



COGENCE Alliance

Owners + Architects + Engineers + Contractors

Inspire. Educate. Unite.



Mission + Purpose

Cogence *(Latin)*

“To drive together” or “Thinking that is well organized”

The purpose of the Alliance is to bring Owners and Developers, Architects and Engineers, Construction Managers and Contractors, and Allied Industry Professionals together to **advocate** and be a **resource** for improved project delivery.

For more information visit us at www.cogence.org

Inspire. Educate. Unite.



Planning for Central Ohio's Future – A Strategic Discussion

- **Matt McCollister**, Interim President, One Columbus
- **Eric Kaiser**, Preconstruction Manager, Turner Construction Co.
- **Kevin Machcinski**, Operations Manager, Gilbane Building Co.

AIA
Continuing
Education
Provider

This program has been approved for 2.0 AIA LU | Elective. To receive credit please complete and sign the CES attendance sheet. Cogence Alliance is a registered provider of AIA-approved continuing education under Provider Number 10101590.

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Columbus Region Economic Update

September 2025



VISION

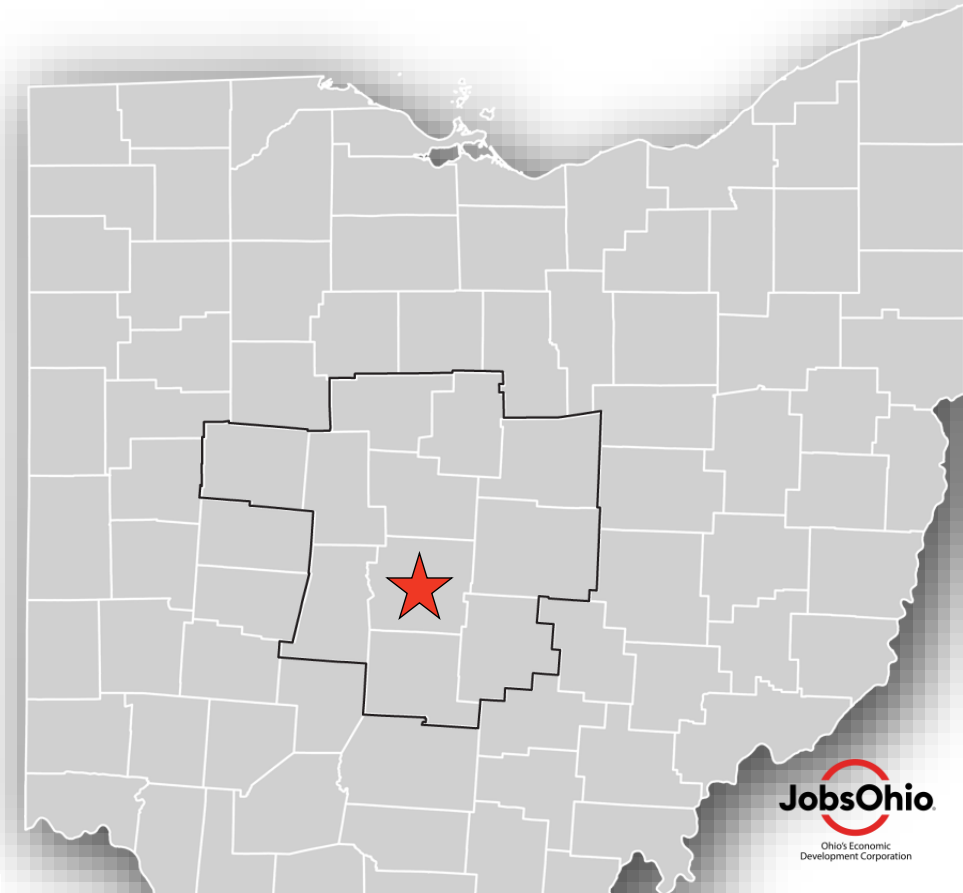
To become the most prosperous region in the United States.

Building prosperity is the process of advancing the social and economic well-being of all residents within the Columbus Region.

By all measures, the
Columbus Region is
one of the strongest
economies in
the U.S.



