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Colossus of Roads

Highway, byway and railway projects around the world seek to put people and products in motion.

Logistics and distribution locations are only as good as the lines on the map that connect them. Thus do transportation infrastructure and the destination points it links continue their perpetual dance of development.

Europe has been rich with supersized infrastructure projects over the past decade, with spectacular bridges, highways and tunnels taking shape to help speed cargo and citizens alike. That trend continues as major new investments stretching from Great Britain to Greece are at various stages of development.

One of the world's major infrastructure achievements is nearing completion in Greece. By any standard, the Egnatia Motorway, is one of the world's great infrastructure accomplishments. Greek Prime Minister Kostas Karamanlis opened the final section of the highway in May 2009.

Construction began in the 1990s. The €6.7-billion (US\$9.5-billion) project stretches 670 km. (416 miles) from the port city of Igoumenitsa on Greece's western border to the city of Kipi on Greece's eastern border with Turkey. The European Union, the Greek Government and the European Investment Bank have financed the project.

The Egnatia Motorway features 1,650 major bridges and 76 tunnels along its route as it passes through 330 towns and villages. Approximately half the project's cost was spent on bridges and tunnels. The route also includes 43 river crossings and 11 railway crossings.

Egnatia approximately traces a major trade route of the ancient world, the Via Egnatia, built in 130 B.C. The original highway was one of the major links to Rome. Greek officials believe the route will regain its regional significance in trade, investment and commerce. It provides an improved link with the Greek metropolitan area of Thessaloniki. On a European level, Egnatia will link the major industrial centers of the West with the East.

The Greek government anticipates the roadway will open many new investment opportunities in areas such as logistics, manufacturing and tourism. Egnatia is a collector route for the Balkan and southeast European transport system, and several regional European transportation corridors connect to the highway. Egnatia directly links Greece with Albania, Macedonia, Bulgaria and Turkey through nine vertical connections.



This new interchange near Thessaloniki is one of nearly 60 new interchanges along the 416-mile (670-km.) Egnatia Motorway in Greece.

by **JOHN W. McCURRY & ADAM BRUNS**
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Link for Northern Europe

In September 2008, Denmark and Germany signed a treaty for the construction of a fixed link across the Fehmarnbelt. The project will connect the German island of Fehmarn to the Danish island of Lolland with a bridge crossing the 19-km. (11-mile) Fehmarn Belt in the Baltic Sea. Officials of the two nations say the link will close the gap in the infrastructure between Scandinavia and the European continent and will greatly improve traffic conditions in the region. The link is projected to result in lower transport costs for train and car traffic while improving business competitiveness.

The current preferred link is a cable-stayed bridge, but an immersed tunnel is also being considered. Engineering firms are now looking at both options. The current timetable calls for the type of link to be determined by 2012 and



construction to be completed by 2018. It will include a double-track railway and four-lane highway. The estimated cost for the bridge alone is €4.4 billion (US\$6.2 billion). If the 20-km. (12.4-mile) tunnel option is selected, it will be the longest of its type in the world.

While the link is a joint project between Denmark and Germany, Denmark has assumed all responsibility for its implementation. The cost will be financed through user payment and EU subsidies. The treaty between Denmark and Germany stipulates that the link is a Danish-owned project, designating that Denmark will plan, construct, operate and finance the coast-coast link. The two countries will each be responsible for developing their own traffic facilities on land as part of the project.



The proposed Fehmarnbelt link will be an important conduit between Denmark and Germany.

London's Crossrail

Initial construction began in May 2009 on Crossrail, the largest civil engineering project in Europe. The \$26.2-billion project will add a 118.5-km. (74-mile) railway that will connect Heathrow Airport and regions west of London to commuter areas east of the city. Crossrail will include up to 42 km. (26 miles) of tunnels bored beneath London streets. Crossrail is due to begin operation in 2017.



The Canary Wharf Station will be among the first projects along London's massive Crossrail.

The U.K. projects that Crossrail will create about 14,000 jobs at the height of its construction and up to 30,000 jobs supporting the project by 2026. Estimates are that it will increase London's public transport network by 10 percent, put 1.5 million people within an hour of London's business centers and add at least \$33.1 billion to the U.K. economy.

