



SC COUNCIL ON COMPETITIVENESS



2025 LOWCOUNTRY ECONOMIC DEVELOPMENT SUMMIT

CONVERGE

GLOBALY ALIGNED. LOCALLY FOCUSED.

Lowcountry Economic Development Summit

January 17, 2025

Susie Shannon, Pres. & CEO, SC Competes





SOUTH CAROLINA COUNCIL ON COMPETITIVENESS

South Carolina Council on Competitiveness - **“SC Competes”** - is a business-led, nonprofit organization that drives South Carolina’s long-term economic growth by managing the state’s industry clusters and providing the research, network, and resources that industry clusters require to thrive.

How SC Competes Advances South Carolina

3 Primary Ways --

Education & Workforce Development

Intersection of business & academia by supporting statewide education initiatives and working collaboratively with industry to develop world-class talent

Actionable Research

Lead research studies that empower industries, economic developers, and state leadership with information needed to grow and sustain competitiveness

Support of Industry Clusters

Directly manage multiple industry clusters and initiatives across SC and supports several others indirectly



SC Competes Industry Clusters



Other Initiatives





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Support of Industry Clusters

Networking and Connectivity
Collaboration
B2B Matchmaking
Thought Leadership

Current Programs

EDUCATION & WORKFORCE INNOVATION

Tech-Cyber Career Pathways Map | Lemonade Supply Chain Game | SC Aerospace Night @ Greenville Drive | Cell Phone Supply Chain Game | TALLO CoreScore Employability Assessments | Roadtrip Nation Career Path | Profile of the South Carolina Graduate | Innovate + Educate 'The Future of Hiring, Working, and Learning' | Riley Institute 'Tracking The Profile of The SC Graduate' | SCDEW SC Labor Force Participation Taskforce | Greenville County Schools CTE Innovation Center Advisory Committee | Share Your Road | TransformSC | Logistics & Maritime Youth Expo | ExcelinEd 'Analyzing the Learner Continuum in SC' | Palmetto Automated Learning (PAL) Robotic Dog | SC Women In Tech | CAP Carolina, Webinars & Resource page | SC Asset Network (SCAN) | Palmetto AI Corridor | Tech Forum | Lexington One CTE Advisory Board | Richland Two Innovation Center (CTE) Advisory Board | SREB AI in Education Commission | Education Commission of the States | SC's 16 Career Cluster Technical Advisory Boards (TACs) | SC Broadband Advisory Council | Naval Information Warfare Center-Atlantic | ESRI ARC GIS Poster Mapping Competition | EV Career Pathways Map

ACTIONABLE RESEARCH

Aerospace Economic Impact Study | Palmetto Applied Research Council (PARC) | Technology-Cybersecurity Economic Impact Study | Logistics Economic Impact Study | SC Fraunhofer Alliance | Palmetto Artificial Intelligence Corridor (PAIC) | 'The Evolving Landscape' Electric Vehicle (EV) Study | Warehousing and Distribution Study | Artificial Intelligence Rapid Innovation Lab | SC Smart Economic Development Plan Around EV & AI | SC Technology & Aviation Center Economic Impact Study | SC Aeronautics Commission Commercial Service Airports Impact Study | SC Task Force Review | SC Population Study | Palmetto Advanced Air Mobility



SC Competes Team



Adrienne Beasley
Director of Strategy &
Communications



Kelly Baird
Senior Program Manager



Susie Shannon
President & CEO



Alex Albrecht
Communications
Coordinator



Mendy Lewis
Program Coordinator



**Suzanne
Dickerson**
Director,
SC Fraunhofer Alliance



Stephen Astemborski
Director,
Engagement & Aerospace Initiatives



**Amanda
Campbell**
Creative Specialist



Meg Cantrell
Office Administrator



**Dr. Marcel
Schaefer**
Senior Research Scientist



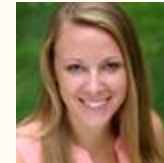
Kim Christ
Director,
Workforce Innovation



Jamie DeMent
Director, SC Tech &
CyberSec



Bunnie Ward
Director,
TransformSC



Amy Sartain
Director,
SC Logistics



Relationships...Touchstone

Government—

Governor – Battery/Electrification...Education

Commerce – Industry clusters, Energy, Applied research

Education...EOC...Employment & Workforce – TransformSC

Ports Authority > **Logistics**
Transportation

Economic Development Entities

City/County/Region – Beaufort County!

Economic Development Alliances

Site selectors

K-12/Post-Secondary Institutions - We are INSIDE Classrooms!

****Companies/Industry Groups**** - Aerospace...Logistics...Tech...Cyber...AI

OEMs

Tiers 1-4 Suppliers

Trade associations





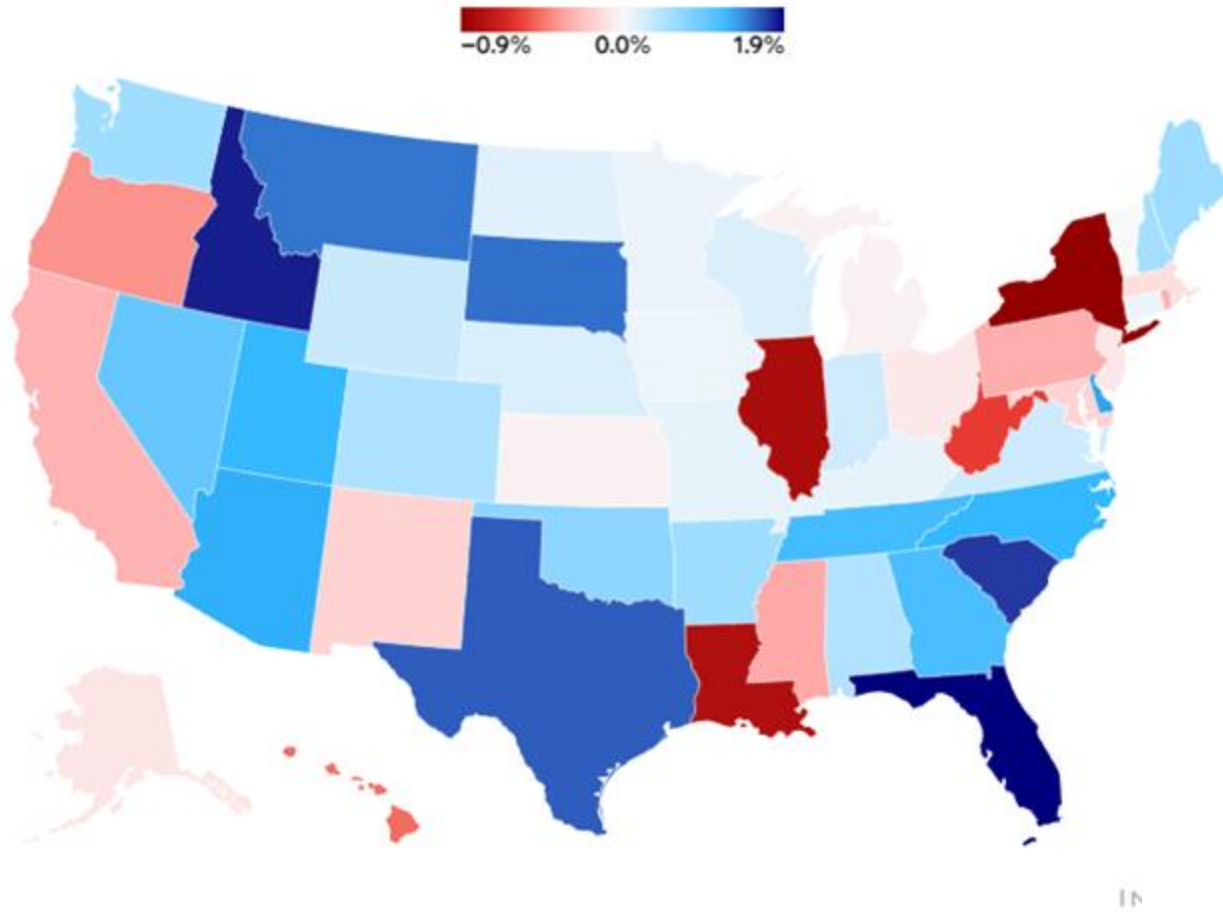
SC COUNCIL ON COMPETITIVENESS



EMERGING:
Globally-Aligned...Locally-Focused

Population Trends

Population changes, July 1, 2021 to July 1, 2022



- Southeast grew by over **864,000** residents between July 2021 and July 2022...1 of the fastest growing areas in US
- Southeast and Western regions have experienced strongest population growth over previous decade

