
Competing for Leadership in a Global Economy

*How Can Colorado Distinguish
Itself?*

Leadership

- Vision
- Alignment
- Execution
- Integrity

21st Century Leadership Styles

1. Global/Regional
2. Collaborative
3. “Service-based”
4. Technology-based, but relationship-driven
5. Outward-looking
6. “Change” embracing

“Leadership in the future of our developing globe will be driven by three major vectors...two unchangeable, the other within our grasp – demographic shift, resources and intelligence, with intelligence the most important.”

Demographic Shifts

U.S. is the fastest growing industrial democracy in the Western World

How many years will it take for the U.S. population to double?

62 years

Mexico?

35 years

Italy?

565 years

Most Populous

- China – 1.3 billion
- India – 1.1 billion
- United States – 298 million
- European Union – 261 million
- Indonesia – 241 million



China

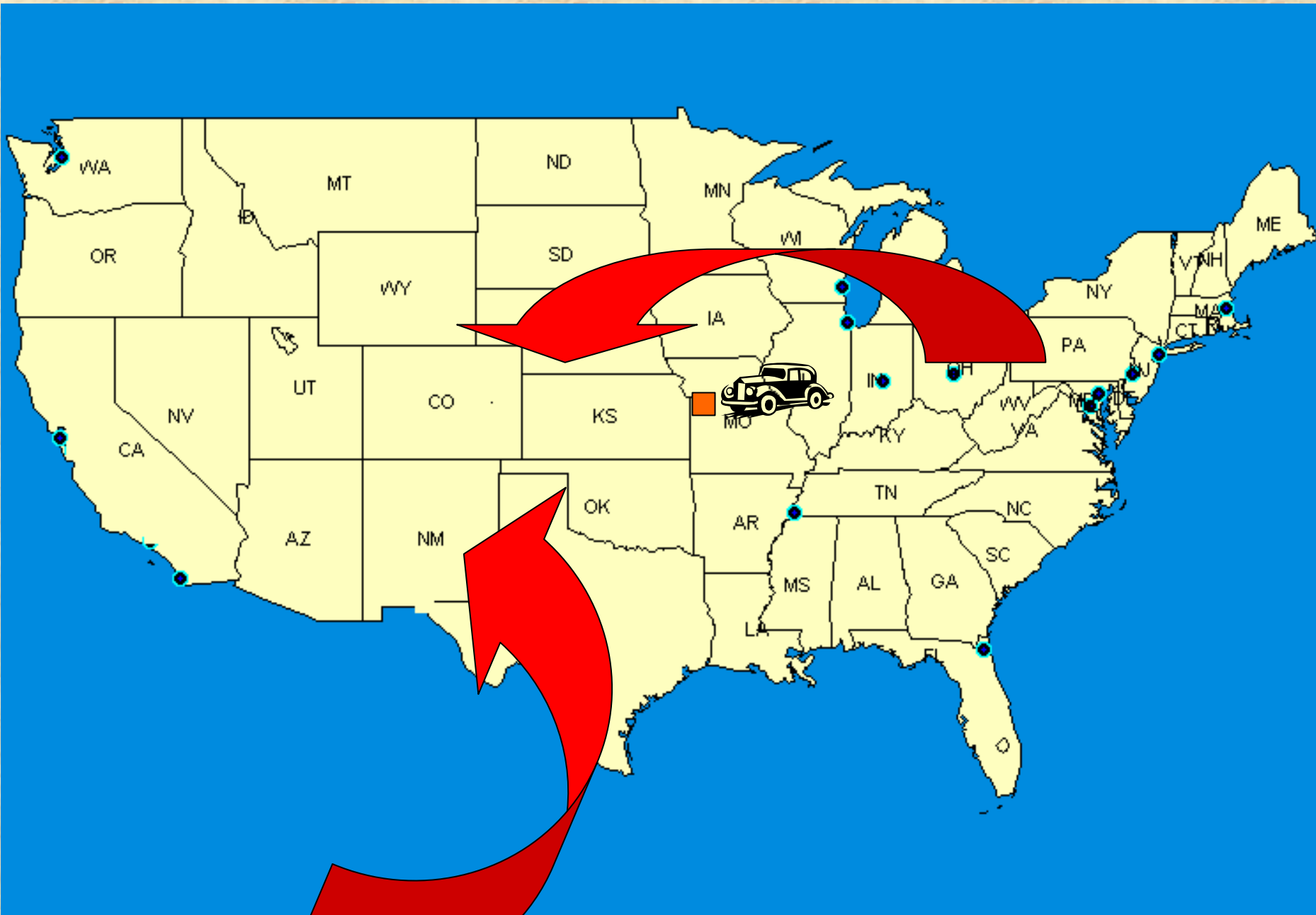
- 4th largest water supply, Canada, U.S., India are 1-3
- Largest population
- “Hottest” economy – 9%+ growth
- 2nd in purchasing power
- 1st in energy consumption, 2nd in oil consumption
- 2nd in coal production
- 17 billion barrels of identified oil reserves, 12th in world

