investment in the marine sector.

GOAL:
Support and encourage public-private partnerships focused on workforce investment in the biomedical/life sciences sector.

GOAL:
Support and encourage partnerships focused on workforce investment in the hospitality and tourism sector.

GOAL:
Enhance the career pathway for construction, welding, and other skilled trades through partnership with industry and raising awareness within the schools.

GOAL:
Encourage use of formal curriculum and informal educational opportunities to enhance skill sets and career preparedness of the region's workforce.

GOAL:
Encourage expansion and provide support for sub-regional/county-based leadership and entrepreneurial training programs.

GOAL:
Support efforts to bring greater efficiency to the provision of education and workplace preparedness to our students.

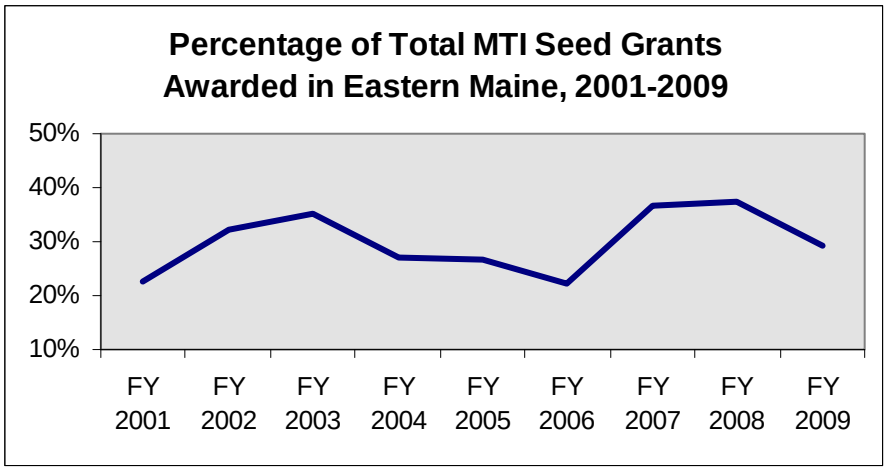
Research, Development, Entrepreneurship and Innovation

Regions that foster entrepreneurship and innovation grow at a much faster rate. Maine's investment in research and development has substantially increased in recent years with programs such as the Maine Technology Institute, the University of Maine's aggressive pursuit of research grants, and collaborative initiatives like the Maine Institute for Human Genetics and Health. To continue to develop and attract a well-educated workforce and compete on a global scale, the region must support entrepreneurship and encourage innovation at all levels of the economy.

Research and Development Grant Awards

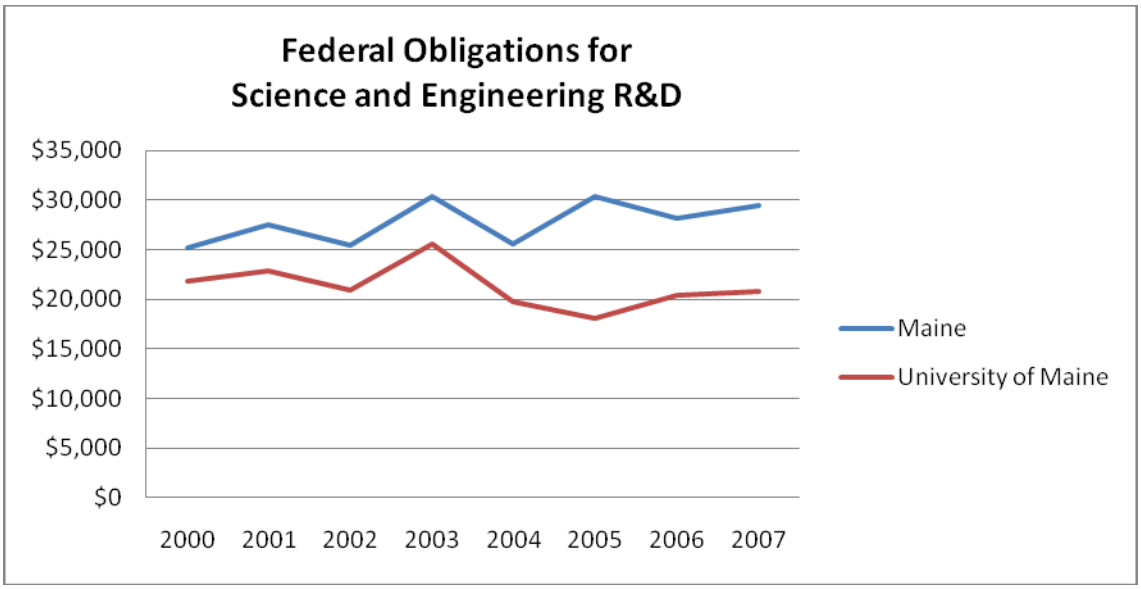
Investment in innovation is a strong indicator of a healthy entrepreneurial environment. Following is an outline of key indicators of entrepreneurship in the region.

- Maine Technology Institute Seed Grants – Since 2001, 847 MTI Seed Grants have been awarded in the State, 258 of those, or 30% overall, have gone to recipients in Eastern Maine. The award of MTI grants to Eastern Maine entities increased from a low of 22% in FY 2006 to just over 37% in FY 2008.



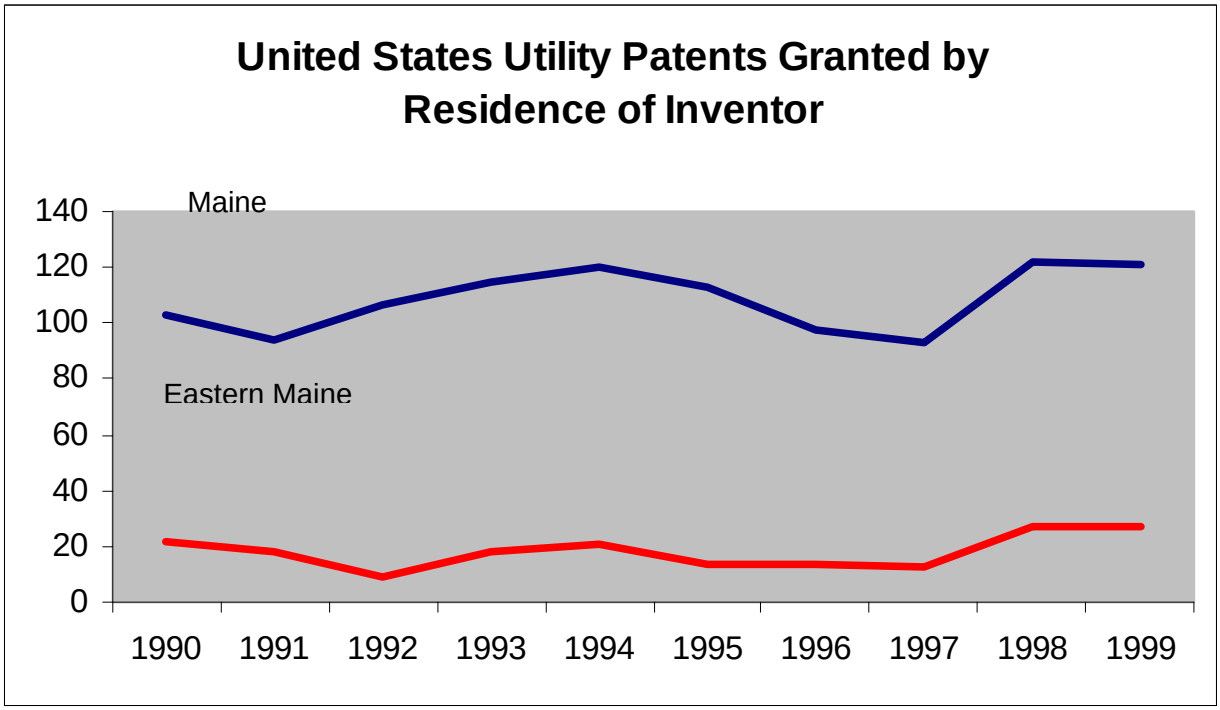
Source: Maine Technology Institute

- Federal Obligations for Science & Engineering R&D – The University of Maine, with its flagship campus in Orono, has consistently received the lion's share of federal R&D commitments made to the State of Maine. After several years of sustained growth in the commitment of federal monies, the trend since 2003 shows a decrease in federal investment in R&D at both the both the State level and at UMO. From 2004 to 2007 the state levels have grown to what they were in 2003, though the Orono campus is receiving a smaller percentage of the money.



Source: National Science Foundation, The Division of Science Resources Statistics

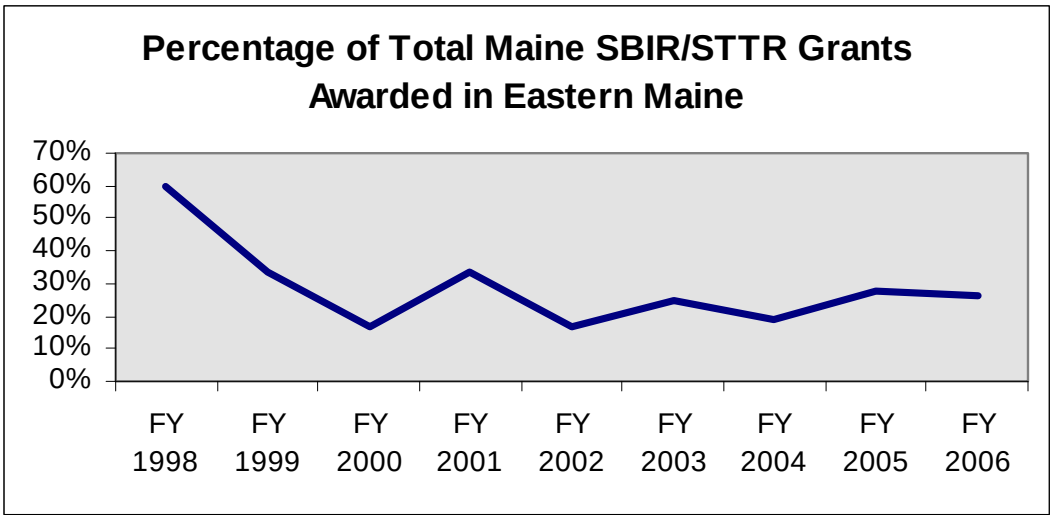
- US Patents Granted by Residence of Inventor – From 1990 through 1999, Eastern Maine residents consistently represented between 10% and slightly over 20% of Mainers awarded US patents.



Office for Patent and Trademark information. April 2000 report "US Patent Grants by State, County, and Metropolitan Area" Utility Patents 1990-1999

- Maine SBIR/STTR Winners – The percentage of Maine State Small Business Innovation

Research/Small Business Technology Transfer grants awarded to businesses in Eastern Maine has fluctuated between 1998 and 2006, from a high of seven awards (1999, 2003, 2005, 2006) to a low of two (2000) during this period. It should be noted this is a relatively low number of awards compared to other areas across the country.



Source: Maine Technology Institute

Research, Development, Entrepreneurship & Innovation Issues:

<u>Research, Development, Entrepreneurship & Innovation Priority Issues</u>:

- The education system needs to be better integrated with the business sector, as well as be agile and responsive to meet current and future workforce needs.
- Connectivity (i.e. broadband) is critical to attracting entrepreneurs that introduce innovations that spur economic growth in the new economy.
- Access to capital and targeted technical assistance remain limited at early stages of conceptualization through to product development, which adversely affects the success rate for viable technologies.
- A limited talent pool of experienced mid-level and senior managers exists throughout the region.
- Infrastructure challenges, particularly limited broadband and telecommunications capacity, adversely impacts the region's research and development potential.
- The region's natural, institutional, and demographic resources present great opportunity for expanded research and development.
- A need exists for targeted market research to identify innovation opportunities that correspond to the assets of Eastern Maine.