"Crossrail will not only mean faster journey times across the capital and beyond, it will also bring a massive economic boost to the city, creating thousands of jobs and adding at least £20

billion to our economy," said U.K. Prime Minister Gordon Brown during a ceremony in May 2009 marking the beginning of construction. "Investment into important projects like Crossrail, the largest construction project in Europe, is vital to create and protect jobs as well as supporting businesses, so that we can grow our way out of recession and ensure a strong future for London

and the country as a whole."

More than 200 million passengers are expected to use the railway in its first year of operation. The new railway will be designed to initially accommodate 10-carriage trains with provision for longer trains in the future. Crossrail will provide new transport links with the Tube, Thameslink, National Rail, DLR and London Overground. It is anticipated that more than 200 million passengers will use Crossrail in the first year of operation.

Baby Steps

Passenger rail is on the front burner on the North American side of the pond too. But before U.S. rail passengers reach high speed, the freight their employers move may need to simply get up to speed.

In April 2009, the Obama Administration announced the availability of \$8 billion in federal stimulus funds for high-speed rail projects, with the expectation of choosing recipients by late September. Another \$2 billion may come from a proposed "infrastructure bank" that received House approval in late July, and President Obama has declared his desire for an additional \$1 billion a year over the next five years to support high-speed rail.

For just the stimulus tranche of cash, by mid-July the administration had received 272 applications totaling \$102 billion in requested funds. Many come from high-speed rail corridor alliances that have been seeking this kind of support for well over a decade. Congress originally authorized a program of national high speed rail corridors in 1991.

"The time has finally come for the United States to get serious about building a national network of high-speed rail corridors we can all be proud of," U.S. Transportation Secretary Ray LaHood said in June. "High-speed rail can reduce traffic congestion and link up with light rail, subways and buses to make travel more convenient and our communities more livable."

Those who follow the nation's infrastructure challenges are familiar by now with the notion that it takes approximately US\$1 million per mile to install electrical transmission infrastructure. To upgrade existing railroad lines to meet the needs of high-speed passenger rail would cost approximately twice that, according to a 2004 report from the Midwest Regional Rail Initiative. Randal O'Toole, a Cato Institute Senior Fellow working on urban growth, public land, and transportation issues, says as a result of price hikes for steel, concrete and energy, it is likely that even those projected costs "need to be adjusted upwards by 50 percent or more."



Randal O'Toole, Cato
Institute Senior Fellow

But more costly than the price tag may be congestive freight failure. For economic developers, then, the key question may be this: Given the country's already backlogged and congested freight rail network, is it possible that, counter-intuitively, the regions that end up receiving some of that \$8 billion for their high-speed corridors might actually be hurting themselves when it comes to future industrial development along rail networks in their regions?

"That is indeed a serious problem," writes O'Toole by e-mail. "Both Japan and Europe have decided to dedicate their rail systems to passenger. Even though Europe has made a big effort to get freight off the roads and onto the rails, it has largely been a failure."

"Do I think it could end up frustrating existing, dilapidated networks? Absolutely," says Foster Finley, managing director in charge of the logistics practice for Southfield, Mich.-based consulting firm AlixPartners, in what he says is simply conjecture. "The normal thing people will find is that planning, efficiency and execution typically get diverted a bit along the way," which often means projects coming in late and over budget. "I'm not sure the average person is ready to embrace the high fixed cost of a high-speed rail system. I'm afraid it's the wrong focus at the wrong time, with a very substantial fixed cost."

In 2004, says O'Toole, Europe only moved 17 percent of its freight by rail; the U.S. moved 38 percent – a proportion which has grown to 40 percent since then. And the Class I railroads would love to see 10 percent more by 2020.

In arguing for a national freight policy before Congress this summer, BNSF CEO Matt Rose suggested a multi-pronged approach that would include tax incentives to spur infrastructure investments, increased use of public-private partnerships, and



The Metsovitikos Bridge connects two tunnels along the Egnatia Motorway.

performance-based transportation funds. To increase freight rail market share by 10 percent, he said, would require an additional \$700 million in annual investment.

