



THE CENTER for
INTERNATIONAL
UNDERSTANDING
The University of North Carolina

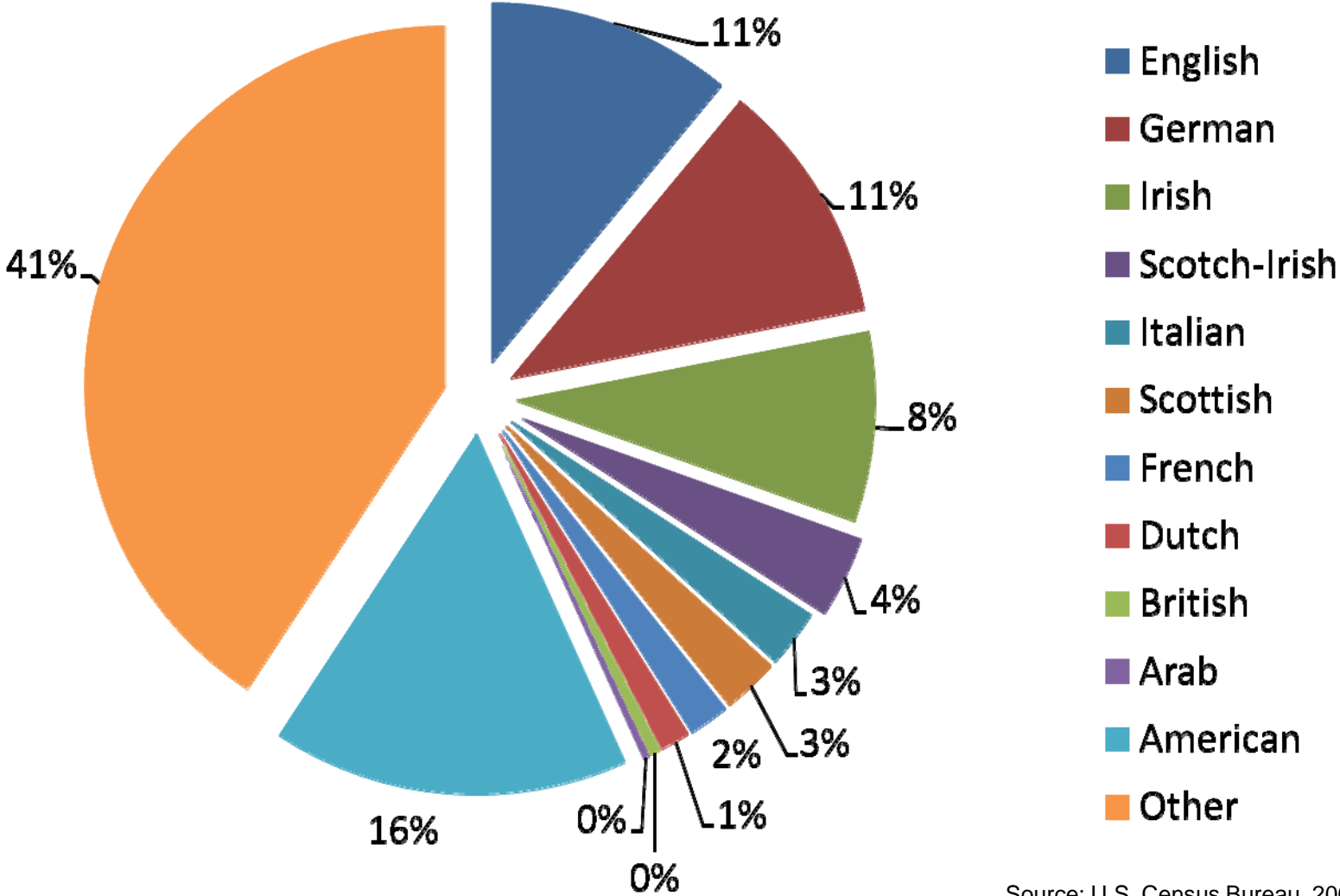
Engaging North Carolina to **Engage the World**



March 30, 2009

A project of the Center for International Understanding and
The William and Flora Hewlett Foundation

North Carolina Ancestry



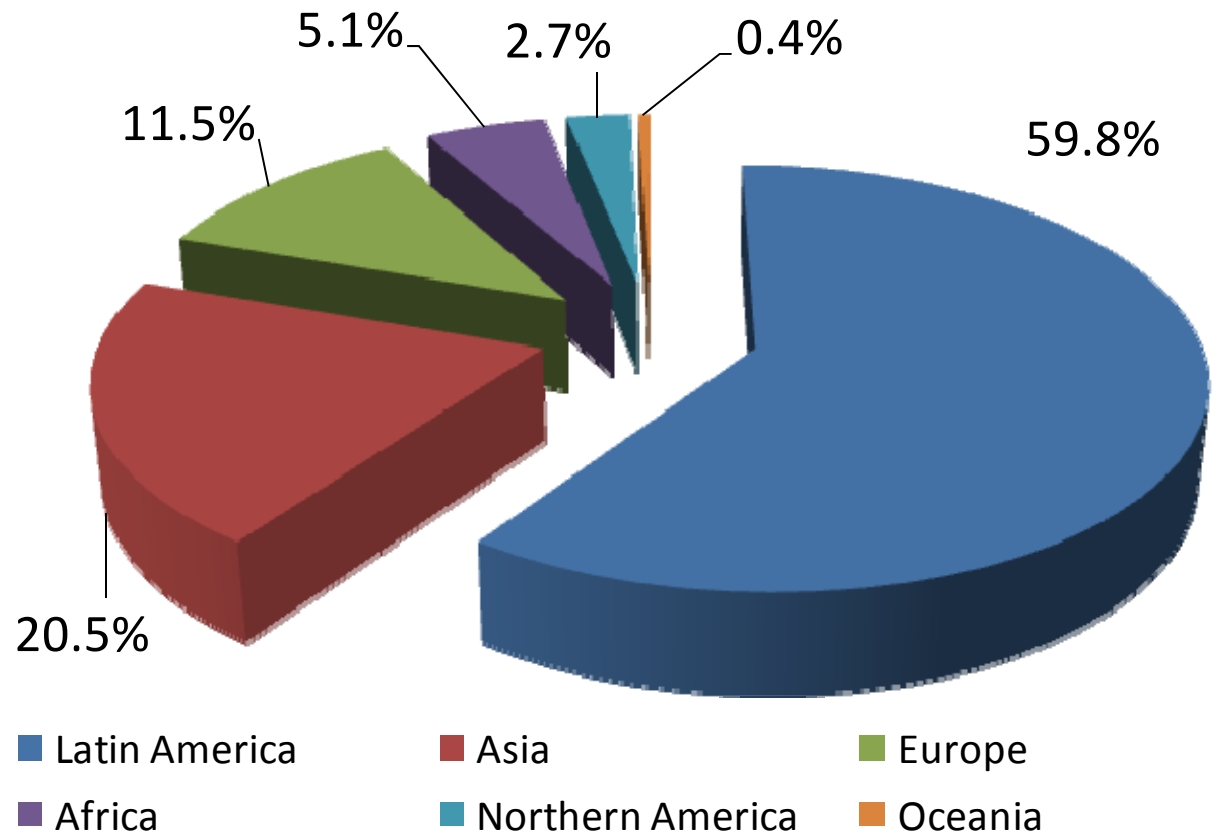
Source: U.S. Census Bureau, 2000 Census

N.C. Population 2007

▶ 7% of N.C. residents (629,947 people) are foreign born

▶ 814,645 North Carolinians (9.7%) speak a language other than English at home

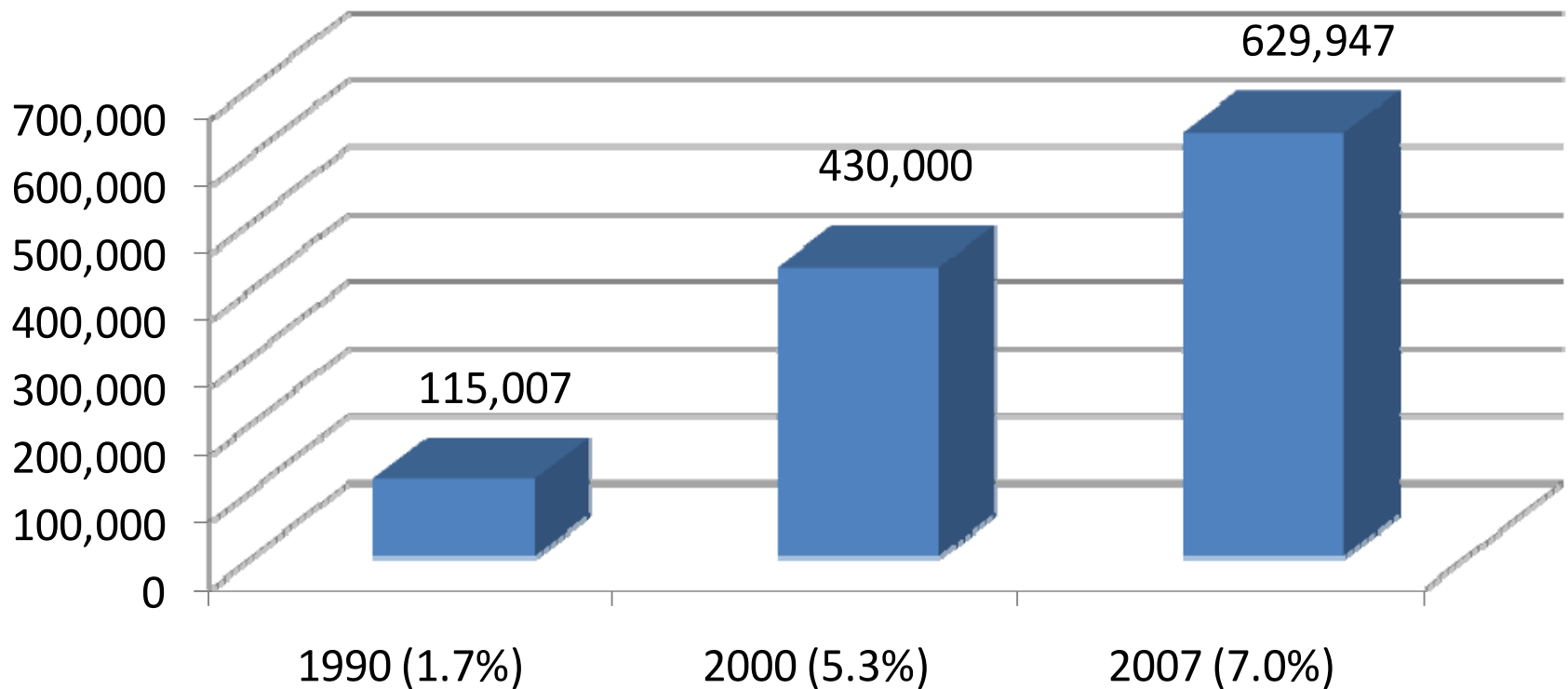
Region of Origin for Foreign-Born Population



Source: Migration Policy Institute (MPI)—Data Hub

N.C. Changing Demographics

Total Foreign-Born Population

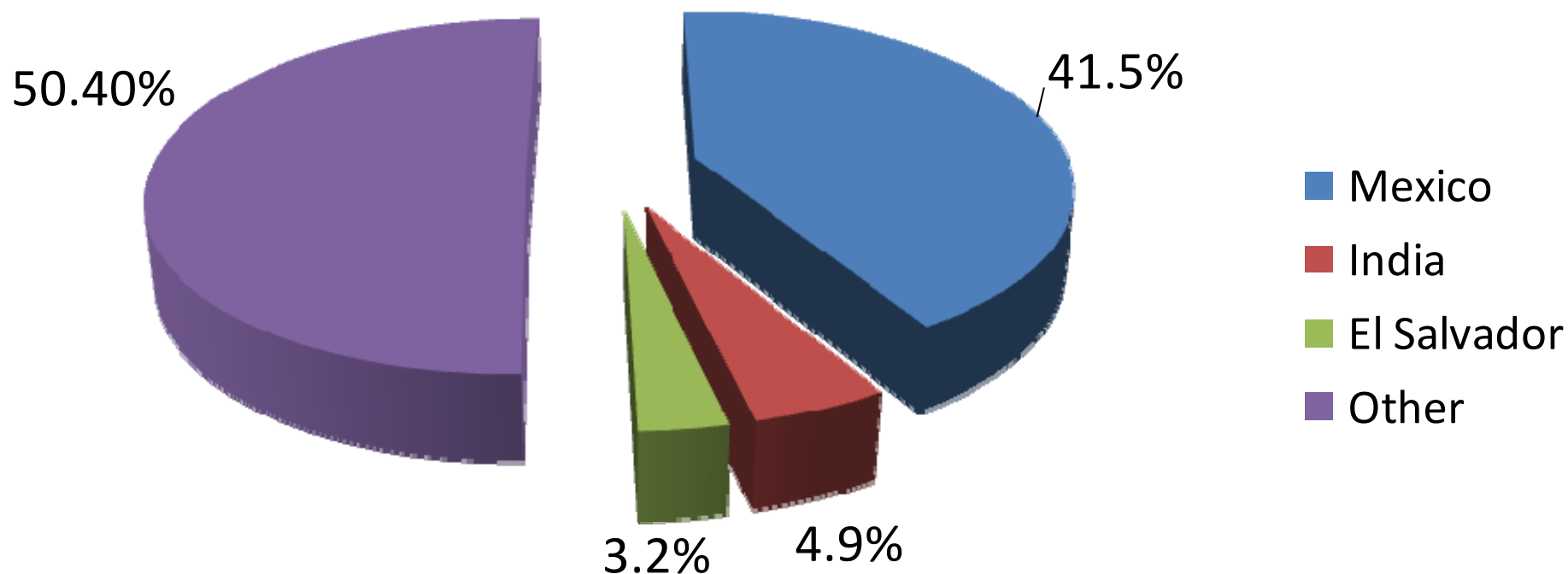


*Percentage of total population

Source: Migration Policy Institute (MPI)—Data Hub

Countries of Origin

Leading Countries of Origin for Foreign-Born Population (N.C.)



