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BOARD OF SUPERVISORS AGENDA ITEM REPORT (BOSAIR)

All fields are required. Enter N/A if not applicable. For number fields, enter 0 if not applicable.

Award Type:	Agenda Item
BOSAIR Activity:	Board Meeting Request
Requested Board Meeting Date:	08/11/2026
Project Title / Description:	Pima County Economic Development Strategic Plan 2026-29

Agenda Item Report

Introduction / Background:	The Economic Development Strategic Plan (EDSP) is Pima County's guiding framework for economic development, last updated for the 2023–26 cycle. The Department of Economic Development, in coordination with Rounds Consulting Group, has completed an update of the plan for the 2026–29 cycle, reflecting three years of implementation experience, updated data, and current stakeholder engagement.
Discussion:	The updated EDSP retains the plan's four core pillars while incorporating updated recommendations, data, and alignment with the County's companion planning efforts, including the Prosperity Initiative, One Pima, PimaCAN!, Pima Prospers, and the Regional Housing Strategy and Funding Plan. The plan was developed through stakeholder input, community engagement, and secondary research, and has been reviewed by County leadership for consistency with Board priorities.
Conclusion:	The EDSP 2026–29 update positions Pima County to pursue coordinated, datadriven economic development priorities over the next three years, while maintaining alignment with the County's broader strategic and policy framework.
Recommendation:	Staff recommends the Board of Supervisors adopt the Economic Development Strategic Plan 2026–29.
Fiscal Impact:	There is no direct fiscal impact associated with adoption of the plan. Implementation of individual recommendations may require future budget requests, to be brought to the Board separately as applicable.
Support of Prosperity Initiative:	13. Support Small Business
Provide information that explains how this activity supports the selected Prosperity Initiative	The EDSP 2026–29 directly supports multiple policy areas in the Prosperity Initiative by prioritizing quality job creation and placement, increasing regional capital investment, workforce development, business expansion and retention, and small business support, advancing pathways to economic mobility for Pima County residents and contributing to the overall financial capability and reduction of poverty of and for Pima County and its residents. The strategy also makes the innovation and startup ecosystem an explicit priority for the first time and will establish a dedicated small and medium-sized business support program providing technical assistance, mentorship, and capital access navigation for entrepreneurs across all sectors, with intentional outreach and support for low-income and underserved communities.
Board of Supervisor District:	• 1 • 2 • 3 • 4 • 5
Department:	Economic Development
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Department Director Signature: Department Director Date: 7/29/2026 | 1:17 PM MST

Deputy County Administrator Signature: Date: 7/29/2026 | 2:14 PM MST

County Administrator Signature: Date: 7/29/2026 | 3:49 PM MST

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PIMA COUNTY
ECONOMIC DEVELOPMENT

ECONOMIC DEVELOPMENT STRATEGY

2026-29

PIMA COUNTY, ARIZONA
MAY 2026

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PIMA COUNTY

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Executive Summary

Over the three years since the adoption of the 2023–26 Pima County Economic Development Strategic Plan (EDSP), meaningful and concrete progress has been made in the community. The inaugural Pima Aviation Alliance was created, bringing together regional educational and workforce stakeholders to advance experiential learning in aerospace and aviation to build a pipeline of talent for these careers. An Innovation Hub concept was developed that envisions bringing government, education and industry together to position Pima County to accelerate advanced manufacturing, the innovation economy, cultural immersion, and entrepreneurship goals in a single coordinated initiative. The Pima County Board of Supervisors adopted new Enhanced Due Diligence and Non-Disclosure Agreement (NDA) policies that directly improve development predictability for investors, ensure interdepartmental coordination and streamline the County's response capacity. Asset mapping for the Aerospace and Defense sector is completed. The prior cycle also produced results in business attraction:

- A historic $3.6B investment in Pima County, including 180 direct jobs and ~3,000 construction jobs;
- The attraction of Taiwan-based semiconductor machinery and electronics manufacturer, JSEDM;
- The expansion of Edmund Optics, a local optics manufacturer and supplier;
- The execution of multiple Memoranda of Understanding to facilitate global Foreign Direct Investment (FDI);
- The Sam Levitz building transaction and location of Arto Brick to Tucson, AZ;
- The expansion of GXO Logistics into 435k square feet in Marana at the S. AZ Logistics Center.

These are strategically coordinated and measurable results, delivered from the foundation of regional collaboration within the 2023–26 strategy across a spectrum of regional partners and collaborators.

The Pima County Economic Development Strategic Plan 2026–29 is an intentional update, building on the priorities, partnerships, and lessons of the prior planning cycle, as well as incorporating regional feedback and existing regional planning documents, and sharpening the County's focus for the next three years. The strategy update reinforces Pima County's role as the critical convener: the organization that brings together businesses, educational institutions, workforce organizations, tribal nations, municipalities, and community partners in a coordinated effort to advance shared economic goals. The update also incorporates new and updated data, to ensure data-informed policy decisions align with Pima County's broader policy goals.

Pima County has a bold vision to create an economy that enables every resident to prosper, one that is diverse, resilient, and grounded in the community's unique strengths and values.

A strong, growing economy underpins the County's ability to deliver services, invest in infrastructure, and expand opportunities to all residents. The 2026–29 strategy is designed to advance that goal through a focused, accountable, and action-oriented framework that is consistent with the federal Economic Development Administration's (EDA) standards for a Comprehensive Economic Development Strategy (CEDS) and aligned with adopted County plans including the Pima County Strategic Plan, Prosperity Initiative, OnePima, the Regional Housing Strategy and Funding Plan, PimaCAN!, and Pima Prospers.

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Companion Plan Alignment

Companion Plan	Purpose
Pima County Strategic Plan	The County's overarching governing document built around four core pillars reflecting the Board of Supervisors' priorities. Aligns strategic vision with operational execution across departments, partners, and the community.
Prosperity Initiative	A regional framework led by Pima County focused on reducing generational poverty and expanding opportunity. Organized around the policy areas of education, health, housing, and work.
Regional Housing Strategy and Funding Plan	A 10-year plan approved by the Board of Supervisors on March 3, 2026, setting five goals and 27 strategies to expand housing supply, improve affordability, address homelessness, and strengthen regional coordination. Backed by a $250 million County commitment toward a projected $413 million total investment.
PimaCAN!	The County's initiative to reduce regional greenhouse gas emissions and build long-term community resilience to climate impacts, integrating climate action into county operations, planning, and policy across departments and regional partners.
Pima Prospers	The County's state-mandated comprehensive land use plan for unincorporated Pima County, updated in 2025 on the ten-year cycle required by Arizona statute. Addresses housing supply and affordability, water resources, business attraction, and open space conservation, drawing on the Prosperity Initiative and the EDSP as source material.

Community and Stakeholder Engagement

The development of the 2026–29 EDSP was informed by a broad and structured stakeholder engagement process. Public outreach meetings, online surveying, one-on-one interviews with industry, institutional, educational, and civic, jurisdictional and tribal leaders, and internal sessions with County Administration, County department representatives, members of the Board of Supervisors and staff captured a wide range of perspectives across jurisdictions, sectors, and organizational roles. The process was designed to ensure that the full breadth of Pima County's economic development community, including large and small businesses, the community at large, anchor employers and entrepreneurs, educational institutions, tribal, and regional municipal partners were heard.

Strategic Framework and Recommendations

The 2026–29 EDSP retains the four-pillar architecture established in the 2023–26 plan: Connect and Support, Focus and Prioritize, Community and Culture, and Advocate and Amplify.

What evolves in this cycle is the application of that framework: greater specificity in sector strategy, an expanded cross-border and FDI agenda that names priority international partners, an explicit commitment to the innovation and startup ecosystem, a new lifestyle industry component aligned with the Tucson region's cultural heritage and tourism assets, and a clearer definition of implementation roles. The plan also aligns explicitly with PimaCAN!, the County's adopted Climate Action Plan, ensuring that clean and renewable energy sector development is consistent with the County's long-term environmental sustainability commitments.

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Strategic Pillars

Pillar 1 Connect & Support	Pillar 2 Focus & Prioritize	Pillar 3 Community & Culture	Pillar 4 Advocate & Amplify
Building vital partnerships among businesses, educational sector, workforce organizations, and community stakeholders as the foundation for coordinated action.	Directing County resources toward priority sectors and high-impact opportunities, including business attraction, Business Retention & Expansion (BRE), Foreign Direct Investment (FDI), and the innovation and startup ecosystem.	Aligning economic development with shared community values, equity, quality of life, and the distinct cultural and creative assets that define Pima County.	Engaging decision makers, stakeholders, and partner organizations to promote broader regional alignment and success by leveraging the County's economic development resources.

Strategic Priorities

Within these pillars, four strategic priorities serve as the organizing framework for the County's work:

Business Retention & Expansion	Business Attraction	Infrastructure Development	Workforce Development
Supporting and growing the businesses already rooted in Pima County.	Recruiting new investment and employers, with a focus on priority sectors supporting the innovation and startup economy and FDI and supply/manufacture chain integration.	Advancing site readiness, and access to infrastructure.	Building the talent pipeline from Pre-K–12 through post-secondary education into careers in priority sectors.

Priority Sectors

Priority sectors for the 2026–29 cycle are: Aerospace and Defense; Health and Health Innovation; Advanced Manufacturing (including mining technology as a sub-sector); Clean and Renewable Energy; Transportation, Distribution and Logistics; Advanced and Emerging Technologies (including optics and photonics) and the addition of Tourism as a seventh priority sector (in recognition of the region's UNESCO City of Gastronomy designation, historic and cultural assets, and significant potential for attracting visitors). The innovation and startup economy, anchored by the University of Arizona's research infrastructure, Tech Launch Arizona, Tech Parks Arizona, the UA Center for Innovation (UACI), and Startup Tucson (Innovation Ecosystem), is also elevated as an explicit strategic priority area for the first time in this cycle.

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What's Next

Executing this strategy requires the same intentional coordination that defined the 2023–26 cycle. Immediate implementation priorities include: continuing strong engagement with the Tohono O'odham Nation, Pascua Yaqui Tribe, anchor employers and Innovation Ecosystem partners; coordination with the Chamber of Southern Arizona as the County's contracted support partner; advancing the Innovation Hub concept toward initial implementation; and establishing broader data and research functions to enhance analysis and evidence-based decision-making across all four pillars, and identifying how to execute the recommendations included in the 2026-29 strategy.

The 2026–29 strategy contains 31 total recommendations across four pillars, including items carried forward or evolved from the prior plan and new initiatives responsive to stakeholder engagement, changed conditions, and County priorities. A complete accounting of progress and next steps is outlined in the 2026-29 Recommendations chapter.

The Pima County Economic Development Strategic Plan 2026–29 is a plan by the community, for the community. It builds on real progress, addresses real challenges and opportunities, and sets a clear direction for a more prosperous and resilient Pima County. With focus, commitment, and coordinated action, the region is ready for the next chapter.

