



Turning the Tide of Technology in Middle Tennessee

January 31, 2008

11:30-1:00 PM

Belmont University

Brief History of the NTC

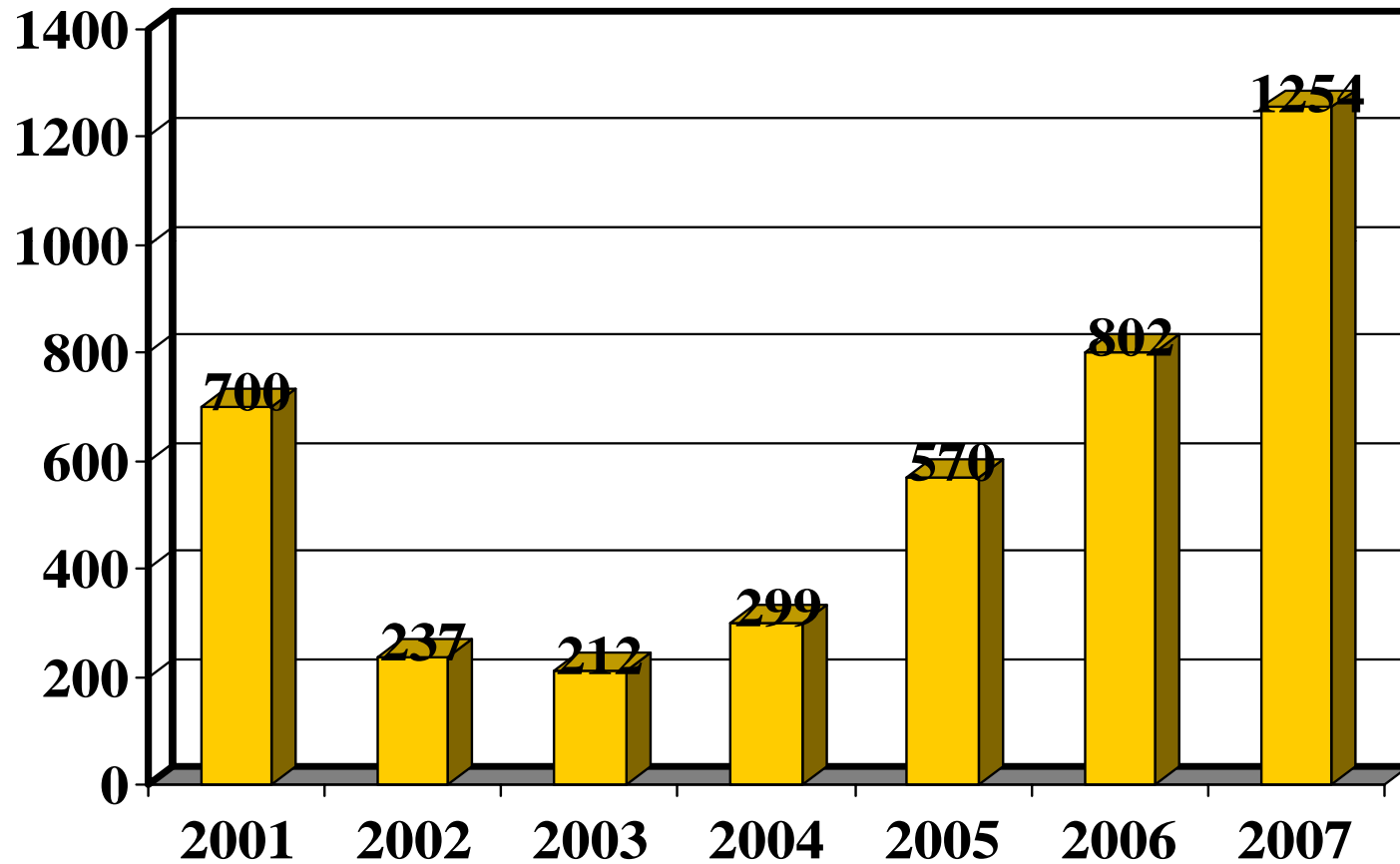
- 501c6 Trade Association Corporation
- Founded in 1999
- Membership made of 321 Companies/Universities
- Primary purpose is to **Serve, Involve, and Promote** the Middle Tennessee Technology Community

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Involving
Promoting



Advertised IT Jobs in Nashville

May 2007



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Types of IT Jobs Available

Job Type	2007	2006	2005
Analyst	387	256	152
Developer	202	155	127
Data Center	103	N/A	N/A
Management	187	141	94
Network Engineer	71	81	69
Help Desk	138	61	47
Database	74	55	32
Web Developer	41	25	26
Training	29	17	10
Quality Assurance	22	11	12
Total	1,254	802	569