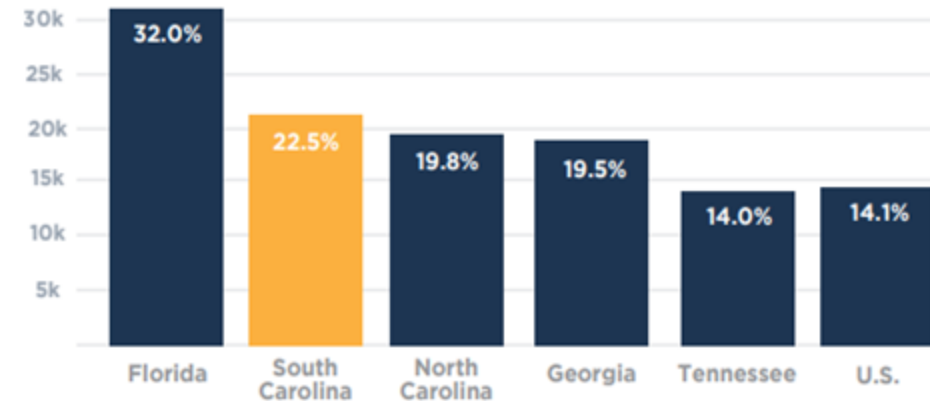


SC Logistics 2023 Population Study

2023 SC Logistics Study

Projected Population Growth (2020 - 2040)

Source: U.S. Census Bureau

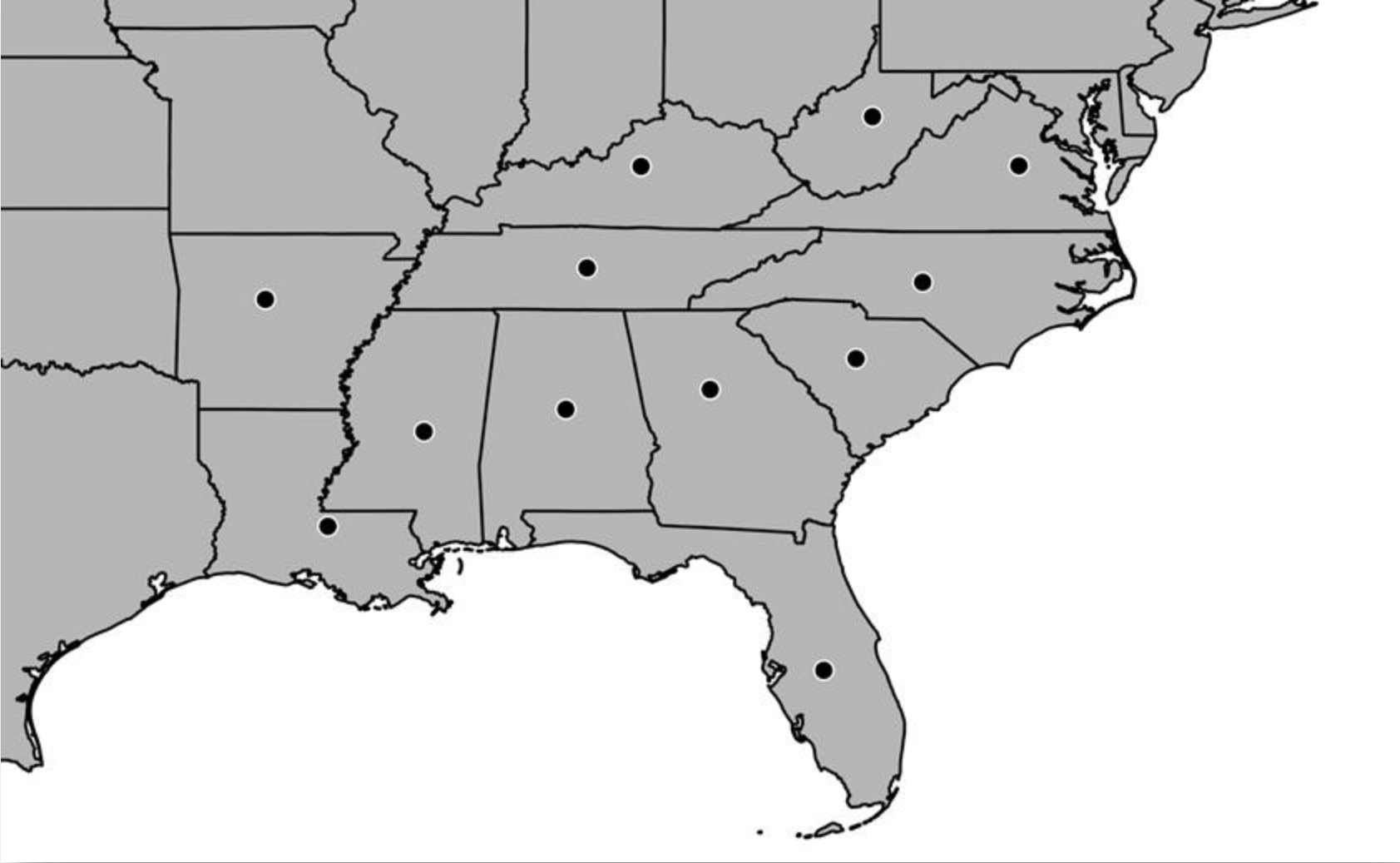


South Carolina is uniquely positioned geographically to be able to reach **66.7 million** people within an **8-hour drive**.