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Introduction

As the National Association of Counties has documented, a central challenge for county governments is how to build prosperous communities by prioritizing resident needs, leveraging public investment to bolster the local workforce, and facilitating policies with tangible impact on people's lives.[1] Counties that succeed at this do so by serving as the critical convener, bringing together workers, employers, educational and workforce organizations, and community partners to advance shared economic goals in a coordinated and intentional way.

This strategy is focused on sustainable, broad-based community prosperity. It builds on the real progress of the 2023-26 planning cycle and sharpens the County's focus for the next three years.

The Pima County Economic Development Strategic Plan 2026-29 is built on that organizing principle. It positions Pima County as a critical convener responsible for aligning Pima County's diverse assets and partners toward a shared vision of sustainable, broad-based prosperity. Collaboration is critical in this role and success depends on the quality and depth of the partnerships cultivated, the clarity of the priorities, and a willingness to be held accountable for results.

The 2026-29 update builds on the previous strategic plan. The four pillars and four strategic priorities established in the prior plan remain the foundation of the department's work. What evolves is the application: more specific sector strategies, an expanded cross-border and international investment agenda, an explicit commitment to the Innovation Ecosystem, a clearer definition of implementation roles, and tighter alignment with adopted County plans and policies.

About Pima County

Nestled in the heart of the Sonoran Desert in southern Arizona, Pima County blends a distinctive natural environment with a modern, complex, and deeply connected regional economy. The County covers approximately 9,189 square miles directly along the United States-Mexico border and is anchored by the Tucson metropolitan area, one of Arizona's major urban centers and its second largest city. Pima County's 2025 population of 1,093,761 makes it the second most populous county in Arizona.[2]

The County's economic base includes a broad mix of industries: government, public and private education, healthcare and services, trade, aerospace and defense and optics and photonics, and transportation, distribution and logistics, supported by the University of Arizona, major employers, entrepreneurial resources, and significant cross-border trade and logistics infrastructure. These strengths contribute to Pima County's role as a regional employment, research and innovation hub, and as an increasingly important node in national and international supply and manufacturing chains. The presence of Davis-Monthan Air Force Base, the Aerospace Maintenance and Regeneration Group (AMARG), and national guard bases also demonstrate Pima County's significant position in the international and national security ecosystem.

Pima County's natural and cultural assets are equally distinctive. The region's desert landscape, public lands, and recreational amenities, including Saguaro National Park, Organ Pipe National Monument, Sabino Canyon all which are reflected in the Pima County Sonoran Desert Protection Plan, and the Chuck Huckelberry Loop, support tourism and outdoor industries. Cultural institutions, the arts, and the culinary community including the UNESCO City of Gastronomy designation reflect the area's long and diverse history.

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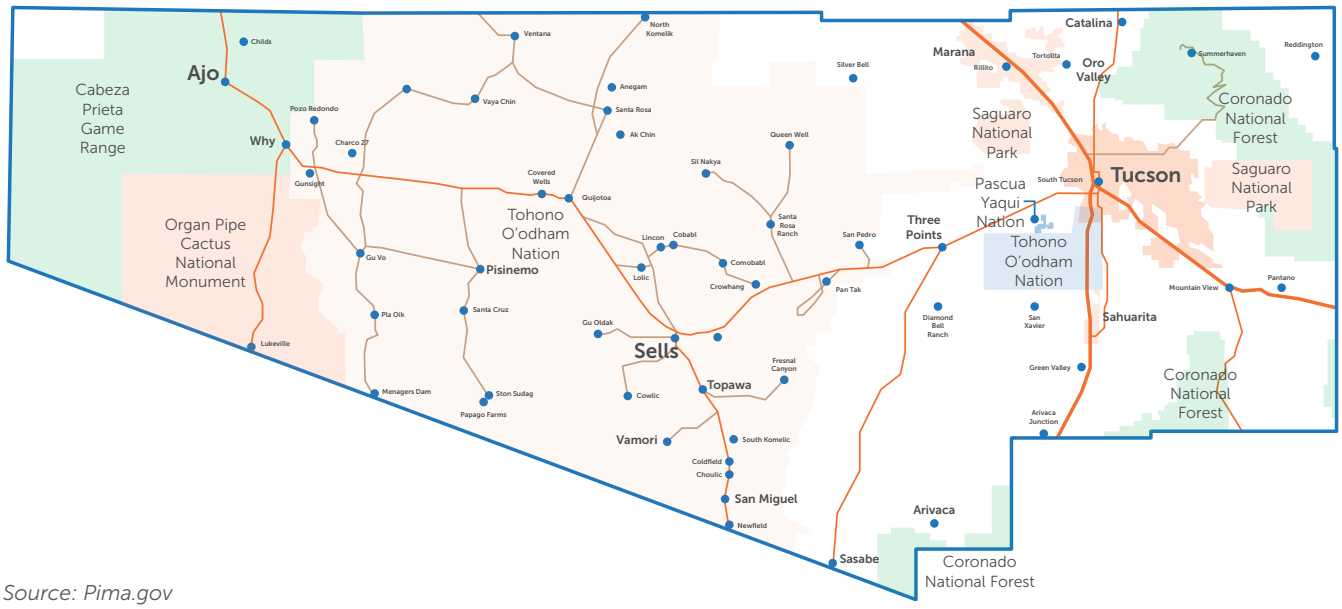

Source: Pima.gov

The County is home to Native American communities with deep and continuing ties to the region. The Tohono O'odham Nation, with approximately 28,000 members, occupies tribal lands encompassing 2.8 million acres and 4,460 square miles, the second-largest reservation in Arizona in both population and geographic size. The Pascua Yaqui Tribe, with approximately 19,000 members, maintains a 2,200-acre reservation southwest of Tucson.[3, 4] Pima County maintains equal-partner relationships with both nations, recognizing the importance of tribal economic self-determination to the region's long-term cohesion and prosperity.

It is important to understand Pima County's geography in context. Significant portions of the County encompass tribal lands, national park boundaries, national defense installations, and the unique characteristics of the Sonoran Desert. These are physical and jurisdictional characteristics that distinguish Pima County meaningfully from neighboring Maricopa and Pinal counties. This context matters when evaluating population growth trends, site availability, development potential and prosperity attainment.

A Shared Vision for Pima County's Economic Future

The development of the 2026-29 EDSP provided an opportunity to reassess and reaffirm Pima County's economic development priorities in alignment with the Pima County Strategic Plan mission and vision:

Plan Mission

Creating a prosperous community through sound stewardship and innovative practices, making a difference in quality of life for all.

Plan Vision

Committed to serving residents and fostering a thriving community.

Input from public, private, and institutional partners through the stakeholder engagement process highlighted the need to balance growth with long-term resilience, and to ground the County's work in a clear, values-based commitment to inclusive and sustainable prosperity. The mission and vision below embody the spirit of the 2023-26 plan and reflect the County's evolving role and ambitions for the 2026-29 plan.

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Department Mission

The Pima County Economic Development Department is the regional leader and critical convener that supports and coordinates business retention and expansion, business attraction, infrastructure investment, and workforce development to increase economic resilience, expand opportunity, and enhance upward economic mobility for the community.

Department Vision

Pima County will be recognized as a welcoming, inclusive community that is open for business, supports opportunity and innovation, and puts people first.

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Building on Pima County Strengths

To develop the 2026–29 economic development strategy, the Pima County Economic Development Department conducted a thorough assessment of the Pima County region's current economic position, drawing on updated market data, demographic analysis, and stakeholder input. That work identified a set of genuine and enduring strengths, a clear picture of the challenges to economic growth, and a set of opportunities to be addressed through this strategy. These tenets informed the strategic assessment and analytical foundation of the recommendations in this plan.

Population and Demographics

Pima County's 2025 population of 1,093,761 reflects cumulative growth of 7.9% over the past decade, a pace that mirrors national trends.[5] Direct comparisons with Maricopa County (15.2% cumulative growth) and Pinal County (24.7%) should be understood in the context of Pima County's unique characteristics mentioned previously.[6] These are structural factors that appropriately differentiate Pima County's trajectory from that of other counties.

The population is projected to reach 1.14 million by 2034, adding approximately 42,400 residents at a pace of 0.3% to 0.6% annually.[7] Residents aged 20 to 54 account for 43.8% of the current population, forming the core working-age labor force. The County's racial and ethnic diversity, with Hispanic or Latino residents comprising 38.5% of the population and American Indian and Alaska Native residents comprising 4.5%, is both a community strength and an equity imperative that the strategy addresses directly.[8]

1,093,761	7.9%	39.8	1.14M
2025 Population	10-Year Cumulative Growth	Median Age	Projected by 2034

Workforce and Economy

Total non-farm employment reached 405,000 in 2025, up approximately 31,500 jobs since 2016. The County demonstrated meaningful resilience through the pandemic, recovering from a 4.4% employment contraction in 2020 to post-pandemic gains of 2.2% in 2021 and 3.6% in 2022.[9] The following table shows a comparison of industry composition data between Pima County, Maricopa County and the national average.

Industry Sector	Pima County	Maricopa County	National Average
Government	19.3%	9.7%	14.8%
Private Education and Health Services	18.2%	17.2%	17.3%
Trade, Transportation, and Utilities	17.2%	19.5%	5.8%
Professional and Business Services	11.8%	15.8%	14.1%
Financial Activities	4.7%	8.9%	5.8%
Manufacturing	7.1%	5.9%	8.0%

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Pima County exceeds Maricopa County and the nation in Government and Private Education and Health Services. Professional and Business Services account for 11.8% of Pima County employment versus 15.8% in Maricopa County and 14.1% nationally. Financial Activities represent 4.7% in Pima County compared to 8.9% in Maricopa and 5.8% nationally.[10] Pima County is slightly lower than Maricopa County and the nation in Professional and Business Services, and modestly below in the Financial Activities sector.

While Professional and Business Services and Financial Activities are not a named priority sector in this plan, it is recognized that as Pima County attracts and grows primary employers across its seven priority sectors, the supporting ecosystem of professional services, financial services, consulting, legal, and technical firms that those industries require will follow. Closing the industry composition gap in this category is therefore an expected outcome of executing the plan's core goals.

Manufacturing, at 7.1% of employment, is a genuine differentiated Pima County strength. This sector exceeds Maricopa County's 5.9% share and is concentrated in aerospace, defense, and advanced manufacturing. Manufacturing employment is projected to grow 12.9% through 2034, adding approximately 3,714 jobs and outpacing overall employment growth.[11] This is one of the strongest data-supported strategies for continued investment in advanced manufacturing.