Additional Research, Development, Entrepreneurship & Innovation Issues Articulated during the CEDS Process:

- The burgeoning biotechnology sector, anchored by The Jackson Lab, presents great potential for the region.
- New media ventures have been attracted to the region, but struggle to attract the necessary financial capital to grow.

Research, Development, Entrepreneurship & innovation Goals and Projects

GOAL:
Encourage research, development, entrepreneurship and innovation in the environmental and alternative energy sectors.

GOAL:
Encourage research, development, entrepreneurship and innovation in the marine sciences sector.

GOAL:
Encourage research, development, entrepreneurship and innovation in the biotech sector.

GOAL:
Encourage research, development, entrepreneurship and innovation to expand and improve access to high speed communications technology throughout Eastern Maine.

GOAL:
Encourage the development of educational infrastructure to assure future generations of entrepreneurs and innovators and the growth of a creative economy.

GOAL:
Encourage research, development, entrepreneurship and innovation in the technology sector.

Unique Quality of Life and Place

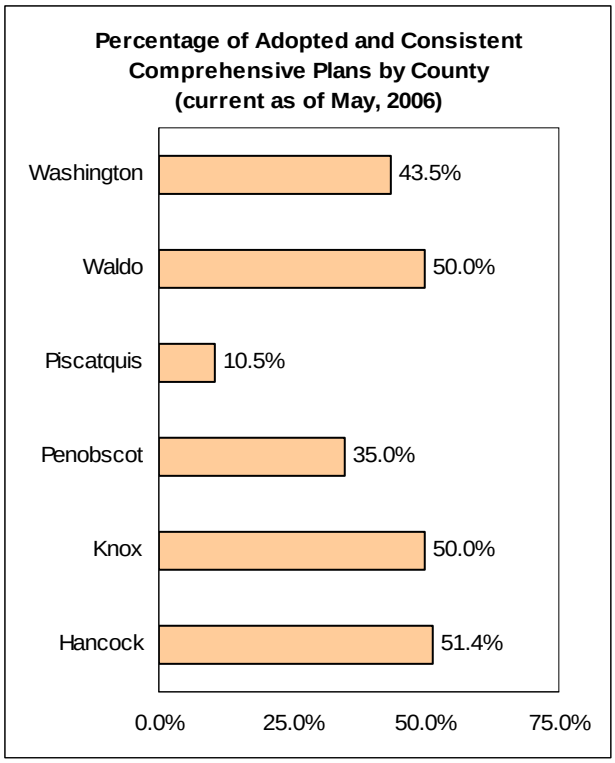
People live and stay in Eastern Maine for a host of reasons other than economic ones. Family, friends, and a quality of life that appeals to a community ideal create strong bonds to the culture and the landscape. For people to stay and the region to continue to prosper the economy must perform at a higher level. Investments in the arts, recreation, a strong education system, and infrastructure improve the quality of life and place that helps attract economic opportunity.

Eastern Mainers from all walks of life cherish what is often referred to as our "Unique Quality of Place" although this concept might seem difficult to articulate there are quantifiable characteristics that can be seen to contribute to this perception and render it more tangible.

Land Use Policy

A commitment to responsible Land Use Policy is another factor that impacts on the Quality of Place that is found in Eastern Maine. As the landscape changes in our region, the need for the pro-active adoption of land use policy on a local, and ultimately regional, basis becomes increasingly important to our ability to maintain the Quality of Place that we expect.

- As of May, 2006, close to 50% of Communities in Knox, Waldo and Hancock Counties had adopted Comprehensive Plans that were deemed Consistent by the State Planning Office.
- Piscataquis County had the lowest percentage (10.5%) of communities with Adopted Consistent Comprehensive Plans.
- 35% of communities in Penobscot County and 43.5% of communities in Washington County are certified Consistent.



Data Sources:
1 - State Planning Office
2 - Maine Municipal Directory (2005)

Unique Quality of Life & Place Issues

Unique Quality of Life & Place Priority Issues

- Eastern Maine's rural downtowns are a critical component to the region's unique character and quality of place, therefore their upkeep and revitalization is essential.
- There is a need for value-added product development opportunities encouraging people to "buy local".
- It is crucial to our quality of place that affordable housing is available for workers in the communities in which they wish to work and live.
- Community character is being threatened by changing development patterns, such as big box development, condominium development, and suburban residential development.
- Major issues exist in balancing the various competing interests in our region, specifically economic development, industry, tourism, recreation, etc.
- The rising cost of waterfront property from second homeowner development is jeopardizing the traditional use of the working waterfront.
- Focus on the creative economy has spurred interest in the impact of the arts and culture on the region's economy - we need to continue to nurture this.

Additional Unique Quality of Life & Place Issues Articulated during the CEDS Process:

- Much of the housing stock throughout Eastern Maine was built prior to 1950, which has resulted in a disproportionate share of substandard units.
- Statistically, the area is relatively low in crime; however, there are region-wide problems with alcohol and drug abuse/dependency that have a negative impact on quality of life and place.
- Ongoing challenge to retain our quality of place, while bringing a greater regional perspective to projects.

Unique Quality of Life & Place Goals:

GOAL:
Support and encourage regional approaches to land use, and transportation planning as appropriate.

GOAL:
Provide affordable housing technical assistance to communities to provide affordable housing, particularly workforce housing.

GOAL:
Encourage and support efforts to revitalize our region's historic downtowns.

GOAL:
Encourage and support efforts to develop our region's creative economy.

GOAL:
Encourage and support efforts to protect the working waterfront throughout Eastern Maine.

GOAL:
Encourage local adoption of land use controls and incentives that protect fragile natural areas, maintain town character, inhibit sprawling land use patterns, discourage fragmentation of wildlife habitat and provide access for recreation and visitor opportunities where appropriate.

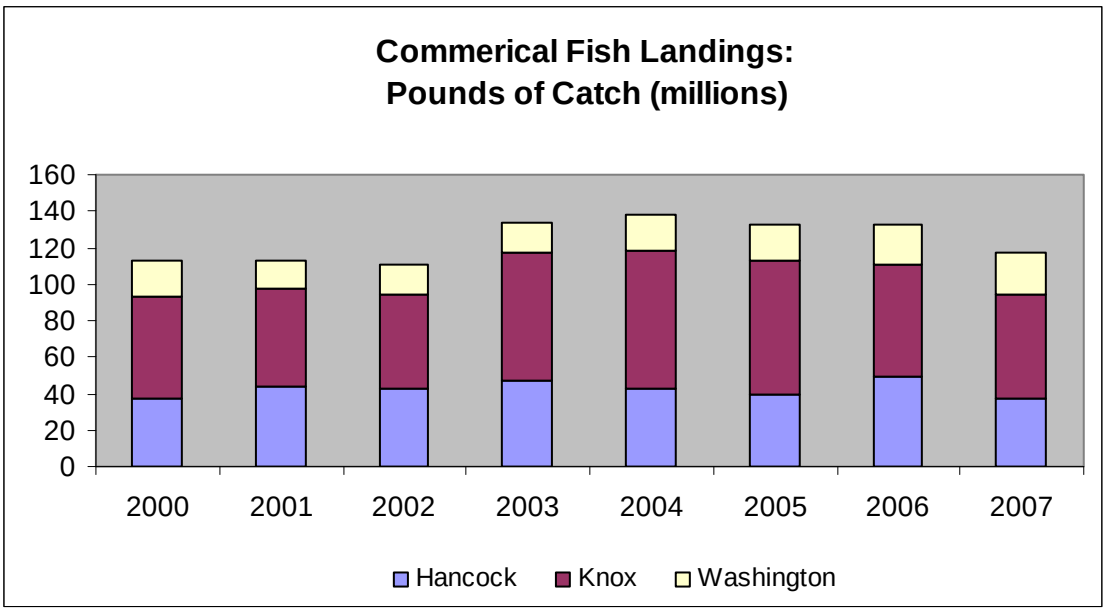
Natural Resources

Eastern Maine's economy was built on and continues to be driven by the region's abundant natural resources – fisheries, forest products, and agriculture. Be it the mature manufacturing of pulp and paper, the long fishing tradition, or the unique farms that dot the landscape, the region's natural resources have provided economically for area residents by providing quality jobs and a way of life. Eastern Maine's tourism economy has also relied on the region's natural resources to draw visitors from throughout the world, creating an image and mystique that is uniquely Maine.

Natural Resources

Commercial Fish Landings[1]

- The value of commercial fish landings in the Eastern Maine Counties of Hancock, Knox and Washington has increased from $158,449,450 in 2000 to $250,496,207 in 2006, representing a total of 112,943,610 pounds in 2000 and 132,932,005 in 2006.
- Throughout the 2000—2006 period, the vast Knox County saw the largest growth in fish landings and maintained the largest catch amounts (in terms of both pounds and dollars), with Hancock and Washington Counties second and third, respectively.

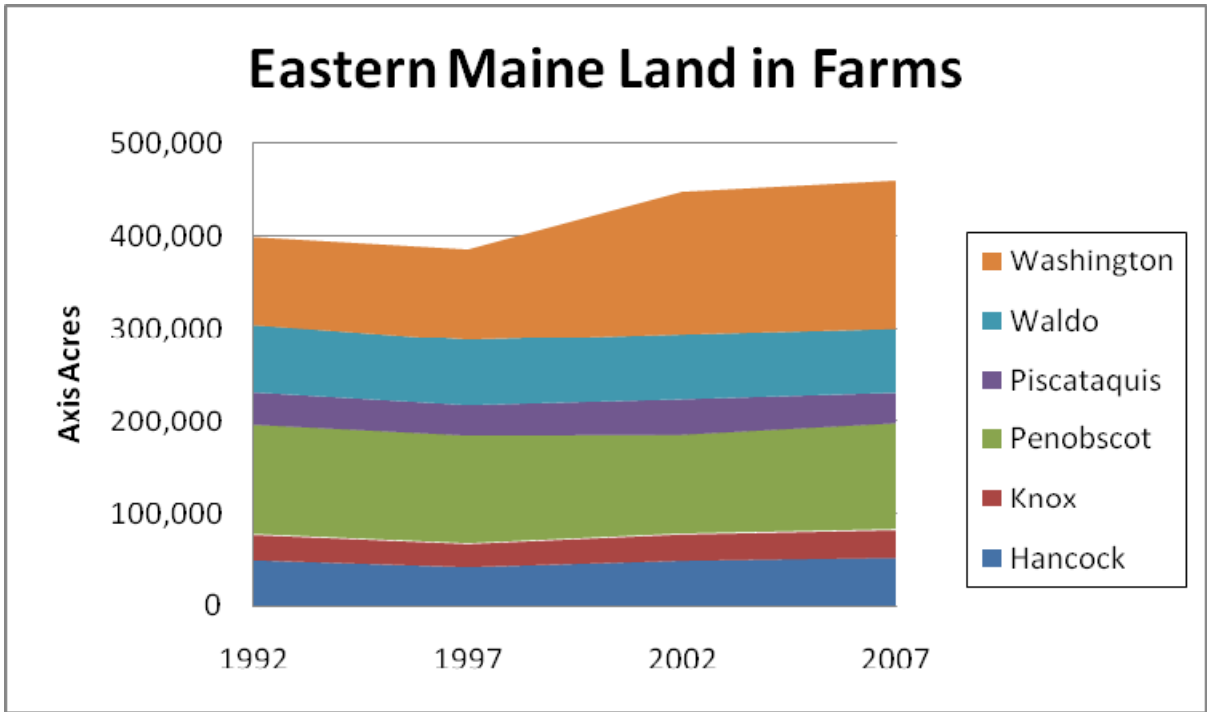


Source: National Marine Fisheries Service.

