

2023

ANNUAL REPORT



GREATER HOUSTON
PARTNERSHIP

Letters From Our Leadership

The Greater Houston Partnership had had an impactful year in 2023, and it is with immense pride and gratitude that I extend my sincere appreciation to our board members, member companies, partners, leadership and staff for a great year.

In my presentation at the 2023 Annual Meeting, we discussed having an “and” mindset versus an “or” mentality. By focusing on the “AND” and working together, we can develop real solutions that move our region and our state forward.

As you read about the organization’s work and accomplishments from the year in this report, you will find that many successes were born out of committed leaders coming together to collaborate, work out differences of opinion and ultimately, succeed.

In 2023, the Houston region solidified our position as a top destination for both domestic and international business expansions and relocations. The impressive 31 economic development wins stand as a testament to our collective efforts, bringing over \$1.8 billion in capital investment and creating more than 4,300 new jobs.

Our advocacy efforts during the 88th Texas Legislative Session were instrumental in addressing issues foundational to maintaining Houston’s economic strength including economic development programs, higher education funding, flood mitigation, and a focus on workforce development through community college funding reform.

UpSkill Houston continues to be a national leader in workforce development programs. Our efforts to bridge the skills

gap in Houston’s emerging hydrogen economy, coupled with the expansion of the Greater Houston Apprentice Network, highlight our dedication to cultivating a robust and skilled workforce for the future.

The Houston Energy Transition Initiative accelerated progress across our key workstreams including CCUS, industrial decarbonization, capital formation, and power management. Houston’s successful proposal for a Department of Energy-funded hydrogen hub positions the region as a leader in clean hydrogen development and deployment.

One Houston Together completed the second biennial Houston Regional Equity and Inclusion Assessment where 92 companies and organizations actively participated. The encouraging results described in this report describe the progress we’ve made since the program’s launch in 2020.

Lastly, I am delighted to express my excitement about the appointment of our new President and CEO, Steve Kean. Without a doubt, Steve’s hiring stands as one of the most pivotal accomplishments during the last year. His leadership, vision, and commitment to our mission will guide the Partnership toward new horizons. I look forward to the positive impact Steve will have on our organization and the greater Houston community.

As we celebrate these accomplishments, let us remain focused on the journey ahead. The Partnership’s success is a reflection of our collective efforts, and I am confident the years ahead will bring even greater achievements for our region and its residents.



Dr. Marc L. Boom
Chair

I want to start off by thanking you for the privilege of serving as the new president and CEO of the Greater Houston Partnership. I am honored to serve alongside the many business and community leaders who are united in wanting the best for our region and for our people, making Houston the best place to live, work and build a business.

I am also grateful for the decade-plus service of my predecessor Bob Harvey, who retired in late 2023. Through his leadership and partnership with you, our members, the Partnership has significantly advanced the region, and we are well-positioned because of his commitment to this organization.

Throughout the pages of this report, you read about the excellent work and many accomplishments over the last year. Thank you to our executive committee, board of directors, members, and partners for your dedication to the work. A special thanks to the Partnership staff who are strong, mission-driven professionals and committed to making this an even better place.

So, where are we headed in 2024 and the years to come?

Our work boils down to one word, *opportunity*.

We must accelerate the opportunity-creating economic development work of recruiting companies to Houston and scaling those who are already here to create new jobs for Houstonians. We will focus our resources on recruiting those companies who belong here because of what we have to offer: a young, skilled, and diverse talent pool, a dynamic market environment, and a

growth-oriented policy mindset that welcomes rather than impedes business. We will also focus on working as a team, united with our regional economic development allies to promote the entire 12-county region. We win when we work together.

Second, we must ensure Houstonians have the skills needed to create opportunity for themselves and their families. This year marks the 10th anniversary of our workforce development initiative, Upskill Houston. We must build on the great work to date and take advantage of this big opportunity to ensure all Houstonians are able to compete for the jobs created by our economic development engine.

All the work we do together at the Partnership will support these two objectives, either directly or indirectly. We will accomplish this work with a spirit of shared purpose and unity, that makes Houston stand apart across the country and around the world.

I believe that coordination and cooperation will help us succeed in our mission of scaling opportunity in Houston.

I am excited for the work ahead, and look forward to our partnership.



Steve Kean
President and CEO





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Houston Next

Houston is a city of tremendous opportunity. It's a region where no idea is too big to realize and no challenge too difficult to address with the right focus and leadership. Houston's growth and prosperity have accelerated rapidly in recent years, and the Partnership works to maintain that trajectory.

The Greater Houston Partnership is the region's principal business organization, serving as the largest regional chamber and driver of economic development and international investment and trade.

To achieve our mission of making Houston one of the best places to live, work and build a business, the Partnership works in four key areas to:

- **Promote economic development and trade across the globe**
- **Advocate for sound public policy at all levels of government**
- **Convene regional leaders on issues that matter most to Houston**
- **Engage our members to create meaningful impact and business opportunities**

This work is guided by our strategic plan *Houston Next*, which aims to advance Houston's position as a great global city, one that provides:

- **A strong, diverse, 21st century economy**
- **A great quality of life**
- **And opportunity for all**

Across these pillars, our actions are viewed through the lens of racial equity to ensure our efforts advance bold solutions to strengthen Houston as a diverse, inclusive and equitable city.