No single industry
sector employs
more than 17% of
our workforce



#1

for GDP Growth

#1

for Population Growth

2.3M

Current
Population

#15

Largest City in the Country

18

Fortune 1000
Company HQs

2.6M

2030 Population
Forecast



SEMICONDUCTORS



**AUTOMOTIVE /
EV SUPPLIERS**



LIFE SCIENCES



DEFENSE TECH

TARGET INDUSTRIES



IT / FINANCE / INSURANCE



HEADQUARTER OPS



LOGISTICS



**DATA CENTERS /
AI OPS**

Our economic development strategy has brought big wins and is transforming the Columbus Metro

80,744

TOTAL JOBS CREATED

\$4.8B

TOTAL JOBS CREATED PAYROLL

\$49.5B

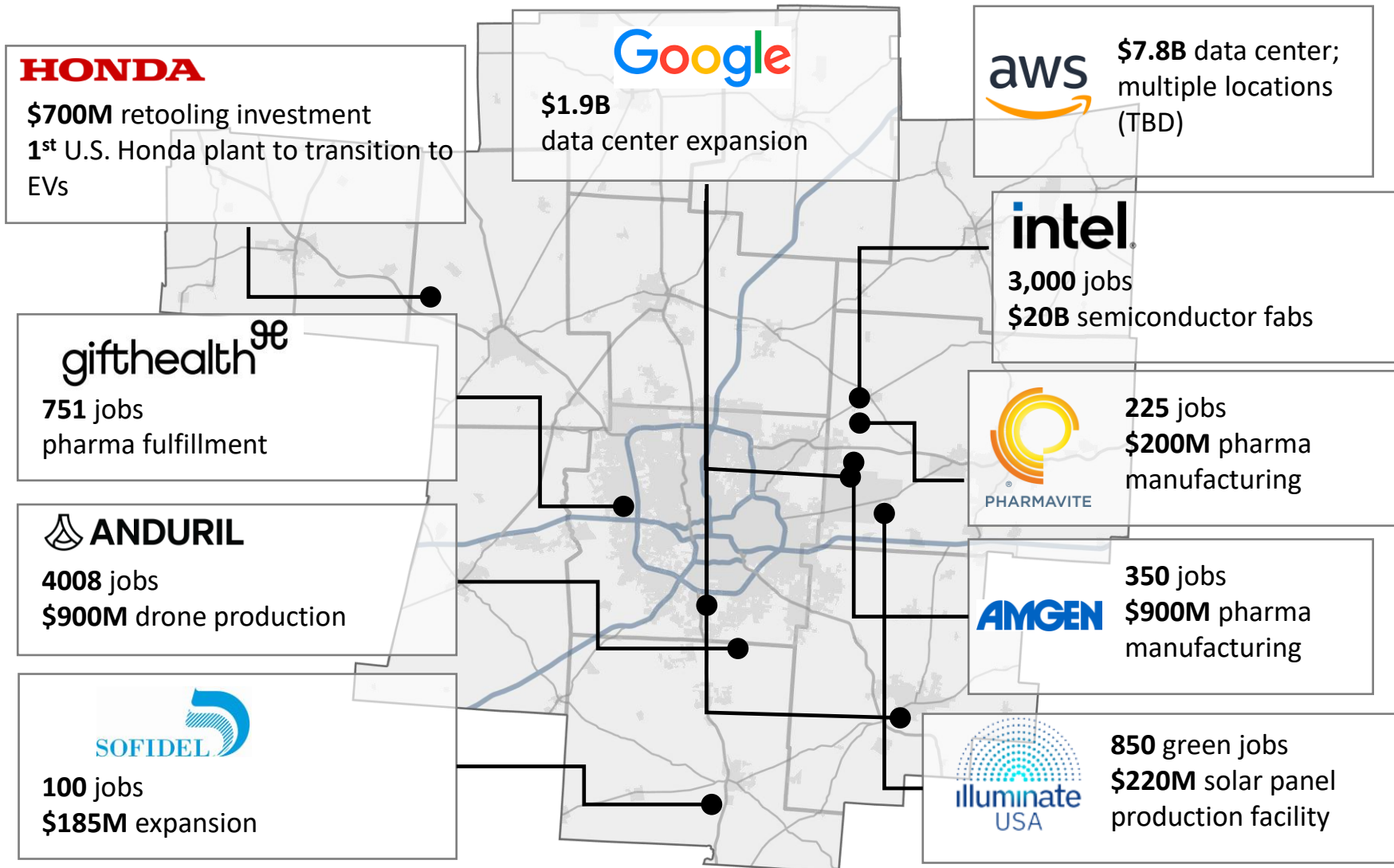
CAPITAL INVESTMENT

829

SUCCESSFUL PROJECTS

(PROJECTS ANNOUNCED JANUARY 2011 - AUGUST 2025)