$70,315	$89,300	+52.3%	31,350
Pima County Median HHI (2024)	Maricopa County Median HHI	Pima County Income Growth 2015-2024	Pima County Net New Jobs Projected 2024-2034

Median household income of $70,315 in 2024 lags Maricopa County, and the U.S. median, though the County posted approximately 52.3% income growth over the 2015 to 2024 period. The average wage of $62,203 across all occupations trails Maricopa County by approximately $5,600, a gap driven primarily by industry composition rather than by the level of individual employers' compensation within shared sectors.[12]

Employment projections through 2034 point to approximately 31,350 net new jobs, a 7.3% increase. Healthcare and Social Assistance leads with 9,362 projected jobs, followed by Trade and Logistics (4,687), Manufacturing (3,714), and Leisure and Hospitality (3,348). Growth in Professional, Scientific, and Technical Services is projected at 328 jobs, reinforcing the urgency of the targeted private-sector diversification strategies detailed in the business attraction and FDI recommendations of this plan.[13]

Housing and Commercial Real Estate

Pima County's median home sales price of $360,000 in December 2025 remains well below Maricopa County ($491,000), Arizona overall ($448,500), and the U.S. median ($428,275).[14] This affordability advantage is one of the County's most tangible competitive differentiators for workforce attraction and business recruitment. The County's Regional Housing Strategy provides the framework for sustaining this advantage through expanded supply, diversified housing types, and proactive planning aligned with economic and workforce development goals.

Residential permitting activity, at approximately 4.8 permits per 1,000 residents in 2024, sits materially below the Phoenix MSA (8.7 per 1,000) and Arizona overall (7.7 per 1,000).[15, 16] This below-average development intensity helps explain the upward price pressure that has accelerated since 2020. Sustaining the advantage of affordability requires ongoing collaboration with the housing industry and stakeholders to facilitate increasing the pace of new residential development.

This need is addressed by the Regional Housing Strategy and Funding Plan, a 10-year plan focused on the entire spectrum of housing from high to low income. The plan sets five goals and 27 strategies to expand housing supply, improve affordability, and strengthen regional coordination, backed by a $250 million County funding commitment toward a projected $413 million total investment over the decade. The plan finds that 40 percent of the housing units needed over the next 20 years are for households earning above the area median income.

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Market	Pima County / Tucson MSA	Phoenix MSA
Industrial Inventory	40.2M SF (+20% since 2016)	471.8M SF (+54% since 2016)
Industrial Vacancy Rate	7.9%	12.9%
Industrial Space Under Construction	574K SF (2025)	10.0M SF (2025)
Industrial Rental Rate	$10.48/SF	$12.43/SF
Office Rental Rate	$24.20/SF	$30.24/SF
Office Vacancy Rate	9.3%	16.3%
Retail Rental Rate	$16.47/SF	$20.23/SF

Tucson's industrial market demonstrates strong and improving fundamentals. Industrial inventory has expanded 20% from 2016 to 2025 to 40.2 million square feet. Vacancy remains tight at 7.9%, well below the Phoenix MSA's 12.9%, indicating a more balanced and lower-risk market for occupiers and investors.[17] Industrial space under construction accounted for 574,400 SF in 2025, reflecting growing developer and investor confidence.[18] Industrial rents have risen substantially from $6.23 per square foot in 2016 to $10.48 per square foot in 2025.[19] Tucson's tighter vacancy, expanding inventory, and accelerating construction pipeline position it as a competitive and lower-risk industrial market for logistics, advanced manufacturing, and defense supply chain users. Office and retail markets offer a further value proposition, with rents materially below Phoenix across both categories.

Pima County's Strengths

The data and stakeholder engagement conducted for the 2026–29 update confirms and, across multiple cases, extends the strengths identified in the prior planning cycle. Pima County's core competitive assets are nationally distinctive, and several of them have strengthened meaningfully since 2023.

Strong and Growing Local Businesses

Pima County's business base has shown resilience and growth through a challenging economic period. Small and medium-sized businesses form the backbone of the local economy, and stakeholder feedback confirms that Pima County businesses are continuing to grow. The County's enhanced due diligence process, adopted by the Board of Supervisors, has improved development coordination and predictability, directly addressing concerns that business owners raised in the prior engagement cycle.

An Educated and Diverse Workforce

With 36.8% of adults holding a bachelor's degree or higher and 16.0% holding graduate or professional degrees, Pima County's talent base exceeds state and national averages in the credentials that support professional, technical, and knowledge-driven industries.[20] The University of Arizona contributes thousands of graduates annually across engineering, science, business, and health sciences, and Arizona State University extends additional access to degree and continuing education programs throughout the region. Pima Community College (PCC) and the Joint Technical Education District (JTED) further strengthen the pipeline through applied workforce programs and Career and Technical Education (CTE) embedded across 14-member school districts.

Innovation Assets Ready to Scale

Pima County is home to a rich and growing entrepreneurial ecosystem. The Innovation Ecosystem provides a platform for commercialization, startup formation, and growth-stage business support. The 2026–29 strategy makes this ecosystem an explicit strategic priority for the first time for the entire region, recognizing that translating research into business activity is one of the highest-return opportunities available in the County. The region is building a credible case as the Silicon Desert — a destination for innovation economy investment with a research infrastructure, talent base, and quality of life that larger markets cannot replicate.

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World-Class Sector Clusters

Pima County's optics and photonics cluster, anchored by the University of Arizona's Wyant College of Optical Sciences, is globally distinctive. No peer market can easily replicate this asset, and it spans defense, medical imaging, semiconductors, and telecommunications.[21] The aerospace and defense cluster, is similarly established and growing. Sustainable mining technology, as a sub-sector within advanced manufacturing, reflects the region's significant mining heritage, the UA's institutional strength in mining engineering, and the County's commitment to sustainable technologies.[22]

A Unique Place

Pima County's quality of life is a genuine economic development asset. The UNESCO City of Gastronomy designation, outstanding outdoor recreation, natural open space, approximately 350 days of sunshine annually, a rich multicultural heritage, and an authentic sense of community and place differentiate Pima County in site-selection conversations in ways that spreadsheets cannot fully capture. These assets support tourism, talent attraction, the lifestyle business economy that the 2026–29 strategy addresses as an explicit priority.[23]

The competitive analysis conducted for this update identified additional strength areas not present or less developed in the prior planning cycle. Improved regional coordination among municipalities and economic development organizations, and the County has created a stronger and more effective delivery structure for the strategy's implementation.

Strengths, Weaknesses, Opportunities, and Threats

The following analysis integrates findings from the stakeholder engagement process, quantitative data review, and comparative market research conducted for the 2026–29 update. It supersedes and updates the competitive assessment from the 2023–26 plan, reflecting both the progress made over the prior cycle and the changed conditions of 2026.

Strengths

- University of Arizona: world-class research, talent, and commercialization engine
- Globally distinctive optics and photonics cluster, unmatched among peer markets
- Established aerospace and defense base
- Higher bachelor's and graduate degree attainment than state and national averages
- Affordable housing market relative to Arizona peers, a genuine business attraction asset
- Outstanding outdoor recreation, climate, and cultural heritage
- Strategic U.S.–Mexico border position for trade, FDI, and nearshoring
- Regional coordination among municipalities and economic development partners has improved, and the County has created a stronger and more effective delivery structure for the strategy's implementation
- Board-adopted enhanced due diligence process strengthening development predictability
- PCC's Centers of Excellence (COEs) offering industry-aligned workforce development programming, certifications, and credentials tied to priority sectors
- Strong regional pre-K–12 CTE programming, including partnerships with JTED, preparing students for careers in priority industries

Weaknesses

- Median household income ($70,300) lags Maricopa ($89,300), Arizona ($80,000), and the U.S. ($81,600)
- Underrepresented in high-wage private-sector industries: Professional and Business Services at 11.8% versus 15.8% in Maricopa; Financial Activities at 4.7% versus 8.9%
- Residential permitting (4.8 per 1,000 residents) well below Phoenix MSA (8.7), constraining housing supply
- Limited inventory of shovel-ready industrial sites, a recurring site-selection disadvantage
- Infrastructure gaps in rural broadband, wastewater, road quality, and the airport corridor
- Limited access to some economic development financing tools relative to peer markets in other states
- Perception-related challenges with some site selectors that must be addressed through consistent, proactive communication
- Fragmented development coordination across County departments is being addressed through the enhanced due diligence process

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Opportunities

- UA research ecosystem and entrepreneurial infrastructure ready to scale commercialization activity and startup formation
- Secondary industry gap in Professional Services and Financial Activities represents a clear target for private-sector attraction and diversification
- Nearshoring trends and shifting global supply chains create a once-in-a-generation cross-border economic opportunity
- Relative cost advantages and quality-of-life assets position Pima County as a competitive alternative to the Phoenix metro for businesses and workers
- Constrained housing supply creates opportunity to expand multifamily and missing-middle product types, sustaining affordability
- Middle Mile broadband infrastructure opens new possibilities for technology sector development, business growth, and broadband-dependent industry attraction when it's completed in mid-2028
- Clean and renewable energy sector growth, aligned with PimaCAN!, creates opportunities for investment in green jobs and sustainable infrastructure
- Strong federal alignment with EDA investment priorities supports competitive positioning for federal resources
- Expansion and alignment of pre-K–12 CTE programs, with priority sectors including aerospace and defense, clean energy, advanced manufacturing, health innovation, and emerging technologies creates a long-term, homegrown talent pipeline opportunity
- Expansion of the Ports of Entry in San Luis, Douglas and Nogales supports talent attraction in priority sectors and facilitates easy movement of goods.

Threats

- Rising home prices risk eroding the affordability advantage if housing supply does not keep pace
- Intensifying competition from Maricopa and Pinal counties for talent, investment, and site-selection decisions
- Federal budget uncertainty could affect defense, healthcare, and research sector anchors
- Water availability and climate-related constraints on certain development types
- Rising construction costs slowing residential and commercial development activity
- Talent pipeline vulnerability if graduate retention and workforce alignment do not improve alongside industry growth

The SWOT analysis reflects a current assessment of where Pima County stands and where the strategy can make the most difference. The strengths are real and, in some cases, nationally distinctive. The weaknesses are structural and will not be resolved in a single planning cycle, but they can be narrowed with focused, sustained effort. The opportunities are significant and time-sensitive, particularly in the cross-border economy and the innovation ecosystem. The threats are manageable with the right communication, partnerships, and policy choices.

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Stakeholder Outreach

Stakeholder engagement is not a procedural step in the development of this strategy; it is the strategy's foundation. Pima County's economic future will be shaped by the decisions of hundreds of organizations including employers, nonprofits, educational institutions, community groups, individuals, municipalities, and tribal nations across the region. Their candid input is the most reliable source of insight into what is working, what is not, and where the County's energy should be directed.

The comprehensive engagement process included public outreach meetings open to all community members, one-on-one interviews with industry, institutional, and civic leaders, internal sessions with County Administration, department representatives, and direct outreach to a broad cross-section of elected officials, private-sector employers, housing, commercial and retail real estate groups, chambers of commerce, economic development organizations, educational institutions, workforce partners, tribal nations, and regional government entities.

Six themes emerged with enough consistency and clarity across all engagement formats to be treated as organizing principles for the 2026–29 strategy.

