

SCOPE OF WORK
Target Industry Land Need Analysis

Background

Targeted Industry Sectors

The Prince William Board of County Supervisors (BOCS) adopted, as part of its Strategic Plan, a list of targeted industries for its economic development efforts. These targeted industries reflect the investment and employment goals of the County's economic development program, and the Department of Economic Development uses these targeted industries to develop specific marketing efforts and incentive programs to assist companies. This list of targeted industries was developed in 1995 and amended in 1999, 2014, 2019, and 2020 as the County's marketing initiatives reflect the changing economy of the Northern Virginia and Metropolitan Washington area and emerging new technologies.

In 2018, the Department of Economic Development, with the help of Camoin Associates, completed a Targeted Industry Study to validate current industry targets and propose new business and industry targets. The Study also recommended policies for each Small Area Plan to support targeted industries in the Small Area Plan Geographies.

The Targeted Industry List focuses the business development, existing business, and marketing work of the Department of Economic Development on companies within the Targeted Industries. A company must be within the Targeted Industries to qualify for Economic Development Opportunity Fund grants, Expedited Permitting, and Permit Fee Reduction.

Data Center Opportunity Overlay Zone

Prince William County has approximately 5 million square feet of data centers under roof and another 1.8 million square feet of data centers are in development, and 5.7 million square feet are in the County's future data center pipeline. We are an integral part of the Northern Virginia Data Center market, the largest data center market in the world. Data Centers are a Targeted Industry within the Information and Communication Technology sector. Data centers provide high paying jobs and generate significant local tax revenues. However, they consume large parcels of industrial zoned land and there is a growing perception that data centers are crowding out other target sector industries such as Logistics and Supply Chain and Advanced Manufacturing.

In 2016 the County created a Data Center Opportunity Zone (DCOZ) to focus data center growth in areas that already have the water and power infrastructure needed to support data center development. The Department of Economic Development calculates that as of July 30, 2021, there were approximately 90 to 830 acres of market viable land remained in the DCOZ that can be developed for data centers.

In 2021 the Board of County Supervisors initiated a Comprehensive Plan Amendment to study the possible expansion of the DCOZ to accommodate the growth of the data center industry. This work is ongoing with a scheduled draft report due in March 2022.

Comprehensive Plan Update

In 2018, Prince William County's Planning Office also initiated an update of the Comprehensive Plan,

which will help guide future Planning decisions in the county. As a dynamic and growing county in a metropolitan area the County has seen significant changes since the current Comprehensive Plan was last updated in 2008 and 2010. Updating the Comprehensive Plan provides an opportunity to review, confirm, and refine the County's vision for the future considering current demographic, land use, and transportation patterns. The Comprehensive Plan update guides the future growth, redevelopment, and preservation of the county as well as its investments in future public infrastructure. Throughout 2021 and 2022, the Planning Office and its consultants will review the previous Comprehensive Plan and update specific plan chapters including Land Use, Housing, and Mobility. Concurrently, and in coordination with the Comprehensive Plan update, the Planning Office have been also preparing detailed, geographically focused Small Area Plans.

Issue

The Department of Economic Development continues to receive inquiries from economic development Target Industry prospects for commercial and industrial projects, however it is getting more challenging to identify suitable sites for those prospects. Additionally, the data center demand has caused land prices to increase causing small to medium sized businesses to seek lower cost land sites in neighboring jurisdictions. For the County to meet its strategic goals of increasing the overall commercial tax base, it is critical that there is a pipeline of suitable commercial and industrial land uses for future economic development growth of all Target Industry sectors.

Scope of Work

- Review 2018 Target Industry Study
- Review County Comprehensive Plan Build Out Analysis
<https://www.pwcva.gov/department/planning-office/build-out-analysis>
- Review the County Comprehensive Plan Update <https://www.pwcva.gov/department/planning-office/pathway-to-2040-land-use>
- Assess the growth of all Target Industry Sectors based on the 2018 Study
- Assess the availability of commercial and industrial planned land use sites for the growth of the Target Industry Sectors.
- Estimate the amount of land needed to continue the growth of the Target Industry Sectors for the next 10 – 15 years
- Make recommendations for County actions to address the amount of land needed to continue the growth of the Target Industry sectors for the next 10-15 years that can be considered as part of the Land Use Chapter of the Comprehensive Plan Update

Deliverables: Phase One (Due: February 10, 2022)

- Estimate aggregate amount of land needed for Target Industries to grow for the next 10 – 15 years.

Deliverables: Phase Two (Due: March 1, 2022)

- Compare this amount to the land currently zoned appropriately or in the Comprehensive Plan for each targeted industry to determine the need for additional appropriately zoned or planned land for the Targeted Industries. Provide separate figures for land availability inside the DCOZ.

- Make recommendations for County actions to address the amount of land needed to continue the growth of the Target Industry sectors for the next 10-15 years that can be considered as part of the Land Use Chapter of the Comprehensive Plan Update