India

- 41% of world's poor people
- 10th largest GDP in world
- 2nd largest labor force
- 4th in instruction hours per student (1,176 hours) Japan 25th, U.S. N/A
- Economic freedom 123/161

Case Study: Spain

- Center of the “wind” industry in Europe
- More advanced wind energy industry than U.S.
- “Tapped out” for wind farms until 2020 – U.S. most promising market



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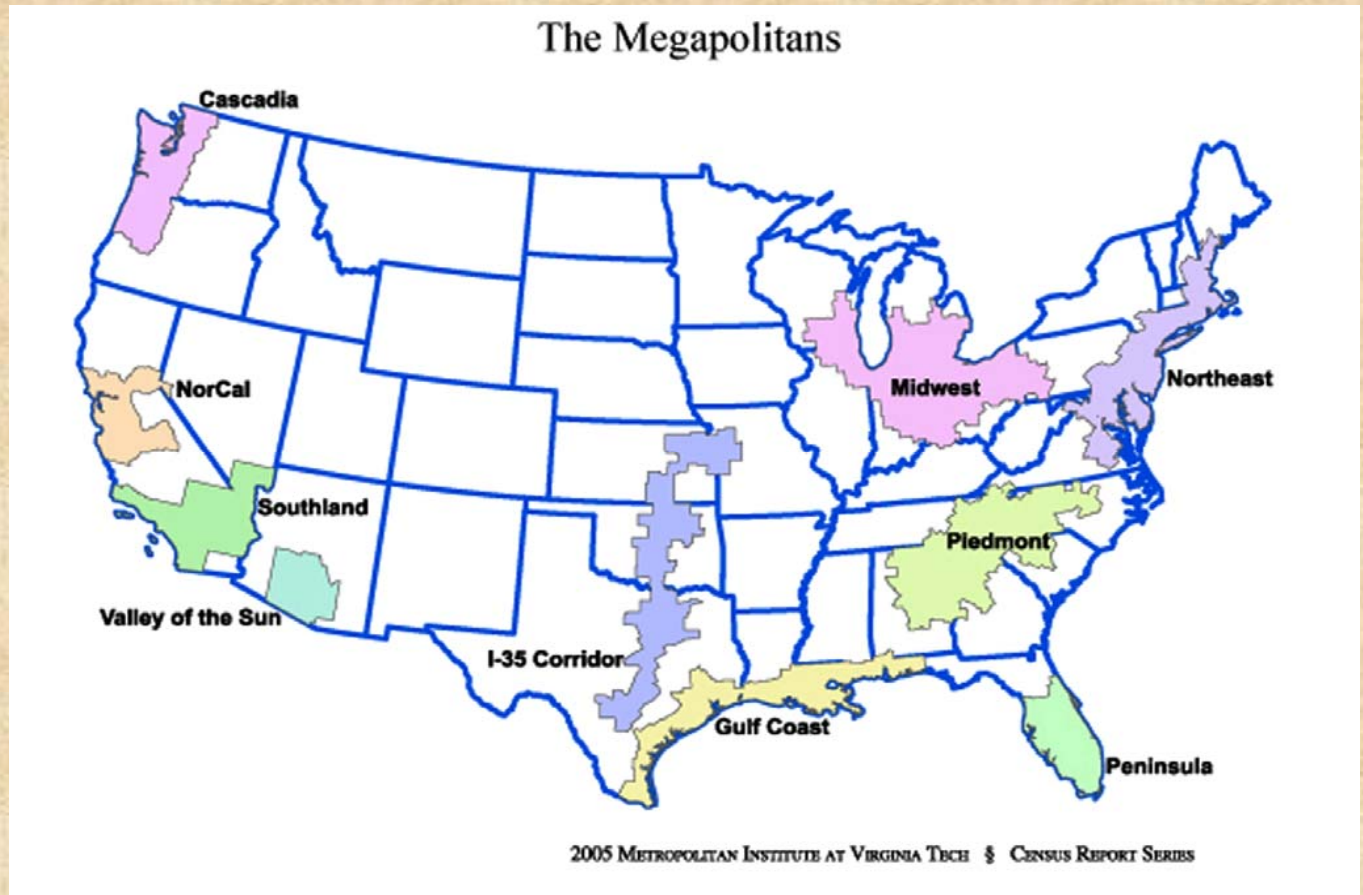