NOTABLE PROJECTS ANNOUNCED 22/25



146

Projects

19,500+

New Jobs

\$1.8B+

New Payroll

\$35.9B+

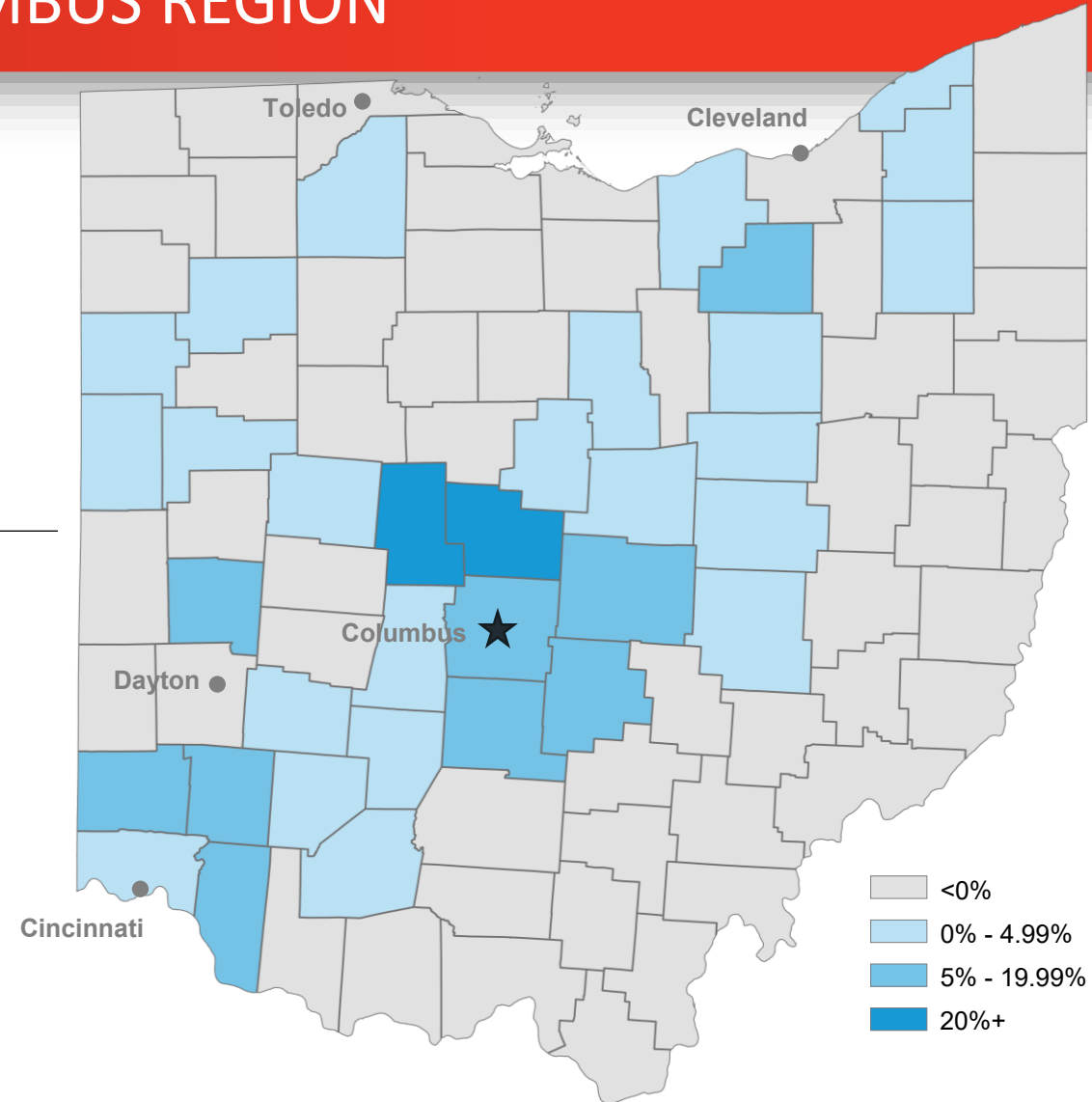
Capital Investment

Source: One Columbus; total jobs, payroll, and capital investment for all One Columbus projects January 1, 2022 – September 1, 2025; One Columbus projects only, does not encompass all market activity.

SIX OF THE FASTEST GROWING COUNTIES IN OHIO ARE IN THE COLUMBUS REGION

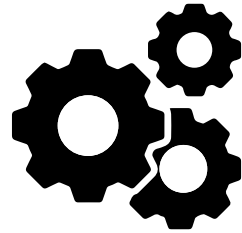
The vast majority (90%) of Ohio's population growth in the past decade can be attributed to net gains from Columbus Region counties.