Strong Foundation, Unrealized Potential Stakeholders were consistent in seeing these not as arguments for complacency but as the platform from which a more ambitious strategy should launch.	**Infrastructure Is the Most Urgent Priority** Stakeholders view infrastructure not as a background condition but as the primary challenge for competitiveness in the current environment.
Workforce Alignment Requires Coordinated Action Talent retention, pre-K–12 outcomes, and alignment between employer needs and educational pathways were identified with equal urgency to infrastructure.	**Operations and Processes Are Actionable** Stakeholders view this as the most directly actionable category of improvement, and one where demonstrated progress would have an immediate effect on investor confidence.
The Cross-Border Advantage Is Underutilized Stakeholders were nearly unanimous that this advantage is not being fully leveraged in the economic development strategy or in the County's external narrative.	**Accountability and Execution Above All** Across every format, stakeholders returned to the same theme: the plan must produce results. Clear priorities, measurable outcomes, defined accountability for who leads each initiative, and honest reporting on prior plan commitments were the conditions stakeholders named most often for sustained engagement and support.

Structural and Perception-Related Challenges

The plan is careful to distinguish between project-specific concerns and systemic governance conditions. Several stakeholders expressed concern that opposition to specific major projects, including some involving mining, data centers, and large-scale energy development, has contributed to perceptions of unpredictability among investors. The plan acknowledges that perception matters in site selection. It also makes clear that project-specific outcomes are meaningfully different from systemic governance barriers, and that characterizing the County's overall business environment through the lens of individual project decisions overstates the structural challenge.

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Target Industries and Growth Opportunities

Stakeholders broadly affirmed the County's existing industry focus areas while offering consistent direction on how the strategy should evolve. The central theme was differentiation: Pima County's competitive identity should be built on its distinct assets rather than positioned as a smaller or secondary version of the Phoenix metro.

- **Core Sectors Affirmed:** Aerospace and Defense, Advanced Manufacturing, Health and Health Innovation, Transportation and Logistics, Advanced and Emerging Technologies, and Clean and Renewable Energy were consistently validated as aligned with regional strengths. No stakeholder group proposed a significant departure from these priorities.
- **Cross-Border Economy:** Proximity to Mexico, port of entry capacity at Nogales, Industria Manufacturera, Maquiladora y de Servicios de Exportación (IMMEX) program relationships related to maquiladoras, and established logistics corridors were named as underleveraged assets. The 2026–29 strategy elevates the cross-border economy as a standalone strategic priority and expands the FDI agenda to include Canada, South Korea, Taiwan, and Japan as named priority partner markets. These sectors were identified as strategic areas of focus by the Arizona Commerce Authority and further validated by Pima County as key opportunities to attract investment and strengthen existing supply and manufacturing chains based on factors including existing trade policy, relevant industry alignment, and global expansion trends, etc. Other opportunities across geographical areas and industry areas are to be analyzed for potential and addressed as appropriate.
- **Tourism:** Tourism was identified as a significant economic contributor that has been underrepresented in prior strategies. The County's coordination role, working in partnership with Pima County Attractions and Tourism and Visit Tucson, is made more explicit in the 2026–29 plan.
- **Mining Technology:** For Pima County, mining is more appropriately framed as a technology-driven sub-sector within advanced manufacturing, reflecting its connections to the University of Arizona, existing industry cluster, regional supply chains, advanced engineering services, and renewable energy systems and sustainable mining technology, intended to mitigate the perceived and real negative effects of mining activity.
- **Innovation and Startup Economy:** Stakeholders, particularly those connected to the University of Arizona and the entrepreneurial community, emphasized the need to make the innovation and startup economy an explicit strategic priority. This is one of the clearest areas of evolution from the 2023–26 plan, where it was implied rather than named. The 2026–29 strategy addresses it directly. There is also a direct nexus to FDI, supply chain/manufacture chain, and talent development/attraction.

Workforce and Talent

Workforce development is among the most consistently cited and most complex priorities in the stakeholder engagement process. The challenge is not simply the size or composition of the talent pipeline, but the degree of coordination required across pre-K–12 systems, community colleges, the University of Arizona, and employers to make that pipeline function effectively for Pima County's priority sectors.

- **Graduate Retention:** The University of Arizona produces thousands of graduates annually across priority fields, and there should be a more intentional effort to connect graduates to local employers during and immediately after their academic careers.
- **Pipeline Alignment:** Greater coordination and employer involvement in workforce training and curriculum development were identified as essential improvements such as pre-K–12 outcomes, high school graduation rates and career pathway access were named as long-term workforce pipeline concerns that require sustained investment.
- **Entrepreneurship and Small Business:** Given the region's high concentration of small firms, strengthening support for entrepreneurship and business scaling was identified as one of the highest-return opportunities for organic economic growth.

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- **Attraction of Experienced Professionals:** Stakeholders recommended expanding efforts to attract experienced professionals, including workers with ties to the region who may be open to returning. Quality of life assets, affordability, and the region's growing economic profile support this strategy.

Infrastructure and Development Priorities

Infrastructure investment is the most consistently cited priority across all stakeholder formats, with site readiness, utility capacity, transportation, and broadband access identified as the primary constraints on the region's ability to compete for major investment.

- **Site Readiness:** The absence of shovel-ready, pre-entitled industrial sites is the single most frequently cited site-selection disadvantage. Addressing this gap requires coordinated investment across land acquisition, entitlement, and utility extension, and it is among the highest-priority actions in the infrastructure strategy.
- **Transportation:** Road quality and connectivity, particularly for freight movement and along major business corridors, were identified as operational constraints and image liabilities. Improvements are needed to support both logistics and the first impressions that influence investor and talent decisions.
- **Utilities:** Reliable access to power, water, wastewater, natural gas and high-speed internet is an increasingly decisive factor for advanced manufacturing and other priority industries. Long-term planning and investment in utility capacity are foundational to the strategy's business attraction goals.
- **Broadband:** Connectivity is increasingly a baseline requirement for competitiveness, not a differentiator. The County's Middle Mile infrastructure development is a significant step forward. Ensuring its utilization and extending its reach, particularly in rural and unincorporated underserved areas, is a priority for Pima County.

Regional Collaboration and Governance

Stakeholders see meaningful progress in regional coordination and broadly view Pima County as the appropriate convener. The consistent ask is for that role to be more assertively played, with a clearer definition of who leads what and more proactive engagement across the region.

Pima County has done foundational work through its economic development strategic plans and has the partnerships, tools, and relationships to build on that foundation with more focus, accountability, and measurable results for the businesses, residents and community we serve.

Stakeholders were also clear that benchmarking the region primarily against Phoenix creates a frame that does not serve Pima County well. The strategy should be grounded in Pima County's differentiated strengths and measured against its own goals, not against a market with a fundamentally different size, land base, and industry composition.

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Quality of Life and Community Assets

Quality of life is one of Pima County's most genuinely distinctive assets, and stakeholders were unanimous in calling for it to be more intentionally and aggressively leveraged in economic development strategy, marketing, and talent attraction.

Outdoor recreation, cultural vibrancy, the UNESCO City of Gastronomy designation, and international connectivity through proximity to Mexico create a quality-of-life profile that is rare among markets of comparable size. These assets attract residents and businesses who are looking for something different from the suburban growth patterns of other Arizona metros. That is a competitive advantage, and this strategy treats it as one.

Looking Ahead: What Stakeholders Are Asking For

The 2026–29 strategy is a direct response to what stakeholders asked for across every format and constituency group: a more focused, more accountable, and more execution-oriented approach. The following commitments are built into the structure of the plan.

- A defined set of priorities, not a comprehensive list of aspirations, so that resources and attention can be concentrated where they will have the greatest impact.
- Clear accountability for each initiative, distinguishing what the County leads directly, what it coordinates with partners, and what it advocates for at the state and federal level.
- An accurate accounting of the 2023–26 plan's 30 recommendations, identifying what was completed, ongoing / in progress, is presented in full in the Strategic Framework chapter.
- Measurable outcomes and annual reporting, so that the Board of Supervisors, partner organizations, and the broader community can evaluate progress and accountability to results.
- A communication strategy that proactively tells the story of Pima County's economic development work, accurately represents the County's posture toward business and investment, and reduces the perception gaps that affect site-selection decisions.

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Strategic Framework

Pima County's Economic Development Strategic Plan is built on a framework for measurable action: four strategic priorities define what the County is trying to achieve, four thematic pillars organize how that work is structured around the community's values, and a set of specific recommendations translates both into coordinated action with clear ownership and accountability.

That framework was established in the 2023–26 plan. It aligned diverse stakeholders around shared language, focused on a manageable number of priorities, and gave the community a consistent basis for evaluating the County's work. The 2026–29 strategy retains and strengthens this framework based on lessons learned in the prior cycle.

Strategic Priorities *The mandate of the department*	**Business Retention & Expansion**	**Business Attraction**	**Infrastructure Development**	**Workforce Development**
Pillars *The values and themes of the strategy*	**Connect & Support**	**Focus & Prioritize**	**Community & Culture**	**Advocate & Amplify**
Recommendations *Initiatives that put priorities into practice*	**Pillar 1**	**Pillar 2**	**Pillar 3**	**Pillar 4**

The cascade operates with intention. Strategic priorities set the mandate: they define the categories of work the County is responsible for and through which resources are applied. Pillars focus that mandate through the lens of Pima County's values, its community character, its diversity and culture, and its commitment to equitable opportunity. Recommendations guide the development of specific initiatives that put priorities and values into practice, assigned to owners, grounded in data, and tied to indicators that allow measuring of results.

Together, these three levels create a strategy that is simultaneously ambitious and accountable. Ambitious because it names what the County intends to accomplish in concrete terms. Accountable because every action is traceable back to priority, value, and a measurable outcome.

A Framework Built on Continuity and Evolution

The 2026–29 strategy builds on three years of implementation, learning, and changing conditions. The prior planning cycle generated real and named progress, iterated above in the Executive Summary. Additionally, the County supported community organizations, engaged directly with the public on Economic Development themes and topics, generated new and profound government and business relationships across the globe, forged new partnerships with the University of Arizona, Arizona Commerce Authority and other stakeholders, created experiential workforce development programming, and expanded the department to continue efficient and effective Economic Development initiatives on behalf of the County, and working groups were established and sustained across four focus areas: small business, priority sector, workforce development, and community and culture. The County deepened its regional partnerships and grew its global and local profile as a visible and credible economic development actor. This progress is the foundation for what comes next.

The table below summarizes what evolved from the 2023–26 cycle to the 2026–29 strategy. This evolution maintains and builds upon the plan's core architecture and values, reflecting lessons learned, stakeholders input, and a data-driven approach.

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2023-2026 Planning Cycle	2026–29 Evolution
Innovation ecosystem referenced as a strength	**Innovation and startup economy named as an explicit strategic priority with dedicated recommendations**
FDI focused primarily on Mexico	**International FDI agenda expanded to name Canada, South Korea, Taiwan, and Japan as additional priority partner markets, and expanded to supply and manufacture chain augmentation**
Business attraction broadly defined	**Tourism added as a seventh sector; sub-sector strategies for optics and photonics and sustainable mining technology formalized, industry-are asset mapping project initiated**
County convening role described	**Implementation roles defined explicitly; Chamber of Commerce contracted work plan codified, additional partnership support established**
Sample KPI tables included	**Full KPI framework with baselines, lead designations, and annual reporting structure established**
Plan aligned with Prosperity Initiative and others	**Plan aligned with five companion frameworks: PimaCAN!, County Strategic Plan, One Pima, Pima Prospers, Regional Housing Strategy, and Prosperity Initiative**
Strategic initiatives accounted for	**Reference table in Strategic Framework chapter**

Alignment with County Companion Plans

The Economic Development Strategic Plan does not operate in isolation. It is one part of a coordinated set of County frameworks that together address the conditions for long-term community well-being, individual prosperity and economic resilience. The following five companion plans contain County goals that are directly relevant to the EDSP's priorities and recommendations. The 2026–29 strategy is designed to be consistent with each of them.