"High-speed trains are a serious competitor with freight for rail capacity," says O'Toole. "Obama's plan calls for running passenger trains on freight lines at 110 mph. Matt Rose of BNSF testified before Congress last April that passenger trains running faster than 90 mph were not compatible with freight.

"High-speed rail will mainly serve downtown areas, so only businesses that require downtown-to-downtown travel will realistically benefit from locating near a high-speed rail station," writes O'Toole. "There will be some cachet in being near a station – as would be true of any heavily subsidized megaproject – but the actual use of those trains will be much more limited than people might think (especially considering that the average speed of most of the trains will only be about 60-70 mph)."

Common Ground

But even the Class Is themselves would not necessarily paint things with so dire a palette.



"Ultimately even freight railroads agree that moving people faster is good," says Association of American Railroads (AAR) spokesperson Holly Arthur. "We support the concept. It just needs to be done in the right way."

In June 2009, the Federal Railroad Administration, much to the AAR's delight, issued guidance on applying for the stimulus funding that made it clear that governments will need to have written contracts in place with the private freight railroads hosting their projects. A year earlier, however, a Union Pacific official asked California authorities to not plan on

using its lines for high-speed passenger rail.

Asked if BNSF has made any similar requests, D.J. Mitchell, assistant vice president of passenger operations for BNSF, says, "Absolutely, positively not. We're working with Caltrans and the high-speed rail authority. We simply do not have that philosophy or that instruction from our executive team."

Asked whether high-speed passenger rail might put a dent in industrial development along the freight lines, Mitchell again says, "Absolutely not, on our property. We have a principle that any arrangement we make with a public agency will not degrade the quality of freight service now or in the future."

Mitchell says that principle applies to any proposed commuter rail service addition, such as those he's overseen in Chicago (where he used to run a commuter line) and Los Angeles.

"We model and measure performance change as we add passenger service, and the obligation is

In 1962 a blue-ribbon committee began studying proposals for a rapid-transit system for Atlanta. The Metropolitan Atlanta Rapid Study Commission hired Parsons-Brinckerhoff to do a feasibility study for the proposed 66-mile (106-km.), five-county rail system. The estimated cost was several hundred thousand dollars for the first stage, and the project was recommended. In 1965, *Site Selection's* publisher McKinley Conway, a Georgia State Senator, co-authored the bill that formed the Metropolitan Atlanta Rapid Transit Authority (MARTA). (Conway had been a member of the original study commission.)



While it still has a long way to go to realize its conceivers' vision, the MARTA system has proved vital to aiding Atlanta's traffic challenges.

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In 1972, voters in Fulton and DeKalb counties passed a 1-percent sales tax to fund the operation, and construction finally began in 1975. At that point the estimated cost was substantially higher than when the proposal was first recommended, due in part to the construction of numerous high-rises in the plan's right-of-way. Today, MARTA is the ninth-largest transit system in the United States, serving an average of more than 550,000 riders a day. The Federal Transit Administration has provided nearly 60 percent of the more than \$3 billion capital cost.

"How It Started" is an occasional series offering glimpses into the 55 years of economic development and project archives associated with Site Selection publisher Conway Data and company founder McKinley Conway.

to go back to current conditions," he says. "If the average [pre-passenger] transit time is 10 hours, we have to make sure it gets

back to that."

Mitchell points to Seattle as a market where a successful marriage of the two needs has occurred, with the twin markers of increased passenger rail stations and increased light industrial development in the same neighborhoods.



THE LAY OF THE LAND: The map above overlays high-speed rail corridors, recent demographic projections and the current rail network to give a complete picture of the potential landscape down the line. Factoring in recent facility project location results from the Conway Data New Plant Database would indicate that Texas, Florida, the Southeast and the Greater Chicago region might have a leg up on the competition for federal funds due to be awarded in September. But there's more to the picture: The criteria released in July include favored status for projects with established revenue sources (e.g. bonds in California) and multistate cooperation, as well as those that would reduce highway and airport congestion and create the greatest number of quality jobs.

Sense of Perspective

Ultimately, says Mitchell, when freight and passenger priorities conflict, whether it's high-speed or not, it's time to add another line.