[1] Data does not include commercial fish landing from Waldo County. These data are not publicly disclosed due to limited numbers.

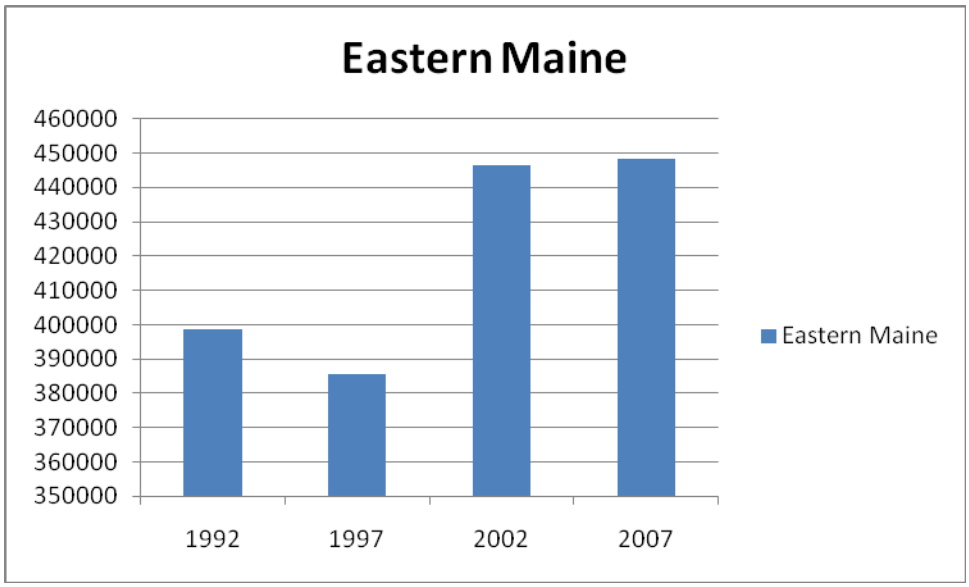
Land in Farms[2]

- From 2002 to 2007, overall land in agricultural use has increased throughout Eastern Maine, from 446,345 acres to 458,182 acres.
- Piscatquis County and Waldo County saw the largest overall loss in farm acreage in that period, from 39,399 to 34,048 and 69,215 to 68,219 acres respectively.
- Washington County saw the largest overall gain in farm acreage from 152,481 to 158,459 acres.



Source: Census of Agriculture (US Department of Agriculture)

[2] Farm land data excludes acreage in the unorganized territories.



Source: Census of Agriculture (US Department of Agriculture)

Cash Receipts from Crops and Livestock

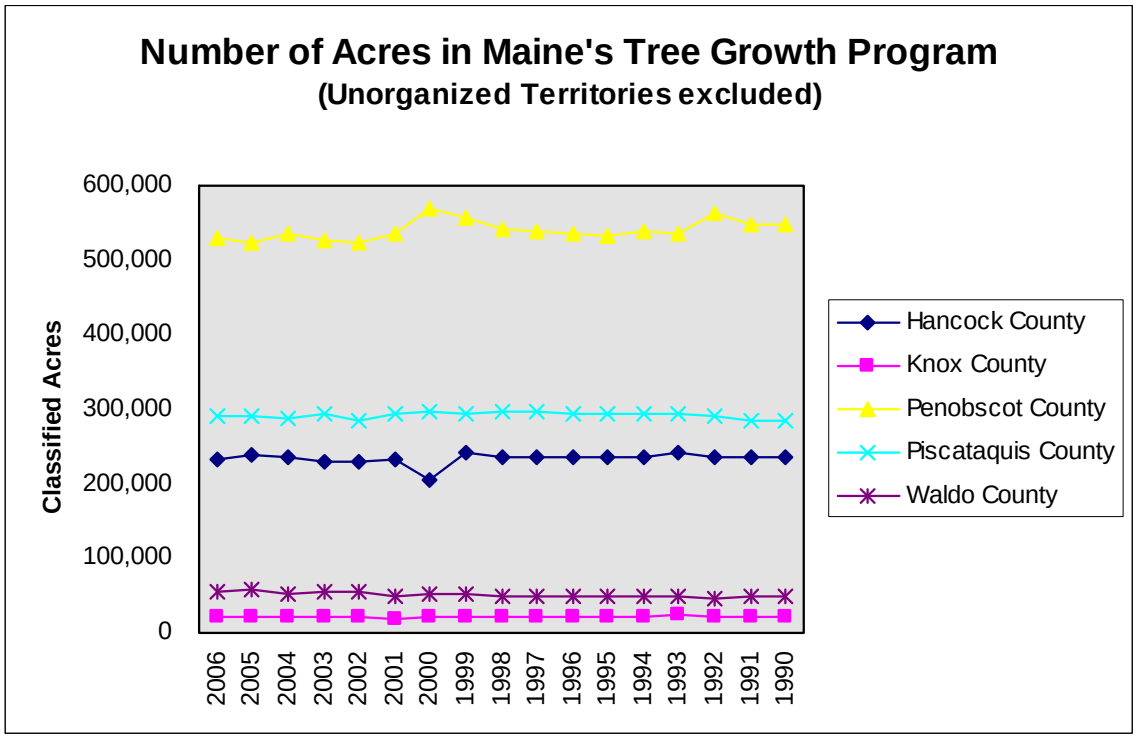
According to the US Department of Commerce, Bureau of Economic Analysis (Table CA45-Farm income and expenses), in calendar year 2005:

- Eastern Maine's six counties accounted for 26.5% of the State of Maine's Cash Receipts from Crops. This is defined as the value of gross revenues received from the marketing of crop commodities (includes grains, such as corn, wheat, and soybeans; hay; vegetables; fruits and nuts; greenhouse and nursery products; tobacco; cotton; and other miscellaneous crops).

- Eastern Maine's six counties accounted for 38.85% of the State of Maine's Cash Receipts from Livestock and Products. This is defined as the value of gross revenues received from the marketing of livestock and livestock products (includes the marketing of meat animals such as cattle and calves, hogs and pigs, sheep and lambs; poultry and poultry products (including eggs); and dairy products; and the marketing of horses, bees, animal aquaculture, and other miscellaneous animal species raised on agricultural operations).

Land in Tree Growth

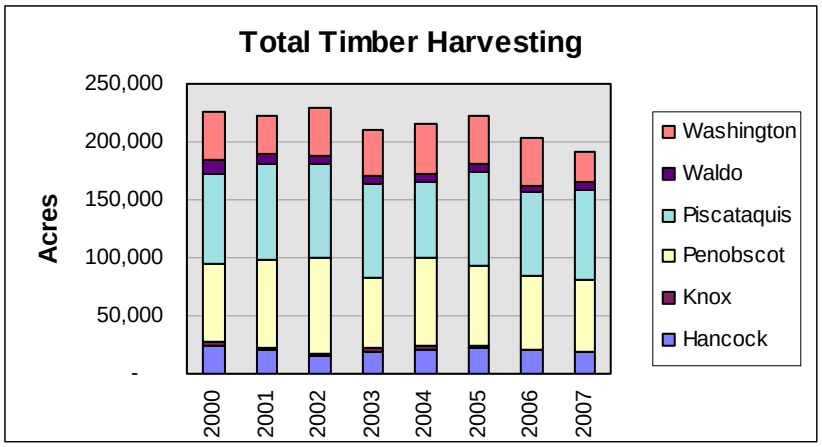
- Land in tree growth throughout the six-county region comprises roughly 1.5 million total acres, a relatively consistent figure over the last five years.
- In 2006, Penobscot (528,360 acres), Washington (359,080 acres), Piscataquis (290,114 acres) and Hancock Counties (232,609 acres) had the greatest number of acres in tree growth (in descending order) while Waldo (55,199 acres) and Knox County (20,727 acres) had the lowest number of acres in tree growth.



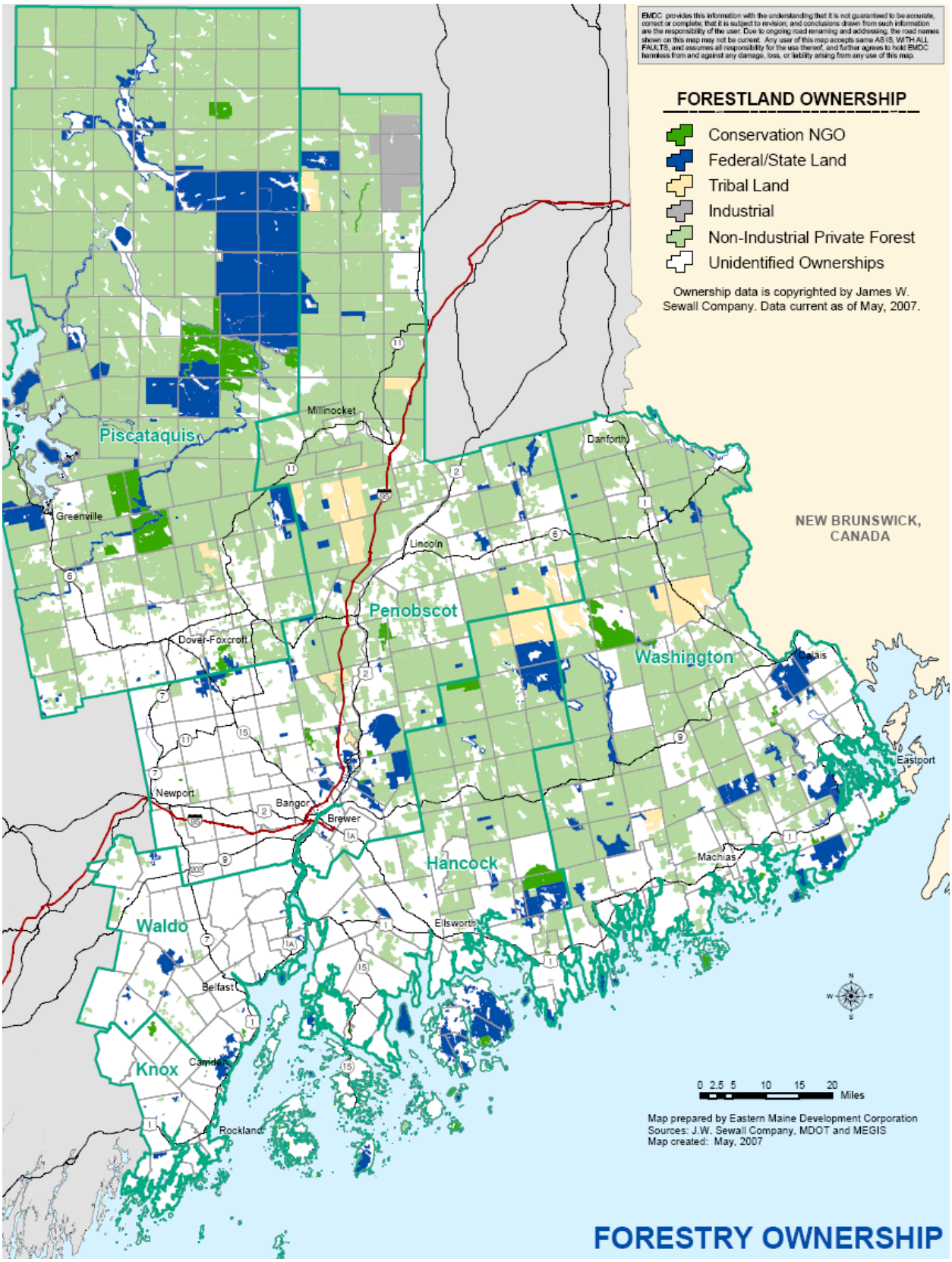
Source: Maine Revenue Services

Total Timber Harvest

- With the exception of slight decreases in 2003 and 2004, the equivalent of over 220,000 acres of timber has been harvested in the Eastern Maine region during each year from 2000 to 2005. In 2006, that number dropped to just over 203,000.
- Piscataquis and Penobscot Counties consistently account for the majority of the Timber Harvest in Eastern Maine, with Washington and Hancock Counties providing the next highest yields.