Companion Plan	EDSP Alignment
PimaCAN! Climate Action Plan	Clean and Renewable Energy sector strategy; water and environmental resource planning; green jobs initiatives in workforce development
Pima County Strategic Plan	Organizational priorities for County government; operational improvement; interdepartmental coordination
Pima Prospers	Equity and upward mobility goals; small business support for underserved entrepreneurs; family economic stability programming
Regional Housing Strategy	Affordable housing supply; workforce housing initiatives; housing as a business attraction and workforce retention asset
Prosperity Initiative	Education, Health, Housing, and Work policy areas; two-generation approach to family economic stability; poverty reduction and economic participation
One Pima	Public safety and neighborhood reinvestment as business environment factors; housing stability and behavioral health services supporting workforce participation and retention; small business safety and recovery programming; community reinvestment in underserved neighborhoods

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The strategy is also designed to be consistent with the Economic Development Administration's standards for a Comprehensive Economic Development Strategy, ensuring that Pima County is positioned to compete for federal resources while advancing its own long-term goals. EDA investment priorities, including workforce development, advanced manufacturing, infrastructure, foreign direct investment, and environmentally sustainable development, map closely to the EDSP's four strategic priorities and seven priority sectors.

Strategic Priorities

Business Retention and Expansion

Small and medium-sized businesses are the backbone of Pima County's local economy, and supporting their long-term growth and sustainability is a central and enduring objective of the department's work. Stakeholder feedback across the 2026 engagement process confirmed that Pima County businesses are growing and are seeking a more visible and accessible partner in the County government.

The 2026–29 strategy builds on prior efforts to enhance services that support businesses, increase awareness of available resources, and strengthen connections between the County and the broader business community. The Pima County Small Business Commission Outreach work in the community is designed to increase the visibility of small business resources so businesses can thrive. The One Pima Small Business Safety and Beautification pilot program will provide grants to assist small business improve their security and exteriors. The strategy also makes the innovation and startup ecosystem an explicit retention and expansion priority for the first time, recognizing that the region's 235-plus entrepreneurial support organizations, its accelerators, incubators, and commercialization resources represent a built-in business development infrastructure that the County can actively amplify and support.

Business Attraction

Expanding Pima County's economic base through targeted attraction of new investment, employers, and entrepreneurs is an important part of closing the wage and industry composition gap that the data identifies. While Professional and Business Services is not a named priority sector, closing this composition gap is an objective of the plan's business attraction strategy: attracting employers in this category helps to drive median wage growth toward peer market levels.

The County's attraction strategy is built on its genuinely differentiated assets: a globally recognized optics and photonics cluster, a competitive and tightening industrial market, a world-class research university, an established aerospace and defense base, a strategic border position, and a quality-of-life profile that larger markets cannot replicate.

The 2026–29 strategy adds Tourism as a seventh priority sector and expands FDI to name Canada, South Korea, Taiwan, and Japan as priority international partner markets alongside Mexico. Clean and renewable energy sector development will also be pursued in explicit alignment with PimaCAN!.

Infrastructure Development

Human and physical infrastructure are essential enablers of sustainable and equitable economic growth in Pima County, and they remain the category most consistently cited by stakeholders across every engagement format.

Pima County's community based economic development approach recognizes human infrastructure and digital equity as foundational to a competitive, inclusive regional economy. PEEPs (Pima Early Education Program Scholarships), created by the Board of Supervisors in 2021, expands access to high-quality preschool for income-

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eligible families at over 100 locations countywide. The Office of Digital Inclusion advances digital equity through Connect Pima, its action plan for broadband infrastructure, digital skills training, and device access, anchored by the Middle Mile Project, a $30.3 million NTIA-funded open-access fiber optic ring expanding high-speed internet to underserved communities. The Community Development Block Grant (CDBG) program and the Office of Housing Opportunities and Homeless Solutions deliver public services, housing support, and homeless assistance in low-income communities. Pima County remains committed to proactively and continuously improving and growing these programs and their wraparound services to strengthen the region's human capital and economic resilience.

Physical infrastructure, including transportation networks, broadband connectivity, water resources, energy systems, and affordable housing, is all simultaneously critical to economic activity and to the quality of life that makes the County competitive for talent and investment. Work during this plan cycle will focus on accelerating infrastructure and site readiness commitments that the prior cycle identified.

Workforce Development

A skilled, diverse, and growing workforce is among Pima County's most important competitive assets, and strengthening the talent pipeline is among the highest-stakes commitments of the 2026–29 strategy. Pima County's strong network of post-secondary institutions, K–12 systems, and workforce development organizations provides a substantial foundation. Enhancing coordination across the range of assets will make the pipeline function more effectively for the employers and industries the strategy is designed to attract and grow.

Employment projections for Pima County through 2034 add urgency: Healthcare and Social Assistance is projected to add more than 9,360 jobs; Manufacturing will add approximately 3,710, growing at 12.9%. Professional, Scientific, and Technical Services, by contrast, is projected to add only 328 jobs, reinforcing an opportunity to deploy an active coordination strategy.[24] Effort related to enhancing graduate retention, K–12 outcomes, alignment between employer needs and educational programming, expanded career exploration, Career and Technical Education (CTE) programming, and pathways for working-class residents into better-paying employment are important components that must be coordinated and advanced in tandem.

Bringing It Together: Priorities, Pillars, and Recommendations

Four thematic pillars provide the connective tissue between the County's strategic priorities and the plan specific recommendations. The pillars were originally developed through rigorous analysis of stakeholder input, community surveys, focus groups, and secondary research during the 2023–26 planning cycle. Four prominent themes emerged from that work: Connect and Support, Focus and Prioritize, Community and Culture, and Advocate and Amplify. These themes are as relevant in 2026 as they were in 2023, and they have been reviewed and updated to reflect three years of implementation experience and the stakeholder input expressed during the current engagement process.

While each of the County's companion plans, the Prosperity Initiative, PimaCAN!, Pima Prospers, and the Regional Housing Strategy and Funding Plan, were developed independently and serve their own statutory or policy purpose, they share common goals with the EDSP's four pillars when viewed through an economic development lens. Quality job creation, workforce development, and small business support depend on the same underlying conditions these plans are built to address: a stable and resilient climate and environment, an adequate and affordable housing supply, thoughtful land use and growth management, and a community where residents have genuine pathways to economic mobility. None of these plans operates in isolation, and none of the EDSP's pillars can be fully achieved through economic development tools alone.

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This overlap is not incidental. Businesses expand and relocate to regions where housing is attainable for their workforce, where climate risk and resource constraints are actively managed, where land use planning supports sustainable growth, and where the broader community has the stability and opportunity to participate in that growth. In this sense, the EDSP's pillars function less as a parallel track to these companion plans and more as the economic development expression of priorities the County has already established across its housing, climate, land use, and anti-poverty work. Continued coordination across departments ensures that progress on one plan reinforces, rather than duplicates or works against, progress on the others.

In the sections that follow, recommendations are organized by pillar. Each recommendation corresponds to the pillar theme and aligns with one or more of the four strategic priorities. Recommendations specify what the County will do, who will lead it, and how it connects to the broader strategy. Where partner organizations have a named role, those are made explicit. Numbered recommendations make accountability tracking straightforward: each one can be checked, evaluated, and reported annually.

Pillar 1
Connect and Support

Building vital connections between businesses, workers, educators, and community stakeholders, with the County as the active and accountable convener.

Why It Matters

Pima County's convening role is most powerful when it is specific, sustained, and organized around shared outcomes. The 2026–29 cycle shifts the focus from establishing connections to deepening and measuring them.

- Businesses continue to seek a reliable network for accessing resources, sharing information, and connecting with programs relevant to their growth. Pima County's convening role is the mechanism through which that network is made real and accessible. Pima County's facilitation of the Arizona Border Counties Coalition, a regional body bringing together Cochise, Pima, Santa Cruz, and Yuma counties to advance shared economic development, infrastructure, and border policy priorities at the state and federal level, is one of the most visible examples of that convening role in action.
- Workforce challenges across the region, from skill gaps in priority sectors to barriers faced by underrepresented populations, cannot be solved by any single organization. Cross-sector collaboration between employers, educational institutions, workforce organizations, nonprofits, and County government is crucial; it is the only approach with a realistic chance of building durable solutions, such as expanding career exploration to 6-8 grades.
- K–12 schools and post-secondary institutions are an underutilized, albeit growing, asset for regional talent development; building those pathways in partnership with employers is one of the highest-leverage investments the County can make. Prior efforts have already established pathways through the Southern Arizona Manufacturing Partnership and the Phoenix Chamber Foundation's expansion of its ElevatedEdAZ program in the Sahuarita School District, which provides stronger alignment between education and business.
- Small and medium-sized businesses, particularly those owned by women, minorities, and entrepreneurs in rural communities, benefit most from proactive and coordinated outreach. The Pima County Small Business Commission is leading these efforts to help businesses find resources the most important to their specific needs.

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Pillar 2

Focus and Prioritize

Directing County resources toward priority sectors, the innovation and startup economy, and business attraction with the greatest potential for long-term diversification.

Why It Matters

This pillar focuses on concentrating resources for maximum impact in a sector-driven approach.

- Pima County's resources are most powerful when concentrated on a defined set of high-impact targets rather than spread across a broad landscape of parallel initiatives.
- Pima County's entrepreneurial ecosystem is one of the most dense and capable in a market of its size: a robust network of support organizations, research centers, accelerators, incubators, and post-secondary institutions with active commercialization programming. Coordination with these partners is the key to activation of resources for maximum impact.
- The industry composition gap in Professional and Business Services and Financial Activities is the most significant structural target for the business attraction strategy. Closing even a portion of that gap over the 2026–29 cycle would have a measurable effect on average wages and household income across the region.
- Nearshoring trends are creating time-sensitive demand for the border economy infrastructure promoted by Pima County, and the 2026–29 strategy names this opportunity directly.

Priority Sectors

The following sectors are the focus of Pima County's business attraction, retention, and investment strategies for the 2026–29 period. Each reflects demonstrated regional strength, alignment with employer demand and workforce assets, and compatibility with the County's infrastructure and quality of life profile.