The Partnership thanks the 63 Houston Next investors who have pledged their financial support to our strategic efforts.

Houston Next Investors

Amegy Bank
Baker Hughes
Baylor College of Medicine
bp America Inc.
Bracewell, LLP
Burns McDonnell
Calpine Corporation
Camden
CenterPoint Energy
Chevron
ConocoPhillips
Crown Castle
Deloitte
Dow, Inc.
Ernst & Young
ExxonMobil
Group 1 Automotive Inc.
Halliburton
HCA Houston Healthcare
H-E-B
Hess Corporation
Hines
Houston Community College
Houston Methodist
Hunton Andrews Kurth LLP
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Intel
Janice McNair
JLL
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Kelsey-Seybold Clinic
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Locke Lord
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Midway Companies
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Mustang Cat
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Onstead Family Foundation
Oxy
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PNC
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Rice University
San Jacinto College
SCF Partners
Service Corporation International
Shell USA
Silver Eagle Distributors
St. Luke's Health
Stellar Bank
Sysco Corporation
TC Energy
TDECU
Texas Medical Center
Tudor, Pickering, Holt & Co. LLC
United Airlines
UT MD Anderson Cancer Center
Vinson & Elkins
Westlake Chemical Corporation
Woodside Energy

Strong Diverse Economy

The Greater Houston Partnership actively fosters the expansion of Houston's economic landscape by strategically engaging in initiatives that attract, retain and nurture businesses. Our primary focus is on stimulating job creation and investment in Houston. Moreover, we serve as a pivotal bridge connecting international companies with the dynamic Houston business community.





Our commitment to economic development is exemplified through the concerted efforts of our dedicated committees, consisting of accomplished executives representing prominent companies and organizations throughout greater Houston. We work alongside our regional economic development partners through the Houston Regional Economic Development Alliance (HREDA) to attract companies and new investments to the Houston region.

Economic Development Wins

The Houston region continues to be a top destination for domestic and international business expansions and relocation activity. In 2023, the Partnership and its regional allies assisted in **31 economic development wins**, accounting for more than **\$1.8 billion** capital expenditures and more than **4,316 new jobs** for the region.

ACE GREEN RECYCLING, a battery recycling company, is opening a plant in Houston. The project is projected to create 100 jobs with a capital investment of \$150 million.

AKSA POWER GENERATION, a Turkish manufacturer of portable generators for industrial use, is opening a product assembly and storage facility in Conroe as part of an expansion to the U.S. The project has a \$25 million capital investment with 100 jobs created.

AMOGY, a manufacturer of ammonia-to-power systems, is opening a new 53,000-square-foot facility on four acres in the Houston region for manufacturing and assembly. The project has a \$40 million capital investment and will create 200 jobs.

AQUAFORTUS, a New Zealand-based water treatment company, is opening a wastewater treatment facility in Houston to serve the oil and gas industry, which will employ up to 100 people with a capital investment of \$3.5 million.

CARBON CLEAN, a British company developing carbon capture solutions for hard-to-abate industries such as cement, steel, and refineries, is opening an office in Houston with the potential for further growth. The initial office will create two jobs with an unknown capital investment.

CART.COM, an end-to-end e-commerce services provider is relocating its global corporate headquarters to Houston as

part of its efforts to support its growing scale of operations and customer base. The project has a \$1 million capital investment and is expected to create 50 new jobs.

CIMSA, a Turkish cement manufacturer, is expanding on their current white cement factory in East Houston with an additional 100,000 square feet to produce gray cement. The project has a \$25 million capital investment and will create 20 jobs.

DAIKIN COMFORT TECHNOLOGIES, a Japanese HVAC manufacturer, is expanding their Houston presence with a new product line for their newest digital technology related to HVAC. The expansion will invest \$40 million and create an additional 200 jobs.

ELIN, one of Europe's largest solar panel manufacturers, is opening a 200,000-square-foot manufacturing facility in Waller County, employing 300. The Turkish-based company, which goes by Sirius PV in the U.S., will invest over \$35 million. The plant will have the capacity to manufacture 2,000 megawatts annually.

FINC BIOTECH, a Singaporean subsidiary of a Shanghai company, has entered into a joint venture with Huayuan Food Group to open a 258,000-square-foot edible fungus factory, which will produce 50 tons of mushrooms daily. The project is projected to create 60 jobs with an estimated capital investment of \$58 million.

FREEZPAK LOGISTICS, in a joint venture with BG Capital, a third-party logistics company, is opening a cold storage facility on 30 acres in Baytown. Phase one will be 250,000 square feet with another 297,000 square feet coming in phase two. The project is projected to create 150 jobs with a capital investment of \$102 million.

HERTHA METALS, a green metals manufacturer, located their headquarters and manufacturing site in the Houston region. The project will create up to 30 jobs and up to \$25 million invested.

HICRI ERCILI, a Turkish chemical manufacturer, is opening a sales and distribution office in Houston, with the intent to add a chemical manufacturing site soon. The initial office will create 18 jobs with a capital investment of \$2.7 million.