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Employer Statistics

- The companies here today represent **3704** IT employees
- The companies here today represent **236** IT job vacancies
- The Average Entry Level Salary - **\$42,000**

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Employer Statistics

- 83% of the companies here today said they are willing to hire a recent college graduate
- 40% of the companies are willing to hire someone with a two year degree or certificate

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University Statistics

- Between **215** to **380** students will graduate in 2008 with a four year technology related degree
- Between **80** to **100** students will graduate in 2008 with a two year technology related degree

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University Statistics

- Between **252** to **389** freshman are currently enrolled in four year technology related programs
- Approximately **152** students are currently enrolled in two year technology related programs

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University Statistics

- **31%** of graduates with bachelors degrees in technology stay within the greater Nashville area
- **67%** of graduates with associates degrees in technology stay within the greater Nashville area

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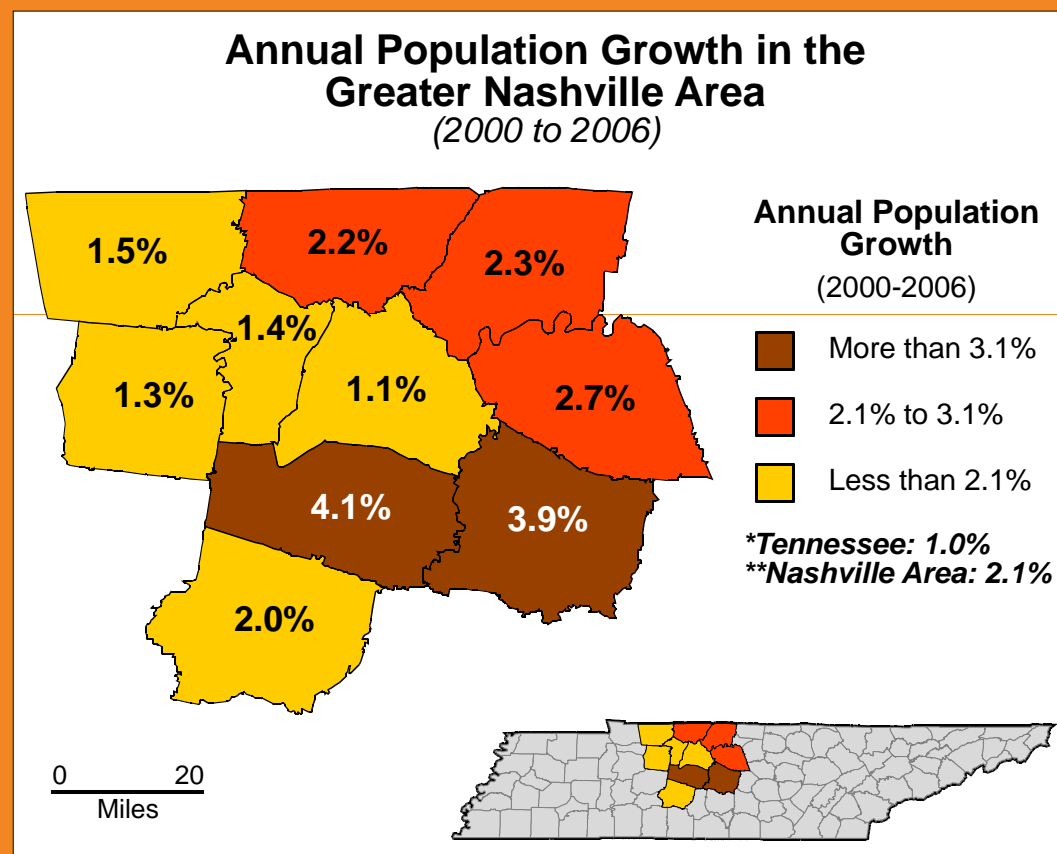
Labor Market Opportunities in the Nashville Economic Market Area

Janet Miller
Nashville Area Chamber of Commerce



The Nashville Economic Market

- 1.6 million people
 - At 2.1%, grew 2x's faster than the state (2000-06)
- 850,000 person labor force
 - 34,000 seeking work (Sept. 2007)
- 1.1 million jobs
 - 800,000 traditional wage & salary jobs
 - 300,000 proprietorships