Source: Maine Department of Conservation, Maine Forest Service.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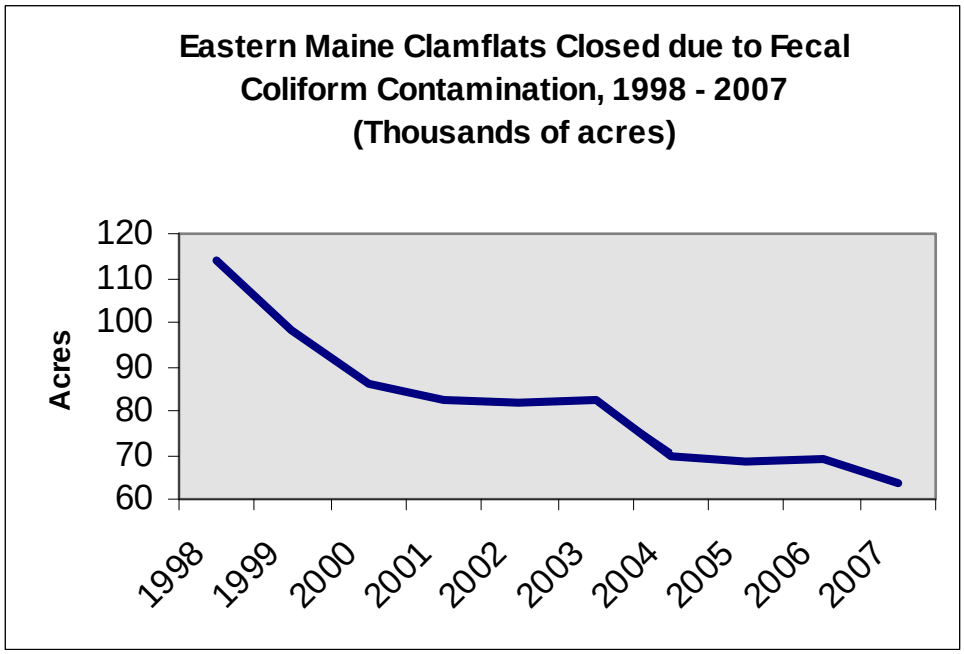
FORESTLAND OWNERSHIP
Conservation NGO
Federal/State Land
Tribal Land
Industrial
Non-Industrial Private Forest
Unidentified Ownerships
Ownership data is copyrighted by James W. Sewall Company. Data current as of May, 2007.
NEW BRUNSWICK, CANADA
Piscataquis
Penobscot
Washington
Hancock
Waldo
Knox
Millinocket
Danforth
Greenville
Lincoln
Dover-Foxcroft
Calais
Eastport
Newport
Bangor
Brewer
Machias
Ellsworth
Belfast
Camden
Rockland
0 2.5 5 10 15 20 Miles
Map prepared by Eastern Maine Development Corporation
Sources: J.W. Sewall Company, MDOT and MEGIS
Map created: May, 2007
FORESTRY OWNERSHIP

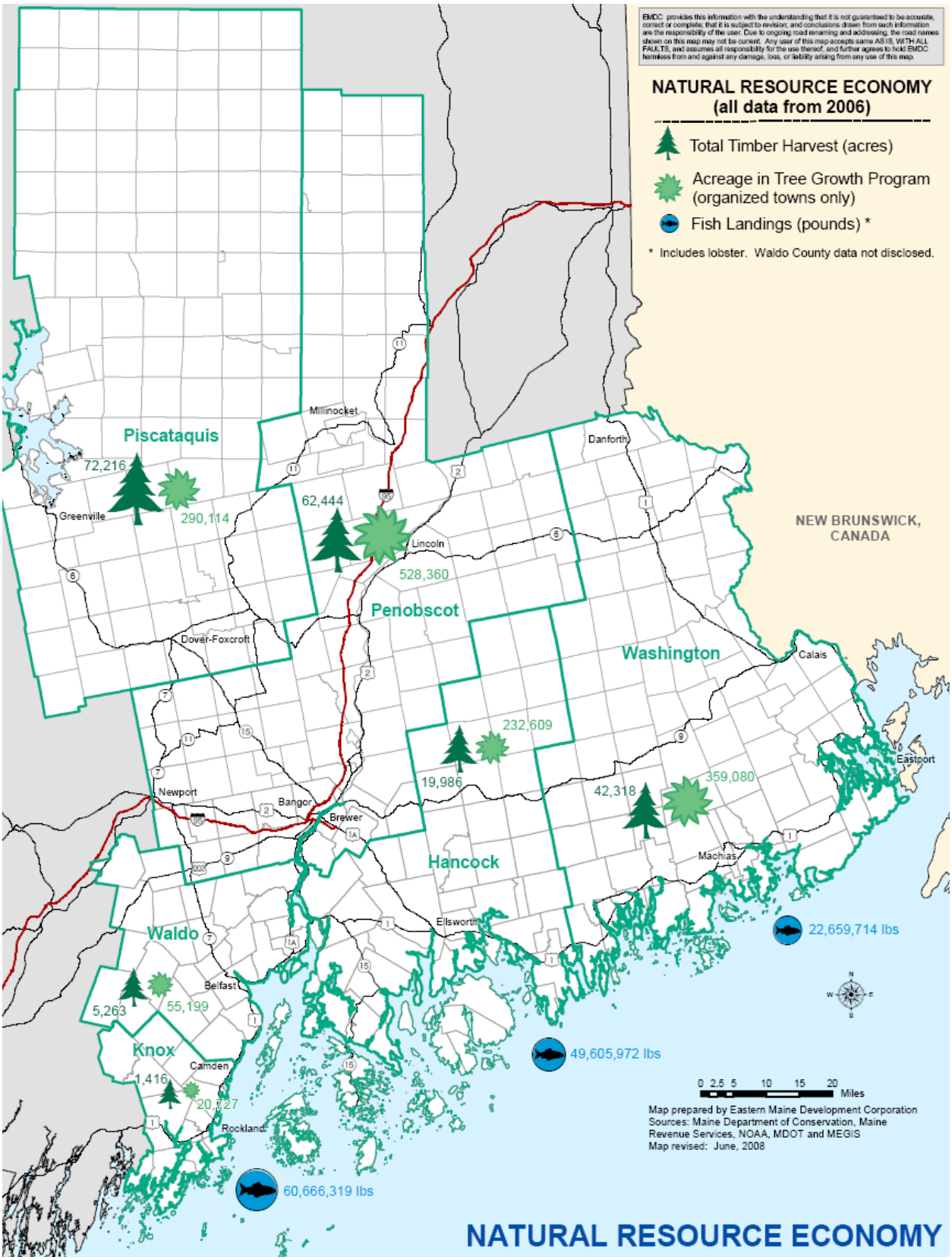
Clam Flat Closures

The quality of our ocean and coastal resources can often be measured by the frequency of clam flat closures.

- Acres of clam flats closed in Eastern Maine due to fecal coliform contamination have gone from a high of 114,115 in 1998 to a low of 63,369 in 2007.
- As these are region-wide figures they do not provide information on any sub-regional variations from the overall trend. Based on conversations in the field, there is a concern that closures have increased in Downeast areas of the region notwithstanding overall region-wide experience.



Source: Maine Department of Marine Resources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NATURAL RESOURCE ECONOMY
(all data from 2006)
Total Timber Harvest (acres)
Acreage in Tree Growth Program (organized towns only)
Fish Landings (pounds) *
* Includes lobster. Waldo County data not disclosed.
NEW BRUNSWICK, CANADA
Piscataquis
72,216
290,114
Greenville
Millinocket
62,444
Lincoln
528,360
Penobscot
Dover-Foxcroft
Danforth
Washington
Calais
Eastport
232,609
19,986
42,318
359,080
Newport
Bangor
Brewer
Hancock
Machias
Ellsworth
22,659,714 lbs
Waldo
Belfast
5,263
55,199
Knox
Camden
1,416
20,727
Rockland
49,605,972 lbs
60,666,319 lbs
0 2.5 5 10 15 20 Miles
Map prepared by Eastern Maine Development Corporation
Sources: Maine Department of Conservation, Maine Revenue Services, NOAA, MDOT and MEGIS
Map revised: June, 2008
NATURAL RESOURCE ECONOMY

Natural Resources Issues:

<u>Natural Resources Priority Issues:</u>

- The region's natural resources provide great potential for the development of alternative energies.
- Traditional natural resource based industries – aquaculture, fishing, agriculture, and forest/wood products – have been the foundation for Eastern Maine's economy, continue to play a significant role in the economy, and need to be supported through various business and community programs.
- There is a need to support, improve, and diversify value-added natural resource-based value-added industries.
- Given changing ownership patterns, a need exists to balance access and ownership rights.
- There is a need to develop sustainable and natural resource-based tourism opportunities which take advantage of the region's natural resources.

Additional Natural Resources Issues Articulated during the CEDS Process:

- Limited state inspectors and out-of-date testing requirements have resulted in too many areas being closed to shellfish harvesting.
- The region has great potential for wind and tidal energy generation.
- Private ownership threatens access to the working waterfront.
- Changing landscape of the Maine woods presents both opportunities and threats depending on access, resource management, and development.
- There are concerns over fishing and the need to diversify the fishing industry.
- Harbors throughout the region present great opportunities for economic growth, in terms of fishing, aquaculture, and tourism.
- There is an opportunity for greater public education about our natural resources.

Natural Resources Goals and Projects

GOAL:
Encourage and support forest products cluster enhancement to take advantage of our substantial infrastructure and long-standing forest products heritage to enable, promote and accelerate growth for our region's oldest industry cluster.

GOAL:
Encourage and support marine industries to ensure the continued viability of the working waterfront throughout Eastern Maine to guarantee access for people who make their living fishing, harvesting shellfish or by manufacturing or servicing seagoing boats.

GOAL:
Encourage and support the development of community supported agricultural cooperatives to sustain small and mid-sized producers.

GOAL:
Encourage and support efforts to advance synergies between natural resources and regional economic drivers.