- Aerospace and Defense
- Health and Health Innovation
- Advanced Manufacturing, including Sustainable Mining Technology as a named sub-sector
- Clean and Renewable Energy, pursued in alignment with PimaCAN!
- Transportation, Distribution and Logistics
- Advanced and Emerging Technologies, including Optics and Photonics as the most globally differentiated sub-sector, with a full sub-sector inventory to be developed within the department
- Tourism, coordinated through Pima County Attractions and Tourism and Visit Tucson

Within Advanced and Emerging Technologies, optics and photonics represent Pima County's most globally distinctive competitive advantage. The University of Arizona's Wyant College of Optical Sciences anchors a world-class ecosystem spanning defense, medical imaging, semiconductors, and telecommunications. No peer market can easily replicate this asset, and it is the clearest example of where Pima County can lead rather than simply compete. Sustainable mining technology is a second high-potential sub-sector within Advanced Manufacturing, reflecting the region's significant mining heritage, the UA's institutional strength in mining engineering, and the sector's growing relevance to clean energy supply chains.

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The innovation and startup economy is elevated as a standalone strategic focus area within this pillar for the first time. Pima County's Innovation Ecosystem is ready to scale. The County is ideally situated to convene and amplify the ecosystem's existing assets, with a particular focus on commercialization of UA research, supporting the transition from early-stage startup to scalable business, and connecting entrepreneurs to capital and market access resources. The future engagement sessions with this group will inform the final scope of this work. This will include named partners at the University of Arizona including Tech Launch Arizona, the Center for Semiconductor Manufacturing, Tech Parks Arizona, the University of Arizona Center for Innovation, existing startup companies across multiple industry subsets, and more.

Pillar 3
Community and Culture

Aligning economic development with Pima County's shared values, advancing equitable opportunity, and leveraging cultural vitality as an economic asset.

Why It Matters

Economic development exists to serve the community and its residents. Each strategic priority in this plan connects back to the values, quality of life, opportunity, and sense of belonging for all who live and work in Pima County.

- Pima County's cultural identity is one of its most genuine competitive assets: our Native American heritage, Sonoran Desert landscape, tourism assets such as the UNESCO City of Gastronomy designation and Tucson Gem and Mineral Show, along with our diverse communities and deeply rooted sense of place are differentiators that no amount of marketing can manufacture. The 2026–29 strategy treats cultural vitality an active driver of economic development and prosperity.

- Poverty affects 14.3% of Pima County's population and creates systemic barriers to economic participation and upward mobility.[25] Housing affordability pressures continue to intensify. These conditions have an impact on the County's ability to grow, attract and retain the workforce that a growing economy requires. This plan supports the aforementioned Pima County plans and policies that address these conditions.

- The Prosperity Initiative includes evidence-based policies directed at increasing housing supply, affordability, and stability, especially for low-income families with children. Stable, affordable housing is one of the strongest predictors of long-term economic mobility. Children who grow up in safe, opportunity-rich neighborhoods, are more likely to experience better education, health, and economic outcomes. Improving housing affordability and strengthening neighborhoods helps families build stability while creating pathways out of poverty. The 10-year Regional Housing Strategy and Funding Plan includes strategies and funding that carry out these policies.

- Engaging the Tohono O'odham Nation, the Pascua Yaqui Tribe, and other Native American communities as genuine equal partners in economic development builds trust, expands opportunity, and reflects the County's inclusivity and ethical values and commitments. These relationships are a centerpiece of the strategy.

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Pillar 4

Advocate and Amplify

Expanding the reach and impact of the County's economic development resources, partnerships, and competitive narrative at every level.

Why It Matters

The effectiveness of programs and resources are exponentially enhanced through outreach and partnerships. Ensuring that County programs are widely known, easily accessible, and proactively communicated is essential to the strategy's overall impact.

- Greater transparency and communication build greater trust. Stakeholders across the 2026 engagement process noted that many views and perceptions about programs, investments, and the County's business posture were often based on incomplete or inaccurate information. Proactive communication, outreach and coordination is the most direct response to that problem and is a hallmark of the plan strategy.
- Federal and state funding opportunities aligned with Pima County's priorities are significant, particularly in infrastructure, workforce, advanced technology integration, clean energy, and advanced manufacturing. Capturing those resources requires a disciplined pursuit strategy. The Arizona Border Counties Coalition, facilitated by Pima County, also serves as one of the coordinated regional voices for state and federal advocacy on border infrastructure, trade, and economic development, amplifying priorities that no single county could advance as effectively alone.
- Pima County's competitive narrative, its identity as a place for advanced industry, innovation, cross-border commerce, and quality of life, can be proactively and accurately communicated to site selectors, investors, and the broader business community. Perception gaps are real competitive liabilities and closing them is this pillar's most important job.

Integration of the Prosperity Initiative

The Pima County Prosperity Initiative is an important policy anchor for the EDSP. Rather than operating as a parallel framework, the EDSP is the economic development complement to the Prosperity Initiative's broader social policy agenda, translating shared goals around education, health, housing, and work into concrete strategies for business growth, job creation, and community investment.

Where the Prosperity Initiative establishes commitments to reducing poverty, advancing equity, and supporting upward mobility, the EDSP identifies the tools, partnerships, and investments through which those commitments are realized in the economy.

Prosperity Initiative Policy Area	EDSP Connection Points
Education (Policy Areas 1–6)	Graduate retention strategy; K–12 and post-secondary experiential learning; upskilling and reskilling for existing workers; early childhood education access
Health (Policy Areas 7–9)	Health and Health Innovation sector strategy; healthcare workforce pipeline development; economic participation initiative addressing barriers to workforce entry
Housing (Policy Areas 10–11)	Regional Housing Strategy alignment; affordability as a business attraction asset; support for affordable and workforce housing development
Work (Policy Areas 12–14)	Small business support for underserved entrepreneurs; family economic stability programming; business ambassador program for minority-owned businesses

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From Framework to Action

The recommendations in this section are organized by pillar and aligned with one or more strategic priorities. Each is grounded in stakeholder engagement and current market data, will be assigned a target implementation timeline, and is linked to key performance indicators that allow for tracking and reporting progress annually to the Board of Supervisors.

This cascading structure, from strategic priorities through updated pillars to time-bound and measurable recommendations, is designed to ensure that County activities remain connected to a clear mandate and to the County's broader goals: a Pima County that is welcoming, inclusive, and open for business; one that puts people first and builds an economy that works for everyone who calls this region home.

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2026–29 Recommendations

The following table is a list of strategic initiatives for 2023-26 plan along with their status.

Table 1: Prior Plan Status Accounting

The table below presents all 30 recommendations from the 2023–26 plan organized by pillar, with their implementation status and evidence of progress from the prior cycle.

PILLAR 1: CONNECT AND SUPPORT			
#	**Recommendation Summary**	**Status**	**Evidence / Notes**
1	Position County as regional leader and critical convener; oversee four working groups	IN PROGRESS	Pima County has positioned itself as the leading economic development agency through the creation of multiple stakeholder groups and coordination with regional chambers.
2	Establish four working groups: small business, priority sector, workforce development, and community and culture	IN PROGRESS	Groups have been created across four areas: Small Business Commission, industry sector consultation, Pima County WIB, and workforce development partners and Community and Culture.
3	Review County website business section for completeness and usability	COMPLETE / ONGOING	ECD website has been reviewed, edited, and updated through multiple iterations, culminating in the current version. Ongoing and evolving.
4	Develop marketing and promotional materials for business section resource repository	COMPLETE / ONGOING	Marketing brochures and materials completed for land assets, and priority sectors. Ongoing as sectors and portfolio evolve.
5	Encourage upskilling and reskilling programs in priority sectors; support working-class job advancement	COMPLETE / ONGOING	Ongoing coordination with PCC around Centers of Excellence (COE) alignment with priority sector employer needs.
6	Work with CWD and Library to reduce barriers to early childhood education (PEEPs)	SUPPORT	ECD continues to provide support as needed.
7	Develop incentives for employers to upskill and reskill workforce	IN PROGRESS	Preparing draft incentive policy.

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#	Recommendation Summary	Status	Evidence / Notes
8	Increase K–12 and post-secondary experiential learning opportunities in priority sectors	COMPLETE / ONGOING	ECD created the inaugural Pima Aviation Alliance and hosted several experiential workforce programs. Piloted middle school career exploration. Ongoing and carried forward.
9	Conduct market assessment for target industries in Pima County	IN PROGRESS	Asset mapping underway for Aerospace and Defense sector. Additional sector maps to follow.
10	Develop strategic marketing and promotional campaign for business attraction and talent attraction	IN PROGRESS	Development of a full marking plan is still pending. Various mini-campaigns have been executed successfully such as the Economic Development Overview brochure.
11	Identify and implement infrastructure projects; add to economic development land portfolio	IN PROGRESS	Formalized land profiles and preliminary assessments created. This item will be carried forward.
12	Develop business attraction campaign; establish selection criteria for priority sectors	IN PROGRESS	Attraction campaign continuously executed through marketing and outreach. Software used to generate internal leads.
13	Ensure focus on foreign direct investment with Mexico, Canada, and ACA	COMPLETE / ONGOING	FDI focus with Mexico and Canada complete. New efforts include a focus on Taiwan, Japan and South Korea.
14	Harness advanced manufacturing potential; invest in makerspace and scale-up facility	IN PROGRESS	Innovation Hub concept is emerging for downtown Tucson presence in partnership with UA and industry professionals.
15	Support growth in six priority sectors; prepare sector strategies for each focus area	COMPLETE / ONGOING	Strategies executed across all target sector areas for attraction, retention, and expansion. Carried forward with tourism added as seventh sector.
16	Conduct Economic Development program assessment; opportunity and gap analysis	COMPLETE / ONGOING	The 2023–26 EDSP is this assessment.
17	Engage arts and culture organizations to create indoor arts and culture space and accelerator	IN PROGRESS	
18	Review opportunities to attract and expand arts and culture industries	IN PROGRESS	Policy drafted for supporting lifestyle and artisan-based businesses through small business support programming.
19	Develop internal and external marketing and promotional campaign for Pima County	COMPLETE / ONGOING	Sub-campaigns developed to promote economic development opportunities and assets. Incorporation of Tourism as a priority sector for 2026-29.

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#	Recommendation Summary	Status	Evidence / Notes
20	Work with Attractions and Tourism to assess tourism and cultural industry; identify heritage preservation opportunities	NOT STARTED	Incorporation of Tourism as a sector priority for 2026-2029.
21	Promote densification in communities throughout the County	SUPPORT	ECD continues to provide support as needed.
22	Support Affordable Housing Taskforce and Regional Affordable Housing Commission recommendations	SUPPORT	ECD continues to provide support as needed.
23	Support regional efforts to address homelessness, housing, and early childhood education	SUPPORT	ECD continues to provide support as needed.
24	Support New Economy Initiatives, Tech Launch, Tech Parks Arizona, and university partnerships	COMPLETE / ONGOING	Created and solidified partnerships in workforce development, advanced manufacturing, and startups. Innovation Hub concept and UACI programming are key examples.
25	Work with CWD to amplify workforce tools; create resource guide for job seekers	SUPPORT	ECD continues to provide support as needed.
26	Assess small business policies; identify mechanisms for business friendliness and grant access	COMPLETE / ONGOING	Small Business Commission makes recommendations to the Board of Supervisors on policy and issues affecting small business. Small and medium-sized business resource page development continues.
27	Expand broadband and cellular connectivity; identify funding programs for broadband expansion	SUPPORT	ECD continues to provide support as needed.
28	Develop affordable housing initiatives with municipalities; identify development zones	IN PROGRESS	
29	Develop economic development legislative policy agenda at state and federal levels	COMPLETE / ONGOING	Creates a legislative policy agenda annually for County Administration and the County lobbyist, in conjunction with regional stakeholders.
30	Ensure internal processes are conducive to rapid response (procurement, NDA, templates)	COMPLETE / ONGOING	Board of Supervisors adopted new policies for Enhanced Due Diligence and NDAs.