*Leading Countries of Origin of Foreign-Born Population in the U.S. are Mexico (30.7%), China (5.1%), and the Philippines (4.4%)

Source: Migration Policy Institute (MPI)—Data Hub

K-12 Student Population

More than 260 different languages are spoken in the homes of N.C. public school students

Some you know...

- Spanish
- French
- German
- Mandarin

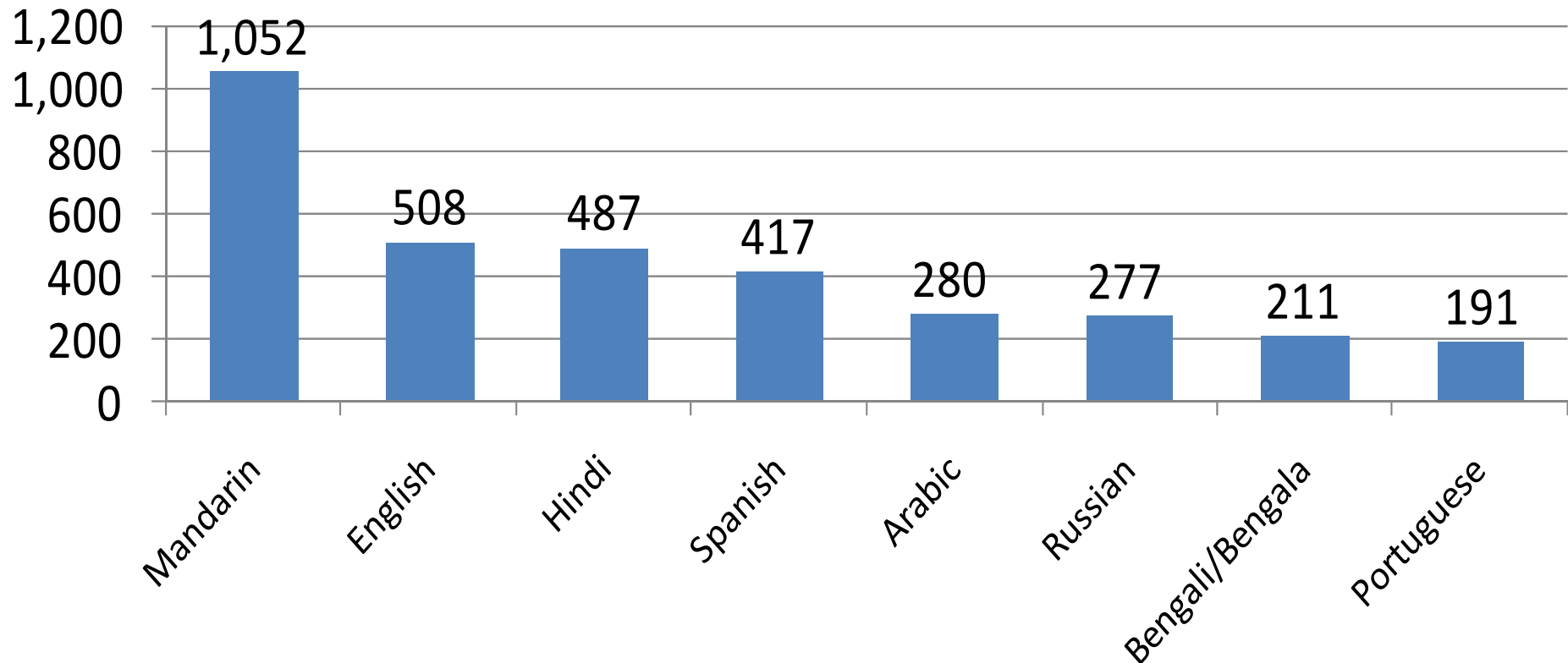
And some you may not...

- Farsi
- Gujarati
- Shona
- Tagalog

Source: N.C. Department of Public Instruction, 2007 home language survey

Most Spoken World Languages

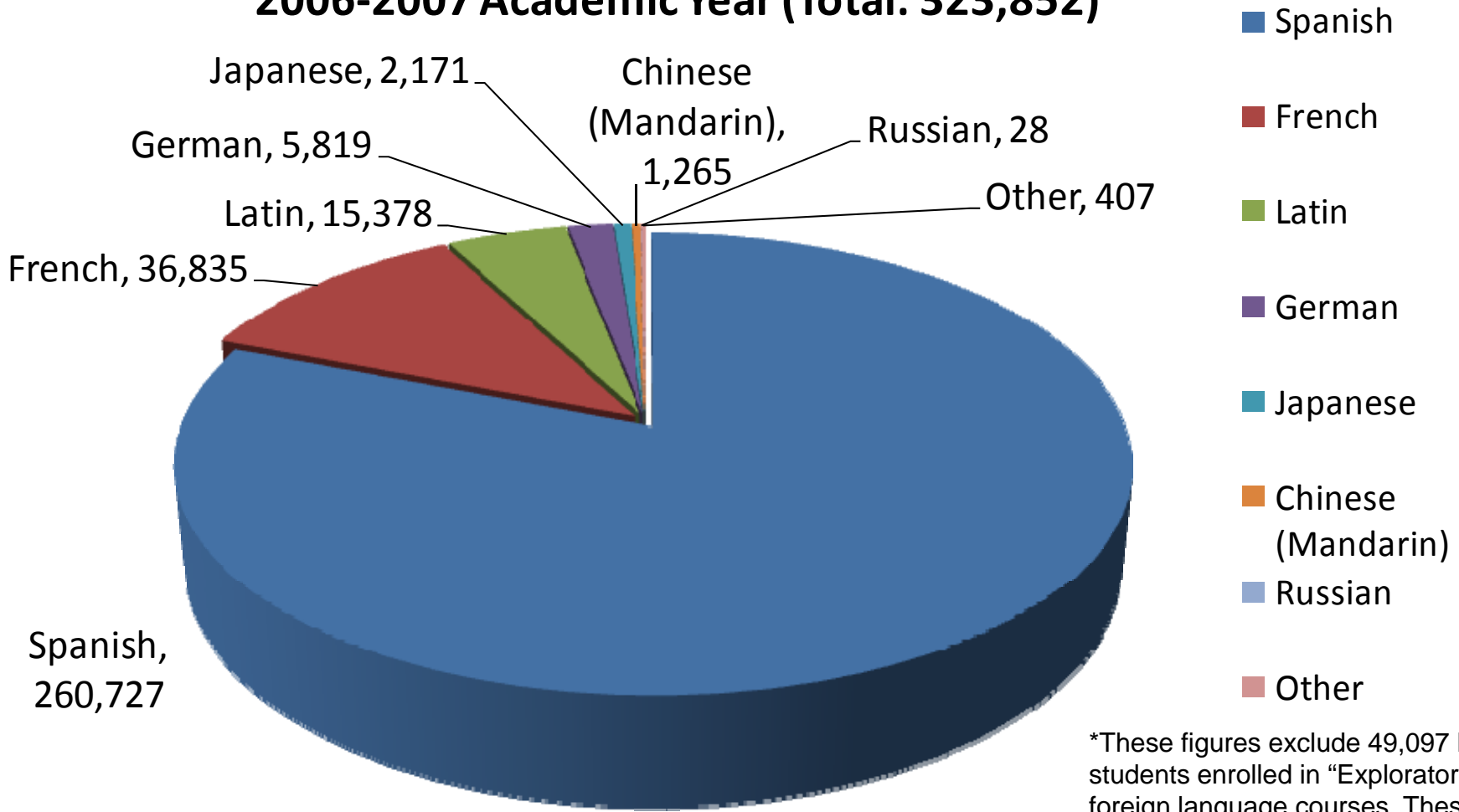
Number of Language Speakers (in millions)



Source: Nations Online, Most Common World Languages, Jan 2009

K-12 Foreign Language Enrollment

2006-2007 Academic Year (Total: 323,852)

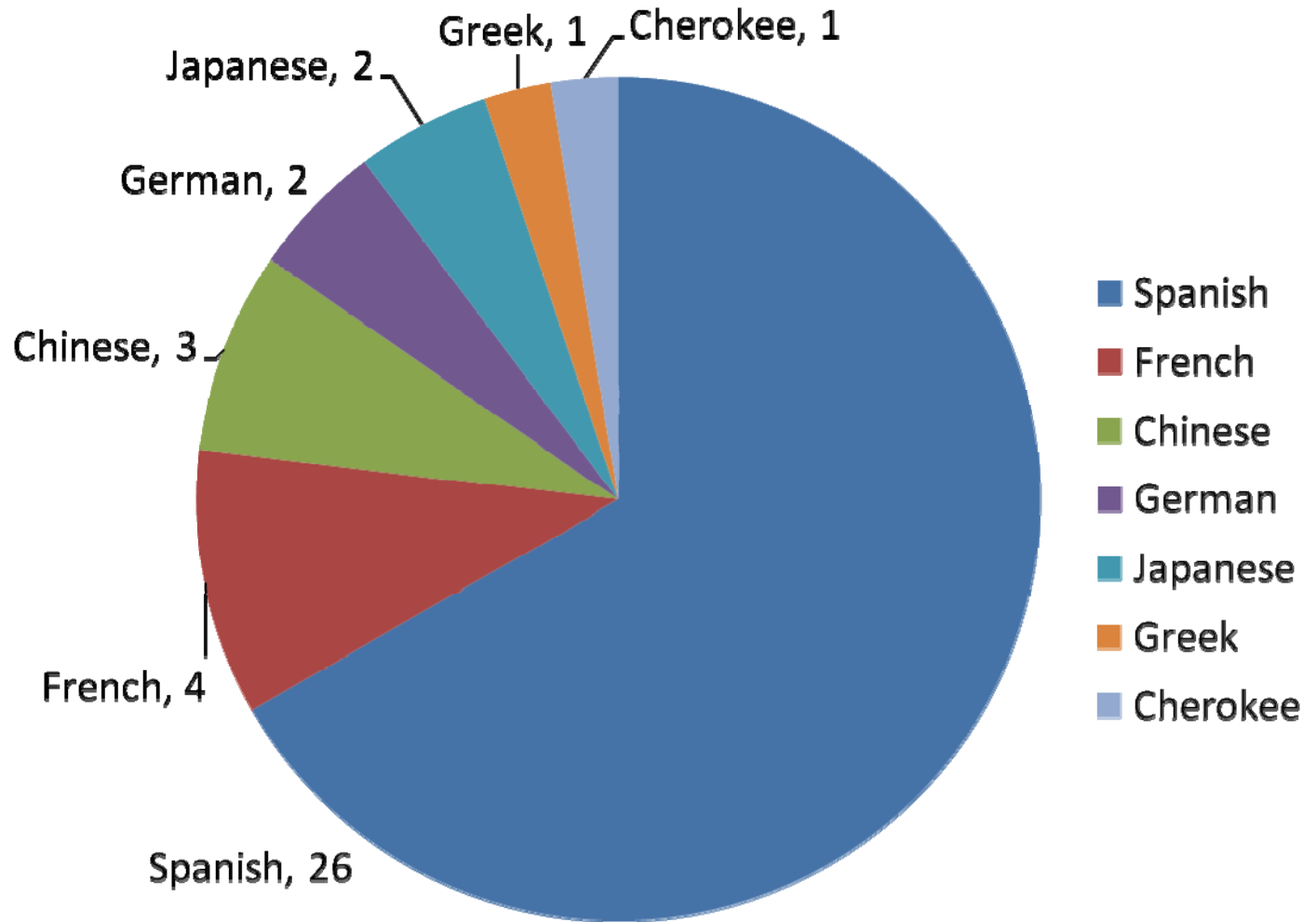


Source: N.C. Department of Public Instruction, K-12 Foreign Language Enrollment data