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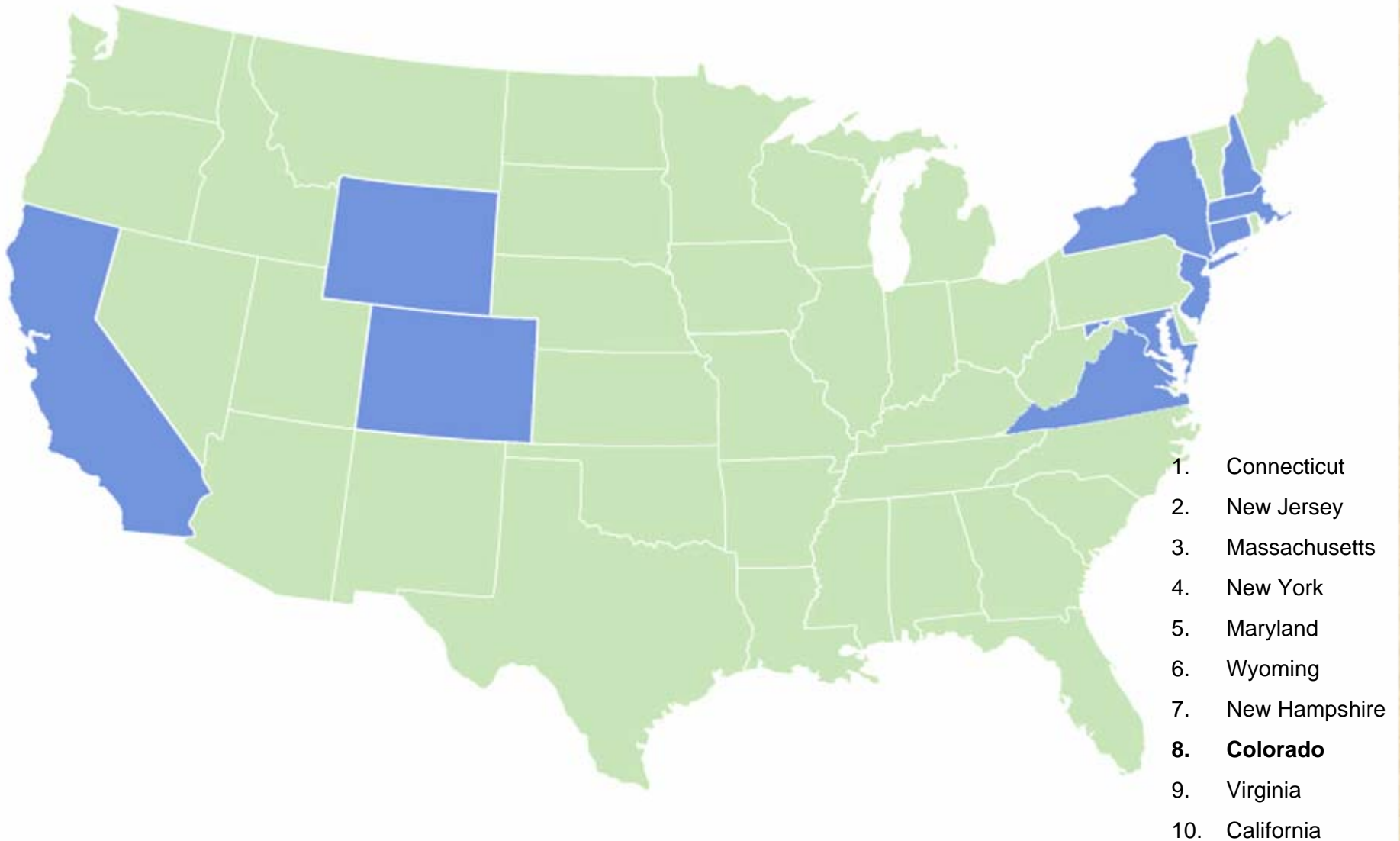
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MEGAPOLITAN GROWTH

Megaforce in the Global Economy



Top 10 States for Per Capita Personal Income



Natural Resources

Headlines.....

“World has 30 year supply of oil.”

Minneapolis Star (newspaper) – 1963

“World has 30 year supply of oil.”

New York Times – 1993

“World has reached “Peak Oil”...end is near.”