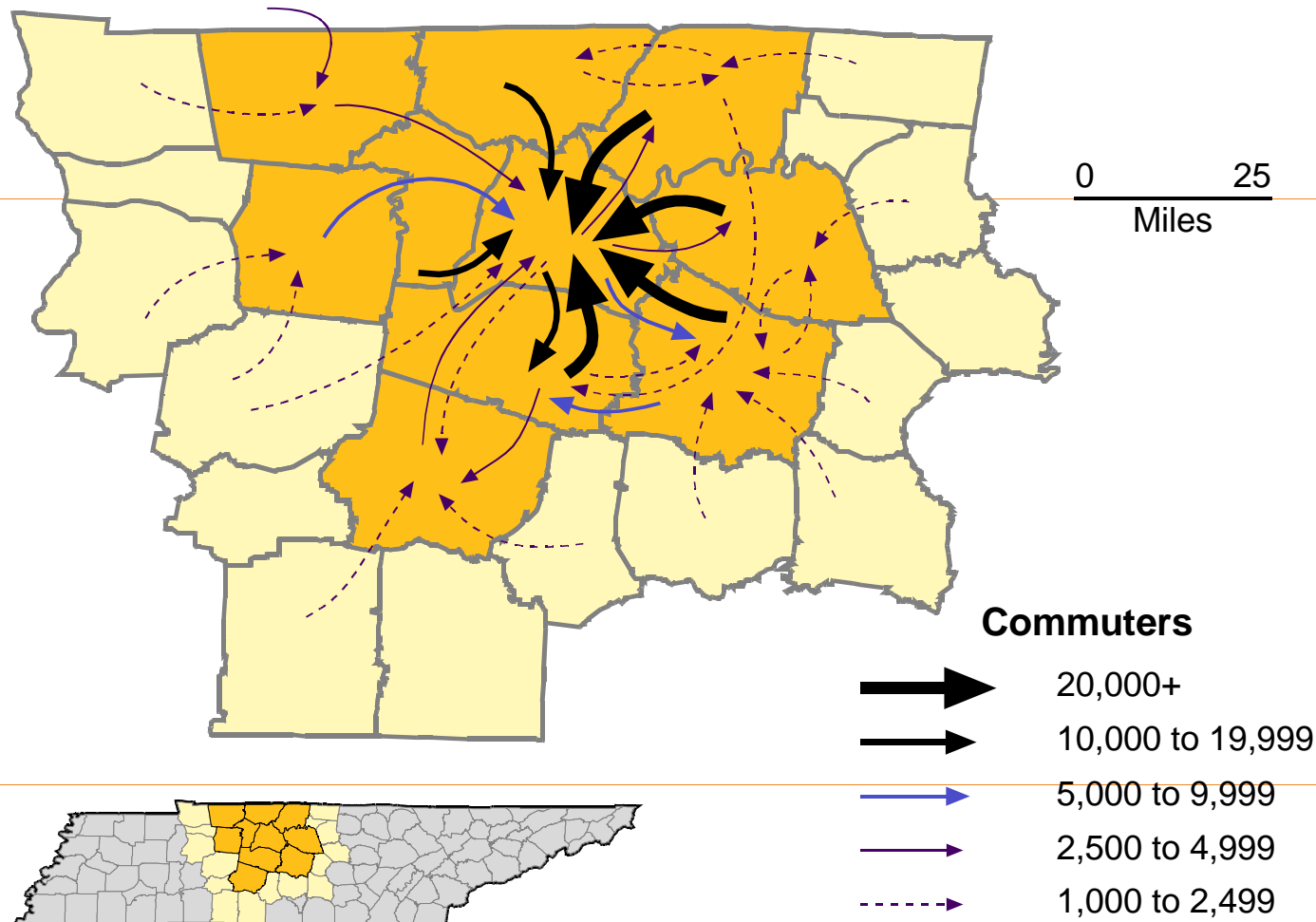


Source: Tennessee State Data Center and US Census Bureau, 2006