K-12 Dual Language/Immersion Programs

28 out of 2,452 N.C. public schools (1.1%) have a dual language or immersion program

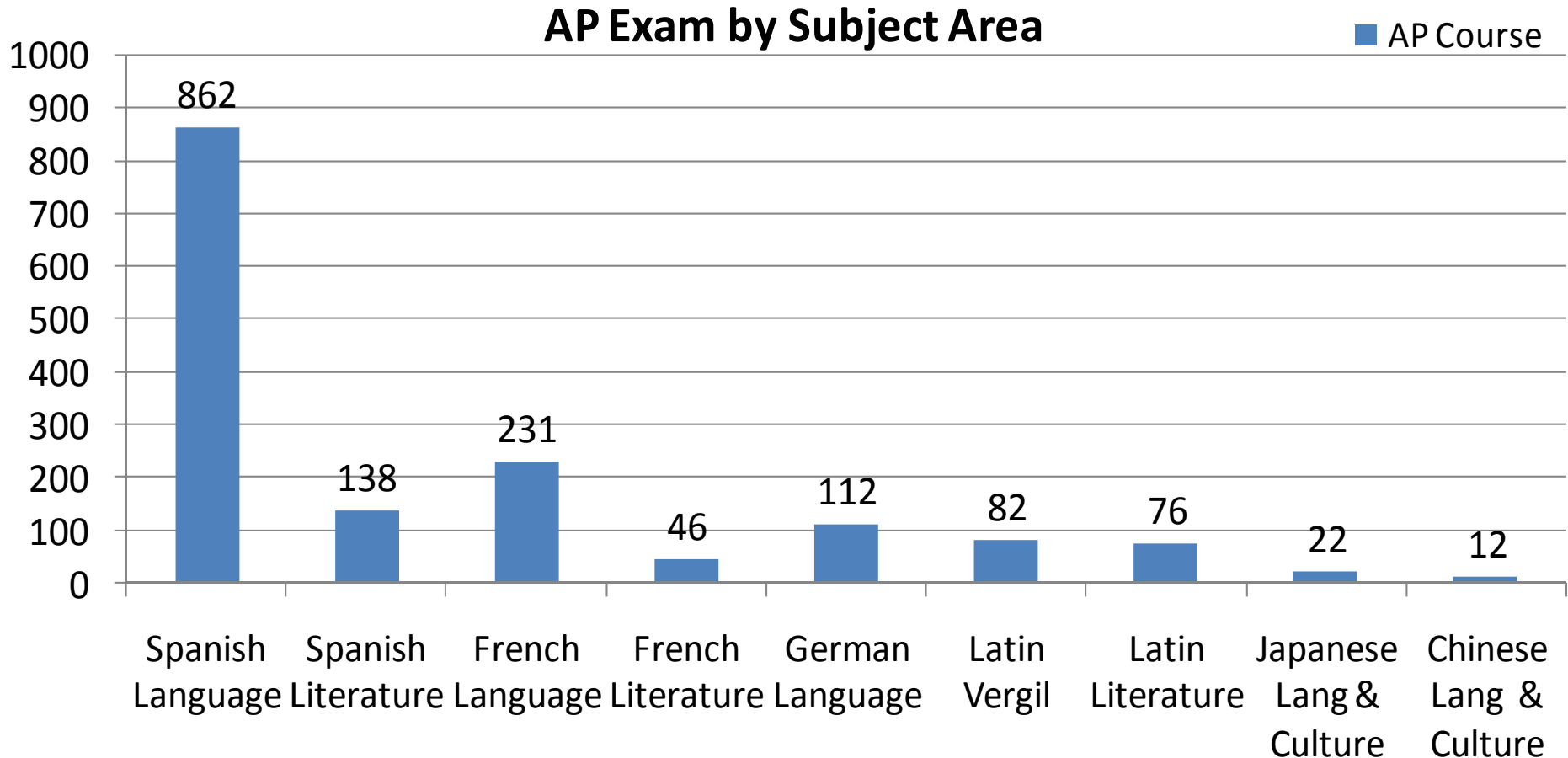
32.1% of these programs are located in either the Chapel Hill-Carrboro or Charlotte-Mecklenburg school districts.



Source: North Carolina Department of Public Instruction—Second Language Website; 2007-2008 Facts & Figures

AP Language Test Takers

1,581 N.C. students took AP foreign language tests in 2008



Source: N.C. Department of Public Instruction, Email Communication, Feb 2009

Community Colleges

In 2006-07, 30,108 workers from 771 existing, new or expanding N.C. companies participated in community college customized training and/or retraining programs

North Carolina community colleges currently have more than 30 Customized Training Program projects underway to fill the workforce needs of international companies doing business in North Carolina. These workforce efforts have prepared more than 4,000 North Carolinians for jobs with global companies

Source: North Carolina Community Colleges news release, via website. February 2009

Higher Education

10,064 International Students in NC (2006-2007)

- ▶ paid \$182.7 million in tuition and fees

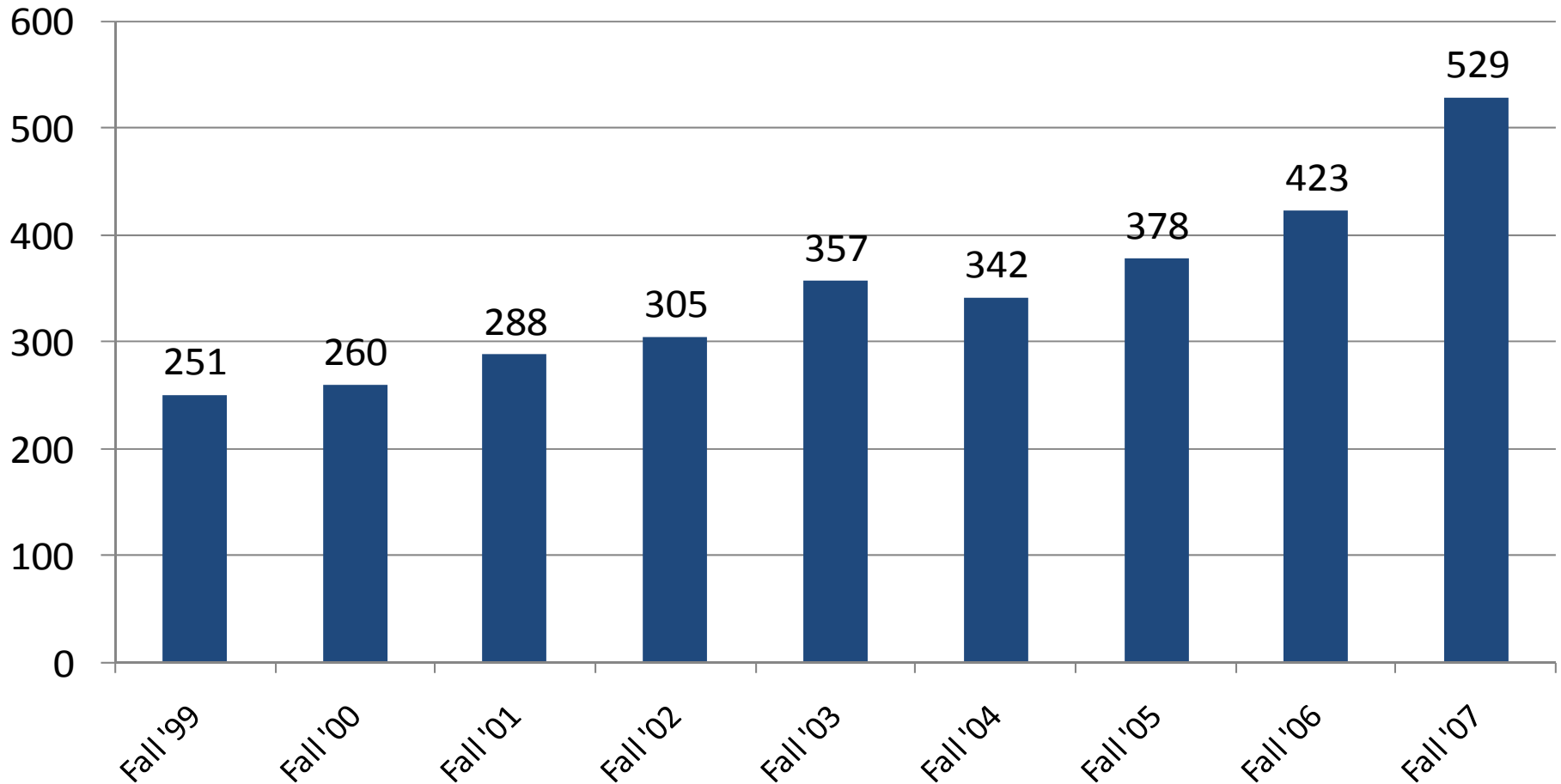
North Carolina Study-Abroad Students:

- ▶ 2004/2005: 7,501
- ▶ 2005/2006: 8,089
- ▶ 2006/2007: 8,454
- ▶ 12.7 % Increase over two years

Source: Open Doors 2008 Report on International Education Exchange

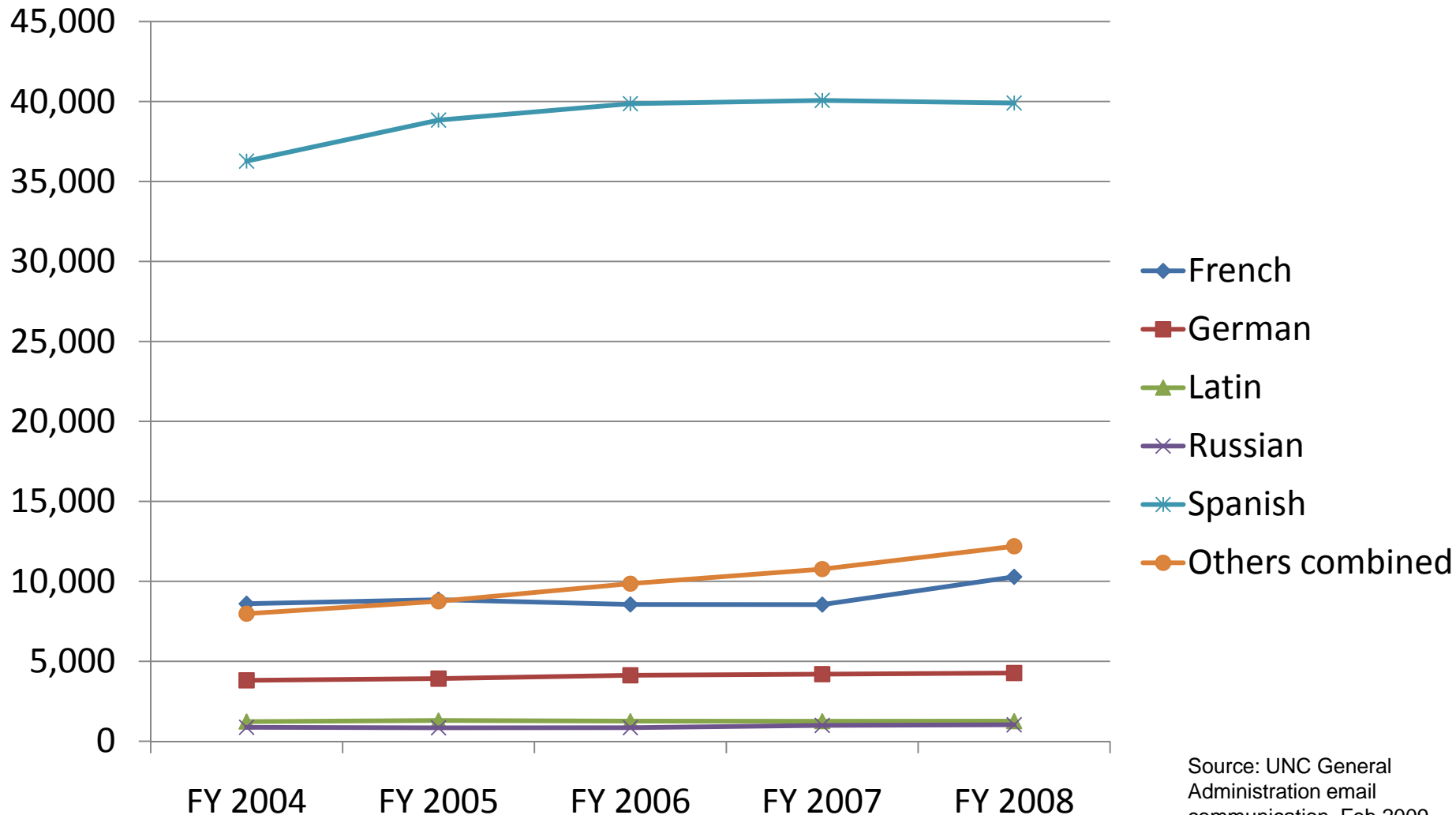
International Major Enrollment

UNC System: International Studies Majors



Source: Email communication, UNC General Administration, International Studies Major enrollment