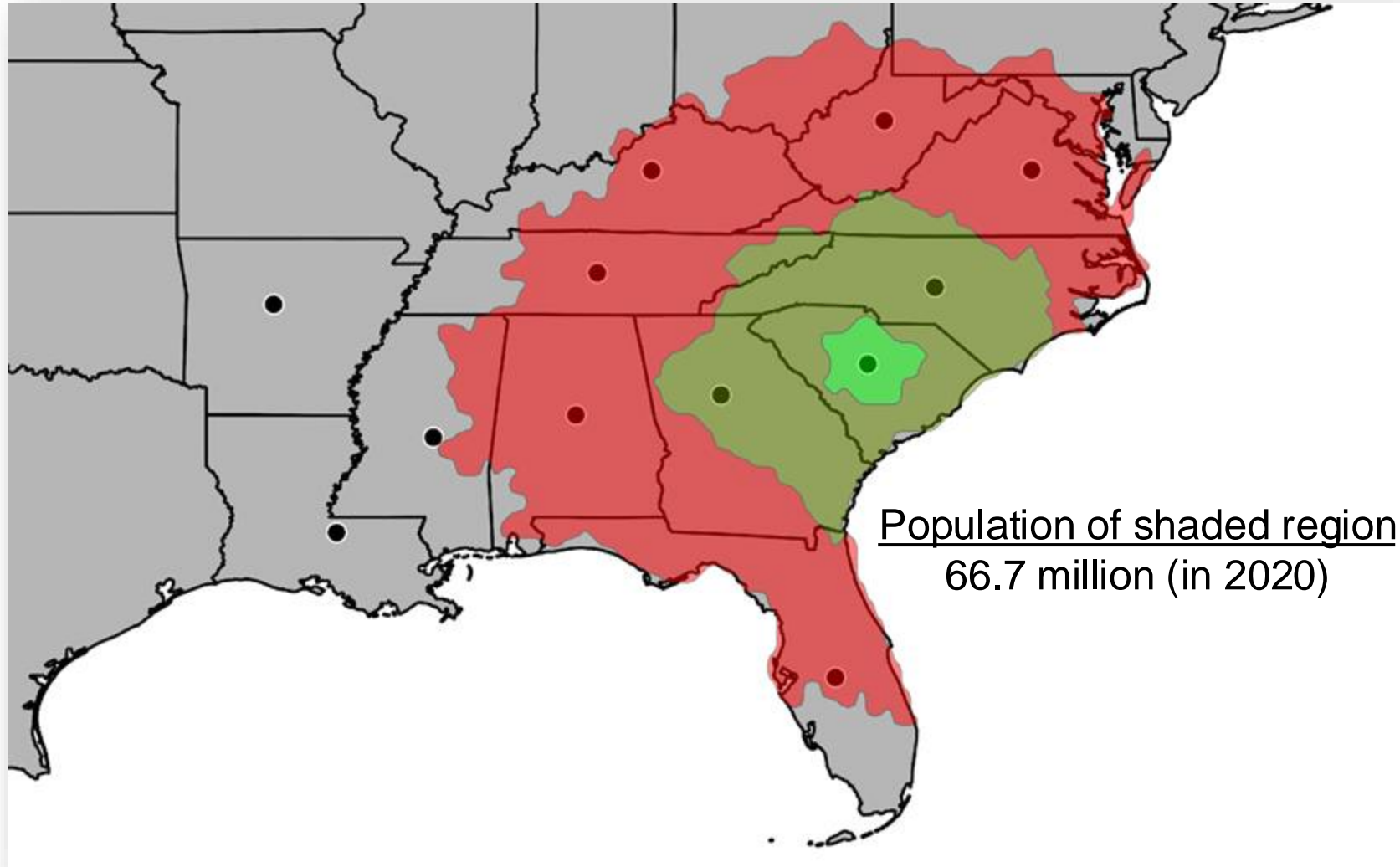
Projected population growth **2020-2040**: SC is projected to grow by **22.5%**