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Table 2: 2026–29 Consolidated Recommendations

The table below presents the 31 recommendations for the 2026–29 planning cycle organized by pillar. Each recommendation shows its lineage from the prior plan and the prior recommendation number(s) it draws from. New recommendations have no prior plan equivalent.

Please note that support initiatives are not listed in the updated recommendations but will continue to help advance the County's goals, plans and policy objectives.

CARRIED FORWARD	Prior recommendation retained with minimal change
EVOLVED / MERGED	Prior recommendation updated or consolidated with related recommendations
NEW	New recommendation added in the 2026–29 update cycle
SUPPORT	

PILLAR 1: CONNECT AND SUPPORT		
#	Lineage	2026—29 Recommendation
1	EVOLVED *Prior: 1, 2*	Maintain and strengthen Pima County's role as the regional leader and critical convener among ecosystem stakeholders, responsible for overseeing implementation of the economic development strategy. Continue to provide oversight of the strategy's working groups, ecosystem coordination, collective marketing, and promotion of the County's economic development assets. Continued engagement with Pima County Small Business Commission, local chambers of commerce, members of the business community, and other key partners.
2	EVOLVED *Prior: 3, 4*	Sustain and evolve the County's digital business resource hub, ensuring that the business section of the Pima County Economic Development website is current, complete, and usable. Maintain sector summary materials, land asset profiles, and FAQ resources, updating them annually as priority sectors and the economic development land portfolio evolve.
3	EVOLVED *Prior: 5, 8*	Build on the inaugural Pima Aviation Alliance and other experiential workforce programs to sustain and expand career exploration, upskilling, reskilling, and pre-K–12 and post-secondary experiential learning opportunities within the County, targeting priority sectors and relevant industry focus areas. Include programs targeted at supporting working-class residents to access better-paying employment in alignment with the Prosperity Initiative.
4	CARRIED FORWARD *Prior: 7*	Advance the development and implementation of employer incentive tools to support upskilling and reskilling in priority sectors and relevant industry focus areas.
5	NEW	Establish a dedicated small and medium-sized business support program providing technical assistance, mentorship, and capital access navigation for entrepreneurs across all sectors, with intentional outreach and support for minority-owned, women-owned, and underserved businesses, consistent with Prosperity Initiative Policy 13. Also, the Small Business Safety and Beautification pilot under the One Pima Initiative as well as the County's broader equity and economic mobility goals.
6	NEW	Develop a graduate retention and talent attraction strategy in partnership with the University of Arizona, Pima Community College, and priority sector employers, identifying targeted incentives, career pathway programming, and quality of life investments that encourage recent graduates to build careers within Pima County and attract skilled professionals in STEM, health sciences, and advanced technology from outside the region.

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PILLAR 2: FOCUS AND PRIORITIZE		
#	**Lineage**	**2026—29 Recommendation**
7	EVOLVED *Prior: 9, 15*	Conduct a comprehensive market assessment for target industries in Pima County and develop individual sector strategies for each of the County's seven priority sectors: 1) Aerospace and Defense, 2) Health and Health Innovation, 3) Advanced Manufacturing, 4) Clean and Renewable Energy (aligned with PimaCAN!), 5) Transportation, Distribution and Logistics, 6) Advanced and Emerging Technologies, and 7) Tourism. Update the assessment and sector strategies, to also include identification areas of alignment with the major County initiatives (Prosperity, Housing, Climate, One Pima, Pima Prospers) on a multi-year cycle aligned with annual reporting.
8	EVOLVED *Prior: 10, 12, 19, 20*	Develop and sustain a comprehensive, unified business attraction and marketing campaign for Pima County, integrating business attraction, talent attraction, resident in migration, and regional brand positioning into a single coordinated strategy. Ground the campaign in Pima County's differentiated identity, strategic goals and community-benefit initiatives. Establish formalized selection criteria aligned with the County's priority sectors and a lead-tracking system to measure campaign performance.
9	CARRIED FORWARD *Prior: 11*	Identify and plan for infrastructure and utility needs for County owned parcels designated for economic development. Identify new areas to potentially add to the County's economic development land portfolio. Advance shovel-ready site certification for high-priority parcels and develop proactive site marketing materials aligned with business attraction priorities.
10	EVOLVED *Prior: 13*	Strengthen and expand the County's foreign direct investment strategy, building on completed and ongoing engagements with Mexico and Canada and expanding the FDI agenda to include South Korea, Taiwan, Japan, as priority international partner markets alongside Mexico and Canada. Taiwan is a priority market not only for general FDI but specifically for semiconductor supply chain development. As global semiconductor manufacturers expand production capacity, Pima County's optics, advanced manufacturing, and defense technology assets — anchored by the UA Wyant College of Optical Sciences — position the region to attract semiconductor-adjacent suppliers and talent. Develop targeted engagement strategies in coordination with the Arizona Commerce Authority, University of Arizona and binational partners.
11	EVOLVED *Prior: 14, 17*	Advance the Innovation Hub concept in downtown Tucson as the primary approach for supporting the advanced manufacturing sector and innovation economy. The Innovation Hub concept has the potential to address scale-up and makerspace needs of expanding companies, provide programming for startups and small businesses, and create opportunities for FDI, grant funding, and broader economic development programming.
12	CARRIED FORWARD *Prior: 16*	Conduct an ongoing review of economic development programs and services delivered by Pima County and its departments — evaluating what is working, identifying gaps, and streamlining or enhancing offerings during the 2026–29 strategy implementation.
13	CARRIED FORWARD *Prior: 18*	Continue to support and develop opportunities to attract and expand lifestyle and artisan-based industries in Pima County and connect this work to the Tourism industry sector.
14	NEW	Develop a dedicated optics and photonics sub-sector strategy in partnership with the University of Arizona's Wyant College of Optical Sciences, focusing on commercialization acceleration, complementary business attraction, and talent pipeline development across defense, medical imaging, semiconductor and semiconductor-related, and telecommunications applications.
15	NEW	Support the University of Arizona efforts leading responsible sustainable mining technology development, including resource development and next-generation extraction technology, including automation, environmental monitoring, and reclamation science.

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16	NEW	Develop a water and environmental resource strategy for economic development that establishes clear guidelines for evaluating the water and environmental compatibility of business attraction opportunities, ensuring that sector growth targets are calibrated to the County's long-term resource capacity and aligned with PimaCAN! and state water guidelines.
17	NEW	Conduct a review of Pima County development standards, zoning frameworks, and alternative compliance pathways along with Pima County Development Services and industry stakeholders to facilitate development outcomes consistent with the EDSP, PimaCAN!, Regional Housing Strategy, Pima Prospers, and the Pima County Strategic Plan. Identify specific regulatory or process efficiencies and recommend targeted adjustments in coordination with relevant County departments.
PILLAR 3: COMMUNITY AND CULTURE		
#	**Lineage**	**2026—29 Recommendation**
18	NEW	Enhance coordination, and develop a joint work plans where appropriate, with the Tohono O'odham Nation, the Pascua Yaqui Tribe, and other Native American communities identifying near-term initiatives in cultural tourism, workforce development, and business support aligned with tribal priorities.
19	EVOLVED *Prior: 19, 20*	Develop a comprehensive internal and external marketing and promotional campaign that embodies the richness of Pima County's culture, natural environment, diversity, equity and inclusivity values, and our welcoming community character, with particular emphasis on the County's tourism assets. Work with Pima County Attractions and Tourism and Visit Tucson to assess the tourism and cultural industry and identify opportunities to preserve and augment the diverse heritage of the community, including the strengths of the region's Native American tribes.
20	NEW	Develop a targeted entrepreneurship and small business development program for residents in low-income and underserved communities, providing access to business planning support, micro-lending connections, and peer networks that lower barriers to business formation and early-stage growth, consistent with Prosperity Initiative.
21	NEW	Develop a quality-of-life investment strategy that identifies and advances the amenities, cultural programming, recreational assets, and neighborhood improvements most valued by the skilled workers and young professionals the County seeks to attract and retain, treating quality of life as an intentional and measurable component of economic competitiveness.
22	NEW	Support regional efforts to address homelessness.

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PILLAR 4: ADVOCATE AND AMPLIFY		
#	**Lineage**	**2026—29 Recommendation**
23	CARRIED FORWARD *Prior: 24*	Support Tech Launch Arizona, Tech Parks Arizona, the University of Arizona Center for Innovation, and other university partnerships ensuring alignment with the innovation and startup ecosystem strategy.
24	CARRIED FORWARD *Prior: 26*	Assess and strengthen policies in place to support small businesses in Pima County to make the region more business friendly. Continue development of the small and medium-sized business resource page and utilize the Pima County Small Business Commission to make recommendations to the Board of Supervisors on policy and other issues affecting small business. Explore integration of elements of the One Pima policy.
25	CARRIED FORWARD *Prior: 29*	Work with internal and regional stakeholders, including tribal nations, economic groups, and County departments to develop and maintain an economic development legislative policy agenda that supports the wide range of needs for economic growth within the region at both the state and federal levels in alignment with County major initiative priorities.
26	CARRIED FORWARD *Prior: 30*	Work with Pima County staff to ensure internal processes and procedures are conducive to rapid response in Economic Development, including the procurement process, NDA process, and template agreements, building on the Enhanced Due Diligence and NDA policies adopted by the Board of Supervisors during the prior cycle.
27	NEW	Develop and publish an annual Economic Development Impact Report aligned with the KPI framework established in this plan, communicating progress against strategic priorities, documenting economic outcomes for residents and businesses, and demonstrating the outcomes from economic development activities.
28	NEW	Develop a dedicated federal and state funding pursuit strategy that identifies grant, loan, and incentive programs aligned with the County's priority economic development sectors and infrastructure needs, assign clear responsibility for pursuing and managing each opportunity, and ensure the strategy is consistent with EDA CEDS requirements.
29	NEW	Establish a formal economic development data gathering and tracking function that maintains current market intelligence, tracks regional economic indicators, and produces analysis to support business attraction, policy advocacy, and annual reporting.
30	NEW	Launch a business climate improvement initiative that systematically identifies and removes administrative, regulatory, and process barriers to doing business in Pima County, establishing a feedback mechanism through which businesses can provide input and create public accountability for measurable progress.
31	NEW	Continue strengthening the County's contracted partnership with the Chamber of Southern Arizona, which serves as a support partner for specific EDSP objectives. Establish and define activities that align with County strategic priorities, roles and deliverables, and mechanisms for joint reporting on shared outcomes.