UNC System Foreign Language Enrollment



Source: UNC General Administration email communication, Feb 2009

Higher Education Resources

- ▶ UNC-CH, Duke and NCSU host eight National Resource Centers, federally funded centers that train language, history, and culture specialists about different regions of the world
- ▶ Duke and UNC-CH each have a Center for International Business Education Research, a federally funded center focusing on the international economy

N.C. Int'l Activities, Partnerships

- ▶ 14 cities have sister city partnerships with 22 international cities
- ▶ Three International Visitor Councils—in Charlotte, Greensboro, and Raleigh—brought delegations from more than 70 countries to NC in 2008
- ▶ Five World Affairs Councils—Asheville, Charlotte, Greensboro, Raleigh and Greenville—provide opportunities for citizen-to-citizen diplomacy, promote understanding of world affairs, and awareness of international education, culture and business

Sources: Email communication, International Affairs Council, February 2009; Communication from Sister Cities International, 2009

N.C. Int'l Activities, Partnerships

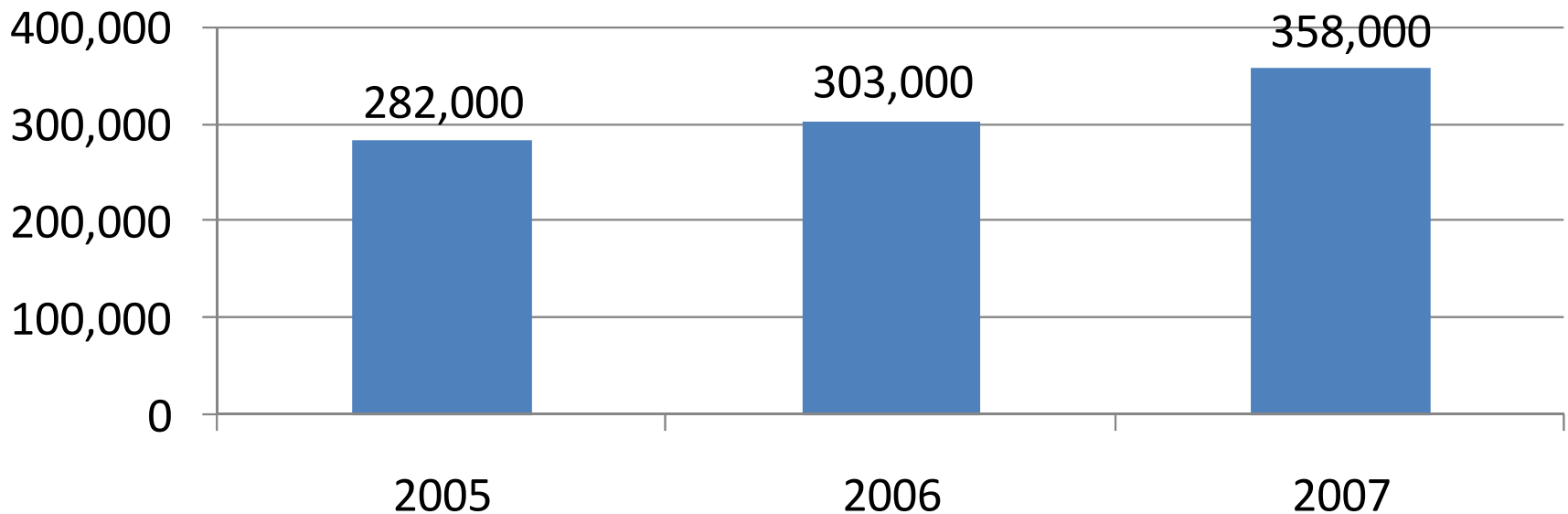
- ▶ North Carolina-Moldova State Partnership Program: Led by the N.C. National Guard, this military-civilian relationship fosters government reform, business development, and health and humanitarian efforts
- ▶ Folkmoot USA, an international festival in western N.C., has a yearly economic impact in the region exceeding \$4 million, generates over \$350,000 in federal, state, and local taxes, and creates the equivalent of 42 permanent jobs

Sources: WCU Institute for Tourism Research, 2001; Email Communication, North Carolina National Guard, February 2009

Tourism: International Visitors to NC

358,000 international visitors came to North Carolina in 2007, contributing \$607 million to the state's economy

Total International Visitors to NC



*Due to small sample size, estimates are based on a 3-year rolling average.

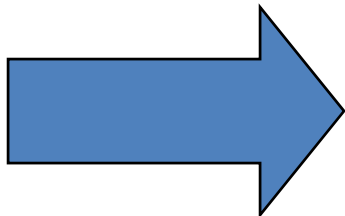
Source: Email communication, N.C. Department of Commerce's Division of Tourism, Film and Sports Development

Business

\$

Exports

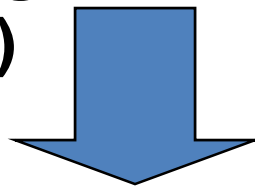
(Selling our goods)



\$

Direct Foreign Investment

(Out-sourcing their jobs or meeting new market demands)

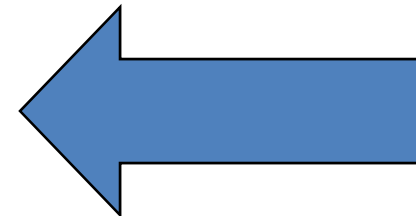


Jobs

\$

Tourism

(Coming here and leaving money)



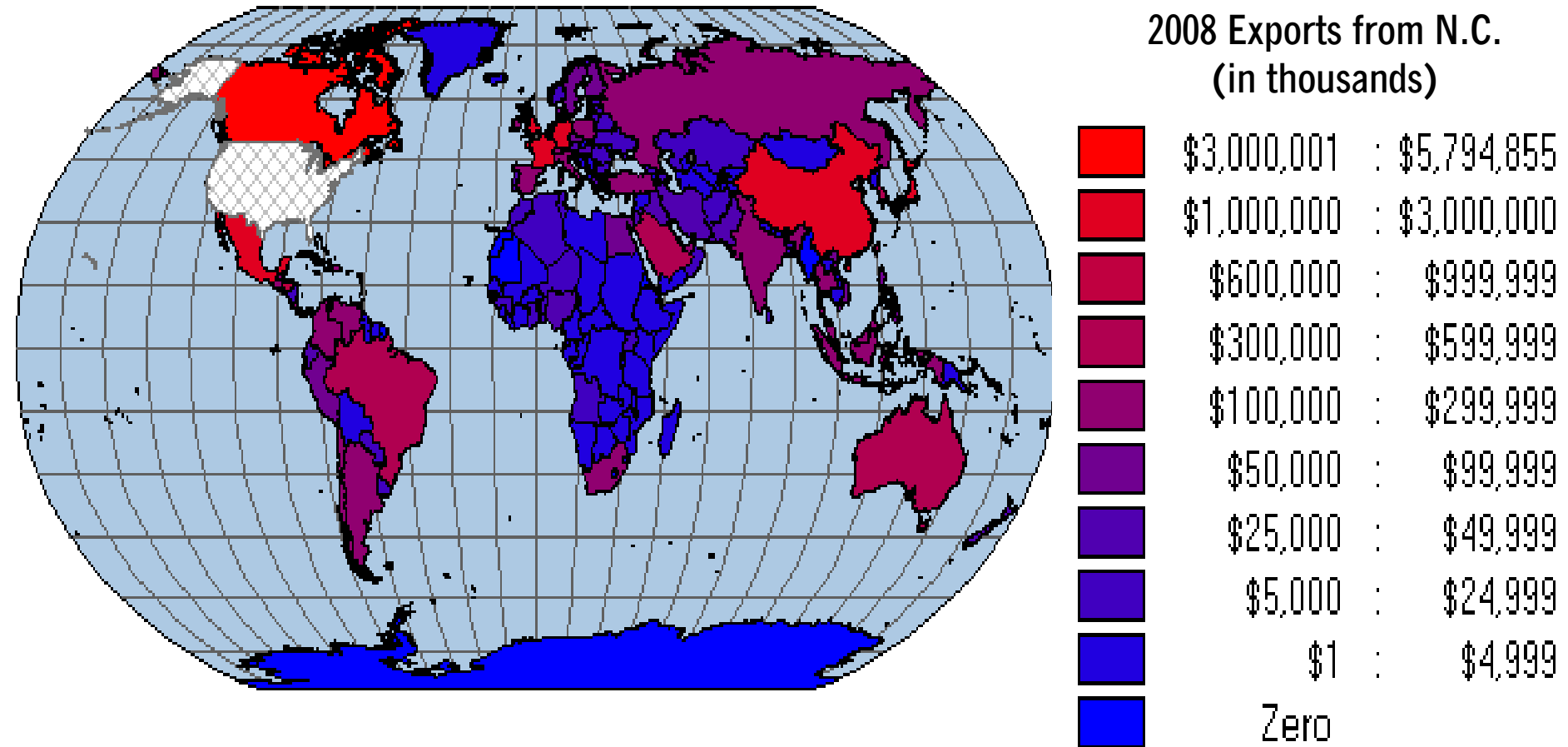
Exports

- ▶ 7,076 companies exported goods from N.C. locations in 2006.
- ▶ Of those, **86 percent, or 6,051 firms, were small and medium-sized enterprises (SMEs)** with fewer than 500 employees, which accounted for 22% of N.C.'s total merchandise exports

International Trade Administration and Bureau of the Census, Foreign Trade Division: Exporter Database

N.C. Exports to the World

N.C. exported to 210 countries in 2008



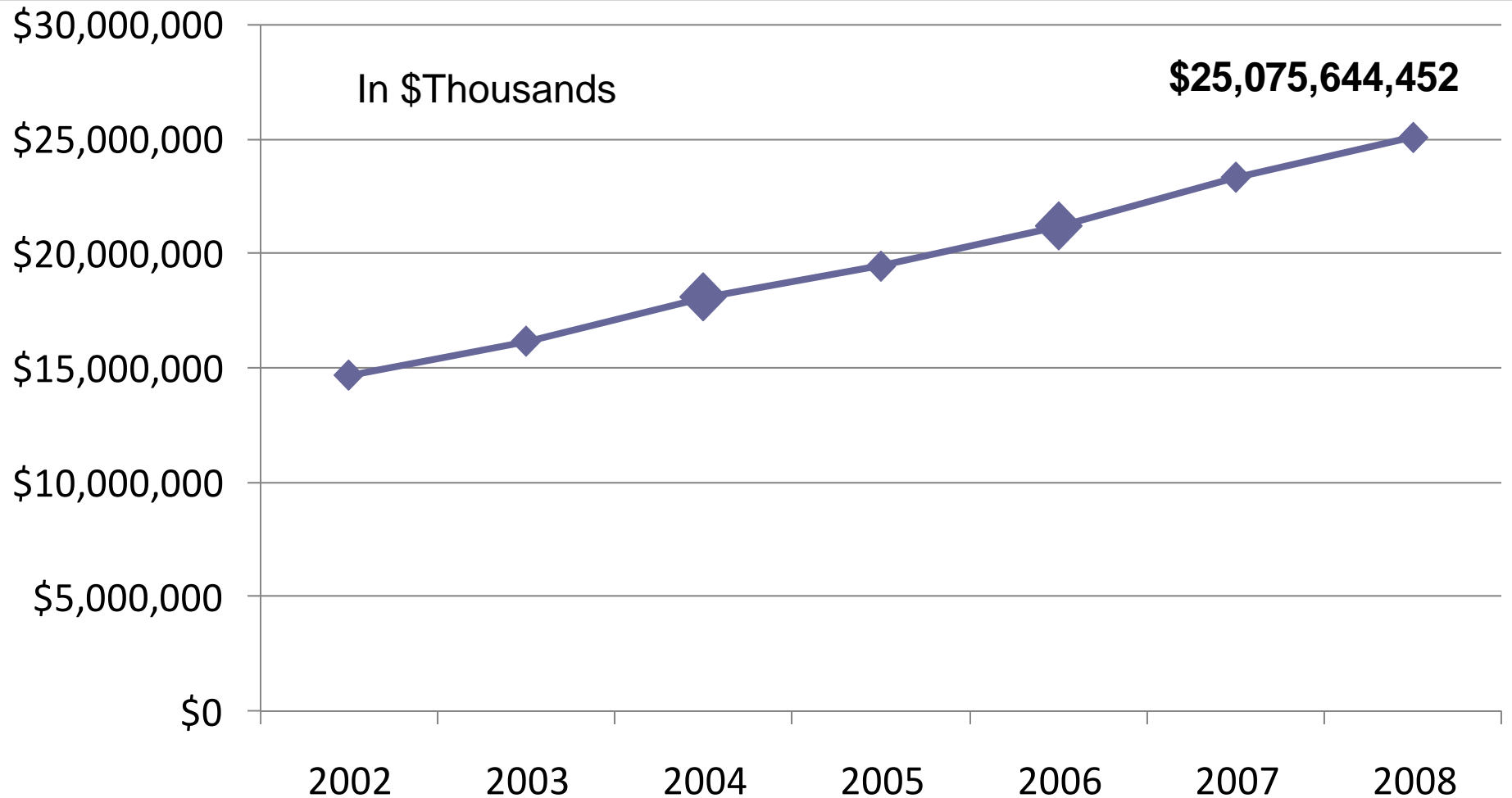
Source: TradeStats Express—State Export Data