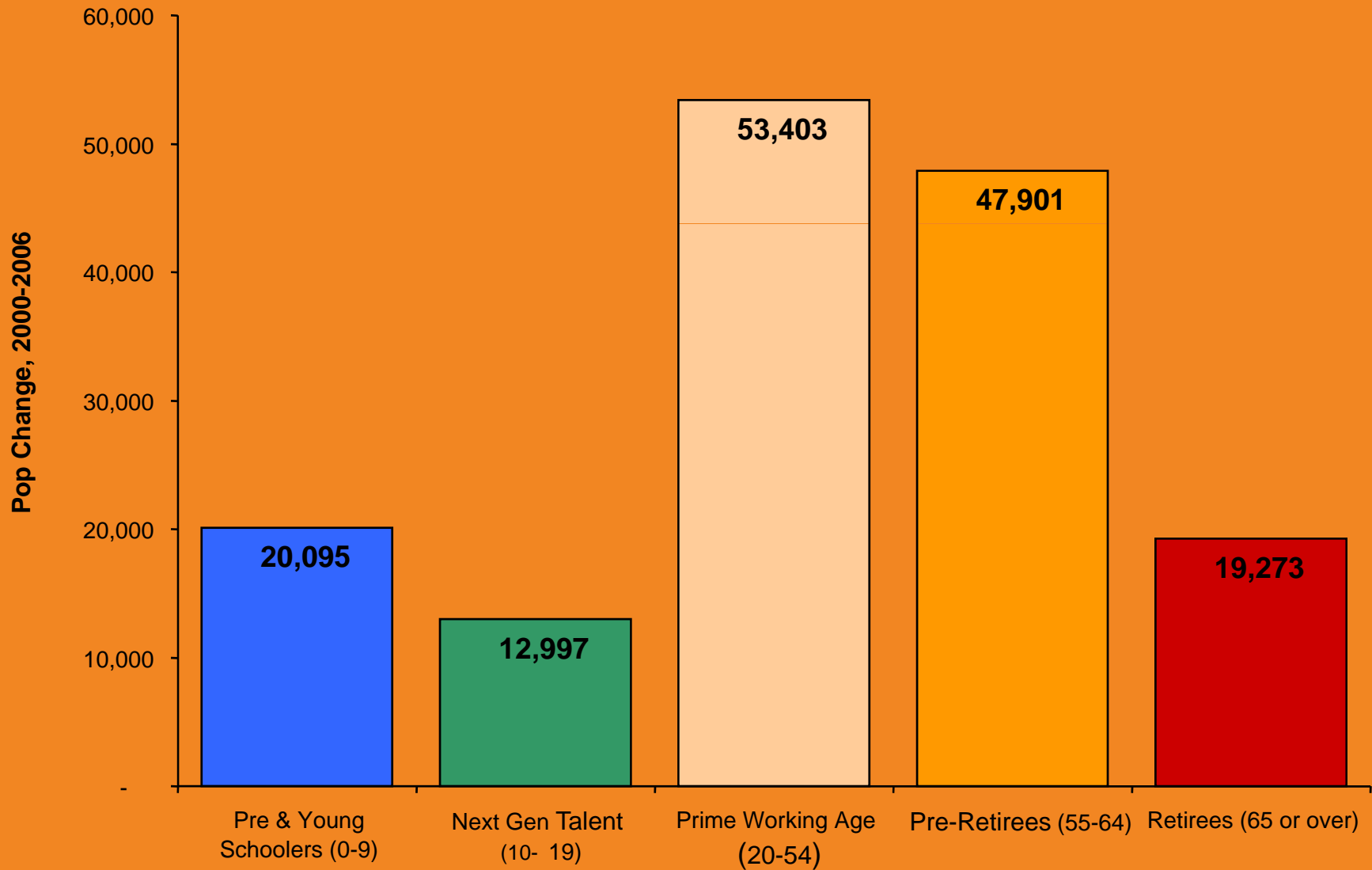
A Truly Regional Economy

Commuting Patterns