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Shifting from Outputs to Impacts

The 2026–29 Economic Development Strategic Plan is designed from the outset to produce and demonstrate results. This section establishes the framework to measure progress, report outcomes, and adapt approaches as implementation advances.

The 2023–26 plan introduced sample KPI tables as illustrative examples. The 2026–29 strategy carries forward the framework while adding three structural improvements: defined baselines for each indicator, explicit lead designations that distinguish County-led from partner-led outcomes, and a formalized annual reporting structure with a named audience, format, and responsible party.

The indicators presented in this section are examples of the measures that will guide implementation. They are directional and transparent and will be tracked and reported on during plan implementation. They will also be used to inform decisions year-over-year.

Logic Model

The logic model below maps the flow from fundamental elements through strategic priorities, pillars, and outputs to the short, medium, and long-term impacts the department is working toward.

Fundamental Elements	1 Community	2 Industry	3 Government	4 Academia
Strategic Priorities	Business Retention & Expansion	Business Attraction	Infrastructure Development	Workforce Development
Pillars	Connect and Support	Focus and Prioritize	Community and Culture	Advocate and Amplify
Sample Outputs	# of jobs created / retained, Average wage growth # of businesses assisted	# of businesses attracted, Capital investment secured # of FDI investments	# of sites shovel-ready, utility, expansion # of housing units supported	# of workforce programs, Graduate retention rate # of training completions
Outcomes (Short-term)	Increased business retention, increased upward economic mobility	Increased businesses attracted, increased personal income	Improved site readiness, expanded connectivity	Increased graduate retention, expanded talent pipeline
Impact (Medium-term)	**To support and accelerate business attraction, retention and expansion, job creation, infrastructure development, and workforce development across Pima County**			
Impact (Long-term)	**Pima County will be recognized as an inclusive, competitive and prosperous community that welcomes business, supports innovation, and puts people first**			

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Annual Reporting Structure

The following reporting structure governs how progress against the KPI framework will be tracked and communicated.

Responsible Party	Pima County Economic Development Department is responsible for annual report production and presentation to the County Administrator for transmission to the Board of Supervisors.
Primary Audience	Pima County Board of Supervisors. Secondary audience: Partner organizations, and the public.
Format	A structured annual Economic Development Impact Report organized by pillar and strategic priority, presenting progress against each KPI with year-over-year comparisons to established baselines. The report distinguishes between County-led outcomes and Partner-reported outcomes and is made publicly available on the County's economic development website.
Cadence	Annual. The first report will be presented following the first full year of plan implementation and will establish updated quantitative targets based on Year 1 baselines.
Building on Pima County Strengths	All KPIs are measured against quantitative baselines established in the Pima County Profile and Competitive Position section. Key baselines include total non-farm employment (405,000, 2025); average annual wage ($62,200, 2024); median household income ($70,300, 2024); poverty rate (14.3%); industrial vacancy rate (7.9%, 2025); and manufacturing employment growth projection (+12.9% through 2034). Specific KPI baselines are noted in the tables below; remaining baselines will be established in Year 1 of implementation.
Role Designations	Each KPI is designated as: County-Led (Pima County owns implementation and reporting); County-Coordinated (Pima County convenes or supports, with a named partner holding implementation responsibility); or Partner-Led (a named external partner owns implementation; the County tracks and reports). These designations directly address the stakeholder feedback about ambiguity in the respective roles of the County and its partners.
Partner Reporting	Partner-led KPIs will be reported through annual data-sharing agreements using a standardized data template and submission timeline for all contributing partner organizations, such as the Chamber of Southern Arizona, University of Arizona, Pima Community College, Visit Tucson, Pima County Attractions and Tourism, and sector-specific workforce and training organizations.

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Example KPIs by Pillar

Finalized recommendations will have key performance indicators that will allow tracking of progress and reporting of results in an annual report provided to the Board of Supervisors. One or more of the following KPI examples will be reflected in reports based on which are most appropriate to the areas of activity.

Pillar	Example KPIs
Pillar 1: Connect and Support	• Number of working groups active and meeting on schedule • Number of businesses engaged through County programs and outreach annually • Number of new business partnerships and cross-sector collaborations established • Number of businesses assisted from underserved and minority-owned communities • Number of upskilling and reskilling programs offered and participants enrolled • Number of pre-K–12 and post-secondary experiential learning opportunities established • Number of graduates retained in Pima County employment within priority sectors • Number of small and medium business support program participants and outcomes
Pillar 2: Focus and Prioritize	• Number of businesses attracted to Pima County annually, by priority sector • Number of jobs created through business attraction and expansion activity • Dollar value of capital investment secured through attraction efforts • Dollar value of cross-border trade and foreign direct investment generated • Number of sector strategies completed and updated for the 2026–29 cycle • Number of optics, photonics, and mining technology firms attracted or retained • Number of innovation ecosystem partnerships activated • Number of economic development land portfolio sites advanced to shovel-ready status
Pillar 3: Community and Culture	• Percentage of population experiencing poverty, tracked annually against baseline • Number of affordable housing units permitted through County-supported initiatives • Number of joint economic initiatives developed with tribal nation partners • Number of cultural tourism programs supported through coordinated partnerships • Number of participants in entrepreneurship programs serving underserved communities • Quality of life investment strategy developed, and implementation milestones achieved
Pillar 4: Advocate and Amplify	• Annual Economic Development Impact Report published and presented to the Board • Dollar value of state and federal funding secured for economic development priorities • Number of legislative policy priorities advanced at state and federal levels • Business climate improvement initiative: friction points identified and resolved • Number of university and innovation ecosystem partnerships supported or expanded

Example KPIs by Strategic Priority

The KPI framework above is organized by pillar and cross-referenced to the applicable four strategic priorities. For example, Business Retention and Expansion KPIs draw primarily from Pillars 1 and 4; Business Attraction KPIs from Pillar 2; Infrastructure Development KPIs from Pillars 2 and 4; and Workforce Development KPIs from Pillars 1 and 3.

The roadmap in the following section shows strategic priority alignment for each recommendation explicitly.

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Roadmap to Implementation

The roadmap below presents all 31 recommendations with strategic priority alignment and intended implementation timing: short-term (first six months), medium-term (six to eighteen months), or long-term (eighteen months or beyond).

Strategic priority alignment is noted with a checkmark: BRE = Business Retention and Expansion; Attract = Business Attraction; Infra = Infrastructure Development; WFD = Workforce Development.

#	Recommendation	BRE	Attract	Infra	WFD	Timing
PILLAR 1: CONNECT AND SUPPORT						
1	Position Pima County as regional leader and critical convener; oversee strategy implementation and working groups	✓	✓			Short
2	Business resource guide and digital resource hub; annual website review cycle	✓				Short
3	K–12 and post-secondary experiential learning in priority sectors	✓	✓		✓	Medium
4	Upskilling and reskilling programs; employer incentives for workforce investment	✓	✓		✓	Medium
5	Dedicated small and medium business support program for underserved entrepreneurs	✓				Medium
6	Graduate retention & attraction strategy with UA, PCC, and priority sector employers	✓			✓	Medium
PILLAR 2: FOCUS AND PRIORITIZE						
7	Market assessment for target industries; ongoing update cycle	✓	✓		✓	Medium
8	Strategic marketing and promotional campaign; differentiated Pima County identity	✓	✓			Medium
9	Infrastructure projects and land portfolio expansion	✓	✓	✓		Long
10	Expanded FDI agenda: Mexico, Canada, South Korea, Taiwan, Japan	✓	✓			Medium
11	Innovation and startup ecosystem activation with Startup Tucson, Tech Launch, Tech Parks, UACI	✓	✓			Medium
12	Economic Development program assessment; opportunity and gap analysis	✓	✓		✓	Medium
13	Tourism coordination; lifestyle industry programming					Medium
14	Optics and photonics dedicated sector strategy with UA Wyant College of Optical Sciences	✓	✓		✓	Medium
15	Sustainable mining technology sub-sector initiative with UA mining engineering program	✓	✓		✓	Medium
16	Water and environmental resource strategy for economic development; PimaCAN! alignment		✓	✓		Long
17	Development standards and zoning review; alternative compliance pathways	✓	✓			Long

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#	Recommendation	BRE	Attract	Infra	WFD	Timing
PILLAR 3: COMMUNITY AND CULTURE						
18	Tribal economic development liaison and joint work plan with tribal nations	✓			✓	Short
19	Internal and external marketing and promotional campaign; resident engagement	✓				Medium
20	Entrepreneurship program for low-income and underserved communities; Prosperity Initiative alignment	✓			✓	Medium
21	Quality of life investment strategy for talent attraction and retention	✓				Medium
22	Regional homelessness support and coordination	✓				Long
PILLAR 4: ADVOCATE AND AMPLIFY						
23	Tech Launch, Tech Parks Arizona, University of Arizona partnerships	✓	✓	✓	✓	Short
24	Small business policy assessment; business friendliness and grant access	✓				Medium
25	Economic development legislative policy agenda; state and federal levels	✓	✓	✓	✓	Medium
26	Internal rapid-response processes: procurement, NDA, template agreements	✓	✓	✓	✓	Short
27	Annual Economic Development Impact Report aligned with KPI framework	✓	✓	✓	✓	Short
28	Federal and state funding pursuit strategy; EDA CEDS alignment	✓	✓	✓	✓	Medium
29	Economic development data and research function	✓	✓	✓	✓	Short
30	Business climate improvement initiative; input and feedback mechanism	✓	✓			Medium
31	Chamber of Southern Arizona contracted partnership; coordination of work	✓	✓			Short

Short-term recommendations are foundational. Medium-term recommendations build strategies and programs on that foundation. Long-term recommendations require sustained coordination, financial resources, or policy action across multiple years.

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Getting Started: Immediate Priorities

The following actions are the priority short-term steps for the early months of implementation.

- Affirm County's role as regional leader and critical convener, and communicate that role to partner organizations, and to the business community. This is not an announcement; it is a sustained commitment backed by visible action.
- Evaluate and reconvene the four working groups from the prior planning cycle. Confirm the composition, mandate, and meeting cadence of each group for the 2026–29 period.
- Establish the annual reporting structure and begin building the data infrastructure needed to track Year 1 baselines.
- Initiate the scheduled engagement sessions with the Innovation Ecosystem to finalize the innovation and startup ecosystem strategy and the Innovation Hub concept.
- Fortify outreach to the Tohono O'odham Nation, Pascua Yaqui Tribe, and Tohono O'odham Community College. The tribal liaison function and joint work plan would be among the earliest deliverables of the 2026–29 cycle.
- Identify work activities with the Chamber of Southern Arizona in alignment with the EDSP's priorities.
- Support Tech Launch Arizona, and Tech Parks Arizona as immediate programmatic priorities, maintaining the momentum of the prior cycle's university partnership commitments.

Work with Pima County staff to confirm that procurement, NDA, and template agreement processes are functioning for rapid economic development response.

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Endnotes

All hyperlinks have been validated as of the date of this report. Where sources are subscription-based (e.g., CoStar Group), no URL is provided; citations identify the data provider and access period. Note numbers correspond to superscript references in the plan text, which will be finalized upon completion of the consolidated draft.

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