Drive Times from Population Centroids



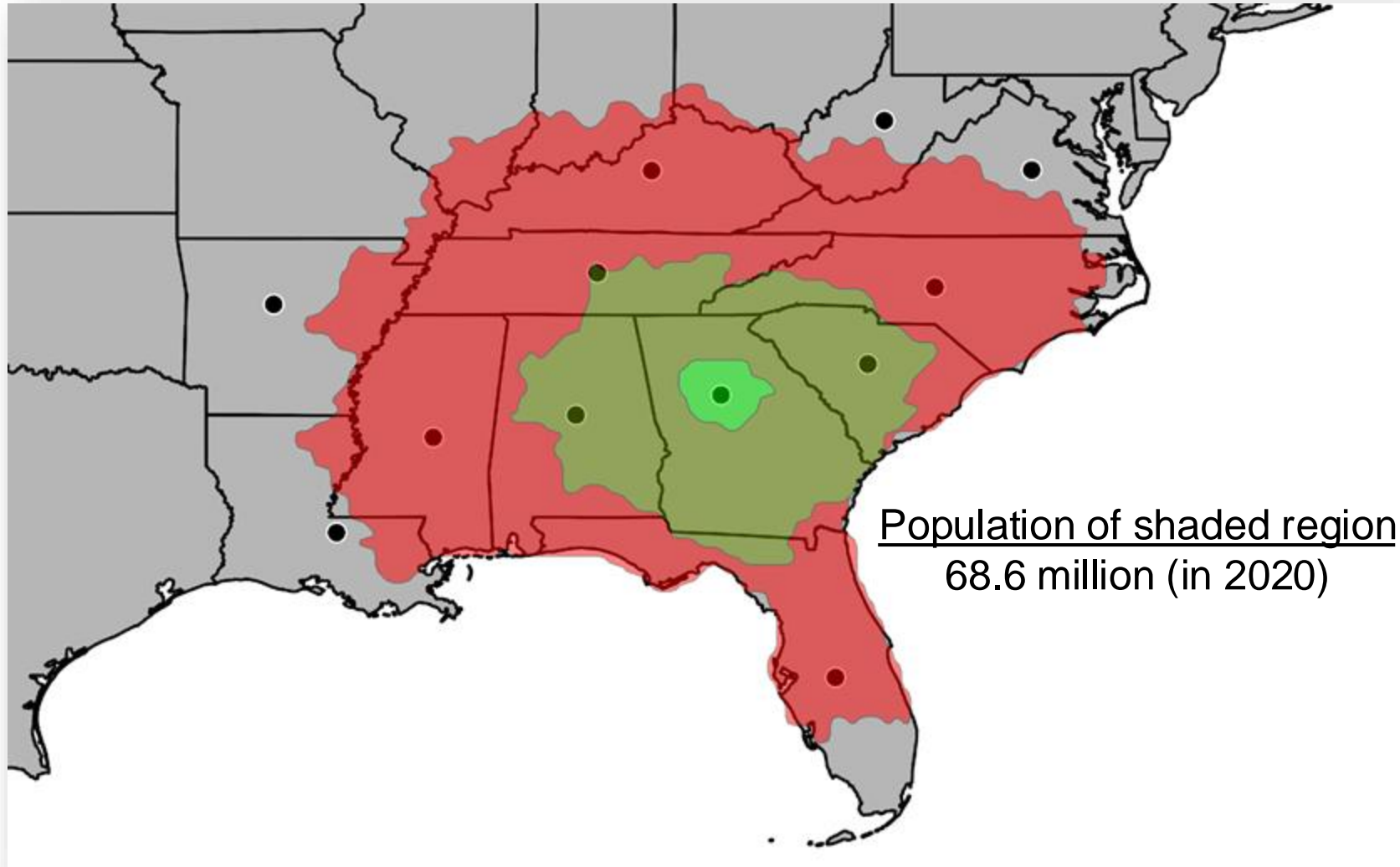
Drive Times from Population Centroids



- One hour
- Four hours
- Eight hours



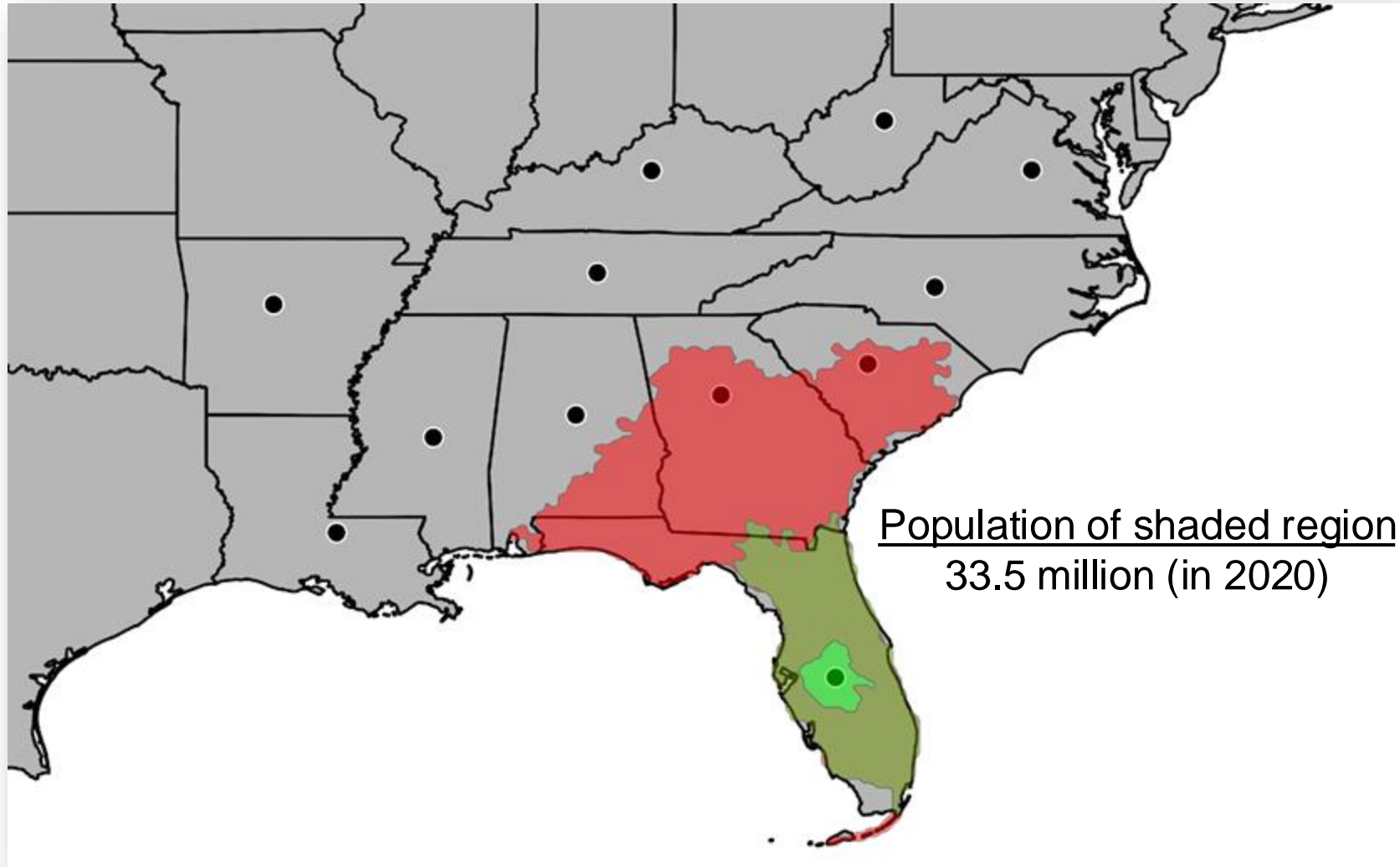
Drive Times from Population Centroids



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- Eight hours



Drive Times from Population Centroids



- One hour
- Four hours
- Eight hours





ABOUT SC AEROSPACE

SC Aerospace is a collaborative effort to advance and market South Carolina's aerospace industry cluster on the global stage. We are a partnership of public, private, academic, and nonprofit sectors, connecting the industry's assets and securing future growth.

South Carolina is home to more than **500 private aerospace firms** and aviation operations.



SC Aerospace joined Team SC (SCDOC, existing SC based aero firms, and economic development alliances) at the 2019 Paris Air Show, taking time to pose with Lockheed Martin's F-35

SC Aerospace - Soaring to New Heights!



SC AEROSPACE

an initiative of



SC COUNCIL ON
COMPETITIVENESS

2024 DATA & TRENDS

SC Aerospace is an initiative of SC Competes.

THE TOTAL ECONOMIC IMPACT OF
AEROSPACE IN SOUTH CAROLINA IS

\$38.3 BILLION

Direct & Indirect

NUMBER OF AEROSPACE JOBS
ANNUALLY SUPPORTED

143,000+

Direct & Indirect

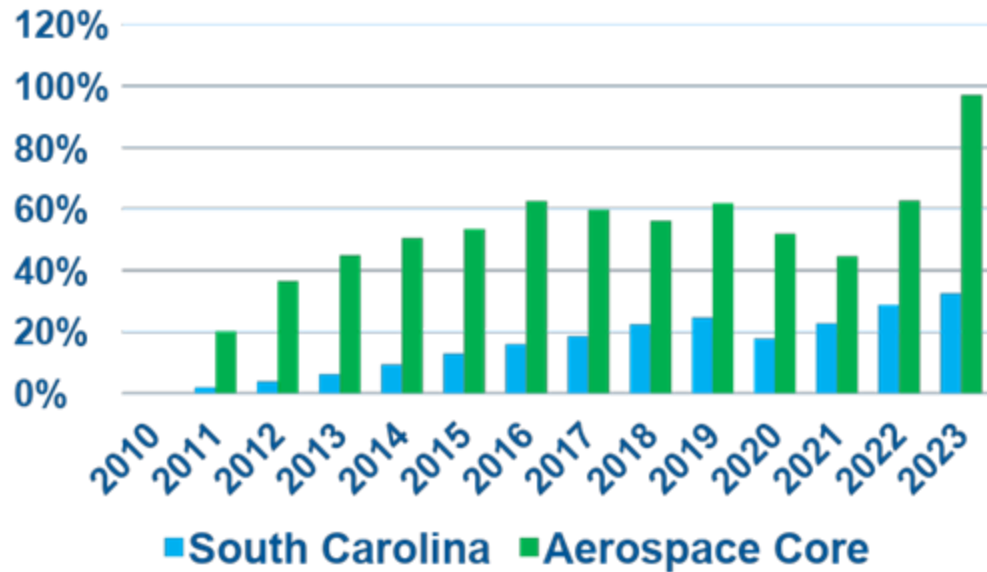
OVER 500

AEROSPACE FIRMS SPREAD
OUT ACROSS THE STATE



SC Aerospace - Understanding Ourselves...

Cumulative Employment Growth: 2010-2023

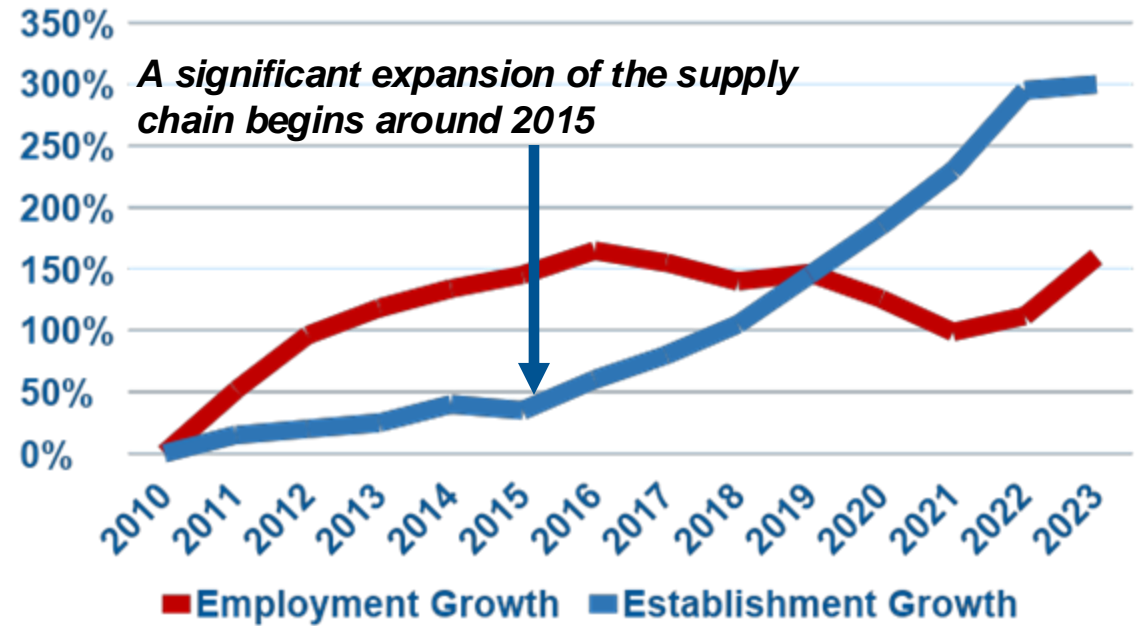


Employment Growth:

Aerospace Core: +97.0%

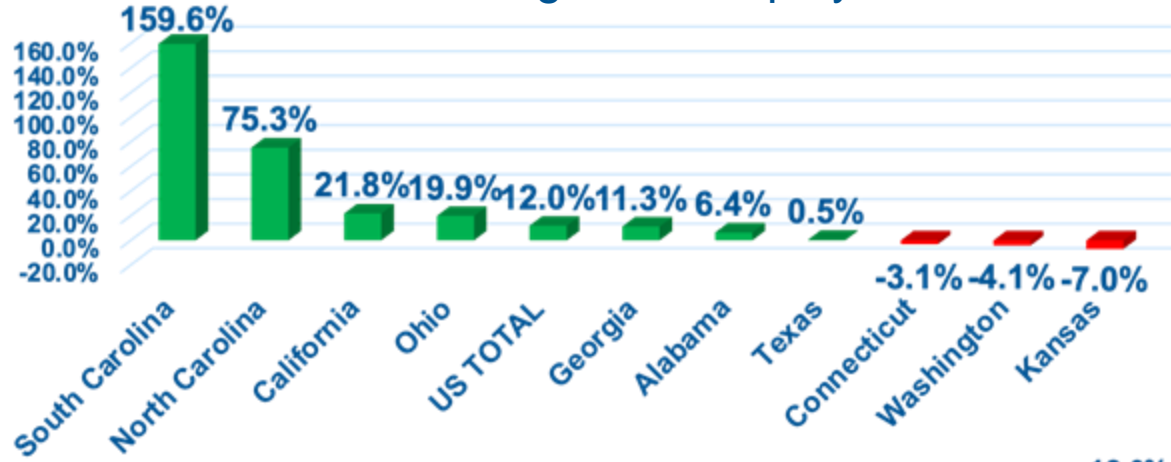
All South Carolina: +32.5%

All United States: +19.8%

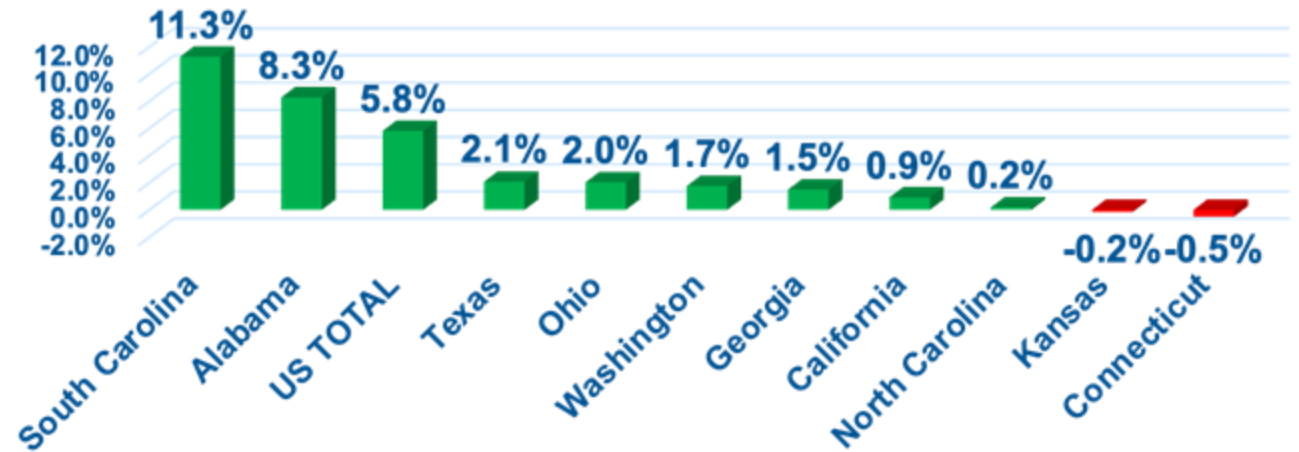


SC Aerospace - Understanding our Peers

Aero Mfg Total Employment Growth



Aero Mfg Establishments



SCTAC Impact Study



SCTAC
SOUTH CAROLINA
TECHNOLOGY & AVIATION CENTER

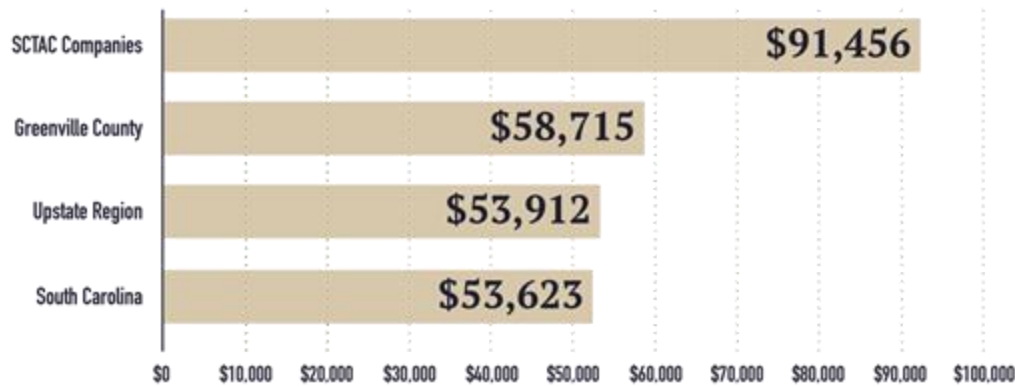
ANNUAL ECONOMIC IMPACT OF THE SOUTH CAROLINA TECHNOLOGY & AVIATION CENTER South Carolina

	Annual Employment	Annual Labor Income	Annual Economic Output
Industrial Production Impact	13,495	\$1,096,924,092	\$5,220,701,091
Consumer Spending Impact	4,803	\$231,345,175	\$831,422,955
Total Impact	18,298	\$1,328,269,267	\$6,052,124,046



AVERAGE WAGE COMPARISONS: SCTAC EMPLOYMENT VS. SOUTH CAROLINA REGIONS

Note: Estimates Represent Average Wage Levels Across All Jobs



**SCTAC supports – directly or indirectly
1 out of every 9 manufacturing jobs
in the Upstate**



SC Aerospace - Airports - Stay Tuned!



Economic impact of SC's 6
commercial service airports,
including Hilton Head Island
(HXD)



SC Aerospace – Palmetto Advanced Air Mobility



It's a Bird...It's a Plane...

No, It's an eVTOL!