Every major news outlet in the world - 2006

Energy Resources - Oil

- Proven Reserves
 - Saudi Arabia – 260 billion barrels
 - Canada – Tar sands – 460 billion barrels
 - United States – 29 billion barrels
- Unproven Reserves
 - Colorado – one trillion barrels (trapped in oil shale)
 - 60% of the “clean wind”, “decent” solar

Natural Gas

- 20 years of identified, permitted and “ready to go” natural gas wells throughout Colorado
- Other gases such as coal bed methane are in plentiful supply
- Two major pipelines connecting Colorado’s supply to St. Louis and Pittsburgh are now operating – freeing Colorado gas to other markets

Fresh Water

- Potable water supplies that are pristine or easily filtered hold one key to future economic development
- Canada, U.S., India and China have largest fresh water supplies
- The Great Lakes region of U.S. will see a transition from “Rust Belt” to “Water Tank” in next 25 – 50 years as water for semiconductor manufacturing, biotechnology brewing and other water-intensive industries dry up on the Left Coast

Wind Power

- 60% of the “clean wind” is located in a band from the Texas Panhandle up through western Minnesota and western Montana
- Only one metro region has an international airport with non-stop service to Europe in the Wind Tunnel

Solar

- Only Arizona has better solar power than Colorado

Intelligence

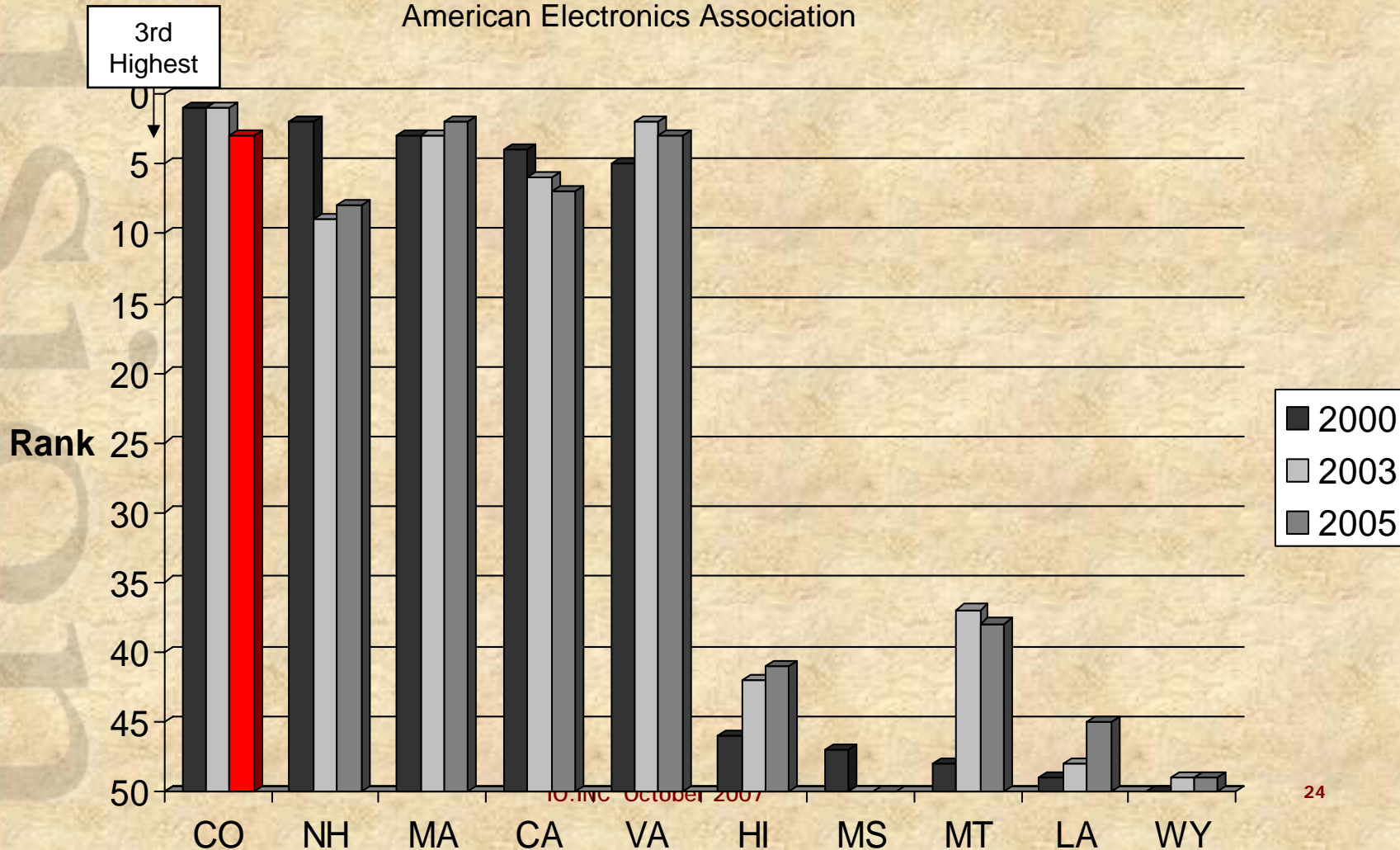
Global Economic Leadership – Intelligence

“Reduced to its most basic element, economic leadership is nothing more than the pursuit of intelligence.”