Rank	County	% Population Growth, 2014 - 2024
#1	Union	33.5%
#2	Delaware	25.7%
#3	Warren	15.4%
#4	Fairfield	11.5%
#5	Franklin	10.0%
#6	Pickaway	9.5%
#7	Licking	9.1%
#8	Miami	7.7%



WHERE ARE WE HEADED?

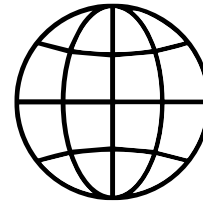
Active Opportunities
9/16/25



61%
Manufacturing

14%
HQ/Office

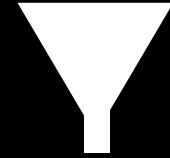
6%
Logistics



57%
Attraction

36%
International

#1 Japan
#2 Italy
#3 Canada



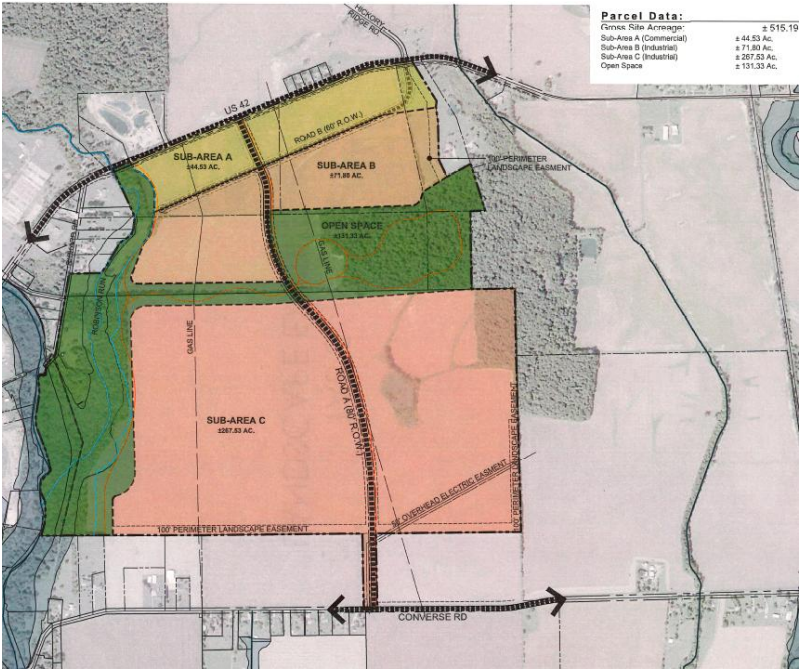
32%
Of the pipeline
projects are in the
“Offer” or
“Application/
Accept” stages

84

ACTIVE
PROJECTS

362

LEADS



THANK YOU

MATT MCCOLLISTER

One Columbus

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Key Themes and Discussion

Vision & Economic Overview:

Goal: Make Ohio the most prosperous economy in the U.S.

Status: Central Ohio leads economically in the Midwest and ranks highly nationwide.

Diversity: Business sector is diverse; the largest sector makes up only 17%.



Key Themes and Discussion

Target Growth Sectors:

- Semiconductors
- Automotive
- Life Sciences
- Defense Technologies
- Data Centers
- Logistics
- Financial Services
- Insurance

Columbus is the **#3 market for data centers**, with strong industrial growth.



Key Themes and Discussion

Population and Development:

- **90% of Ohio's population growth** is centered in Columbus and nearby areas.
- One Columbus is actively pursuing **manufacturing, office, and logistics** opportunities.

Opportunities and Risks:

- **Data Centers:** Require large land and power resources.
- **Housing:** Shortage due to projected growth.
- **Airport Expansion:** New terminal presents major opportunity.
- **Office Space:** Renovation of older buildings is underway.
- **Utilities:** Power infrastructure is a key concern.
- **Workforce Development:** Need to train population for manufacturing jobs.



Key Themes and Discussion

Panel Q&A Highlights:

- **Labor Shortage:** Trade partners and skilled labor are hard to find.
- **Power Infrastructure:** New power plants are being built.
- **Prefabrication:** Growing trend to reduce costs and labor needs.
- **Joint Ventures:** Increasing collaboration between subcontractors and firms.
- **Education Gap:** Fewer students graduating; companies are now focusing on developing willing candidates.
- **Role of One Columbus:** Can assist with competitive incentives and guidance.
- **International Firms:** Often lack design/construction professionals and pose cultural challenges.