New Initiatives



Farnborough Airshow Follow-up
April Meeting

SC Defense

Peer Evaluation
Stakeholder Buy-in
Advisory Board Formation





Bring Awareness

- Market cluster of 600+ firms
- Career Awareness
- K-12: Lemonade & Cell Phone Supply Chain Games
- College: EV curriculum



Look Ahead

- (also) Serve as SC Freight Advisory Council (for USDOT/SCDOT)
- Workforce needs
- Emerging technologies/Areas – AI, Electrification, Sustainability

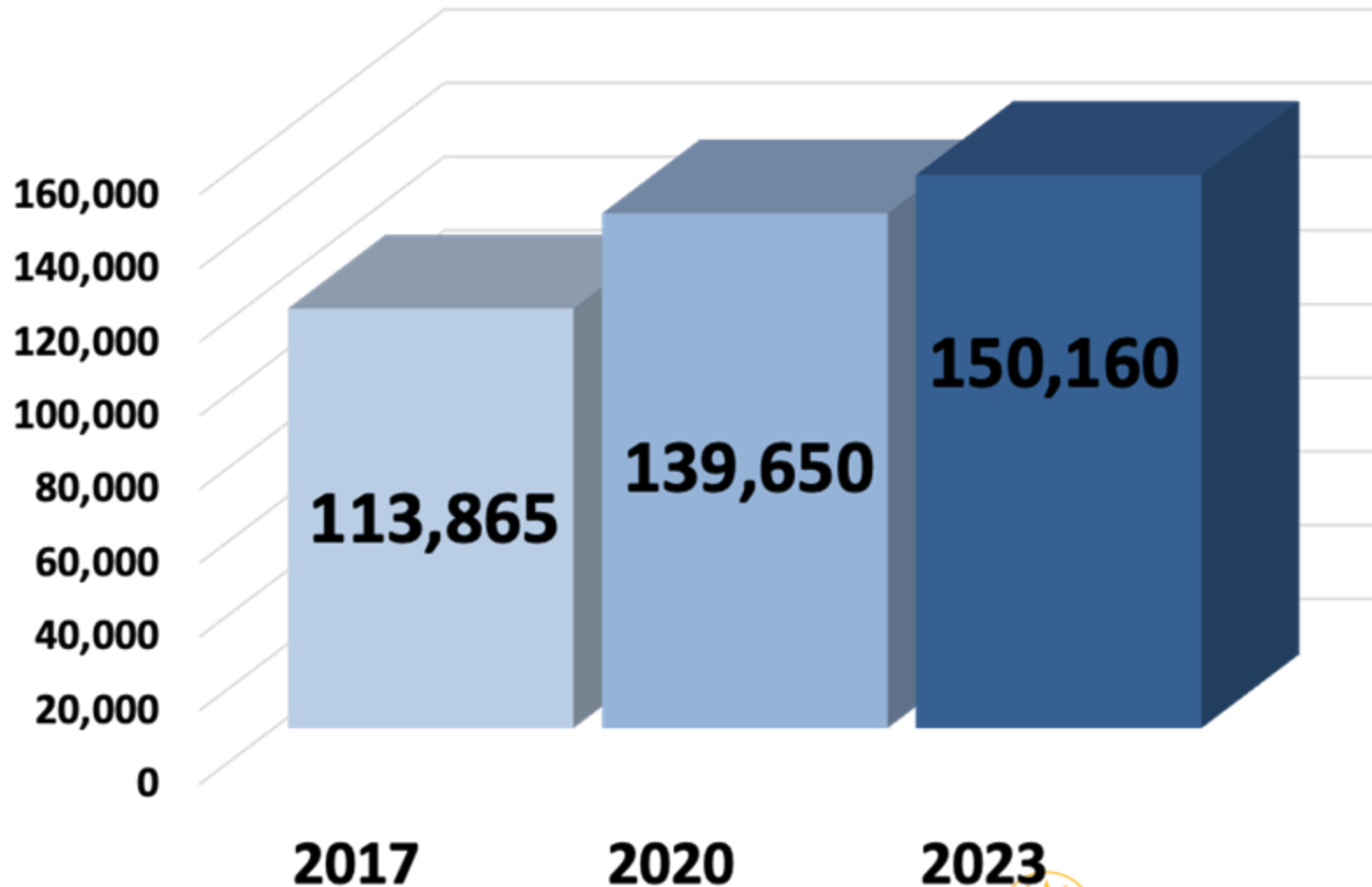


Connect the Cluster

- Tech Talk – Bring together all modes of logistics with the technologies that drive it
- State of Logistics forum
- OEM and Supplier B2Bs (including cross-sector)



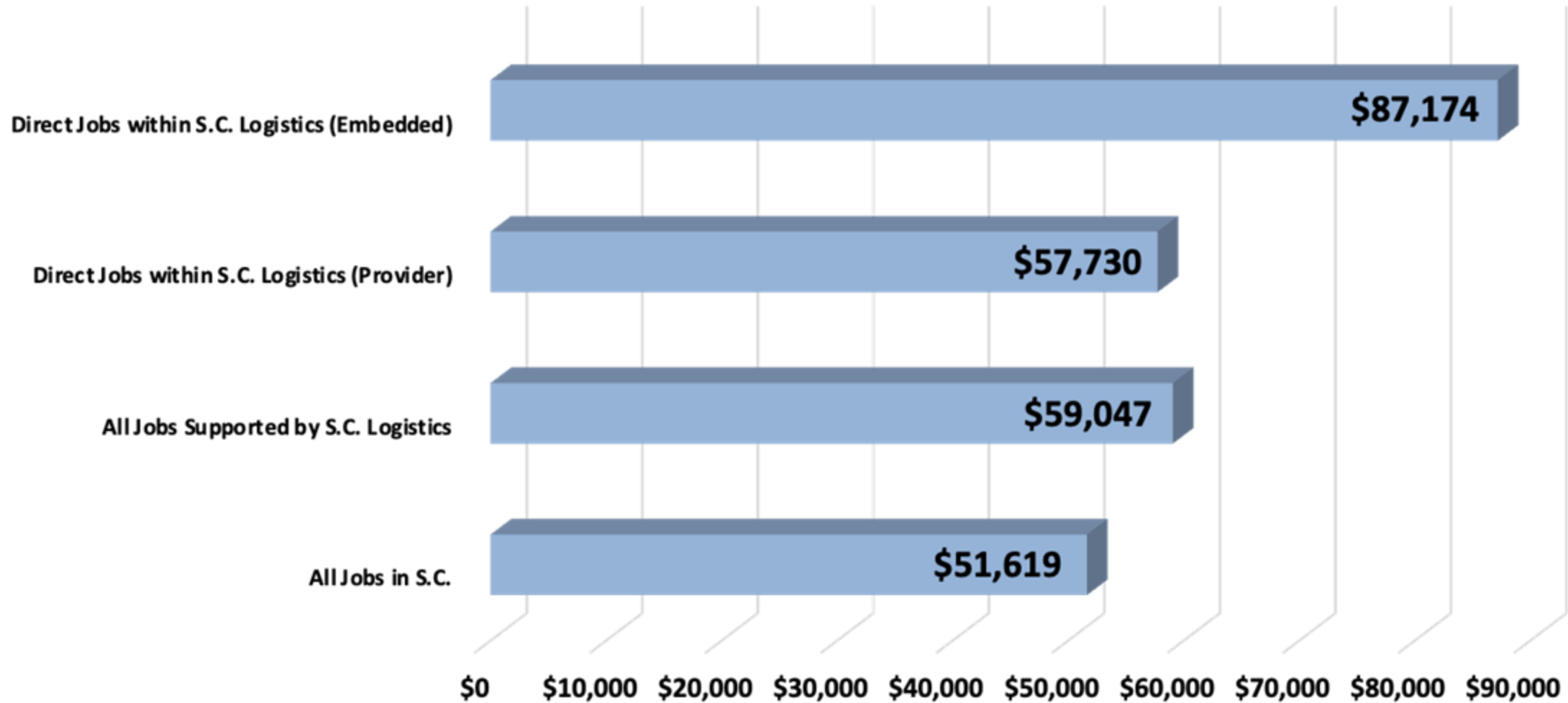
A Growing Impact: Employment



+31.9%
2017-2023 growth



Average Annual Wage Comparisons





South Carolina Economic Impact

Total Employment: 150,160

Total Compensation: \$8.9 billion

Total Economic Impact: \$48.3 billion



2x2 SC Tech Impact Study 2024 - A Look Back

2024 Economic Impact Study



South Carolina's Tech Industry Powers Economic Growth

SC Tech is a rapidly-expanding industry, having **grown more than twice** as fast as South Carolina's economy over the previous decade.