Intelligence

High Tech Employment per 1,000 Workers

American Electronics Association



Workforce and Population

- Engineering Graduates*

- # of Graduates

	High	Low
– U.S.	70,000	59,000
– India	350,000	120,000
– China	600,000	200,000

* Numbers for China and India vary greatly. For example, the “600,00” number first appeared in a speech and was picked up nationally. Researchers have been unable to verify the “high” number. No matter how the numbers are calculated, India and China are far out-producing the U.S. in engineering talent.

Immigration...more than meets the eye....or that reaches the border

- Over 30% of all graduate degrees in U.S. are earned by foreign students
- Over 40% of all PhDs
- Over 48% of PhDs in math
- Over 53% of PhDs in engineering
- Colorado has the 3rd highest concentration of scientists and engineers/1000 population in the U.S.

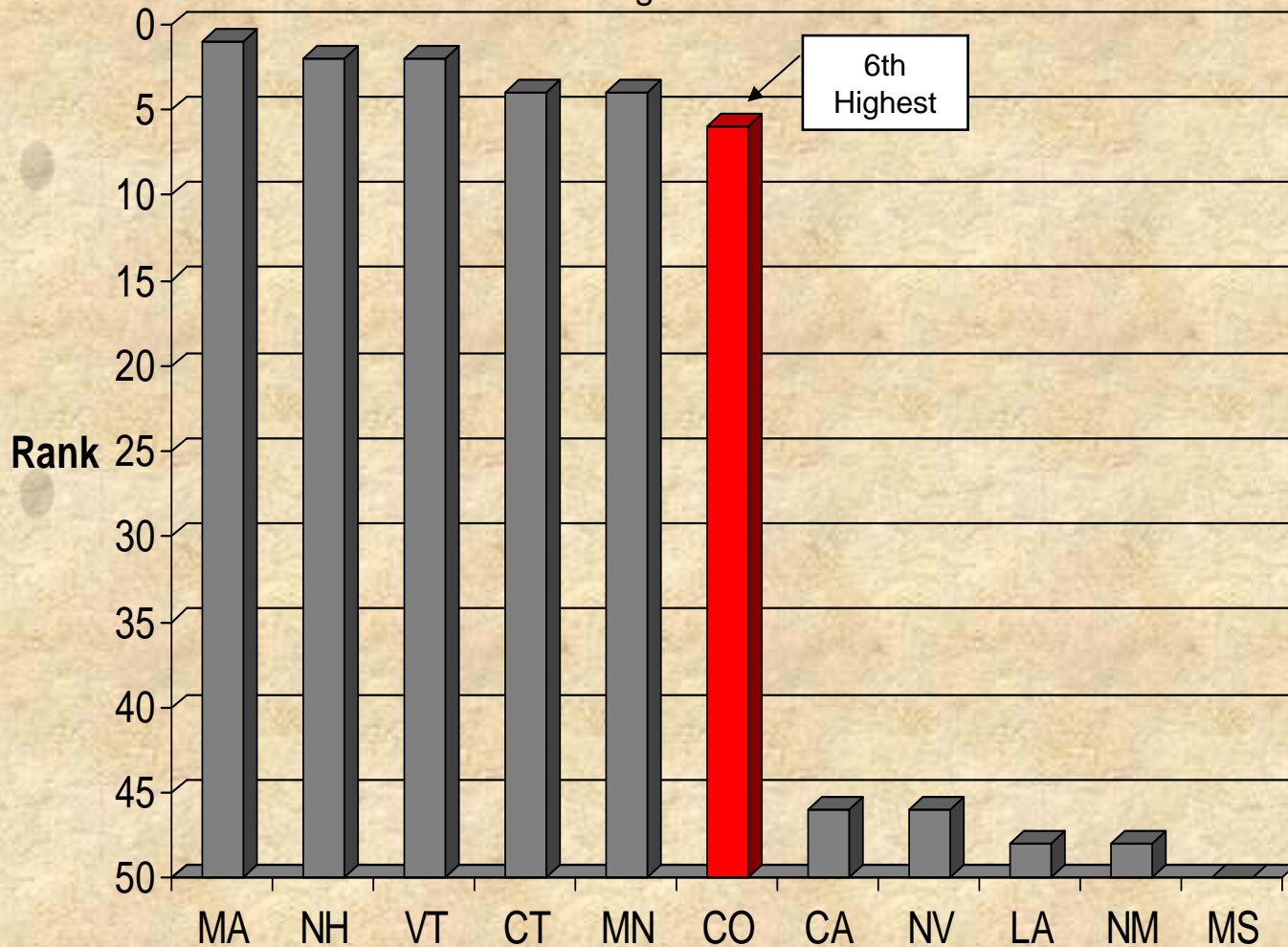
Margaret Thatcher's Big Mistake

- Great Britain began charging foreign British Commonwealth students tuition
- Result?
 - 90% drop in “best and brightest” students from Commonwealth countries attending UK colleges

Beneficiary: United States

Percent of Public School Fourth Graders Proficient or Better in Reading

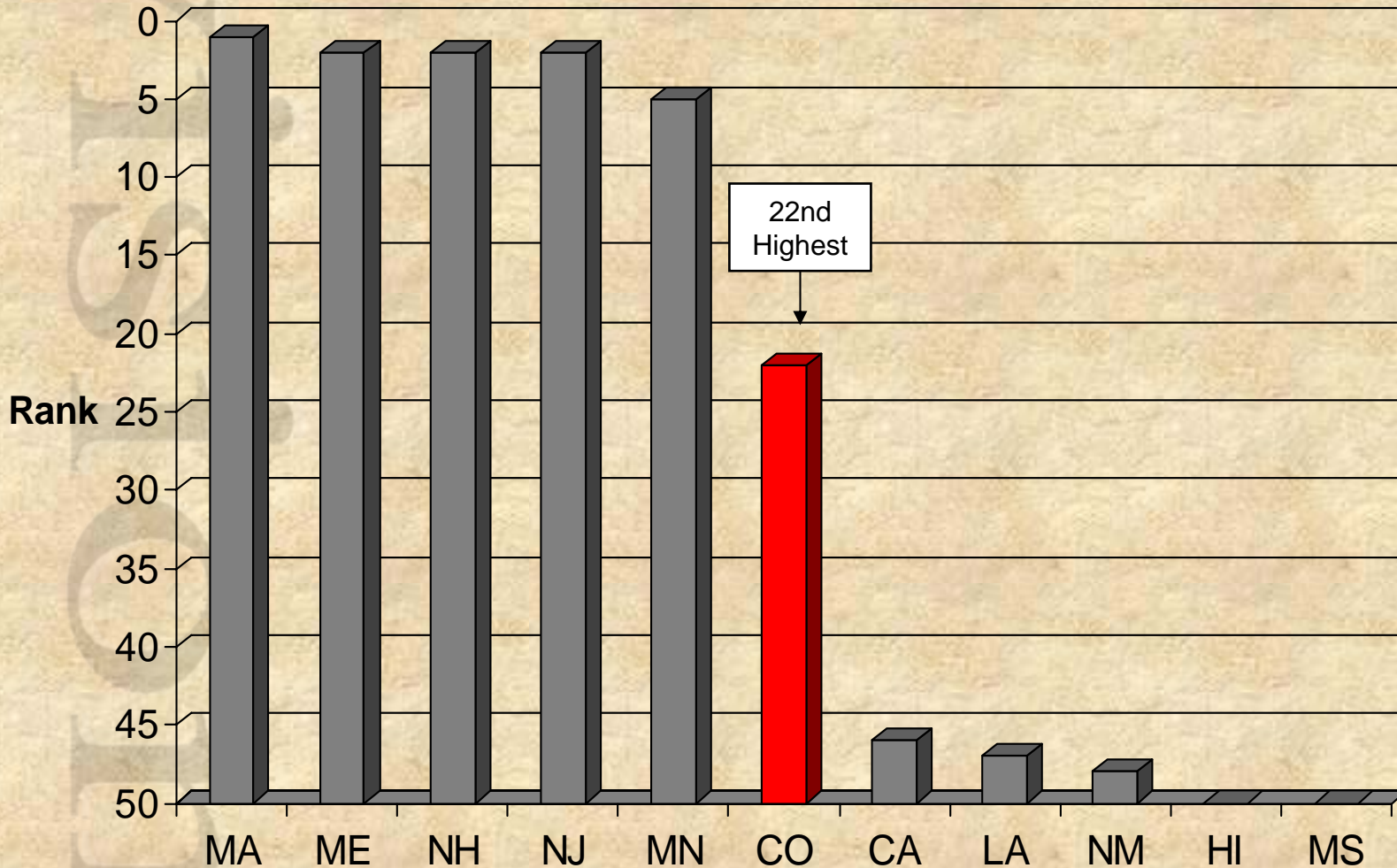
Morgan Quitno Press



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Percent of Public School Eighth Graders Proficient or Better in Reading