INTELLIGENOME, a medical device company focused on diagnosing diseases founded in New Orleans, has secured space in Houston to host its headquarters with R&D and office space. This project will create up to 30 jobs and up to \$9 million invested.

JOHN COCKERILL, a Belgian manufacturer of electrolyzers, is expanding with an additional 200,000 square feet to manufacture hydrogen electrolyzers. The project has a \$145 million capital investment and will create 202 jobs.

KONEC, a Korean auto parts manufacturer, is opening a 200,000-square-foot manufacturing facility to produce electric vehicle parts for Tesla. The project has an \$80 million capital investment with 200 jobs created.

MALLARD BAY, a tech startup from Louisiana State University with a booking platform for outdoor charters and outfitters, is opening a major office in Houston, creating 10 jobs. The company previously placed in the Rice Business Plan Competition in 2022.

OMNISOURCE, a processor, distributor and manager of scrap and secondary metals founded in Indiana, is building a metals recycling facility on a 40-acre rail-served site in Dayton. The project will create 55 jobs with a capital investment of \$40 million.

PACKGENE BIOTECH, a contract research and contract development and manufacturing organization founded in Massachusetts, broke ground on its 22,000-square-foot cGMP manufacturing facility that will create up to 80 jobs with \$20 million invested. They are already in the

expansion process to grow the facility to 35,000 square feet. This project will accelerate gene therapy product development by providing a fully integrated one-stop solution for clients.

POWER ELECTRONICS, a Spanish solar manufacturer, is setting up a centralized logistics operation in northeast Houston. The project has a \$2 million capital investment and will create 50 jobs.

PV HARDWARE, a solar panel frame manufacturer from Spain and a subsidiary of Gransolar, is opening a manufacturing and assembly facility in Fort Bend County. The project is projected to create 70 jobs with an estimated capital investment of \$5.5 million.

RS TECHNOLOGIES, a provider of composite utility poles, is opening a manufacturing and assembly facility in the Houston region. Their composite poles enable a resilient and sustainable grid structure. The project will create 450 jobs with a capital investment of \$150 million.

SEG SOLAR, a solar panel manufacturing company, is opening a facility in the Houston region. The project is projected to create 500 jobs with a capital investment of \$60 million.

SERVIACERO, a Mexican manufacturer, has purchased land to build a steel manufacturing plant. This project will create 300 jobs with a \$20 million investment.

SUMIKA SEMICONDUCTOR MATERIALS, a subsidiary of Sumitomo Chemical, is building a high-purity semiconductor process chemical manufacturing plant in the Houston region. The project includes an investment of \$250 million and will create 50 jobs in the region.

TINCI MATERIALS, an Asian chemical manufacturing company, is building a 100,000-square-foot electrolyte blending facility in Baytown, with the planned capacity of 200 kilotons to supply U.S. domestic EV and Lithium-ion battery manufacturers. The project is projected to create 139 jobs with an estimated capital investment of \$182 million.

TOSHIBA INTERNATIONAL CORPORATION, a Japanese corporation whose Houston location manufactures energy transmission and distribution equipment, has invested \$100 million into heavy equipment manufacturing in Houston, keeping 1,100 employees in the region.





Delivering the Houston Message

Houston continues to draw interest from companies across the country and around the world thanks to its business-friendly environment, pro-growth policies and exceptional, low-cost quality of life.



The Partnership hosted a Norwegian delegation to discuss collaborative efforts in space exploration



The Mayors of World Energy Cities gathered for an in-person reception at the Partnership Board Meeting during CERAWeek to celebrate Climate Leadership