Tourism

Tourism has been an integral part of the Eastern Maine economy for nearly two centuries. Henry David Thoreau's *Maine Woods* provided a wonderful travel log capturing the essence of the region, which attracted visitors then and continues to influence travelers today. Eastern Maine boasts some of Maine's iconic natural attractions such as Acadia National Park, Mount Katahdin, Baxter State Park, Moosehead Lake, and our rugged coastline. These destinations provide visitors a world class experience and with product development, infrastructure improvements, and marketing resources to spread the word, tourism in Eastern Maine should continue to grow.

Visitation and Economic Impact

- In 2004, domestic visitors to Maine directly and indirectly generated: *$13.6 billion in sales of goods and services; 176,600 jobs; and $3.8 billion in total payroll.*
- Out-of-state domestic visitors made up *72% of all travel expenditures* in 2004.
- In 2004, revenues from domestic tourism totaled *$531 million in state and local taxes*, including *$294 million in Sales Tax; $149 million in Personal Income Tax and $88 million in Gasoline Tax.*

Type of Visitation

- An estimated *8.9 million overnight trips* were taken to Maine in 2004.
- An estimated *34.7 million day trips* were taken to Maine in 2004, 3 million to Downeast Acadia, 5.7 million to Midcoast, and 3 million to the Maine Highlands.
- Travel during *July, August & September* accounts for *52% of overnight tourist trips* to Maine.
- Travel during *April, May & June* accounts for *25% of overnight tourist trips* to Maine.
- Travel during *October, November & December* accounts for *16% of overnight tourist trips* to Maine.
- Travel during *January, February & March* accounts for 8*% of overnight tourist trips* to Maine.
- The average length of stay in Maine for overnight visitors that spend a portion of their travel in Eastern Maine ranges from 4.8 nights for those overnight visitors to Downeast Acadia to 6 nights for Midcoast travelers. Of those travelers to the Midcoast and the

Maine Highlands roughly two-thirds of their time is spent in those respective regions. Downeast Acadia has a slightly higher retention as overnight visitors spend roughly three-fourths of their time Downeast.

Tourism Issues:

<u>Tourism Priority Issues</u>

- There is a need to improve infrastructure that supports tourism product development, particularly quality roads, hotel facilities, and certain amenities such as signage and rest room facilities for visitors.
- There is a need to establish and increase dedicated state funding through the Office of Tourism that is indexed to market performance for tourism product development.
- Overriding need for vision, policies and funding for tourism that will transcend administrations and politics.
- Tourism product development presents serious challenges to the industry in Eastern Maine; collaboration, regional cooperation and thematic packaging are some possible solutions.
- There is a need to develop improved regional organizational capacity through the education of tourism leadership, area businesses, and the community at all levels.
- State legislators, regional leaders, business people and the public need to be educated about tourism and its impacts on the economy of our region.
- State funding is limited compared to other states and those resources are susceptible to changes in the Legislature, which has not been overly friendly to the tourism industry in recent years.

Additional Tourism Issues Articulated during the CEDS Process:

- A need exists to build organizational capacity at the leadership level within tourism, as well as establish quality career paths for those interested in the industry.
- Maine's Office of Tourism's mission and scope is outdated, needs to be revised to reflect current needs and focus on product development (this requires legislative action).
- Longwood's visitor report provides "tourism statistics" that include economic data. It is critical that Longwood data be reframed to clearly state the economic impact of tourism on our region. Data exists to do this, but the report needs to be repackaged to show tourism as the economic engine that it is.
- Nature-based tourism projects need more resources to be implemented (Great Maine Birding Trail for instance).

Tourism Goals and Projects

GOAL:
Support Tourism Product Development Efforts throughout the Eastern Maine region.

GOAL:
Support development of infrastructure necessary to promote tourism and accommodate visitors (bathroom facilities, picnic areas, bikeways/bike lanes, trail head facilities, way finding and interpretive signs, single and multi-use trails, visitor centers, transportation alternatives, scenic by-ways, etc.).

GOAL:
Encourage and support actions intended to provide sustainability and organizational capacity for tourism industry.

Infrastructure

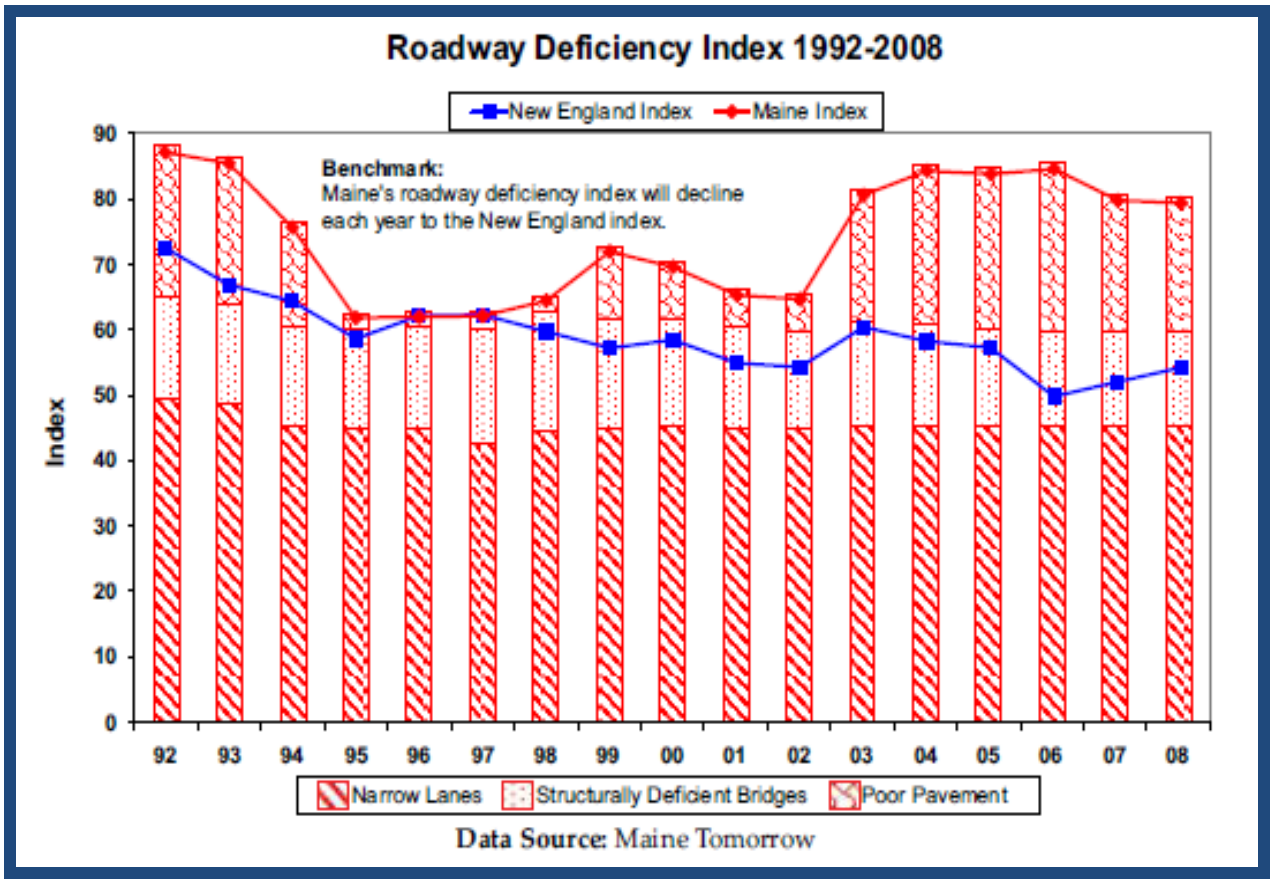
The ability to efficiently and safely move people, goods, and information is a crucial element to the economic health of any region. This is particularly true for an area like Eastern Maine, which spans such a broad geographic area with population hubs located in widely scattered major service center communities and a significant rural population. It is also true that more urban regions, with concentrated business and population centers often receive priority for funding road and bridge maintenance, upgrades and development. Maintaining adequate, safe roadways can pose a real challenge in regions like ours that are highly dependent on private vehicles for daily transportation needs.

Our Region's Infrastructure:
Roads and Bridges

The following is based on information provided by the Maine Better Transportation Association from Maine DOT and Federal DOT information.

Using nationally accepted International Rideability Index (IRI) Standards, the Maine Better Transportation Association estimates that, from 2001 to 2004:

- 25% of State Roads had "Poor" pavement, up from 6% in 2001.
- "Fair" pavement decreased from 62% to 39%.
- "Good" Interstate pavement decreased from 89% to 83%.
- According to the Maine Development Foundation, pavement conditions in the State of Maine continue to deteriorate at a pace that exceeds conditions in New England as a whole by close to 25%.



Maine Development Foundation 2010 Report

According to the Maine Department of Transportation, only 10% of all Maine Roads are arterials, but these roads carry 62% of all travel.

- Significant portions of Major and Minor Arterials in the Eastern Maine region have not been constructed or rehabilitated to meet current road standards and as such are deemed to be "Unbuilt".