Morgan Quitno Press

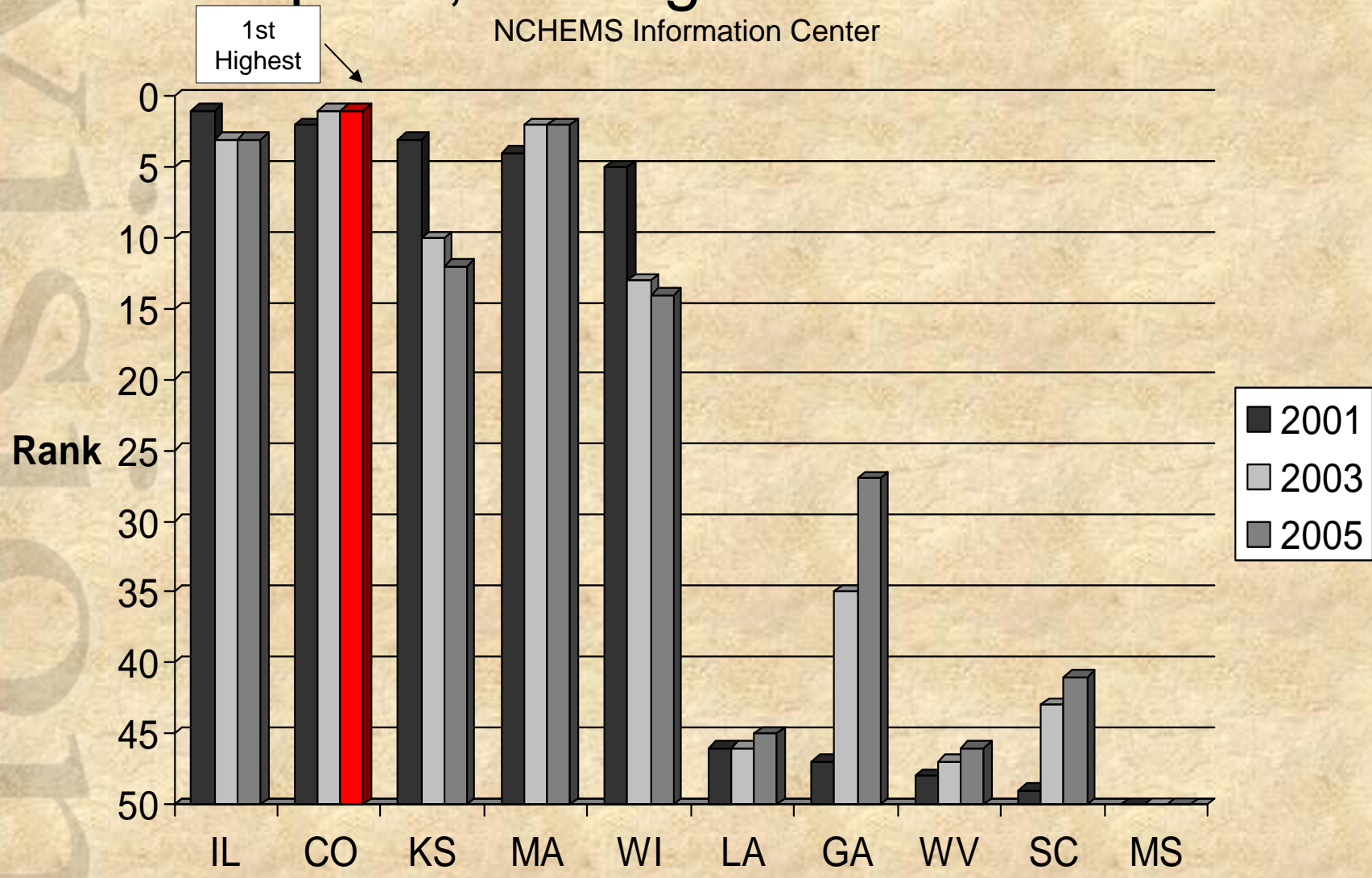


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- **Colorado has the smartest kids in the United States!!!!!!**

Highest ACT (26 or above) and SAT (1200 or above) Scores per 1,000 High School Graduates