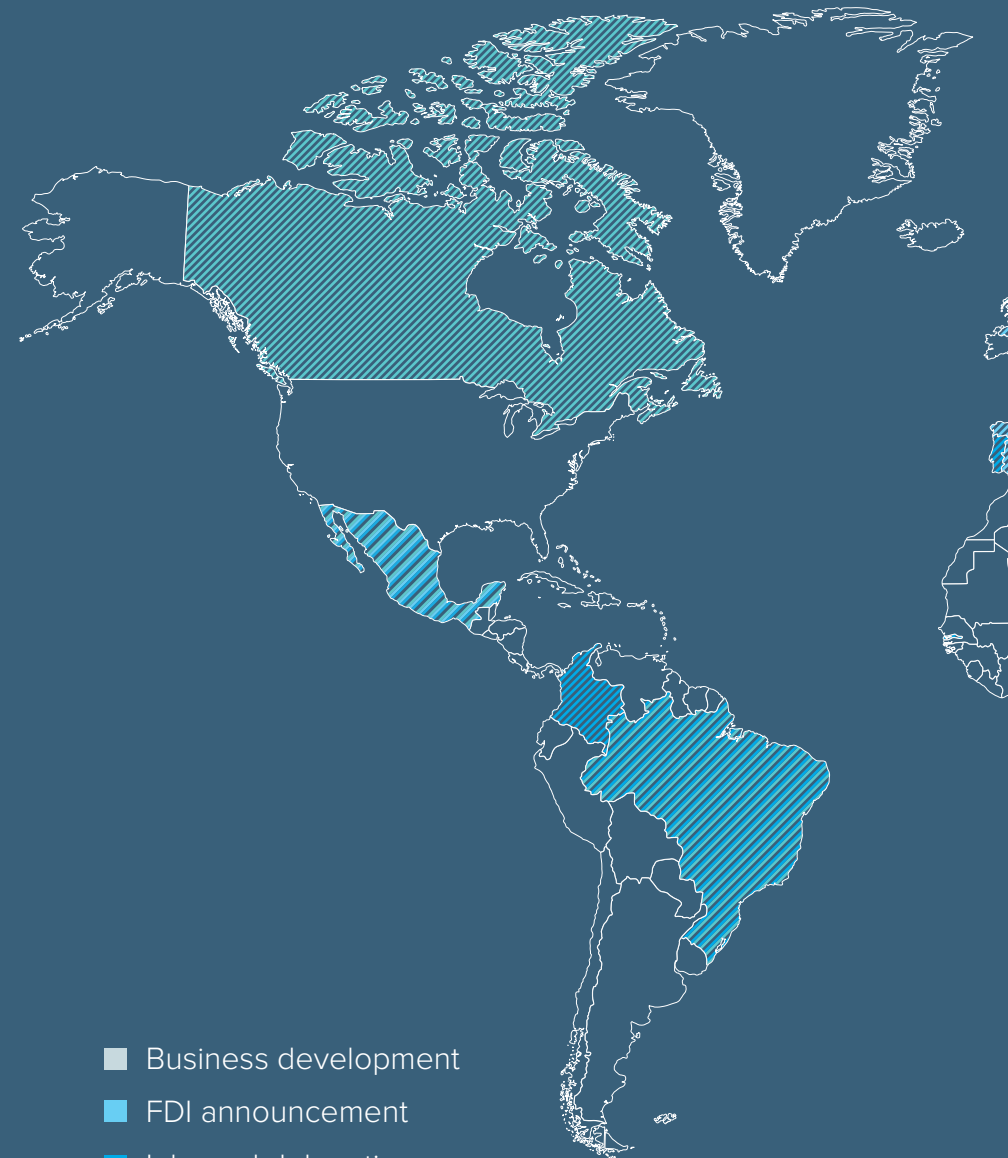
Trade and Investment Missions

In 2023, the Partnership and the City of Houston led several international trade and investment missions to further establish avenues for cooperation with key global partners.

BRAZIL: The Partnership, in collaboration with the City of Houston and the Brazil-Texas Chamber of Commerce, organized a trade and investment mission to Sao Paulo and Rio de Janeiro in April 2023. The mission included meetings with the Novonor, Braskem, Petrobras, AMCHAM Brazil, and others with the goal of promoting the Houston region as a top global destination for trade, investment and tourism. The mission established new ties and strengthened the existing commercial and cultural relationship between Houston and Brazil, created synergies and collaboration areas in topics of common interest, including energy transition, manufacturing, technology, and port exchange, and promoted cooperation with our government and business counterparts in Brazil.

MEXICO: In May, Mayor Sylvester Turner, Houston First Corporation, the Texas Medical Center and the Partnership spearheaded an economic development and integrated marketing campaign in Mexico. The mission included business and governmental meetings in Mexico City and Monterrey in critical sectors such as life sciences, aerospace, innovation and advanced manufacturing. High-level meetings were held with Secretary of Tourism Miguel Torruco, Governor Samuel Garcia of Nuevo Leon, Mayor Luis Donaldo Colosio of Monterrey and the President of Consejo Coordinador Empresarial, Francisco Cervantes. The meeting with CCE allowed us to establish strategic alliances that stimulate trade and investment opportunities between Mexico and the greater Houston area and to collaborate towards establishing an adequate framework to achieve common goals. During the visit, two MOUs were signed between Space Center Houston, Tec de Monterrey and the National Autonomous University of Mexico (UNAM) to promote mutual interest in supporting the space economy through STEM education and workforce development. The visit to each city culminated in an experiential Hola Houston event that highlighted Houston's dynamic tapestry of culture.

CHINA: The Partnership, in collaboration with the Asian Chamber of Commerce and Yurise Foundation, traveled to China on a trade and investment mission to participate in the China International Import Expo (CIIE). The CIIE Show is held in Shanghai, China's financial capital, and provided an opportunity to explore the Chinese market, identify new business-to-business and investment opportunities between our two regions, and promote global trade with Houston's second largest trade partner. The mission also included high-level visits and business to business meetings in Suzhou and Jiangsu, including a meeting with Vice Governor of Jiangsu Province Fang Wei and an MOU signing with the Shanghai Chemical Industrial Association, as well as a roundtable discussion on bilateral trade opportunities with the Deputy Mayor Chen of the HongKou District. The delegation also met with officials from the U.S. Consulate General and Pudong Chamber of Commerce to exchange thoughts on building bilateral business opportunities.



- Business development
- FDI announcement
- Inbound delegation
- Outbound mission



A photograph of a panel discussion at the Houston Week Mexico Mission 2023. A woman in a purple top stands at a podium on the left, addressing the audience. Behind her, a large banner features the event title "HOUSTON WEEK MEXICO MISSION 2023" in stylized yellow and red text, set against a background of a golf course. Five men are seated at a long table behind the speaker. The table has a black cloth and several water bottles. The audience, seen from behind, is seated in the foreground. The banner also includes logos for Houston, Mexico, and TMC.