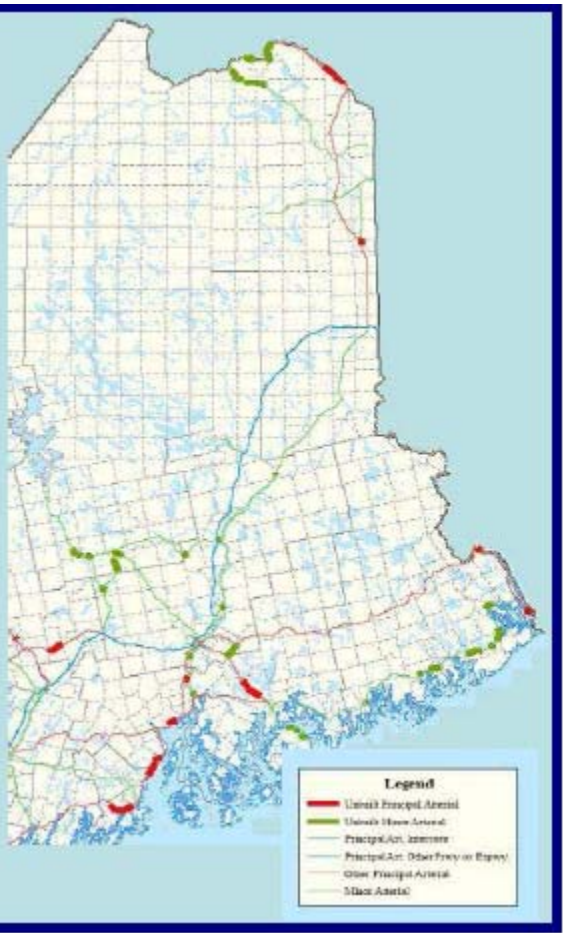
Unbuilt Rural Arterials

Major Arterials

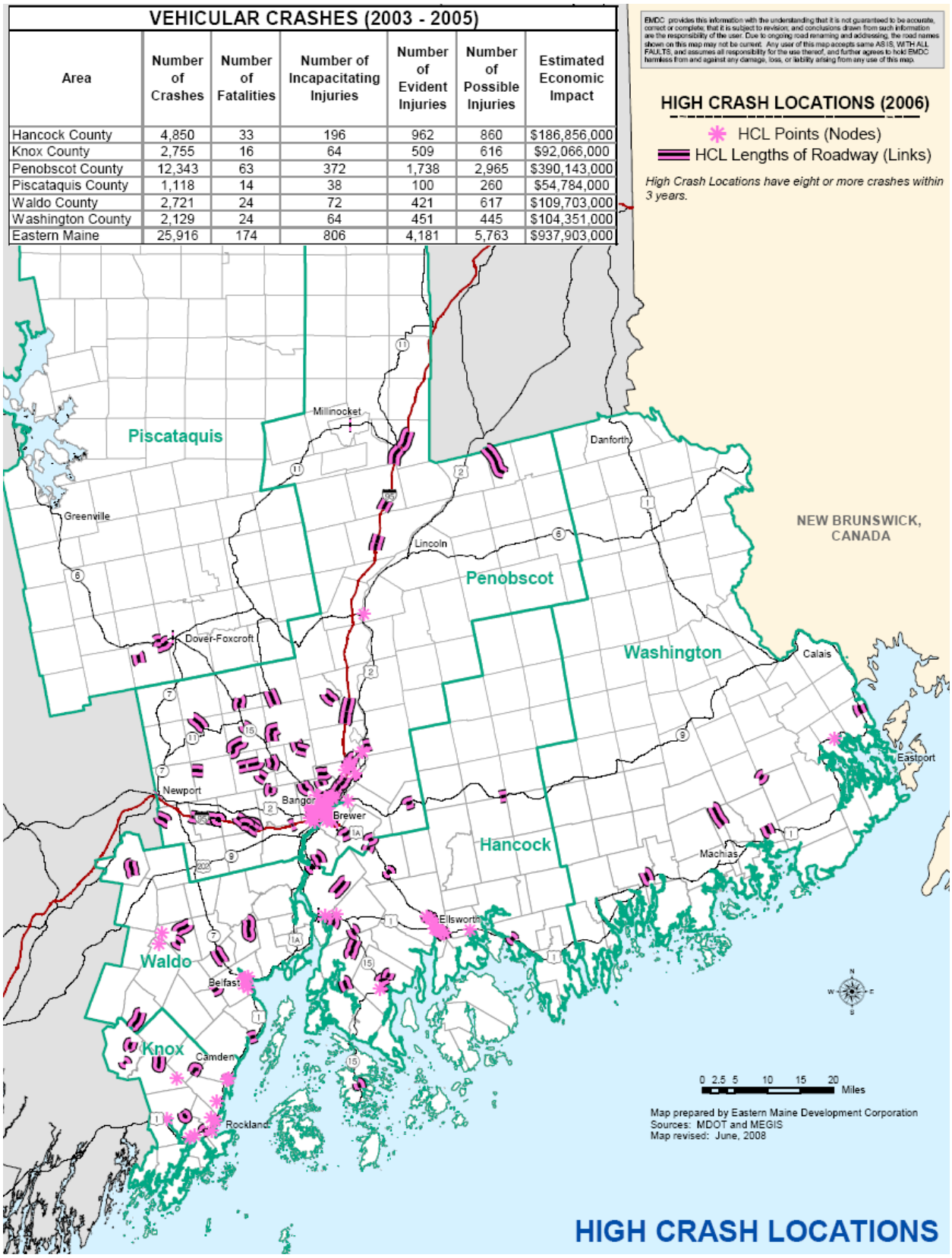
•Route 1A	Waldo/Hancock
•Route 1	Knox/Waldo / Washington / Aroostook
•Route 2	Somerset
•Route 190	Washington
•Route 201	Somerset

Minor Arterials

•Route 1-A	Penobscot / Washington
•Route 1	Washington / Aroostook
•Route 2-A	Aroostook
•Route 2	Penobscot
•Route 3	Hancock
•Route 6	Piscataquis / Penobscot
•Route 7	Piscataquis / Penobscot
•Route 15	Hancock / Penobscot / Piscataquis
•Route 46	Penobscot
•Route 161	Aroostook

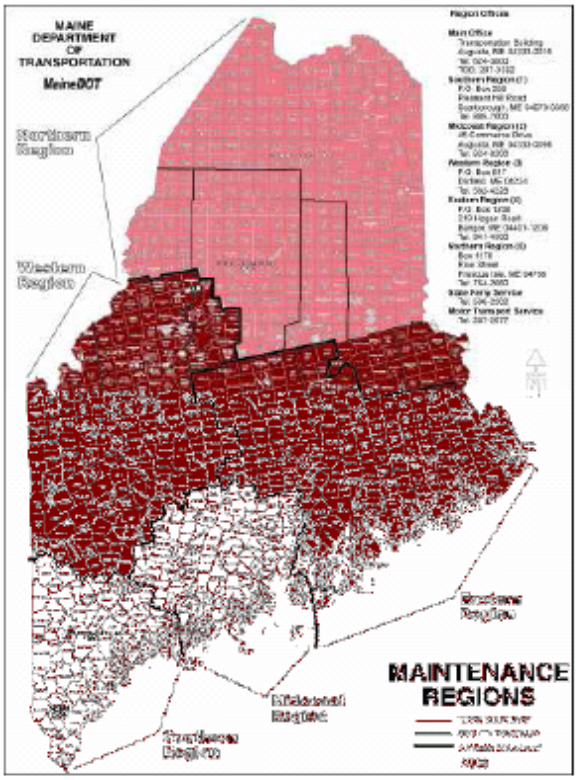


VEHICULAR CRASHES (2003 - 2005)						
Area	Number of Crashes	Number of Fatalities	Number of Incapacitating Injuries	Number of Evident Injuries	Number of Possible Injuries	Estimated Economic Impact
Hancock County	4,850	33	196	962	860	$186,856,000
Knox County	2,755	16	64	509	616	$92,066,000
Penobscot County	12,343	63	372	1,738	2,965	$390,143,000
Piscataquis County	1,118	14	38	100	260	$54,784,000
Waldo County	2,721	24	72	421	617	$109,703,000
Washington County	2,129	24	64	451	445	$104,351,000
Eastern Maine	25,916	174	806	4,181	5,763	$937,903,000



Posted Roads

A Story of Two Maines



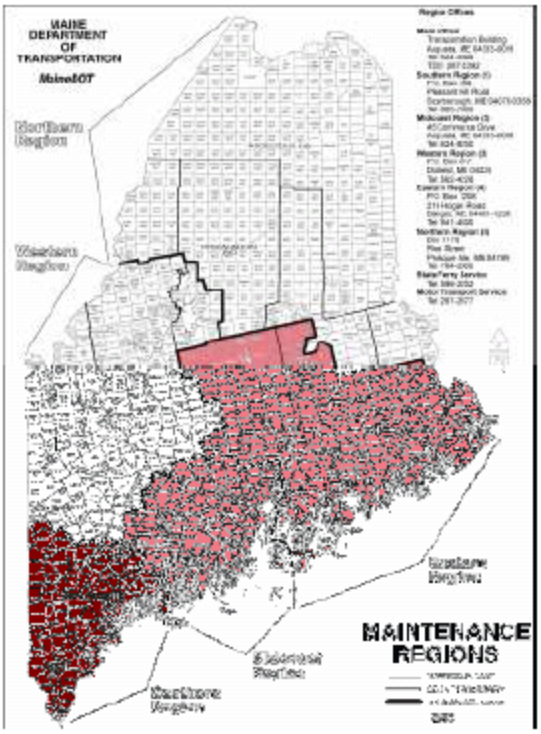
REGION	MINOR COLLECTOR	MAJOR COLLECTOR
SOUTHERN	6 Miles	
MID COAST	37 Miles	20 Miles
WESTERN	293 Miles	428 Miles
EASTERN	483 Miles	232 Miles
NORTHERN	283 Miles	56 Miles
TOTALS	1,102 Miles	736 Miles
SYSTEM TOTAL	1,842 Miles	3,739 Miles
% POSTED	60%	20%

0 - 299 Miles
300 – 599 Miles
Over 600 Miles

- According to the Maine department of transportation, many miles of the state's Posted Major and Minor Collector roads are located in Eastern Maine's six county region.
- Among the state's "Top 25 Congestion Hotspots" are Over 20.4 miles of roads in Maine DOT's Eastern Maine Maintenance region and 40.1 miles of roads in the Midcoast Maintenance region.

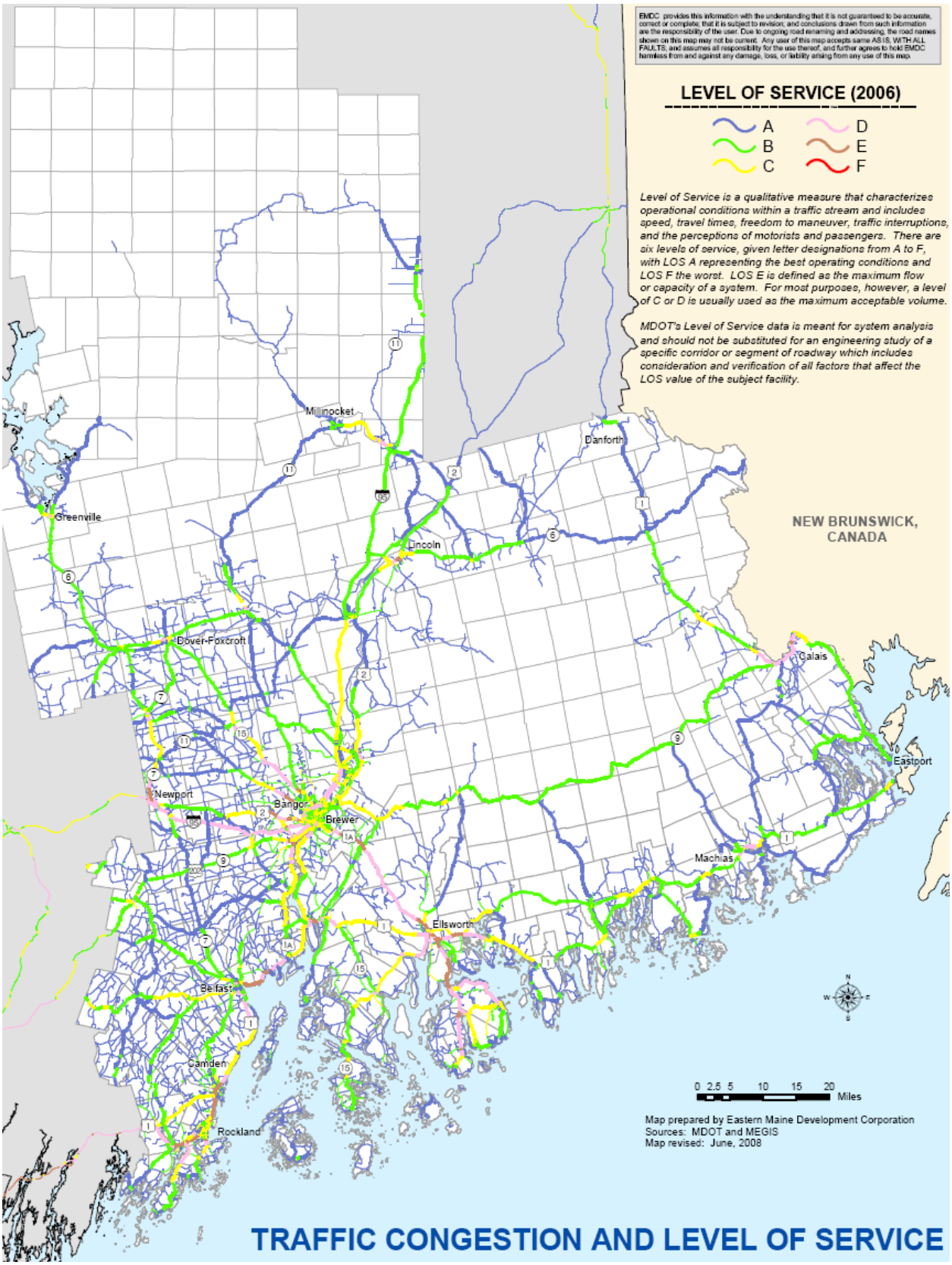
Top 25 Congestion Hotspots

Another Two Maines Story



Region	Length
Total Eastern	20.4 Miles
Total Midcoast	40.1 Miles
Total Southern	64.9 Miles
Total Western	5.1 Miles
Total Northern	0 Miles