N.C. is 16th Largest Exporter in the US

- ▶ North Carolina's 2008 exports totaled \$25.1 billion. North Carolina was the 16th largest exporter among the states in 2008
- ▶ In 2008, North Carolina's leading manufactured export categories included chemical manufactures (\$5.0 billion, 19.8%), machinery manufactures (\$3.1 billion), computers and electronic products (\$2.8 billion), and transportation equipment (\$2.3 billion)

Source: WISER, from US Census Bureau, Foreign Trade Division

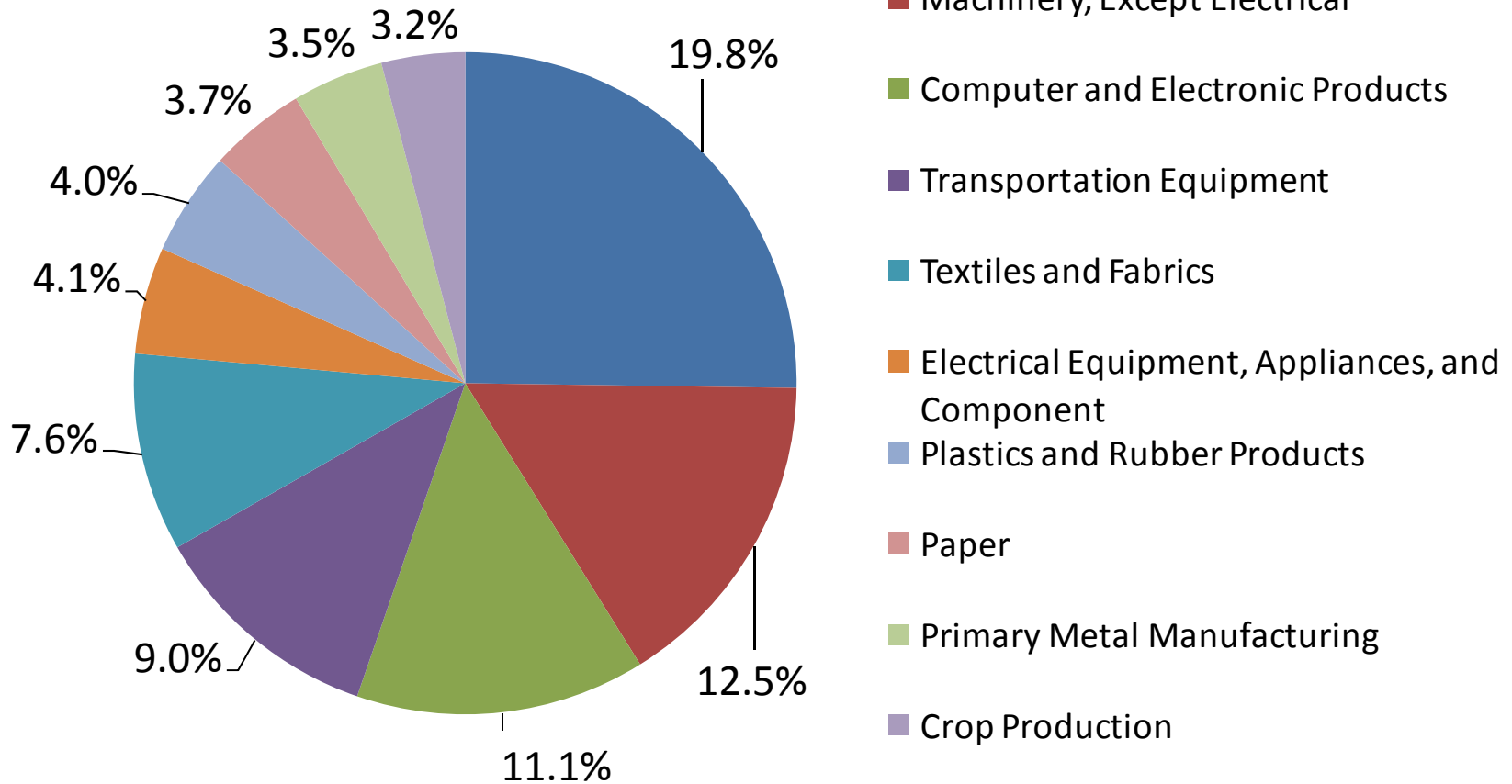
Total Exports from North Carolina



Source: WISER, from US Census Bureau, Foreign Trade Division

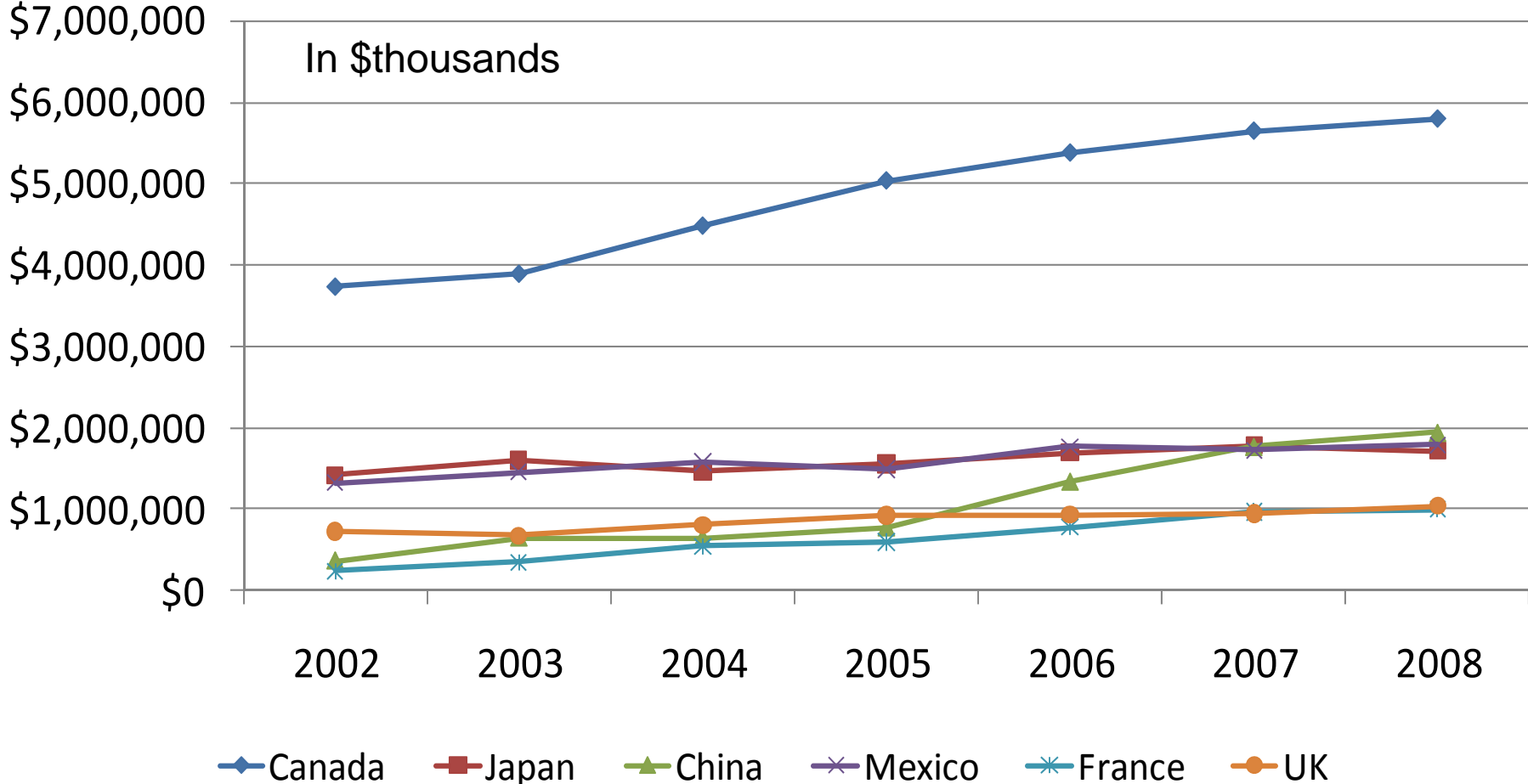
N.C. Export Breakdown (2008)

Top Exports by Commodity



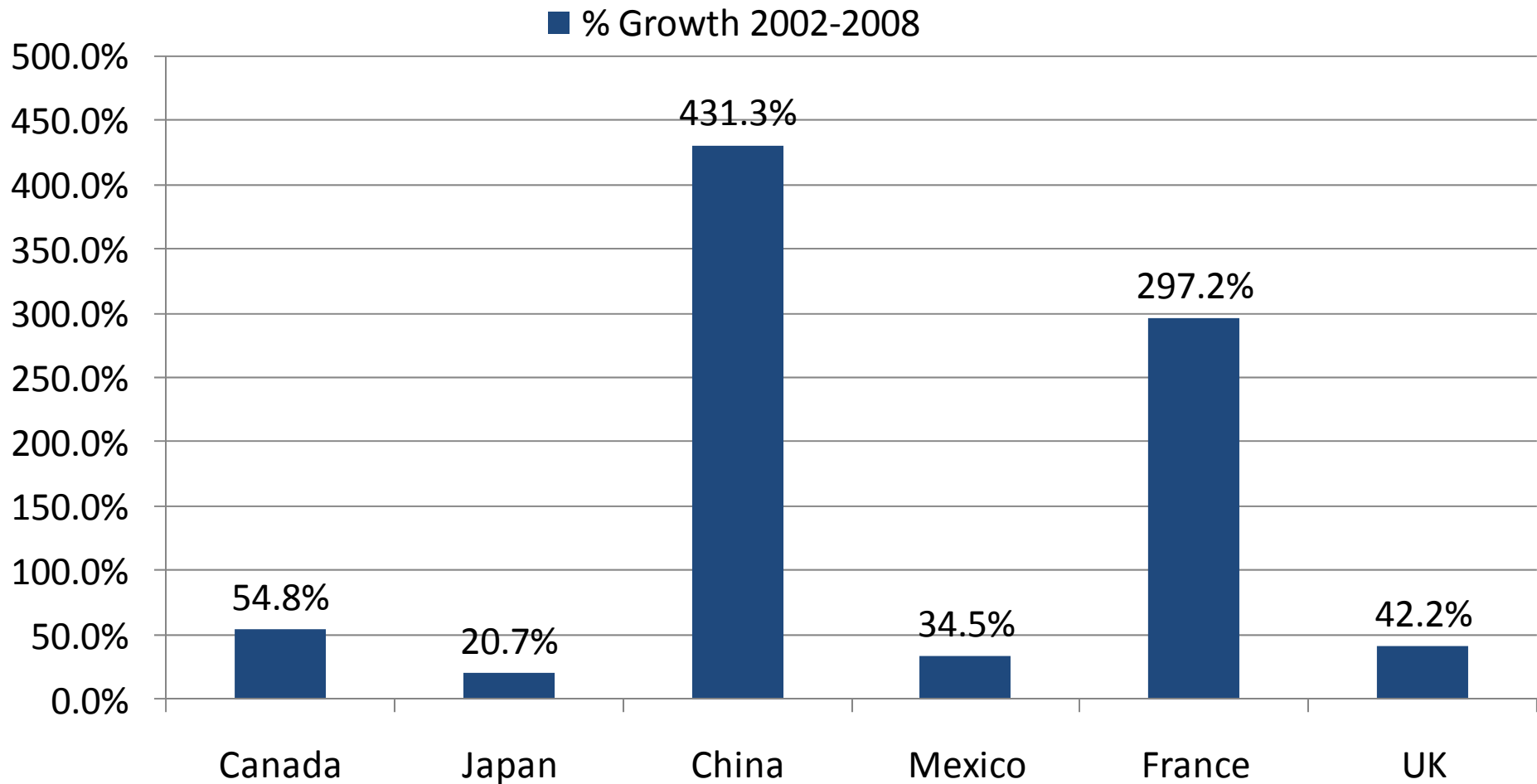
Source: WISER, from US Census Bureau, Foreign Trade Division