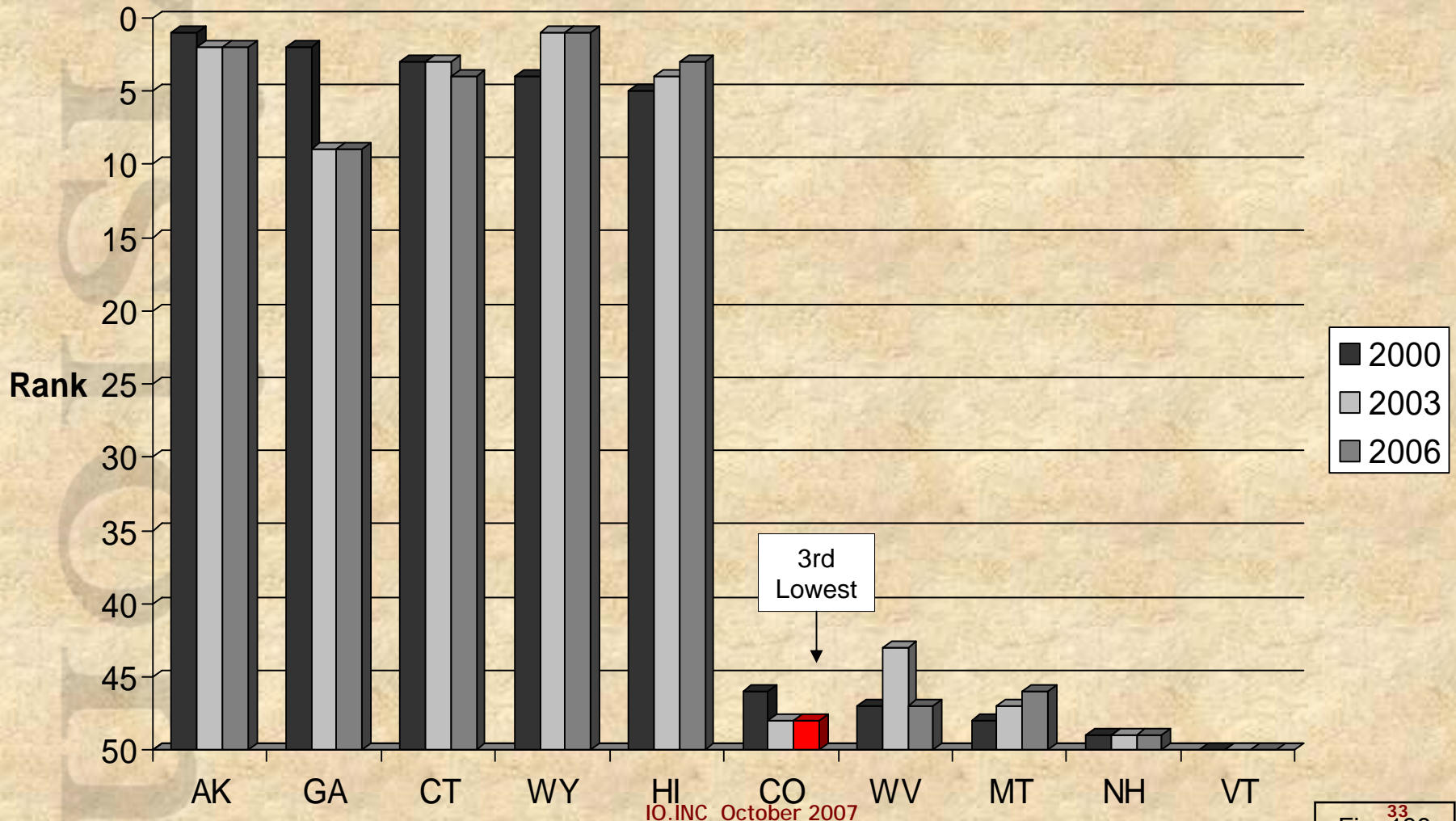
NCHEMS Information Center



Then...we must spend the most on
higher education, right?

State and Local Public Higher Education Support per Full-Time Student

NCHEMS Information Center



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Fig. 133³³

“The phrase, “If present trends continue” is an oxymoron.
Present trends never continue.
In fact, present trends create the
• circumstances of their
opposition.”

Gordon Black
USA Today - pollster

The Gathering Storm

- “Right to Work” initiative
- “Fair Share” initiative
- “Corporate Liability” initiative
- “Just Cause” initiative

The end of Labor Peace will quickly spin out of our control. Outside forces will decide our economic destiny.

One final note....of hope

“Denver has no reason to exist, perhaps that’s why its inhabitants engage in ‘superlatives’.”

City Times of London
January, 2008