"The working carrying capability of a two-track railroad is about 80 trains a day. For a three-track, north of 150 trains a day. But you have to worry about the operating pattern. If the commuter people want inbound and outbound service during rush hour, they're taking the asset – that's the point when we need a third track. L.A. is adding a third track by 2012 or 2013. Seattle is in that process."

In fact, four or five tracks are not out of the question for some areas, says Mitchell, provided there is the property and the money. Mitchell leavens ballooning cost projections with an engineer's eye, noting that most first-blush estimates are based on unit cost estimates that vary by locality.

"Right now the cost in L.A. as we're triple-tracking is bumping up to \$10 million a mile," he says. "In the open area [outside the city] it's closer to \$3 million or \$4 million a mile. For any one of these high-speed rail corridors, it will be different."

One thing Mitchell does know, however, is that passenger rail in the long run beats building another expressway lane. He says to add the level of highway service that would equate to 1,500 people per train on five trains an hour would cost "north of \$60 million a mile."

Mitchell says it's all about "creating another right of way to carry boxes a little bigger than the boxes people ride in on

something called a 'street.' The mission of rail service is to get more people in boxes to move the same distance."

In fact, in Ohio, a revised financing plan for the state's passenger rail infrastructure upgrade includes a potential \$10 million from fees paid by establishments to appear on blue highway upcoming exit signs.

As the nation's various high-speed rail corridor supporters would attest, it's all about perseverance and long-term courage.

"We started working on the Seattle project in 1991," says Mitchell, "and this year we finished construction on the south leg of that service. There's no longer a debate, because they were able to make good policy decisions based on the position we took early on in 1992."

For those who point to France's TGV network, Mitchell calls attention to the system's 50 years of evolution, and the fact that really fast trains did not come up until capacity between Paris and Lyon had been filled to the breaking point and a new line had to be considered.

"They didn't get there overnight," he says. "They built the market, and the reliability. At the point of TGV, there was a significant mode shift from air to rail. Now I don't think you can fly between Paris and Lyon, and I know you can't fly between Paris and Brussels.

"It's a lifetime effort," he says. "In the United States we are just now starting, and we've been working in the trenches on this subject for literally 20 years."

What the Logistics Numbers Say

As for the cargo side of the equation, facility projects with a distribution/logistics component tracked by the Conway Data New Plant Database between Jan. 2008 and mid-July 2009 numbered 1,255. After the U.S., which was the far-and-away leader with 965 projects, among the leaders by nation were, in order:

Canada	50
Mexico	32
United Kingdom	23
Hungary	21
Germany	21

Leading non-U.S. metro areas for new logistics activity include Calgary, Budapest, Dubai and Guadalajara, followed by Shanghai, Toronto and Mexico City. Logistics momentum in Mexico is heating up: Witness **Wal-Mart de Mexico's** July 2009 announcement of its third distribution center in the state of Tabasco and 14th in Mexico. The \$54.1-million facility will employ 700 on a spread approaching 2 million sq. ft. (185,800 sq. m.) that will serve seven Mexican states in the nation's southeast region.

As shippers and territories alike create new services and routes to take advantage of the Mexican connection to Asia, some analysts continue to look favorably on the country's logistics prospects. Early 2009 saw the release of the "Global Contract Logistics 2009" report by U.K.-based Transport Intelligence. "Mexico is set to benefit from two major trends," said Transport Intelligence CEO John Manners-Bell of the report's findings. "Investment in port facilities will divert Asia Pacific shipping volumes from the major U.S. West Coast ports. The country's logistics industry will also develop on the back of 'near-sourcing' of production which, with rising input costs in China, will become increasingly important. For the full benefits of this to be seen by the American consumer, the authorities need to sort out the cross-border trucking impasse which is engraining inefficiency in the system."

Texas is Tops

Within the U.S., these are the top 10 states continuing to see logistics location or expansion momentum, listed in order of

project totals tracked during that same Jan. 2008-July 2009 time period:

Texas	141
Ohio	118
Illinois	68
North Carolina	56
Pennsylvania	48
Virginia	41
Florida	40
Indiana	39
California	38
New York	36

Those states are being chased by the next tier: Georgia (31), Michigan (31), Kentucky (29), Tennessee (25) and Wisconsin (18).