2023 Annual Report

Advancing a Great Global City

Widely regarded as “Houston’s Front Door”, the Partnership welcomed **109 inbound delegations from 45 countries** to further grow the region’s international ties. **Notable business and governmental delegations included:**

BERNARDO IVO CRUZ, SECRETARY OF STATE, INTERNATIONAL TRADE AND INVESTMENT, AND FRANCISCO DUARTE LOPES, AMBASSADOR OF PORTUGAL TO THE UNITED STATES

In March, the Partnership held the Houston-Portugal Business Forum, an event hosting Bernardo Ivo Cruz, Secretary of State, International Trade and Investment and accompanied by Francisco Duarte Lopes, Ambassador of Portugal to the United States. The event focused on bilateral trade and investment opportunities between Houston and Portugal.

AMBASSADORS OF TANZANIA, KENYA AND RWANDA

In May, an Executive Luncheon with the Ambassadors of Tanzania, Kenya and Rwanda was held to discuss furthering trade ties with the African Union. The event focused on the distinct energy and development goals of these countries and the role Houston and the United States can play to support and partner in the future of the energy development in Africa.

MARNIX VAN RIJ, NETHERLANDS MINISTER FOR TAXATION

In September, the Partnership hosted a roundtable discussion with the Netherlands Minister for Taxation Marnix van Rij. The meeting focused on fostering meaningful discussions with Texas-based companies that are already active in the Dutch market or those with potential interest. It was an opportunity to exchange views on the investment and fiscal climate in the Netherlands while exploring avenues for mutually beneficial collaborations.

LUIS DONALDO COLOSIO, MAYOR OF MONTERREY, MEXICO

In November, the Partnership collaborated with the Mayor of Monterrey, Luis Donaldo Colosio, and his delegation. The objective of the meeting was to discuss the recent announcement from the Mexican Government related to fixed asset incentives to take advantage of nearshoring opportunities. Additionally, the delegation followed up on the commitments of the trade mission to Mexico in May and finished the event by highlighting investment and trade opportunities between Monterrey and Houston.

ALEXANDER DE CROO, PRIME MINISTER OF BELGIUM

In December, the Partnership hosted Alexander De Croo, Prime Minister of Belgium, to tackle the challenges of the energy transition. Houston is home to some of the biggest energy producers in the world, many of whom are significantly increasing their investments in green energy. The developing production of green energy offers perspectives for future export. Belgium is already an energy hub in the center of Europe, with the Port of Antwerp-Bruges serving as a crucial player and providing extensive storage capacity and pipeline connections to neighboring countries. Houston and Antwerp are the two largest petrochemical clusters in the world. Their ports have a long-standing maritime connection, which offers perspectives for the shipping of green molecules from the United States to Europe. The opportunity to establish a green shipping corridor could be explored in this context with all relevant stakeholders.



Bernardo Ivo Cruz and Francisco Duarte Lopes



Marnix van Rij



Alexander De Croo



Great Quality of Life

Houston's sustained prosperity hinges on the enhancement of its residents' quality of life. Numerous facets of the broader Houston area actively contribute to the attraction of top-tier talent and the establishment of leading companies. Business leaders universally recognize that safeguarding an exceptional quality of life for residents is paramount for ongoing growth and sustained access to opportunities.





The Partnership remains at the forefront of advocacy efforts aimed toward elevating the quality of life for all Houstonians. Functioning as the principal business advocate for the region, we forge strong collaborations with elected officials across various levels of government. Our work champions policies that directly address the most urgent challenges confronting our community, and fosters a thriving environment for all.

Advocating for Strong Policy Solutions

In 2023, the Partnership remained committed to working with our federal, state and local representatives to advance policies supporting the region's growth and opportunity for all.

FEDERAL

Many of the policy solutions for the Houston region require action from multiple levels of government. The Coastal Texas Program, better known as the Coastal Spine or Ike Dike, calls for both state and federal appropriations to begin designing and constructing the project. The federal CHIPS & Science Act requires state and local buy-in to receive federal funding to expand microchip research and manufacturing capabilities. Similarly, Texas needed to create an entity to draw down federal dollars from the Infrastructure Investment and Jobs Act (IIJA) for the expansion of broadband infrastructure and access across the state. All of this makes our engagement at the federal and state levels integral to the implementation of these important programs.

STATE

During the 88th Texas Legislative Session, the Partnership worked alongside our members, key stakeholders and business coalitions to inform policy makers on issues most important to the region's business community, strategically focusing on issues foundational to maintaining Houston's strong and diverse economy.