N.C.'s Top Export Partners



Source: WISER, from US Census Bureau, Foreign Trade Division

Percent Export Growth 2002-2008

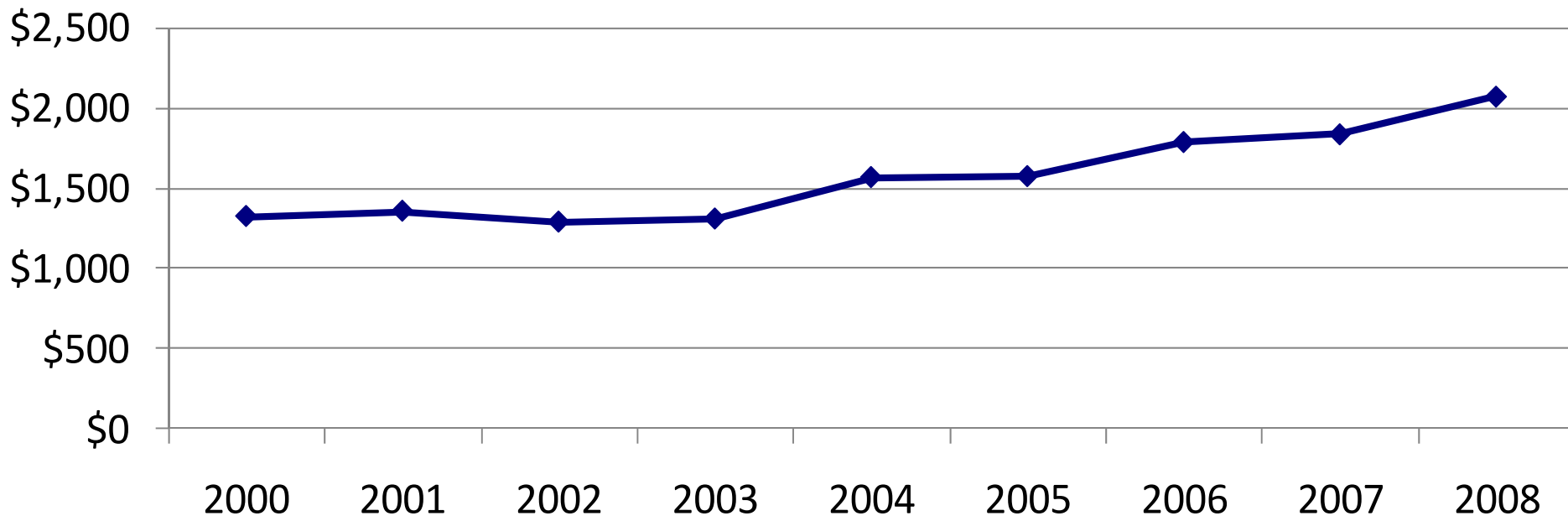


Source: WISER, from US Census Bureau, Foreign Trade Division

Agricultural Exports

North Carolina ranks 14th in the US in agricultural exports

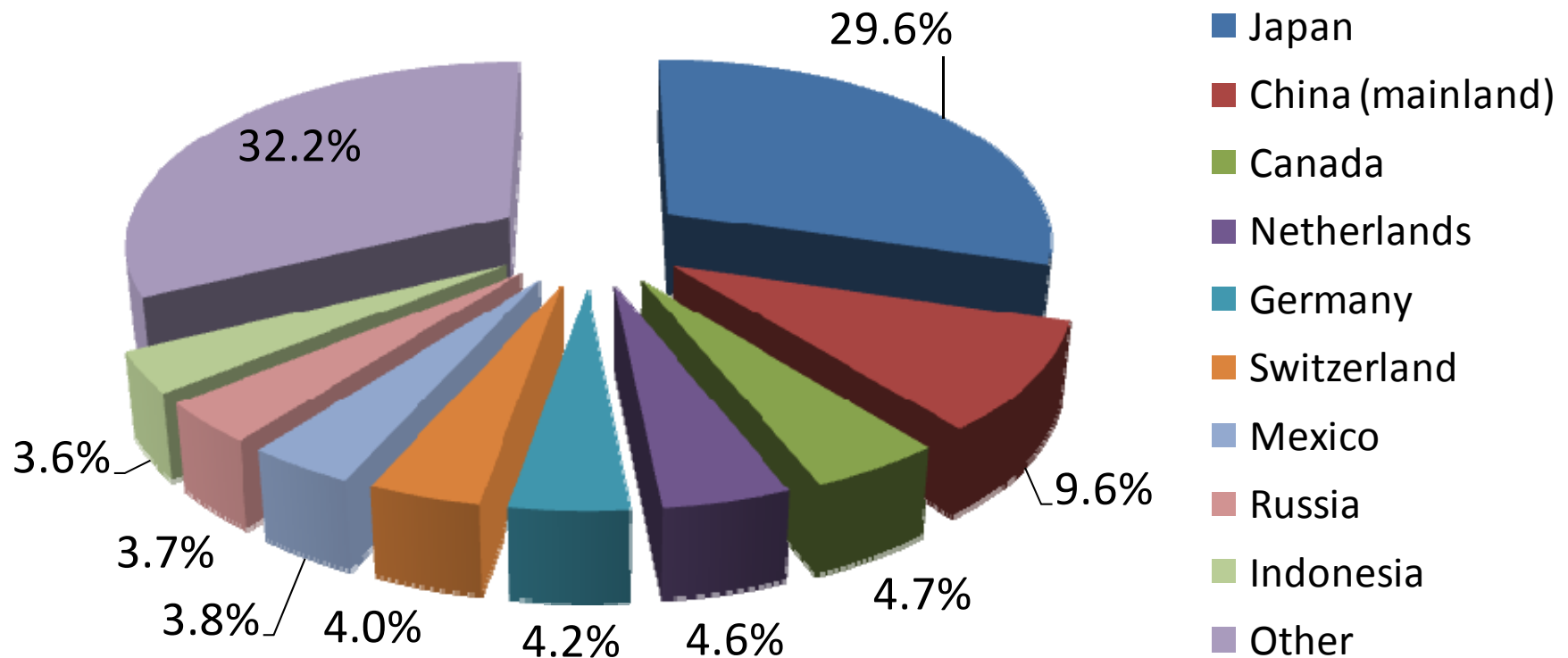
Total Agricultural Exports (Estimated Value, million dollars, FY 2003-2008)



Source: U.S. Dept. of Agriculture Economic Research Service; WISER, from US Census Bureau, Foreign Trade Division

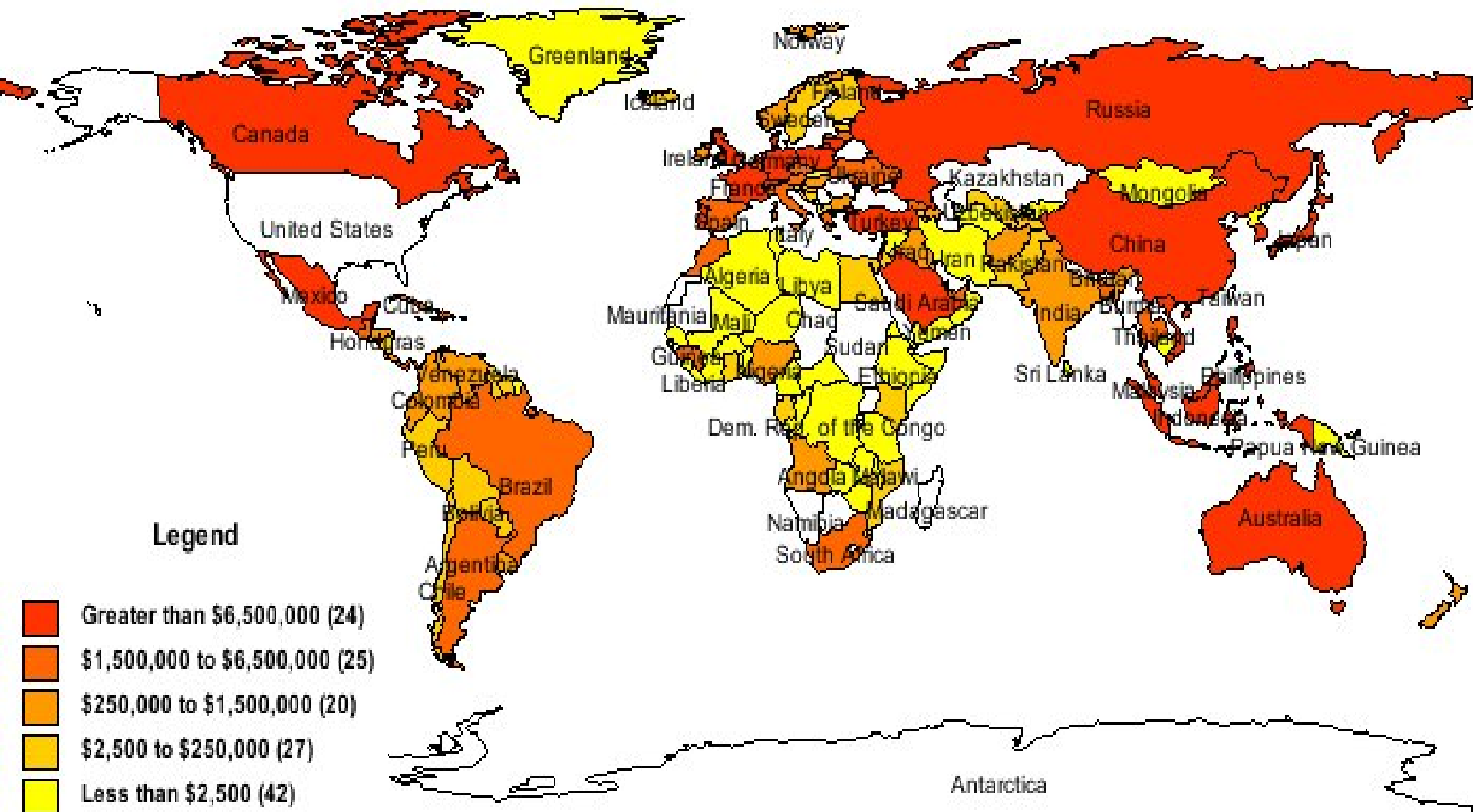
Top N.C. Agricultural Export Markets

2008 #1 Market: Japan



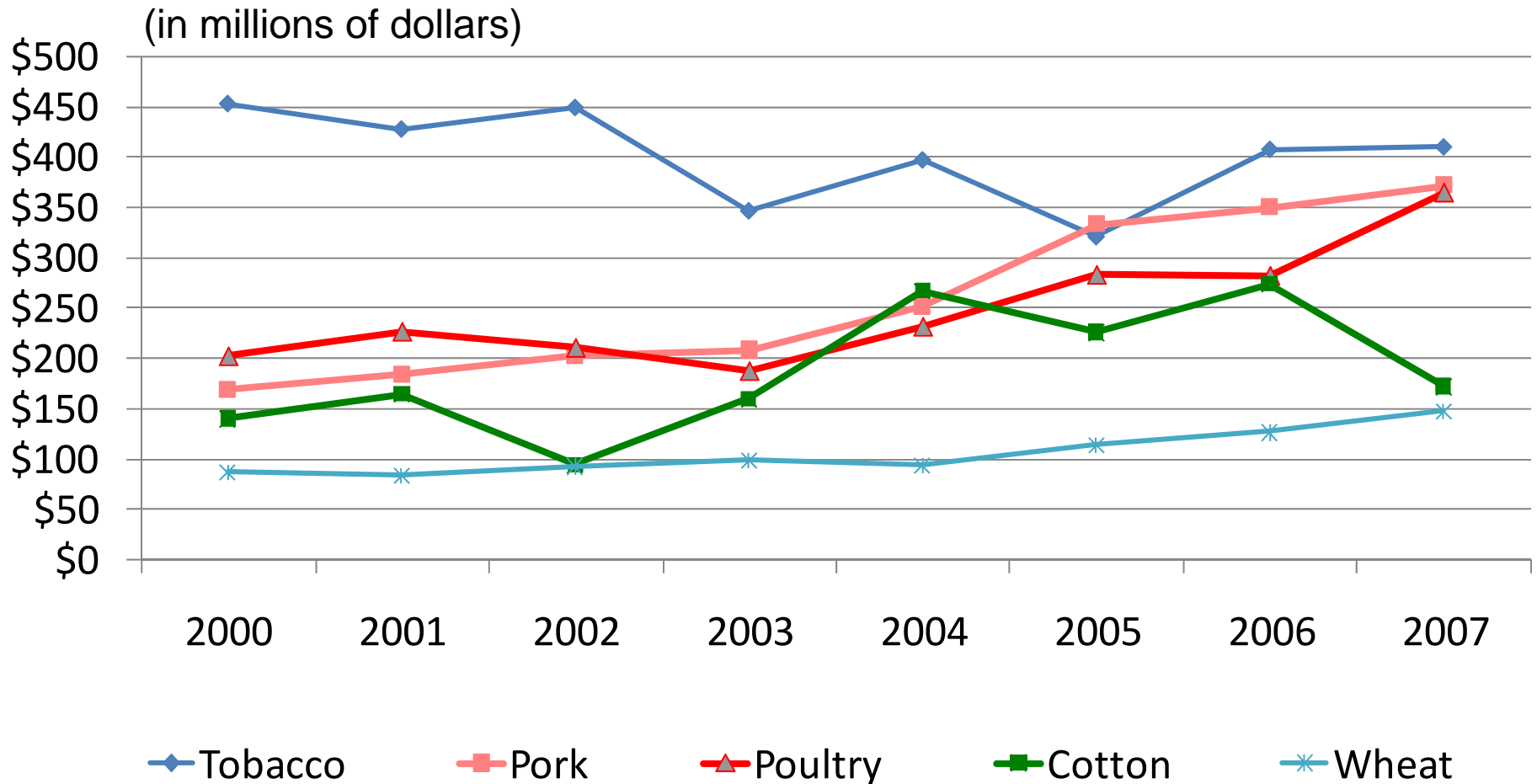
Source: WISER, from US Census Bureau, Foreign Trade Division