0-19 Miles
20-49 Miles
Over 50 Miles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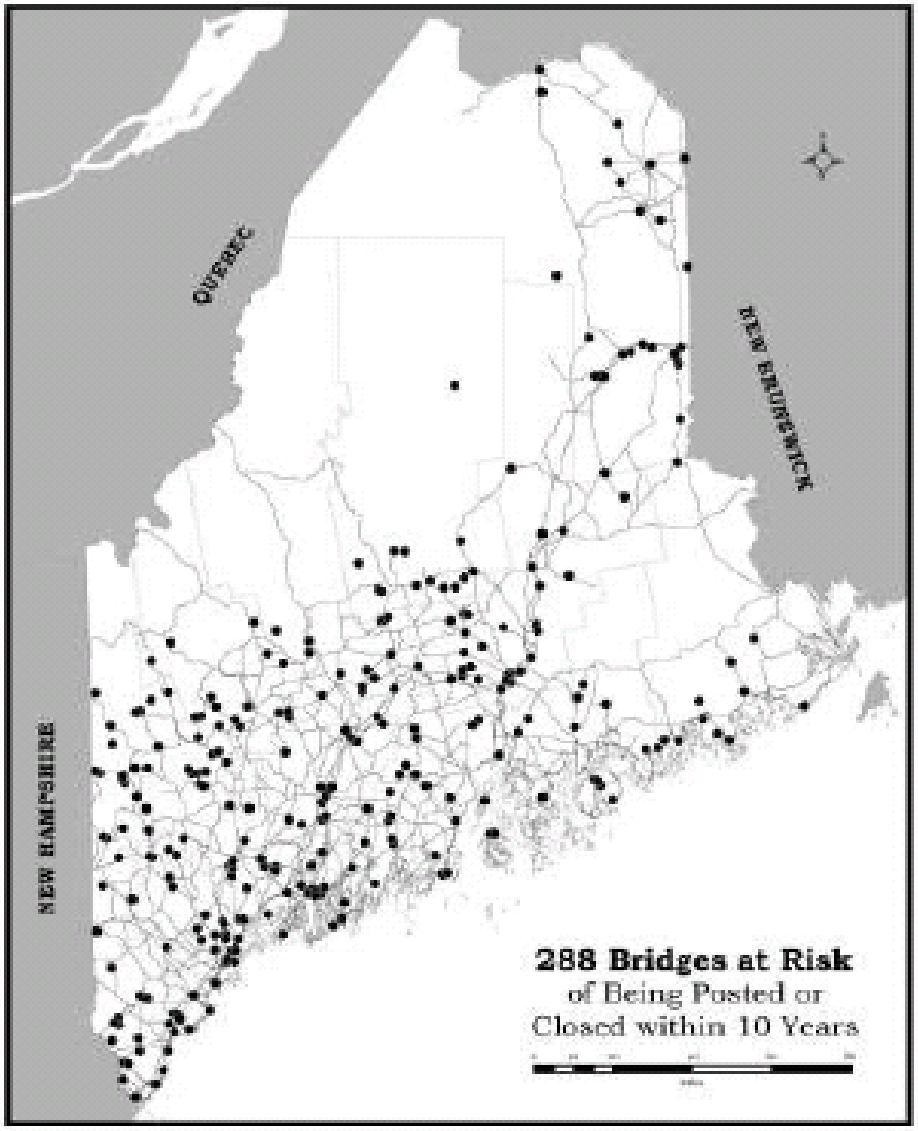
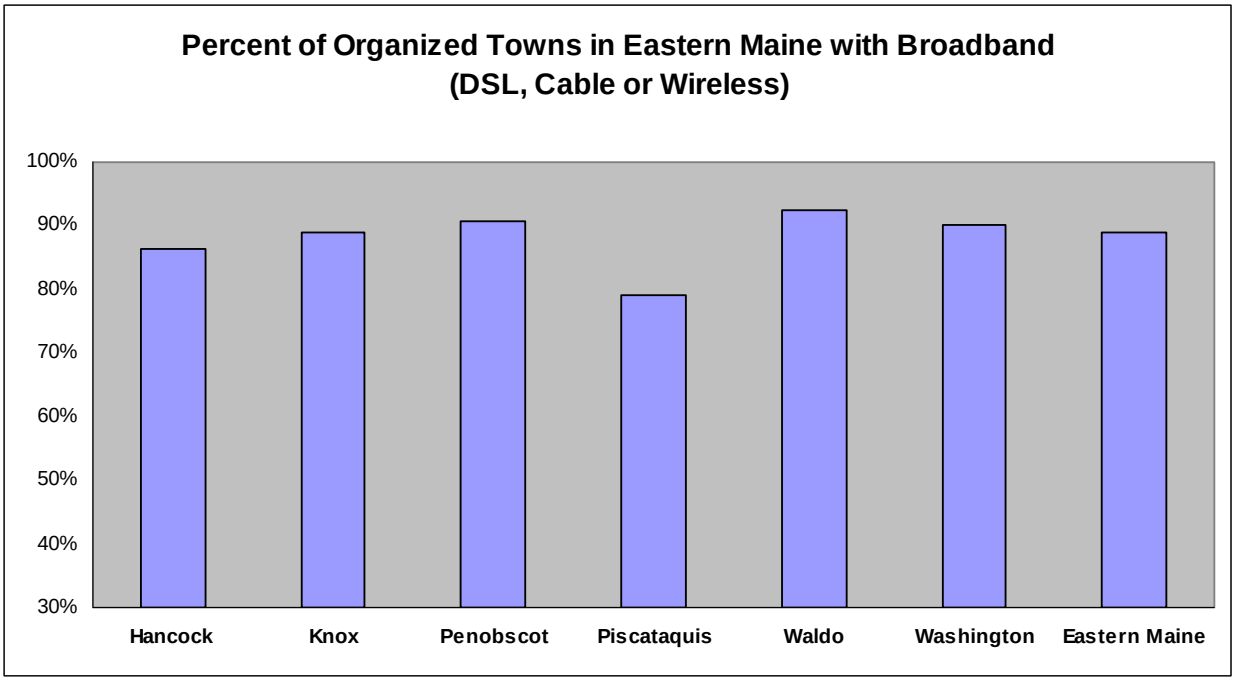
LEVEL OF SERVICE (2006)
A
B
C
D
E
F
Level of Service is a qualitative measure that characterizes operational conditions within a traffic stream and includes speed, travel times, freedom to maneuver, traffic interruptions, and the perceptions of motorists and passengers. There are six levels of service, given letter designations from A to F, with LOS A representing the best operating conditions and LOS F the worst. LOS E is defined as the maximum flow or capacity of a system. For most purposes, however, a level of C or D is usually used as the maximum acceptable volume.
MDOT's Level of Service data is meant for system analysis and should not be substituted for an engineering study of a specific corridor or segment of roadway which includes consideration and verification of all factors that affect the LOS value of the subject facility.
NEW BRUNSWICK, CANADA
Millinocket
Danforth
Greenville
Lincoln
Dover-Foxcroft
Calais
Eastport
Newport
Bangor
Brewer
Machias
Ellsworth
Belfast
Camden
Rockland
0 2.5 5 10 15 20 Miles
Map prepared by Eastern Maine Development Corporation
Sources: MDOT and MEGIS
Map revised: June, 2008
TRAFFIC CONGESTION AND LEVEL OF SERVICE

- A number of the 343 “Bridges at Risk” of being Posted or Closed within 10 years are located throughout our six county region. This shows an older map, locating 288 of the 343 structurally deficient bridges.

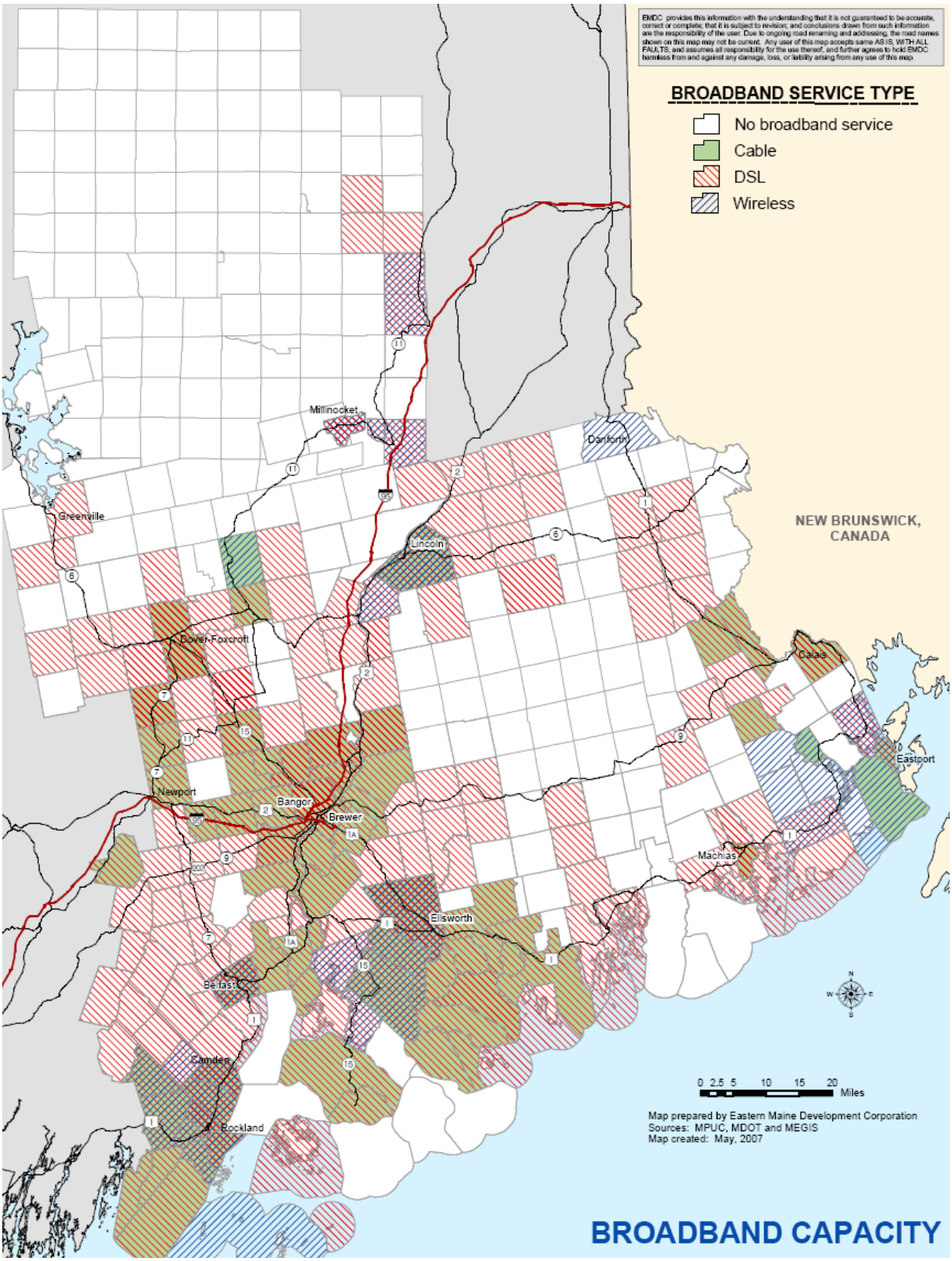


Broadband Capacity

- According to the Maine Public Utilities Commission, over 89% of Towns in Eastern Maine's six counties have Broadband (DSL, Cable or Wireless) access.
- The highest Broadband penetration is 92% in Waldo County; the lowest penetration is 79% in Piscataquis County.
- Notwithstanding these seemingly high numbers, in many communities broadband access only reaches town centers and more densely populated areas. Wide-spread broadband accessibility remains an issue for many communities which currently have limited access.