The Partnership's executive priorities guided our advocacy efforts in Austin. These executive priorities included higher education funding, economic development incentives, energy transition initiatives and flood mitigation efforts. In addition to these four priorities, the Partnership worked to advance bills positively impacting the greater Houston area, such as public education curriculum reform, advancements in workforce development, funding for infrastructure needs, increasing criminal court

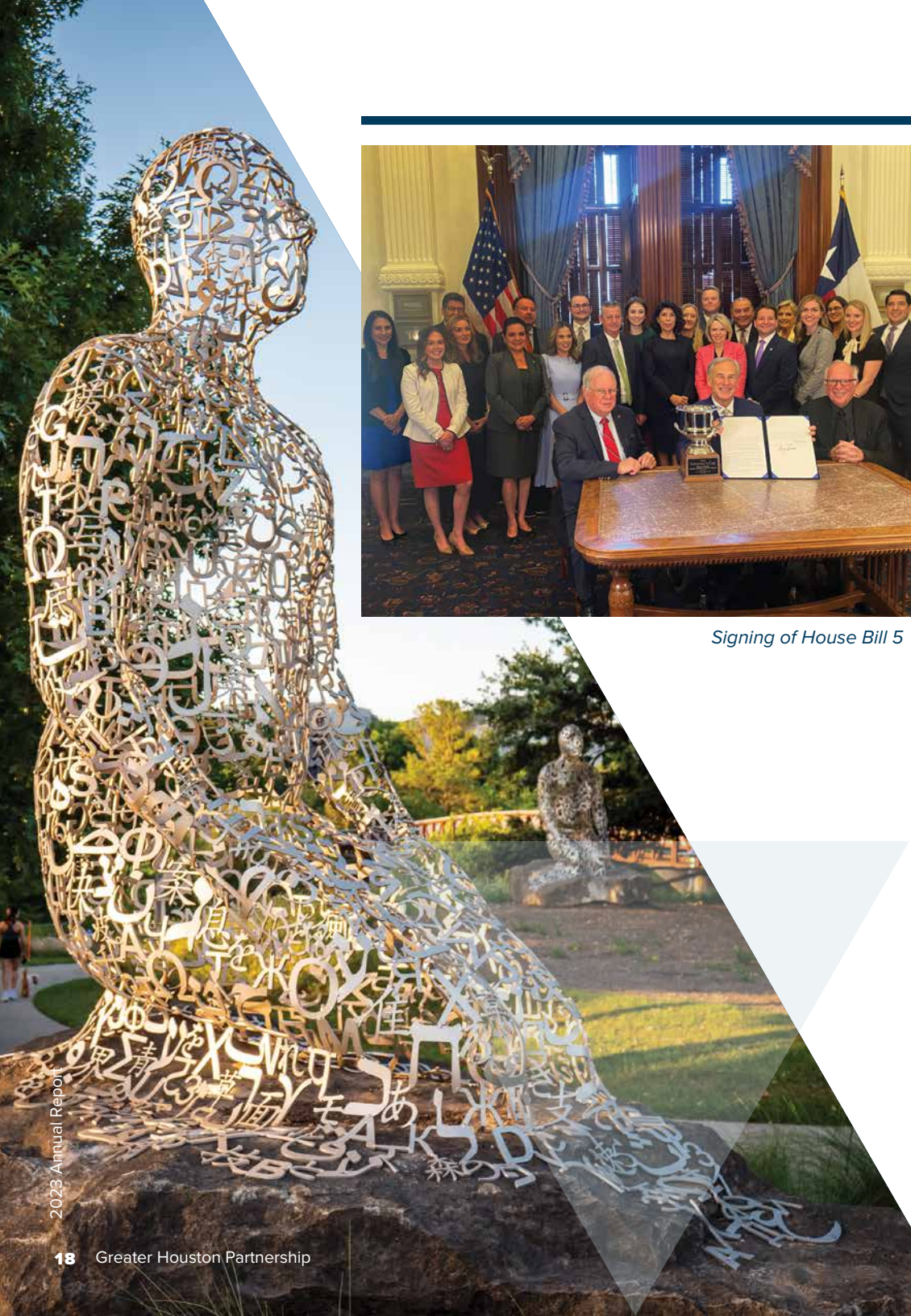
capacity and expanding broadband access. These advocacy efforts resulted in important legislation making it through the Texas House and Senate and being signed into law by the Governor.

LOCAL

For several years, the City of Houston has passed budgets reflecting year-over-year expenditures growing faster than revenues, closing the gap with one-off windfalls and deferred expenses. These budget maneuvers have contributed to a widening operating deficit. To better understand this structural deficit and its impact on the City's financial health, the Greater Houston Partnership formed the City of Houston Budget Task Force. The Task Force had three objectives:

01. To develop an empirical understanding of the City's financial structure and
02. Help identify ways to enhance delivery of the services and benefits Houstonians should expect, while
03. Achieving long-term financial stability by bringing its budget into structural balance.

In collaboration with Professor John Diamond from Rice University, the City of Houston Budget Task Force commissioned a report, ***State of the City's Finances – A Deep Dive into the Fiscal Issues Facing the City***, that examines the City's financial challenges and discusses the opportunities available to policy makers to set the City on a sustainable course.



Signing of House Bill 5

Policy Priorities

ECONOMIC DEVELOPMENT INCENTIVES

Texas has long been a national leader in securing large-scale, capital-intensive investments, attracting businesses looking to relocate or expand their regional footprint. However, when the state's Chapter 313 program expired last fall, the lack of a school property tax abatement program meant Texas could fall behind other states in landing new projects. In response, the Partnership and other business organizations began working on a replacement well before the start of the 88th Legislative Session. The Partnership led the coalition efforts to mobilize chambers of commerce and economic development organizations throughout the state to aggressively advocate for House Bill 5 – the Texas Jobs, Energy, Technology, and Innovation Act. House Bill 5 establishes a new, more transparent economic development tool, allowing our region to continue competing globally for large-scale projects and bringing investments to local communities. The Partnership remains committed to working with the Legislature to build on the foundation of Chapter 403 to enhance Texas' ability to compete nationally and globally.