N.C. Agricultural Export Destinations



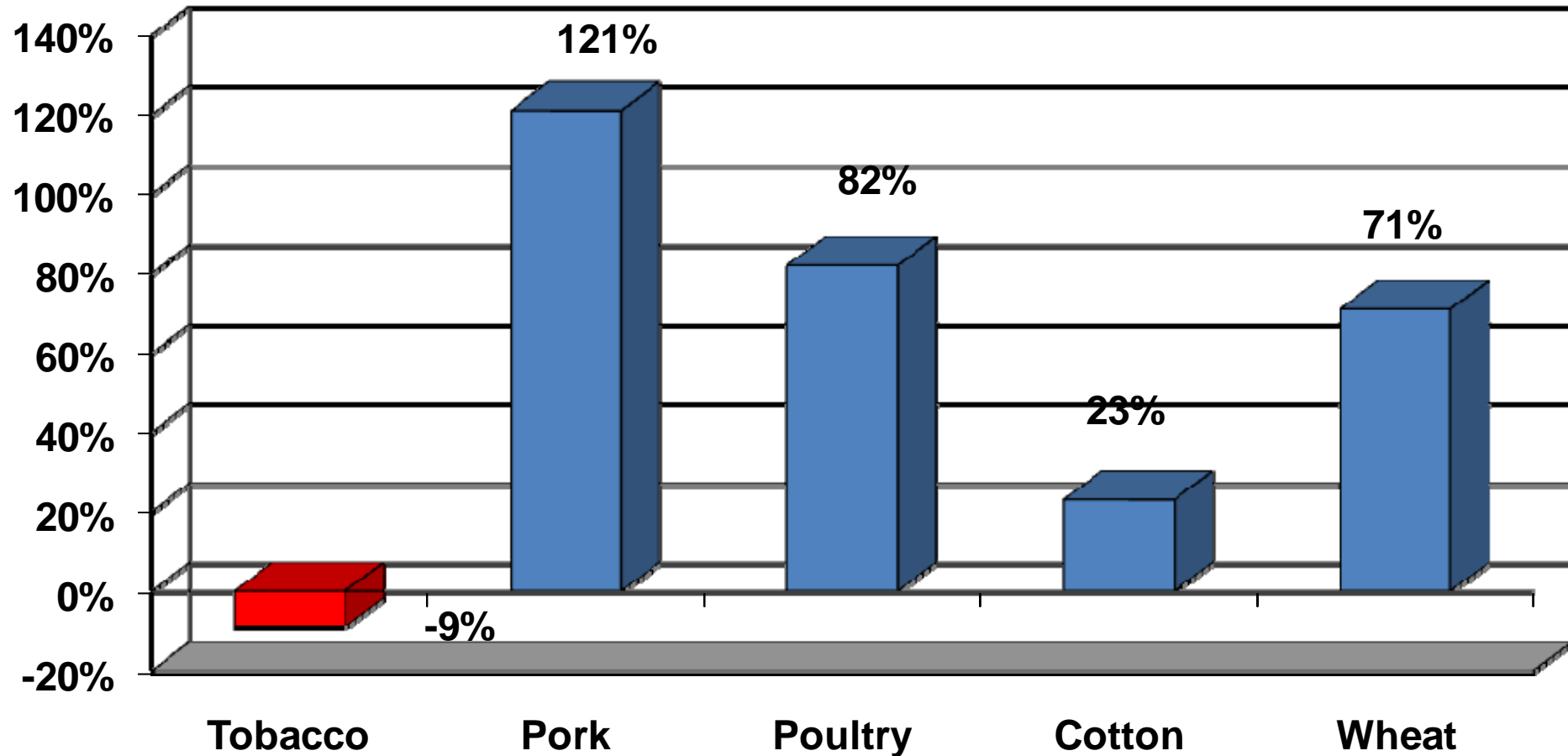
Source: N.C. Dept. of Agriculture and Consumer Services

N.C. Agricultural Commodity Exports



Source: US. Dept of Agriculture, Economic Research Service, Agricultural Commodity Exports

Agricultural Exports- % Change 2000-2007



Source: US. Dept of Agriculture, Economic Research Service, Agricultural Commodity Exports

Foreign-Owned Firms

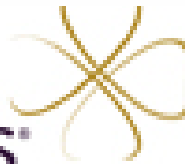
More than 700 foreign-owned firms operate in North Carolina



Sony Ericsson



SIEMENS



novozymes*

Rethink Tomorrow



B/S/H/

TOSHIBA

Leading Innovation >>>



Foreign Direct Investment = Jobs

- ▶ In 2006, foreign-controlled companies employed 209,400 workers in North Carolina
- ▶ Over one-third (37 percent) of these jobs (77,200 workers) were in the manufacturing sector in 2006
- ▶ Foreign-controlled companies accounted for 13.8 percent of total manufacturing employment in North Carolina in 2006
- ▶ Foreign investment in North Carolina was responsible for 6.1 percent of the state's total private-industry employment in 2006

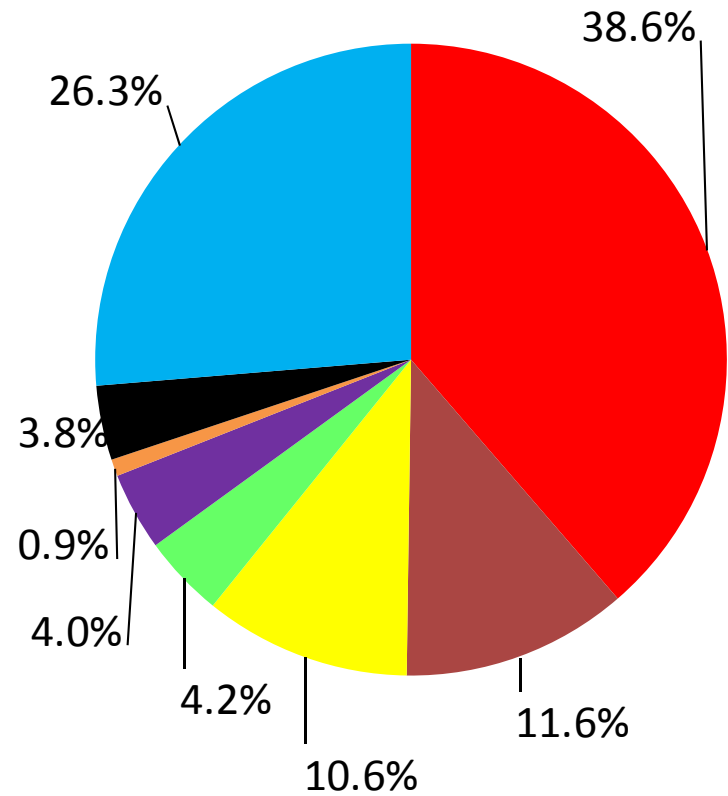
Note: All figures exclude employment in banks affiliated with foreign companies.

U.S. Department of Commerce, Bureau of Economic Analysis, 2006.

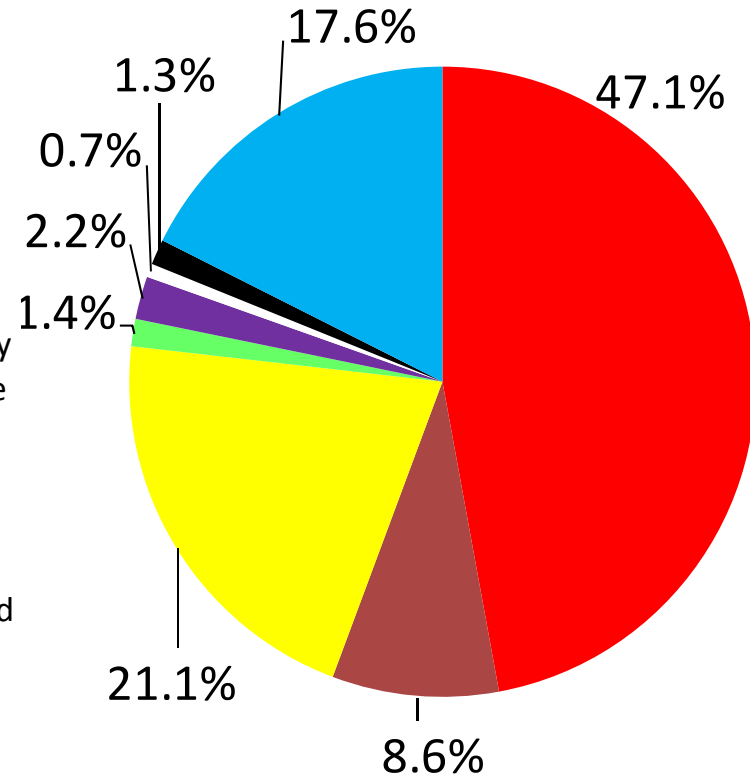
Foreign Direct Investment by Sector

USA

- Manufacturing
- Wholesale Trade
- Retail Trade
- Information
- Finance (except depository institutions) and insurance
- Real estate, rental and leasing
- Professional, scientific, and technical services
- Other industries



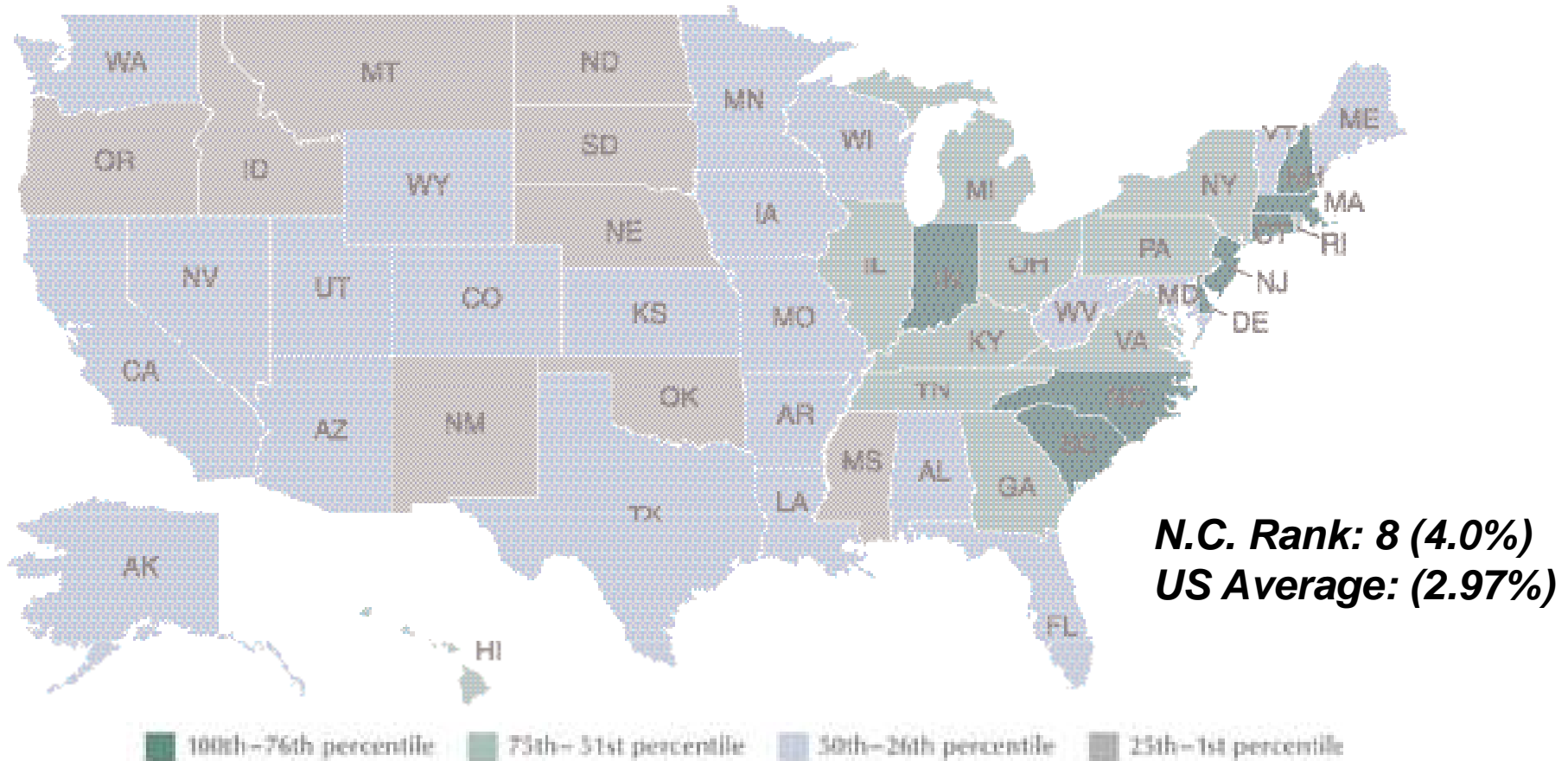
N.C. (USA 9th overall--6th in manufacturing)



Source: U.S. DOC, Bureau of Economic Analysis (2006)

FDI Nationally

Percentage of each state's workforce employed by foreign companies.