Among U.S. metro areas (core-based statistical areas, or CBSAs) examined for that same time period, here are the logistics leaders:

Dallas-Fort Worth-Arlington, Texas	59
Chicago-Naperville-Joliet, Ill.-Ind.-Wis.	57
Houston-Baytown-Sugar Land, Texas	43
Cincinnati-Middletown, Ohio-Ky.-Ind.	35
Indianapolis, Ind.	21
Columbus, Ohio	21
New York-Newark-Edison, N.Y.-N.J.-Pa.	18
Cleveland-Elyria-Mentor, Ohio	15
Riverside-San Bernardino-Ontario, Calif.	14
Detroit-Warren-Livonia, Mich.	14

All but Indianapolis and Riverside were among *Site Selection's* Top 10 Metro areas for overall corporate facility projects in 2008, according to New Plant data.

Approximately a dozen communities hover just outside the logistics top 10, including Pittsburgh, Pa., Richmond, Va.; and Atlanta-Sandy Springs, Ga., with 13 projects each; Charlotte-Gastonia-Concord, N.C.-S.C., and Virginia Beach-Norfolk-Newport News, Va., with 12 each; and the multi-state river metros of St. Louis, Louisville and Memphis with 11 each.

Tennessee, Ohio and Kentucky lead the way in micropolitan logistics, with projects locating in smaller communities such as Ripley, Tenn.; Holiday City, Ohio; and Springfield, Ky.

Following the overall consolidation trend, 114 of the U.S. projects (nearly 12 percent) featured manufacturing and distribution functions, 40 included headquarters or office space mixed with logistics space, and 37 contained some mix of office, logistics, manufacturing and/or R&D space.

The Trains from Spain Come Back

In announcing a \$47-million agreement in July 2009 to purchase two 14-car passenger trains from Spanish manufacturer Talgo for Amtrak's popular Milwaukee-Chicago route, Wisconsin Gov. Jim Doyle was also able to announce that Talgo would establish an assembly facility and a maintenance facility in the state, which together could employ as many as 80 people.

The company makes all of its parts in Spain currently, and its only U.S. facilities are a main office and a maintenance facility in Seattle. The new facilities will most likely be sited in southeastern or south-central Wisconsin.