FLOOD MITIGATION

The Partnership continued to advocate for increased investments in flood mitigation projects by all levels of government – federal, state and local. In 2019, the Partnership worked with state officials to establish the Flood Infrastructure Fund (FIF), and in 2023, it successfully advocated for its replenishment, which received nearly \$625 million in state appropriations. In addition, the Partnership was able to help secure \$600 million in funding for the Gulf Coast Protection District (GCPD) toward the state's 35 percent match contribution to the Coastal Texas Program, a priority project due to its ability to protect the Houston region from hurricane-induced flooding and storm surges. As a result of the Partnership's advocacy, the Texas Legislature invested more than \$1.3 billion in flood prevention and resiliency work. On the federal level, the Partnership developed a two-track advocacy approach to achieve federal appropriations and a "new start" designation, which would allow for the design phase of the Coastal Texas Program to begin. The strategy involved working with members of Congress on appropriations requests while simultaneously meeting with the Biden-Harris Administration on opportunities within the bipartisan IJA. While we await decisions from policy makers, the Partnership continues to build and engage a broad coalition, including through a Texas Delegation-wide letter, to show that further fortifying the greater Houston region – which is almost one-third of the state's economy – is not only a need but a preeminent priority.

Convening Policy Makers and Business Leaders

WASHINGTON, D.C. FLY-IN

The Partnership's 2023 Washington, D.C. Fly-In convened nearly 50 business leaders, industry experts, elected officials and governmental relations professionals in our nation's capital to meet with some of the country's leading decision makers working to address the most pressing issues facing the greater Houston region. The group engaged with 12 Members of Congress and several senior officials from the Biden Administration. Many of the conversations focused on Houston's leadership role in the energy transition and the Coastal Texas Program.



Washington, D.C. Fly-In

AUSTIN DAY

To kick off the 88th Texas Legislative Session, the Partnership and its members traveled to Austin to meet with state elected leaders, their staff, key stakeholders and government relations professionals to advocate for the region. The event included a "Legislative Briefing on Energy," highlighting Texas' role in the energy transition through an afternoon of policy conversations between elected leaders and their staff with experts in the energy industry. The day ended with a legislative reception, bringing together members of the Legislature and the Texas business community to celebrate the greater Houston region and highlight the issues most important to our region.



Austin Day

FUTURE OF TEXAS

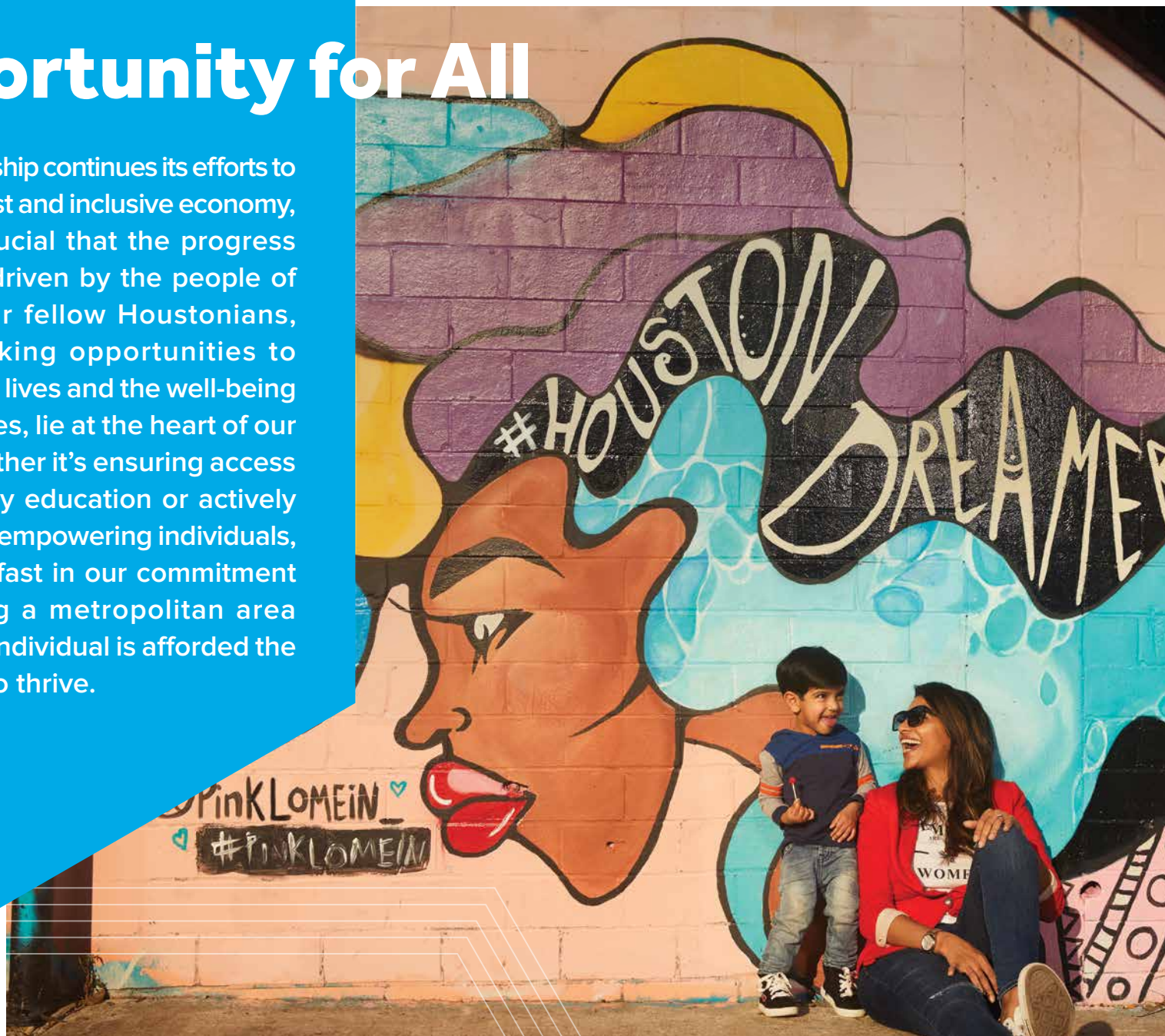
Throughout 2023, the Partnership's Future of Texas series continued with hundreds of Partnership members and key stakeholders hearing from elected officials, allowing them the opportunity to engage with local, state, and federal policy makers to discuss the most pressing issues impacting the Houston region and how they are working to address them.