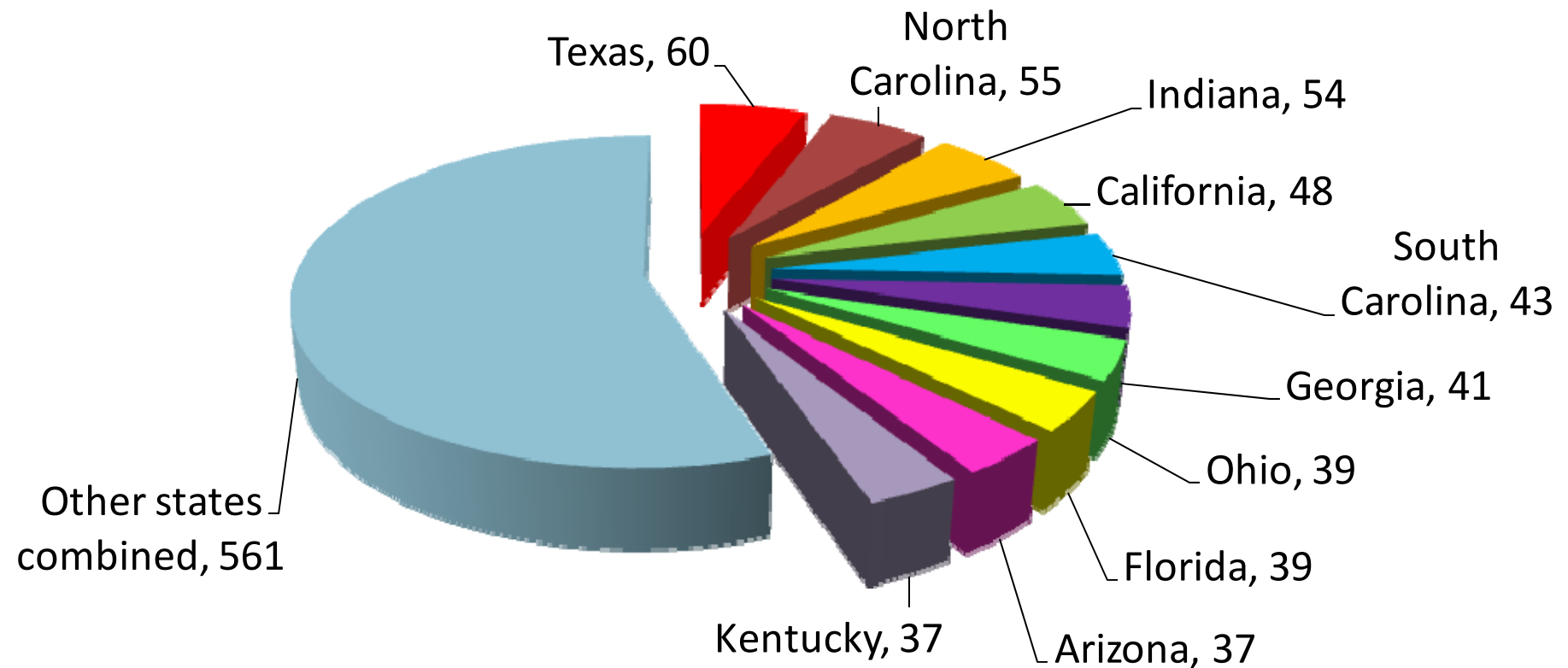


Source: The Information Technology & Innovation Foundation, The 2008 State New Economy Index: Benchmarking Economic Transformation in the States

State Rankings – FDI Projects

- ▶ North Carolina No. 2 in the nation with 55 FDI projects in 2007

Total 2007 US FDI Projects-1,102



Source: N.C. Dept. of Commerce, International Services presentation

State FDI Recruitment Efforts

Here are some steps North Carolina has taken to attract FDI

- ▶ Article 3J Tax Credits
- ▶ Research and Development Tax Credits
- ▶ North Carolina Ports Tax Credits

Source: N.C. Dept. of Commerce, International Services presentation

Trade Offices Abroad

N.C. (population 8.8 million) has 7

- ▶ Canada
- ▶ Hong Kong
- ▶ Japan
- ▶ Mexico
- ▶ South Korea
- ▶ China

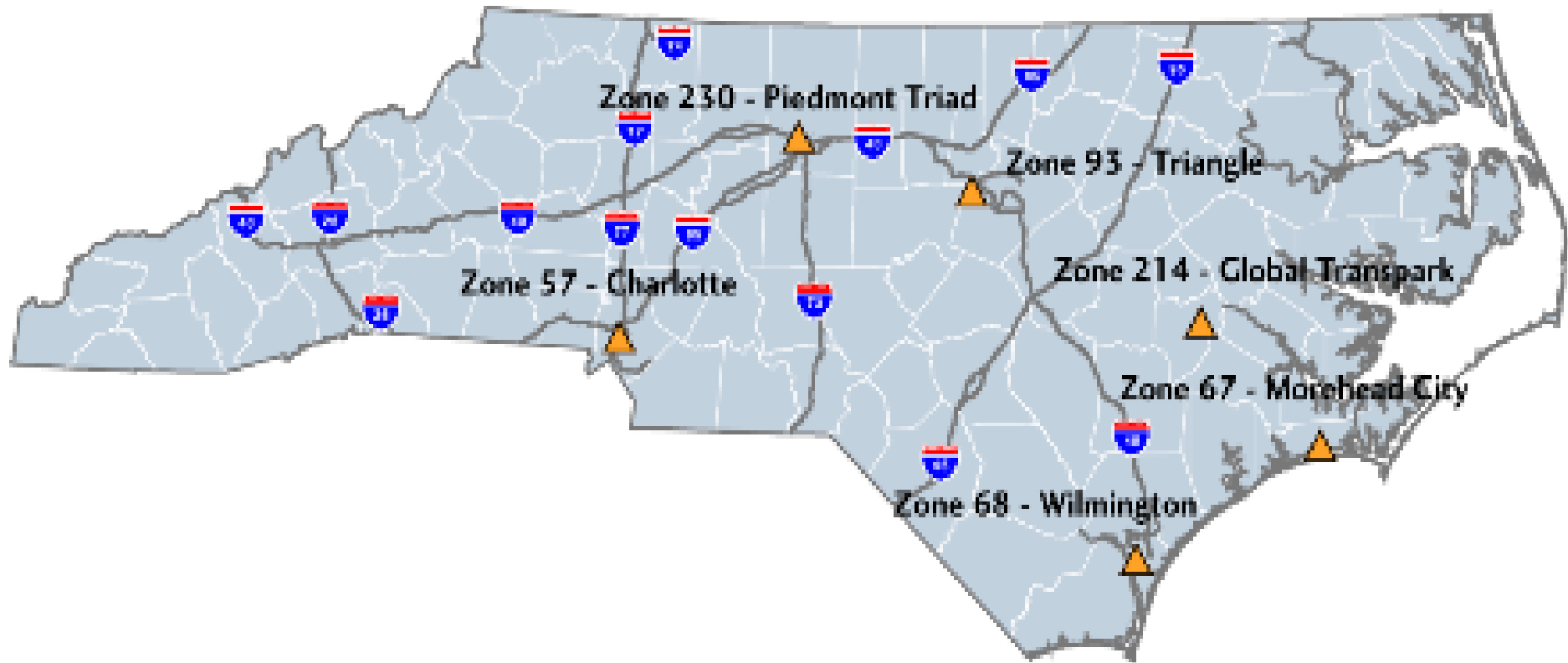
Singapore (population 4.8 million) has 20

Ireland (population 4.5 million) has 47

Sources: N.C. Department of Commerce—International Offices; US Census Bureau, 2006 pop estimate; CIA.gov World Fact Book

N.C. Has 6 Foreign Trade Zones

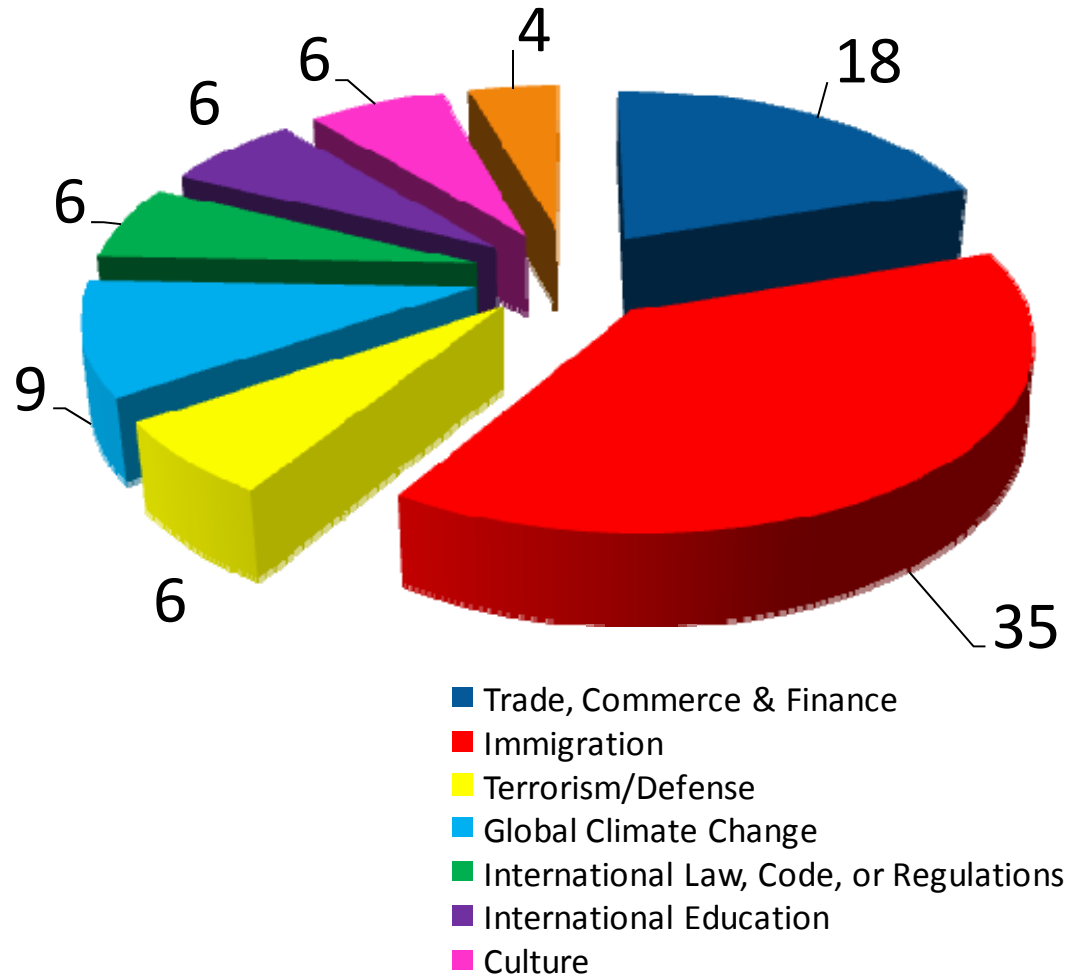
Foreign Trade Zones



N.C. Dept. of Commerce, International Services presentation

N.C. Legislative Activity

90 unique bills or resolutions with significant international content were introduced in the NC General Assembly in 2007



Source: Center for International Understanding 2008 Legislative Study (2007 session)

Going Forward...

The demographic, educational, and business trends all show North Carolina operating in an increasingly inter-connected global environment

The questions are...?



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