in the Nashville Region

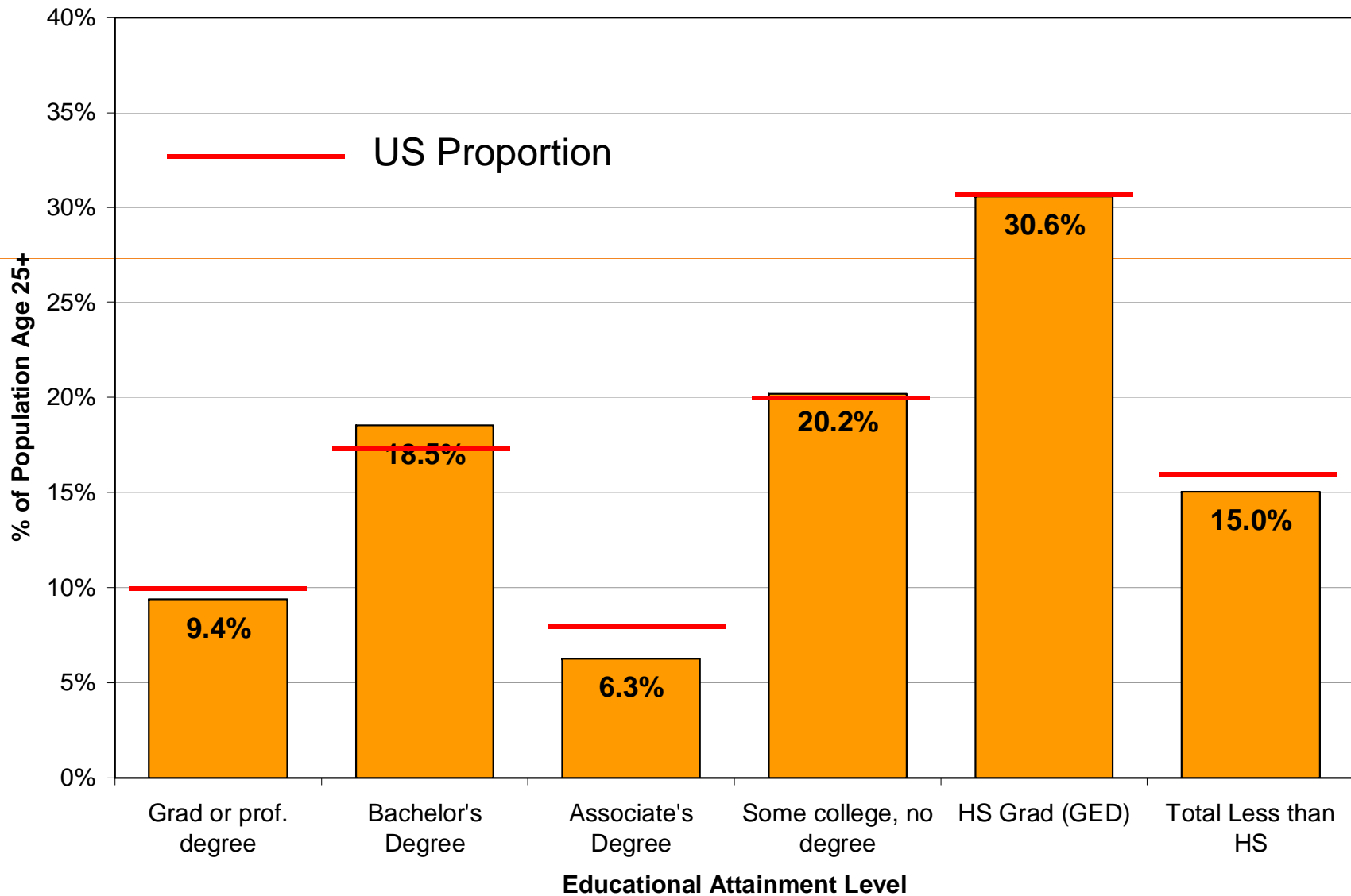
(US Census Bureau, 2000)