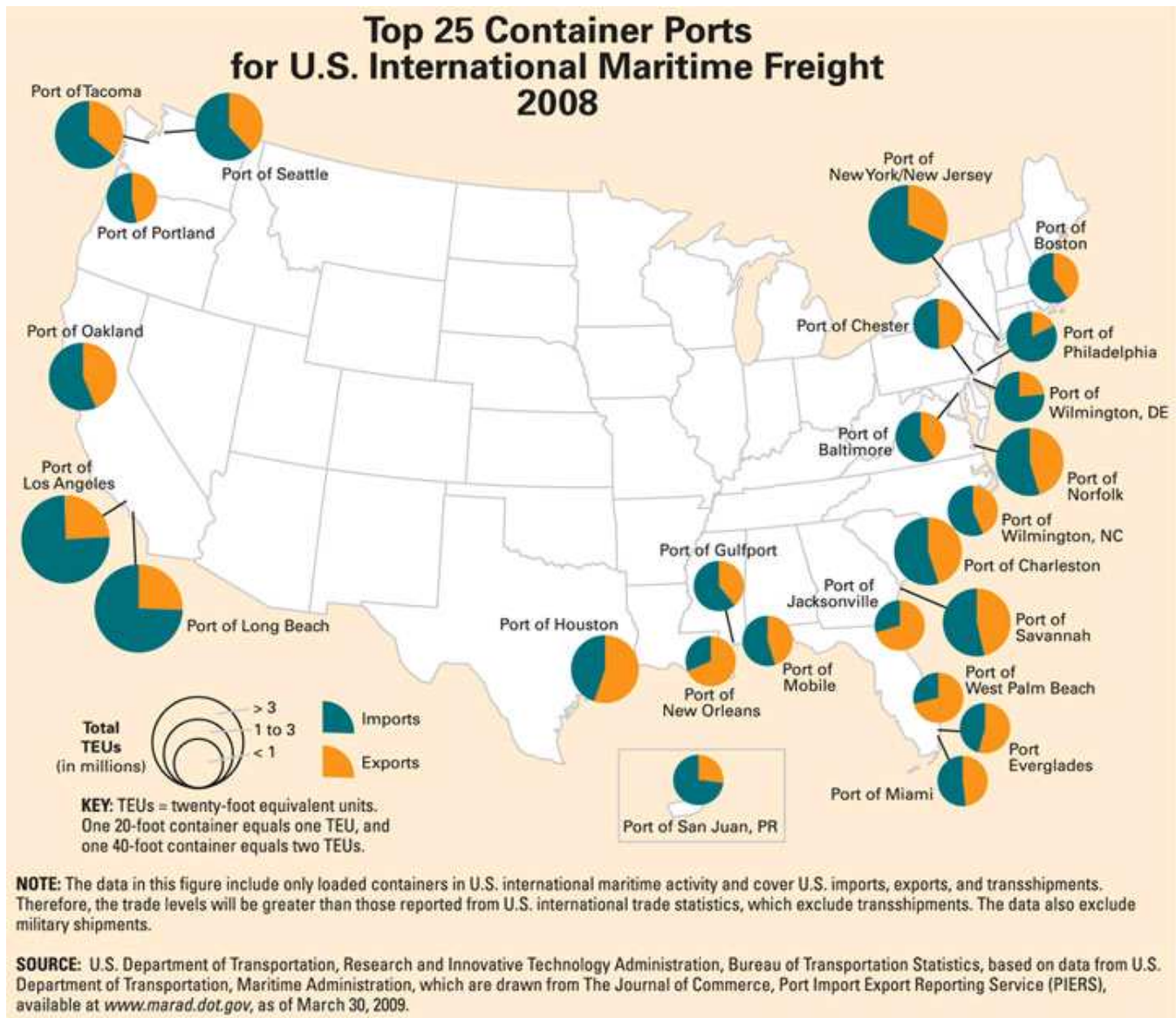
The future may bring more business between the state and Talgo: Wisconsin has pledged to purchase two more such trains if it receives federal funding backing new train service between Milwaukee and Madison.

"After 14 years of track record in the U.S. market and having participated in the Midwest Regional Rail Initiative in 2000, Talgo is very excited to have its equipment selected again as the most suitable for the Madison-Milwaukee-Chicago Corridor," said Antonio Perez, CEO and president of Talgo Inc., the company's U.S. subsidiary. "We are very excited with the opportunity of manufacturing high-speed trains in Wisconsin and helping to bring economic development and the option for proven intercity passenger rail equipment to the Midwest region."

Each 14-car set will seat 420 people, 70 more than current capacity on Amtrak's Hiawatha Service between Milwaukee and Chicago. Its popularity continues to grow, with more than 766,000 riders in 2008, a 24-percent increase over 2007.



Wisconsin Gov. Jim Doyle said his state's relationship with **Talgo** "has the potential to create even more jobs, gives the state a major role in the growth of an exciting transportation industry and helps us move forward with our vision for high speed passenger rail service in the Midwest."



Plenty Coming, Some Going by Sea and by Land

U.S. international maritime freight data for 2008 shows a healthy import/export balance along the entire string of ports extending from Houston around to Norfolk, all of which have been growing their business. Demographic and business location trends, in addition to new incentives such as Louisiana's new "Port Investor" and "Import Export" tax credits (signed into law in July 2009) may further support making a positive logistics location recommendation in this region, as well as in spot markets such as Portland, Ore., and Tacoma, Wash.

"Overall, there were over 25 million container entries into the United States by all modes of transportation in 2007, up 38 percent from nearly 19 million in 2000," says a June 2009 report on U.S. container ports published by the U.S. Dept. of Transportation. "In addition to the more than 11 million ocean-borne containers used to bring goods into the United States, over 14 million containers entered the nation by truck and rail from Canada and Mexico in 2007.

"From 2000 to 2007, the number of truck, rail, and maritime container units (loaded and unloaded) crossing into the United States rose by 8 percent, 27 percent, and 94 percent, respectively," said the report.