TOTAL ECONOMIC
OUTPUT OF TECH IN SC
\$51.7 BILLION

LABOR INCOME
OF TECH IN SC
\$13.8 BILLION

TOTAL EMPLOYMENT
OF SC TECH
143,011

SC TECH FIRM
EMPLOYMENT HAS
INCREASED BY
56.7%
SINCE 2020



\$ TECH JOBS PAY AN
AVERAGE WAGE OF
\$96,763

The Tech wage premium reflects a **"skills premium"** as well as a high demand for workers in tech-related operations. This higher average wage is **78% higher** than SC's average pay.



SC "TECH FIRMS" INCLUDE

Industries identified as having a concentration of tech workers at least

5x higher

than the national average,

and industries considered by CompTIA to be a part of the tech ecosystem.

FASTEST GROWING TECH OCCUPATIONS (2019-2023)

Data Scientists	+168.9%
Misc. Computer Occupations	+21.5%
Computer & Info Systems Manager	+9.1%
Computer User Support Specialist	+7.6%
Computer Network Support Specialist	+5.3%



ABOUT CYBERSEC

CyberSecureSC (CyberSec) is an initiative of SC Competes through its SC Tech cluster, put forth to aid the public and private sectors in both facing the challenges and realizing the opportunities that a technologically-centered culture present.

CyberSecureSC assembles those from different spheres – government, education, and industry – to train and educate a strong multi-disciplinary cybersecurity workforce, cultivate and advance IT and innovation to keep pace with the ever-evolving digital threat landscape, support industry leaders and entrepreneurs in managing digital risk and shaping the future of our state’s online security, and be the first choice to establish SC as a global leader in cybersecurity.

Industry/Companies

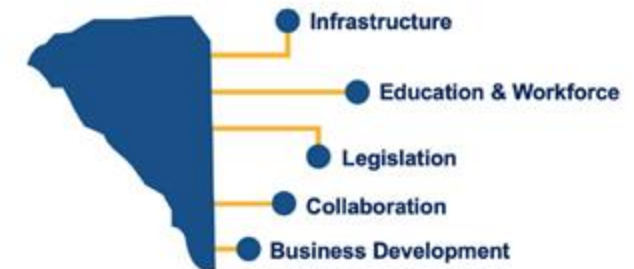
Education (K-12, Higher Ed, Work-Study)

Government

Defense/Military

Economic Development Organizations

Existing Regional Initiatives



Logistics/Maritime Cybersecurity Mentorship Forum

Charleston Region – March 12

Beaufort Region – March 13

Orangeburg / Denmark, SC – Date Pending

- INSPIRE female junior/senior high school & post-sec students to explore career opportunities in cybersecurity & critical technologies, particularly within logistics & maritime
- OFFERS participants unique experience to learn from industry leaders, build professional skills, and connect with potential mentors within their own communities



Palmetto AI Corridor



World's supply chains and advanced manufacturers are turning to artificial intelligence to solve key business issues and explore new opportunities

SC Competes has established "Palmetto AI Corridor" to connect and grow the communication and influence among our state's public agencies, AI firms/professionals, and academic researchers.

2022 - Rapid Innovation Labs:

SC Competes hosted a Rapid Innovation Workshop around Artificial Intelligence, bringing together representatives from public bodies, academic institutions, and private companies working in, or heavily implementing, AI.

2022-2025 - AI in Education and Career Awareness:

- AI Pathway and Standards Study
- Data Science and Artificial Intelligence Initiative with 4-yr college & AI company
- AI Summer Camps with 2- and 4-year colleges
- **"PAL" - Palmetto Automated Learning Robot**



Misc. Trends

- Advanced Air Mobility // AAM
- Unmanned Systems
- Artificial Intelligence...MRO, Predictive maintenance *e.g.*
- Digital twins
- Energy
- Sustainable Aviation Fuel // SAF
- Workforce – *evergreen*
- Space
- Defense spending

...TnT (Tariff & Taxes)...Geo-Political issues...
Above my pay grade!





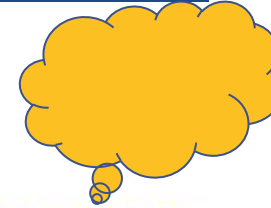
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Education & Workforce Development

TransformSC – K-12

PROFILE OF THE South Carolina Graduate



WORLD-CLASS KNOWLEDGE

Rigorous standards in language arts
and math for career and college
readiness

Multiple languages, science, technology,
engineering, mathematics (STEM), arts and
social sciences



WORLD-CLASS SKILLS

Creativity and innovation
Critical thinking and
problem solving
Collaboration and teamwork
Communication, information,
media and technology
Knowing how to learn

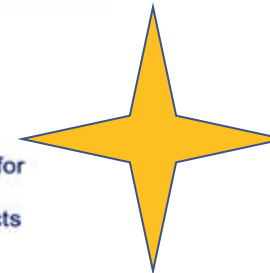
LIFE AND CAREER CHARACTERISTICS

Integrity • Self-direction • Global perspective • Perseverance • Work ethic • Interpersonal skills

© SCASA Superintendents' Roundtable

Codified by the South Carolina General Assembly in 2016

Adopted by: SC Arts Alliance, SC Arts in Basic Curriculum Steering Committee, SCASCD, SC Chamber of Commerce, SC Coalition for Math & Science, SC Commission on Higher Education, SC Council on Competitiveness, SC Education Oversight Committee, SC School Boards Association, SC State Board of Education, SC State Department of Education, TransformSC Schools and Districts



Skills & Dispositions Assessment Analysis:

Are South Carolina schools measuring the skills and characteristics on the Profile of the SC Graduate?

Integrity • Self-direction • Global perspective • Perseverance • Work ethic • Interpersonal skills