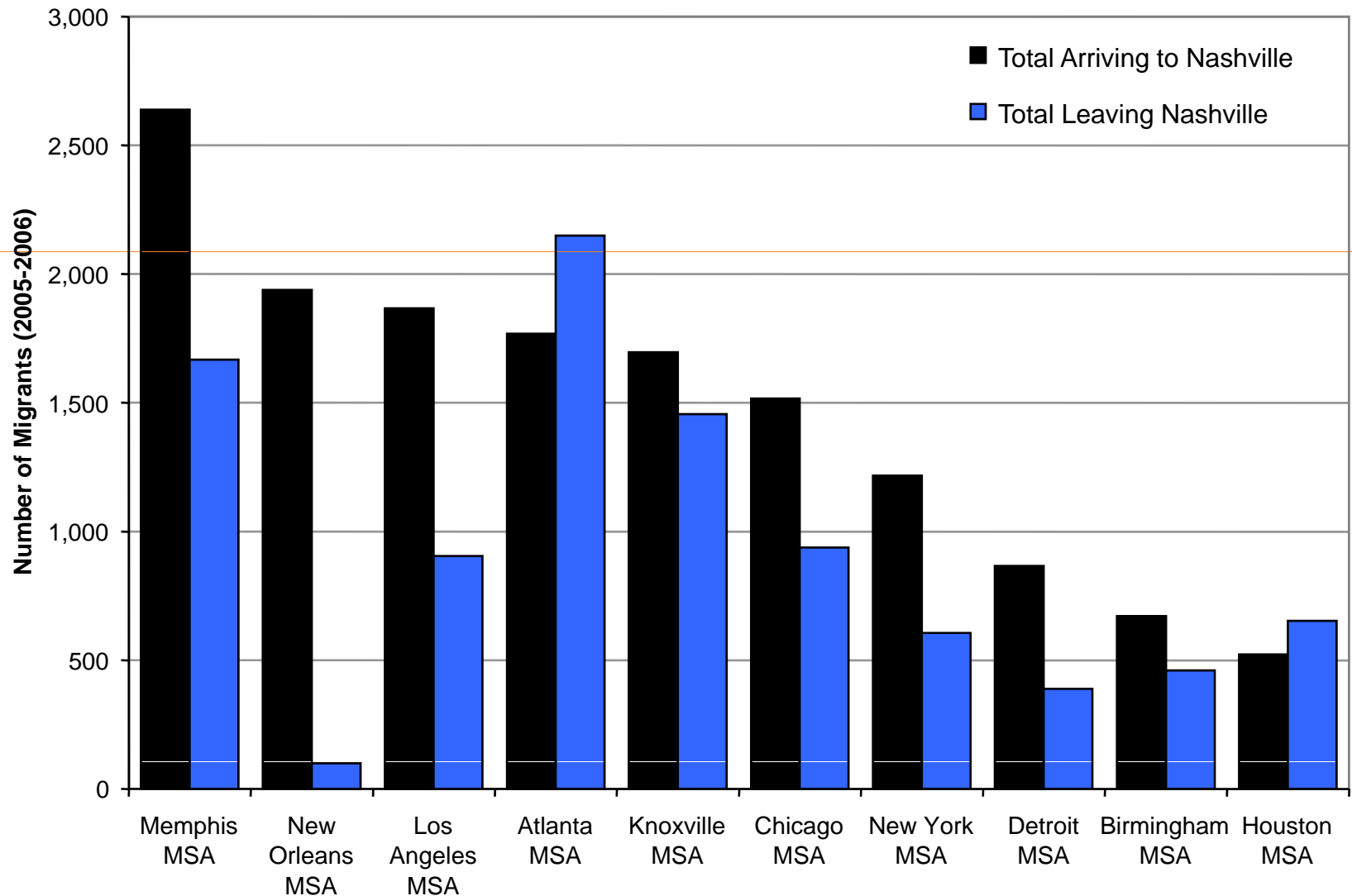
Population Increase by Age Cohort, 2000-2006



Educational Attainment for the Nashville Region (2006 est.)



Largest Origins and Destinations of Nashville Area Migrants, 2005-2006



Regional Workforce Demand



- Employment growth to slow
 - 127,000 jobs between 2002 and 2007
 - Expected to add 120,000 jobs through 2017
- Half of new employment growth will occur in 3 economic supersectors:
 - Education & health services,
 - Leisure & hospitality, and
 - Wholesale and retail trade
- High growth, high wage occupations include:
 - Nursing,
 - Postsecondary teachers,
 - Various managerial positions, and
 - High skill IT-related occupations

Regional Workforce Demand



- Annual Job Growth Goal of 11,500
 - Last FY - 19,386
 - YTD through October - 9,000
- Current Relocation Pipeline
 - 39 negotiating projects
 - 7,475 jobs
 - 5.6 million square feet
 - 1.4 billion investment
- Large demand for technology workers in HQ's, Data Centers, shared services and pure IT shops

Off Shoring Statistics

- 5% of US companies off shoring (10% of NTC Companies)
- Expected changes in next two years
 - Increase 7%
 - Decrease 4%
 - No Change 86%
 - Don't Know 3%
- Higher Off Shoring in Larger Companies
 - 1000+ 11%
 - 500-999 11%
 - 250 - 499 8%
 - 100 - 249 3%

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Off Shoring Has A Place

- Provides cost effective alternative
 - Back Office Support and Function
 - Alternative for US pm support
- Staff Augmentation
- Good for spike and part time needs to ensure
- At HealthSpring
 - Evening Coverage (DBA and Operations)
 - Secondary “Non Core” development in India
 - Niche skill set augmentation (PeopleSoft)

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Off Shoring Myths

- All of our jobs are going overseas, why major in IT
 - Continual high number of openings locally - and growing
 - Demand is Outpacing Supply
 - There will always be a place locally for good technologists

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Next Steps

- March 6
 - Meeting with Deans and Tech Educators
 - Strategy / Action plan for Initiative
 - Create top issues to be addressed
- May 8
 - Present Findings
 - Go Forward Action Plan
 - Partnership Charter

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