Source: Maine Public Utilities Commission, 2005. * Not all unorganized territories are included.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BROADBAND SERVICE TYPE
No broadband service
Cable
DSL
Wireless
NEW BRUNSWICK, CANADA
Millinocket
Danforth
Greenville
Lincoln
Dover-Foxcroft
Calais
Eastport
Newport
Bangor
Brewer
Machias
Ellsworth
Belfast
Camden
Rockland
0 2.5 5 10 15 20
Miles
Map prepared by Eastern Maine Development Corporation
Sources: MPUC, MDOT and MEGIS
Map created: May, 2007
BROADBAND CAPACITY

Infrastructure Issues:

<u>Infrastructure Priority Issues</u>

- Current telecommunications infrastructure (broadband capacity – backbone – redundancy, connectivity and cellular service) is insufficient.
- The region's road infrastructure is not being maintained in a manner that is supportive of economic development goals, largely due to limited resources.
- High costs of energy transmission and distribution are adversely impacting business.
- Interstate weight limit presents economic, road maintenance, and safety concerns.
- Current carrying capacity of the road network is stressed along the coast during the tourist season and additional infrastructure is needed to ensure continued visitation.
- The region has inefficient intermodal transportation infrastructure.
- New border crossing at Washington County should provide for proper way to costal U.S. and Calais.

Additional Infrastructure Issues Articulated during the CEDS Process:

- Mack Point and Sears Island present great opportunities for the region to better utilize its port resource.
- The Penobscot River offers great potential as a transportation resource that is underutilized.
- There is a relative high cost of air travel into and out of Bangor International Airport (BIA).
- MDOT funding is key to downtown revitalization efforts. With limited transportation resources alternate funds need to be sought to continue improving downtowns.
- Many communities face imminent problems with aging water and wastewater facilities.
- Lack of passenger and freight rail limit transportation options and adversely impact economic development.
- Need for commercial air service in Washington County

Infrastructure Goals and Projects:

GOAL:
Encourage and support efforts to improve Eastern Maine's transportation infrastructure.

GOAL:
Encourage and support efforts to improve Eastern Maine's communications infrastructure.

GOAL:
Encourage and support efforts to improve Eastern Maine's business and industrial infrastructure.

GOAL:
Encourage and support efforts to improve Eastern Maine's marine facilities and infrastructure.

GOAL:
Encourage and support efforts to improve energy access, cost effectiveness and increase energy options throughout Eastern Maine.

BACTS Transportation Infrastructure Projects:

- Stillwater Avenue Bridge, Old Town -- Replace and widen the bridge over the Stillwater River on Stillwater Avenue in Old Town.

- Route 1A, Hampden -- Complete the reconstruct of Route 1A in Hampden from Hillside Drive to Western Ave. (Rte. 9).

- I-95 Corridor -- Fund the recommendations in the currently draft Maine DOT I-95 Corridor Study. This includes lengthening on and off ramps at various interchanges, improving ramp/arterial intersections and other miscellaneous improvements.

- Wilson Street Widening, Brewer -- Widen and improve Wilson Street from Greenpoint Road to Parkway South.

- Traffic Signal Improvements -- Implement recommendations from the ongoing study of regional traffic signals & develop a traffic signal operations center.

- I-95 Exit 193 Interchange Modifications, Orono -- Improve Configuration of the interchange as recommended in the Old Town/Orono Stillwater Avenue Corridor Study.

- Stillwater Ave. Widening, Old Town -- Widen and improve Stillwater Ave. from the Orono town line to Center Street.

- Bangor International Airport Access -- Study and construct new access to the Bangor International Airport from the I-95 Exit 183 Hammond Street to a new Intermodal Facility.

EASTERN MAINE DEVELOPMENT CORPORATION
BOARD OF DIRECTORS – 2011

2011 (1 YEAR APPOINTED POSITIONS)

James Donnelly
Machias Savings Bank
P.O. Box 557
Ellsworth, ME 04605
Phone: 667-3378
Representative Non-Penobscot Member-At-Large (Hancock County)
Banker

(E) Susan Hammond ***(Board Appointment)***
Four Directions Development Corporation
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Orono, ME 04473
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Member 10 years plus
Representative Native American Community (Penobscot Nation)

Stephen Walton
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Member 2 years
Representative Hancock County Planning Commission

Robert Peabody, Jr.
Town Manager, Town of Rockport
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townmanager@town.rockport.me.us
Representative Mid-Coast Regional Planning Commission
Knox County

Betsy Fitzgerald
County Manager, Washington County
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manager@washingtoncountymaine.com
Member Less than 1 year
Representative Washington County Council of Governments

(E) = Executive Committee

2011 (1 YEAR APPOINTED POSITIONS) continued

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Representative Growth Center
Penobscot County

Mark Woodward
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Bangor, ME 04401
Phone: 942-6637 amwoodward@gmail.com
Representative Penobscot Member-At-Large

(E) = Executive Committee

2011 (3 YEAR ELECTED POSITIONS)

(E) Eugene Conlogue
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Member 8 years
Representative Penobscot County

Barbara Drisko
Town of Columbia Falls
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Columbia Falls, ME 04623
Phone: 483-2072, Cell: 460-1743
barbarod@mgemaine.com
Member 10 plus years
Representative Selectman - Washington County

(E) Ralph Harvey ***(Past Chair)***
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Phone: 548-6204, Cell: 239-7147
Rajoy1@myfairpoint.net
Member over 10 years
Retired, Town of Searsport
Representative Waldo County

Dennis S. Damon
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dsdamon@panax.com
Member 3years
Representative Hancock County

Daniel Tremble
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dtremble@penobscot-county.net
Representative Penobscot County
New Member
For One Year- finishing up Joyce Hedlund's Term

(E) = Executive Committee

2012 (3 YEAR ELECTED POSITIONS)

Roger Moody
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Camden, ME 04843-4401
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Knox County Commissioner
Member 2 years
Representative Knox County

(E) John Moore
Bangor Savings Bank
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Phone: 262-4936, john.moore@bangor.com
Representative Penobscot County

(E) Percy L. Brown, Jr.
97 Sunset Road
Deer Isle, ME 04627
Phone: 348-6019
Hancock County Commissioner
Representative Hancock County

Representative James Gillway
PO Box 499
Searsport, ME 04974
Phone: 548-6372
Representative Waldo County

(E) = Executive Committee

2013 (3 YEAR ELECTED POSITIONS)

(E) Richard Crossman ***(1st Vice Chair)***
Allen Insurance and Financial ***(Board Appointment)***
P.O. Box 578
Camden, ME 04843-0578
Phone: 236-4311, Cell: 542-4610
rcrossman@allaninsuranceandfinancial.com
Member 16 years
Representative Knox County

(E) Michael Crowley ***(Secretary/Treasurer)***
Eastern Maine Charities
P.O. Box 931
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Phone: 973-5055
Representative Penobscot County

Tom Davis
Penobscot County Commissioner
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Representative Penobscot County

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Representative Piscataquis County

(E) Tom Lizotte ***(2nd Vice Chair)***
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Representative Piscataquis County

(E) = Executive Committee

Honorary Members

Congressman Michael Michaud
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Phone: 942-6935

Guy Chapman ***(Chair, Loan Review Committee)***
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Rhonda	Amsden	Program Manager
Michael	Aube	President & CEO
Kitty	Barbee	Project Manager
Jeffrey	Barclay	Database Manager
Jane	Black	Seasoned Worker Navigator
Jennifer	Brooks	Director of Business Development
Ashley	Bubar	Junior Accountant
Judy	Carreras	Deputy Director of Operations, Workforce Development Program
Glendon	Carter	Loan Officer
David	Chenowith	Traffic Counter
Tyler	Collins	GIS Specialist
Annie	Collins	Human Resources Coordinator/Events Coordinator
Don	Cooper	Senior Transportation Planner
Celeste	Cota	Grant Manager
Matthew	Currier	Staff Accountant
Edward	Dahl	Regional Manager, Maine PTAC
Francesca	DeSanctis	Clerk of the Corporation
Jessica	Donahue	Marketing Coordinator
Erin	Doucette	Accounting Assistant
Jon	Farley	Director of Economic and Workforce Development
Thomas	Fernands	IT Manager
Patrick	Frazier	Executive Assistant
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Melissa	Gerety	Director of Communications
Amanda	Grant	Career Advisor
Ernest	Gray	Regional Manager, Maine PTAC
Kevin	Gregory	Peer Support Specialist
Jaci	Hancock	Program Manager
Marie	Hayden	Business & Community Development Specialist
Seamus	Higgins	Career Advisor
Christopher	Huh	Program Manager

Roxanne	Jobe	Director of Business & Community Services
Robert	Kenerson	Director of BACTS
Tracy	Knights	Business & Workforce Development Specialist
Sarah	Krause	Career Advisor
Kimberly	Landry	Career Advisor
Gwen	LaPointe	Disability Program Navigator
Matthew	LeClair	Staff Accountant
Wendy	Lord	Career Advisor
Dorathy	Martel	Project Manager
Frances	McIntyre	Database Manager
George	McKay	Senior Career Advisor
Anne	McKechnie	Youth Program Manager
Kimberly	Moore	Business & Workforce Development Specialist
Theresa	Mudgett	Senior Career Advisor
John	Noll	Senior Planner
Karen	Patterson	Administrative Assistant
Elizabeth	Perry	Senior Accountant
Elizabeth	Rambo	Career Advisor
Shelly	Reilly	Workforce Development Specialist
Dianne	Rice	Transportation Specialist
Vicki	Rusbult	Program Development Officer
Joanna	Russell	Director of Tri-County Workforce Development Board
Joyce	Santerre	Career Advisor
Sheena	Scales	Project Assistant
Denise	Smith	Career Advisor
Janet	Smith	Administrative Assistant
Robin	Thibodeau	Career Advisor
Janet	Toth	Loan Officer
Kerrie	Tripp	Director of Greater Bangor CVB
Lisa	Weaver	Administrative Assistant
Melody	Weeks	Program Manager
Jeffrey	Wright	Workforce Development Specialist

**Staff Listing updated 8/4/2011*