MOST commonly measured characteristics

Communication
Information
Media
Technology



World Class Skills



Life & Career
Characteristics



World Class Skills
+
Life & Career
Characteristics

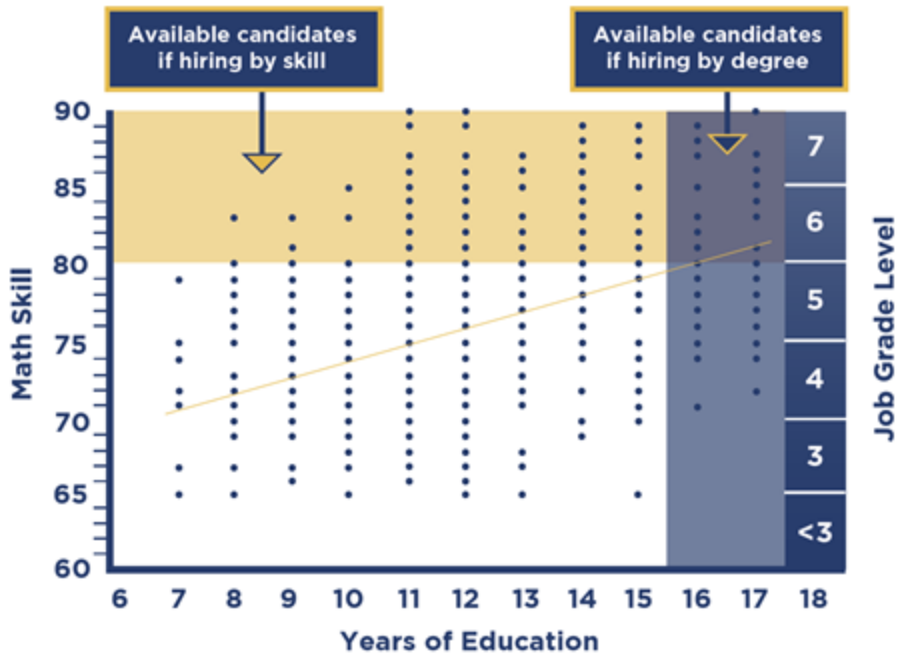
LEAST measured characteristics

Integrity
Work Ethic

The Riley Institute, 2021, "Skills and Dispositions Assessment Analysis: TransformSC Profile of the SC Graduate"



Hiring the SC Graduate:



Expanding the Talent Pool

The # of individuals across South Carolina's potential workforce that do not have a **formal degree** is

53%

Research shows that hiring on skills is

5x

more predictive of success than hiring by degree alone.

Evaluating candidates based on skills rather than degree attainment could open up South Carolina employers to a

47% larger talent pool.

I+E surveyed over **26,000 businesses** in SC to determine which skills matter and how they assess them.

Skills listed on The Profile of the South Carolina Graduate are still those most in demand.

Skills most in demand were **Perseverance and Work Ethic**.

The main ways businesses judge these skills is by using **work-based experience** list on a resume or through **behavioral interview** questioning.



Aerospace Education

K-12 PROGRAMS

Dozens of SC High Schools are teaching SREB four year **aerospace engineering** curriculum (launched by SC Aerospace and Dept of Ed in 2017) or two year **pilot training** curriculum (AOPA)

30+ Project Lead the Way Intro to Aerospace courses taught at middle and high schools in nearly every school district

NASA Challenger Learning Center – dedicated to introducing flight and space to students statewide (located in Columbia)

Many camps, museums and events to get students interested in aerospace



THE
CHILDREN'S
MUSEUM
OF THE UPSTATE



Logistics Education



1,000+ Students

Learned about Supply Chain thru games we taught across SC at Elementary/Middle/High Schools and Colleges

300+ Students

Enjoyed hands-on experiences in logistics careers at our co-hosted Maritime & Logistics Youth Expo



Company Visits w/ Kids

- Hosted annual school visits to SC Ports, Walmart Distribution Center, and more



K-12 Career Cluster Technical Advisory Committees

*Reconstitute and convene business-majority career cluster advisory boards to gather *industry input*, enabling the education community to identify relevant certifications and curriculum offerings for SC employers within those pathways*

Will steer direction on education pathways thru SC Department of Education

Clusters

1. Agriculture, Food, & Natural Resources
2. Architecture & Construction
3. Arts, Audio/Video Technology, & Communications
4. Business, Management, & Administration
5. Education & Training
6. Finance
7. Government & Public Administration
8. Health Science
9. Hospitality & Tourism
10. Human Services
11. **Information Technology**
12. Law, Public Safety, & Security
13. **Manufacturing**
14. Marketing, Sales, & Service
15. **Science, Technology, Engineering, & Mathematics (STEM)**
16. **Transportation, Distribution, & Logistics**



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SC Fraunhofer USA Alliance



Collaborative of SC Department of Commerce, SC Competes, & research expertise of Fraunhofer USA network and SC's research institutions.

Alliance and research it supports gives SC an edge by accelerating applied research and increasing competitiveness of SC companies.



SC Fraunhofer Alliance

2024 - A Look Back

Another sold-out and successful Battery Symposium (300+ attendees)
Expanded Voice of Industry representation on Review Board



2025 - A Look Ahead

Expand Energy and Life Science project portfolio
Increase impact!

Industry sectors served to date:

Automotive

Logistics

Aerospace

Life Sciences

Industries to be served going forward:

Automotive & Battery Industry

Logistics & Supply Chain

Aerospace & Materials

Life Sciences

Advanced Energy



SCAN/ SC Asset Network – Get on the Map!

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ASC

of Assets in List
3,653

Filters

- Business or Education/Workforce: - All -
- Partner: - All -
- Aerospace Cluster (Y/N): - All -
- Logistics Cluster (Y/N): - All -
- Tech Industry (Y/N): - All -
- Industry Sector: 0 Selected
- Highlighted Technology: - All -

Assets

- ★ Business Partner
- ★ Education & Workforce Partner
- Business
- Education & Workforce

10RULE INC
Industry: SC Tech
Partner: No

1ST DEFENSE TRAINING LLC
Industry: SC Tech
Partner: No

21ST CENTURY HOLDINGS LLC
Industry: SC Logistics
Partner: No

2AM GROUP LLC (SC) - BLYTHEWOOD
Industry: SC Aerospace
Partner: No

2AM GROUP LLC (SC) - CHARLESTON
Industry: SC Aerospace
Partner: No

2AM GROUP LLC (SC) - GREER
Industry: SC Aerospace
Partner: No

Powered by Esri

SC AEROSPACE
CYBERSEC
SC TRAINING USA ALLIANCE
SC LOGISTICS
SCTECH
transformSC
PALMETTO AI CORRIDOR

SCAN = GIS-enabled asset map of Aerospace, Logistics, Technology-Cyber, EV, AI firms AND education & workforce training programs across SC

Can filter by type of industry, specific industry categories, or highlighted technologies such as AI, EV, Cyber.

[Link to SCAN](#)



2025 SC Competes Spring Summit

SC COMPETES '25 SPRING SUMMIT

We Advance South Carolina

April 29th - May 1st | Charleston, SC

Offering multiple lanes across **logistics, aerospace, technology, battery, and workforce innovations.**



Celebrating two decades of nurturing growth & innovation in South Carolina.

Registration opens in January.
Stay tuned for more info!



 SC COUNCIL ON COMPETITIVENESS



Featured lanes include: **Logistics Tech Talk, Battery Symposium, Regional Innovations, and Connections & Collaborations.**

KEYNOTE STAGE

Our keynote stage will include: **SC Logistics Tech Talk** focused on automation in supply chain, **Sustainable Aircraft Fuel (SAF)**, **Advanced Air Mobility (AAM)**, and featured keynote speakers in **energy** and **battery** investment in the state.

BATTERY SYMPOSIUM

Together with Fraunhofer USA, **SCFUSA Battery Symposium** will be back for a third year. Our battery experts and SC battery companies will take stage at the Spring Summit, focused on South Carolina's future in the **battery production, safety, and recycling.**

REGIONAL INNOVATION SPOTLIGHT

Our **Regional Innovation Spotlight** lane will be a great engagement opportunity for students and professionals to interact with speakers and each other. Come check out presentations and demos from **Lowcountry innovators** and **USC McNAIR Center** researchers.

CONNECTIONS & COLLABORATION

Collaboration is in our DNA! This lane will include our fourth annual **logistics/tech B2B** speed dating event, speaker **ask us anything (AUA)** for students, **receptions**, and more opportunities for networking and connection.





SC COUNCIL ON COMPETITIVENESS

Let's Talk!

Susie Shannon - SC Competes
sshannon@sccompetes.org



www.sccompetes.org