Roundtable Discussion

As you prepare for the next 5 years in your company, what do you need from your project partners to help each other succeed?

- **Project Labor Agreements (PLAs):** Mixed views; may be challenging in current climate.
- **Trade Recruitment:** Improve job site conditions to attract youth (e.g., better facilities, respect, awareness of trade benefits).
- **Budgeting:** Owners need to plan budgets better from the start.
- **Legal & Regulatory:** Hire attorneys early and engage reviewing agencies sooner.
- Engage reviewing agencies early.



Mentimeter Audience Polling Results

What is your one key takeaway from today's roundtable that you can implement at your company:

- What we need from partners for success
- To maintain and advance the current growth in Central Ohio, we need to improve how we design and deliver projects, and how we engage with all project stakeholders.
- All in / collaborative mentality key to take on all that Columbus needs
- The pipeline remains strong
- Communication across all aspect is critical
- Importance of early partnering.
- The discussion on craft worker development was valuable and insightful
- Columbus future is bright
- Talk to your partners and each other - there is plenty cake to pass around and working together is going to be best for our community.
- Being more proactive in filling the talent gap.
- I took away that I believe that the larger CM's may prefer national contractors or JV's with nation contractors.
- The discussion on future development projections and possible impacts on services.
- Many contractors favor design assist and getting into the design early.
- Great information about the current state of developing projects and some future work potential.



Mentimeter Audience Polling Results

What is your one key takeaway from today's roundtable that you can implement at your company:

- Importance of collaboration and key partnership with design partners from early in the process.
Transparent communication.
- Be a partner to all project team members
- Collaboration with partners!
- Creating a better condition for labor can attract workers to site
- Planning upfront, transparency
- One Columbus expansion market sectors
- Lots of need for early collaboration with partner
- Great turnout with all partners represented!
- Construction and growth is booming in Ohio. Many new contractors coming in and labor is stressed.
- Methods of prefabrication in different industries
- National contractors or JV's with national contractors may be preferred
- Push for better open discussion throughout the project duration between all parties
- Columbus is set to keep growing over the next 10 years in specific market sectors. Housing shortage.



Mentimeter Audience Polling Results

Plus: What went well today?

- Diverse audience participation
- Good variety of panelists to give multiple perspectives on the topic.
- Good speaker/panelists
- Learn a lot about success and growth of Columbus
- Great speakers and professional discussion
- Great to me are the other people at my table
- Good panel!
- New faces
- Diverse conversations that touch everyone in the room.
- Overall discussion and open communications.
- Informative presentation and good discussion
- Robust table discussion
- Outstanding dialog based upon the questions posed for the panel. Panel expertise was above expectation and supremely professional.
- Very dynamic panelists with great insight to Columbus development.
- Great presentation that seemed timely and well informed. Good follow up discussion
- Meeting new people
- Topic of conversation focused attention
- We all share many of the same challenges
- Good discussion on market sectors, labor challenges, and opportunities.
- Healthy labor needs conversation



Mentimeter Audience Polling Results

Delta: What didn't go as well? Where can we improve?

- Visibility of panelists to the room
- All good
- Lighting
- Not really sure- more time is always needed!
- Even more visuals always good
- Ability to clearly hear the panelists
- More discussion time would be nice to really dive in
- It was hard to hear some of the panelist's
- More all room discussion time
- Traffic getting to the location due to road construction made it challenging to be on time. Nothing really in the presentation.
- Went smoothly
- Would have enjoyed more AE focused discussion
- Thought today was very insightful
- No comment, it went well
- Sound for panelist
- Start time of 4:30 is early



Mentimeter Audience Polling Results

What topics would you like to discuss at future roundtables?

- A trade or engineering led discussion to raise awareness
- Are there project delivery approaches in other parts of the country that would make Central Ohio an even better place to grow?
- How is prefabrication changing the construction industry
- Owner issues and questions
- More focus on individual sectors
- Would love to hear some perspectives from A/E
- More specifics on how to implement these ideas contractually and the risks involved
- Future is sustainable design in the industry and trends
- What makes a good owner?
- Deeper dive into the frustrations with design assist.
- Finish phase of the job challenges
- Best building practices to avoid litigation.
- How to promote a successful project delivery between all associated Owners, Design Team and Construction Team members.



Save-the-Date!

Central Ohio Roundtable

November 20

**Looking Beyond 2025 /
Challenges for Central Ohio Pt.3
Labor / Supply Chain**