Cost Reduction Redux

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oster Finley, leader of the logistics practice at consulting firm AlixPartners, recently led an effort to help a client firm achieve a sustained transportation cost reduction. The firm, he says, spent substantial dollars, but was inefficient in leveraging that spend and managed its transportation function in a fragmented manner. For instance, he says, "they had not thought about individually scheduled trucks crossing paths which could have been brought together."

AlixPartners began by bringing together the various people responsible for logistics management. A competitive sourcing process with carriers was carried out. And the team examined the cost of delivery to customers compared to the price those customers were paying. The client thought the difference between the two figures was close enough.

"We took a long hard look, and the assumed cost of delivery was very misaligned with the actual cost. We began to look at where the worst infractions were. Sometimes we went back to customers and said we needed to change how we get a product to them."

As for facility location, "this client had been bringing in product from abroad through various U.S. ports, transported them at expensive rates to a central location, then turned around and shipped them to points of demand. It so happened that demand was along the coasts."

By shuttering a facility and quickly bringing up facilities proximate to the coast, the team was able to intercept product flow, increase flexibility and reduce inventory.



Foster Finley, managing director and logistics practice leader, AlixPartners

Know Where You Stand

The clean-up process was abetted by better data collection and decision-support technology to manage such items as inbound freight conversion. For instance, knowledge of supplier locations can lead a decision-maker to loop a truck around to get an item rather than pay a parcel rate.

AlixPartners is known for helping companies in bankruptcy, which are "not known for having all the data at hand," says Finley. "Nine times out of 10, the data exists. It's just not easily accessible." A combination of data forensics and persistence can usually yield the necessary facts. If not, it's best to at least know inflection points, says Finley, e.g. if a price point falls between \$1.60 and \$2.10 per mile for a fully loaded truck, there will be no change in a location decision.

Finley says the current market makes it advantageous for shippers to continually review rates, even if they have a contract for a year or more. That includes shipping by sea, he says, noting the impact of difficult economic times for shippers on sailing schedules, routes and frequency. He notes in particular the new multi-carrier e-commerce platform INTTRA and its chief competitor GT Nexus. "Ocean is a tremendous opportunity right now," he says.

Regular Rail Does Nicely

Even when it's not high-speed, new rail amenities can play a big part in improving a place's attractiveness to companies and talent. BNSF Assistant Vice President of Passenger Operations D.J. Mitchell says his days running the commuter service in Chicago (where BNSF has run commuter rail since 1864), and since with BNSF, have been punctuated by site searchers' questions about passenger rail service. The results are clear in such communities as Naperville, Ill., and Fullerton, Calif., where commuter rail has breathed life into community growth. He says the Southern California Regional Rail Authority, via Metrolink, "runs 27 to 30 trains on [BNSF rail lines], and their ridership has gone up. Go to Fullerton, and what used to be blighted area is now top-end row housing."

In Chicago, it's 92 trains a day, 20 minutes apart. And in the increasingly rail-friendly environs of Seattle, says Mitchell, "we're expecting 36 trains a day soon."

In service since just 2000, the Seattle commuter trains already are transporting the equivalent of one lane of traffic off of I-5, says Mitchell.

"People are beginning to make decisions, after just nine years of service, as to locating in and around the rail stations,



D.J. Mitchell, BNSF

so they can get access downtown," he says. Light rail expansion taking people to Sea-Tac and to the region's universities is just coming into being, with a link to Sea-Tac International Airport due to open in December 2009. Mitchell says the first stops of that service along the south side of Seattle already are seeing a lot of traffic going to the growing light manufacturing sector in the area.

"There are sizable numbers of people getting on and off because they're going to jobs in that area," he says. "There is a lot of manufacturing, and there was a conscious decision to put those stations where they are so buses could take riders from those stations to points of employment."

The SeaTac City Council has taken action to encourage redevelopment by updating zoning laws to allow for high density in the station areas, and investing \$3.7 billion in public infrastructure over the past 15 years. "We are actively seeking development partners to work with us on the 82-acre [33-hectare] site located just across the new sky bridge from Sea-Tac International Airport and the site at South 154th Street," said Jeff Robinson, economic development manager for the City of SeaTac, in a July 2009 news release.

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