Future of Texas

Opportunity for All

As the Partnership continues its efforts to bolster a robust and inclusive economy, it remains crucial that the progress we attain is driven by the people of Houston. Our fellow Houstonians, actively seeking opportunities to enhance their lives and the well-being of their families, lie at the heart of our mission. Whether it's ensuring access to high-quality education or actively involving and empowering individuals, we are steadfast in our commitment to cultivating a metropolitan area where every individual is afforded the opportunity to thrive.



Advancing Opportunity

HIGHER EDUCATION FUNDING

Currently, Texas has only two public universities ranked in the national top 50, which inhibits Texas' ability to attract and retain top talent. This year, the Partnership advocated for the establishment of the Texas University Fund (TUF), which is a permanent research endowment appropriating billions of dollars to four of the state's public universities, including Houston's flagship public university, the University of Houston. This historic investment will improve Texas' higher education institutions by providing the necessary funding to elevate Texas universities' national rankings, securing long-term financial certainty, helping Texas schools compete for federal research grants and positioning Texas as a top destination for premier higher education. The TUF will also bolster the state's economy by strengthening its talent pipelines and making Texas more attractive to businesses.

WORKFORCE DEVELOPMENT

Strong global economies are measured by their workforce talent pipelines. To ensure Houston's workforce is competitive with the economies of the world, the Partnership worked with the Texas Commission on Community College Finance (TCCCCF) to support recommendations that would improve how community colleges are funded. During the 2023 Legislative Session, the Partnership successfully advocated for legislation that pumped nearly \$700 million into Texas' community colleges and implemented a new funding model rewarding schools demonstrating improved student outcomes, such as high graduation rates, successful transfers and awards of industry-recognized credentials of value. This innovative funding model positions Texas as the first state in the nation to fully align community college funding with workforce development objectives.

CURRICULUM REFORM

The Partnership believes it is critical to invest early in the workforce of the future. In 2022, only 19 percent of Texas students received grade-level classroom instruction, resulting in students falling behind academically. During the 2023 Legislative Session, the Partnership supported legislation to provide school districts with "high-quality instructional materials," including complete lesson plans and supplements, guaranteed to be on grade level. The legislation also provided additional funding for training and implementation.

HOUSTON INDEPENDENT SCHOOL DISTRICT

Following multiple years of poor academic performance and serious governance challenges, the Texas Education Agency intervened in the Houston Independent School District (HISD) by installing a Board of Managers and a new superintendent during the summer of 2023. The new administration immediately initiated sweeping changes, including funneling resources to the highest-need students and schools, modernizing instruction delivery, and providing teachers and principals with additional support and higher pay. Opportunity for all in Houston begins with a strong HISD, ensuring the children of today are prepared for the workforce of tomorrow. The Partnership is committed to working with the Board of Managers and the new Superintendent to ensure HISD lives up to its promise of providing a high-quality education to all students.



Increasing Economic Prosperity and Mobility while Building a Work-Ready Workforce



UpSkill Houston is an important foundation for the Partnership's Opportunity for All pillar by working directly in the Houston region to increase economic prosperity and mobility for the residents in the region's disadvantaged communities while ensuring our industries and employers have the skilled workers to

grow the region's economy and strengthen its global competitiveness. It serves a vital role as an orchestrator that leverages the leadership of the business community and helps drive connections with community colleges, school districts and community-based organizations.

Through its ten years of work, UpSkill Houston has established a recognized and leading collaborative table of business, industry, education and community leaders that builds strong relationships and provides the region with the opportunity and

agility for innovations as we develop a work-ready workforce in Houston and the Texas Gulf Coast region.

In 2023, UpSkill Houston advanced the following innovations in the region:

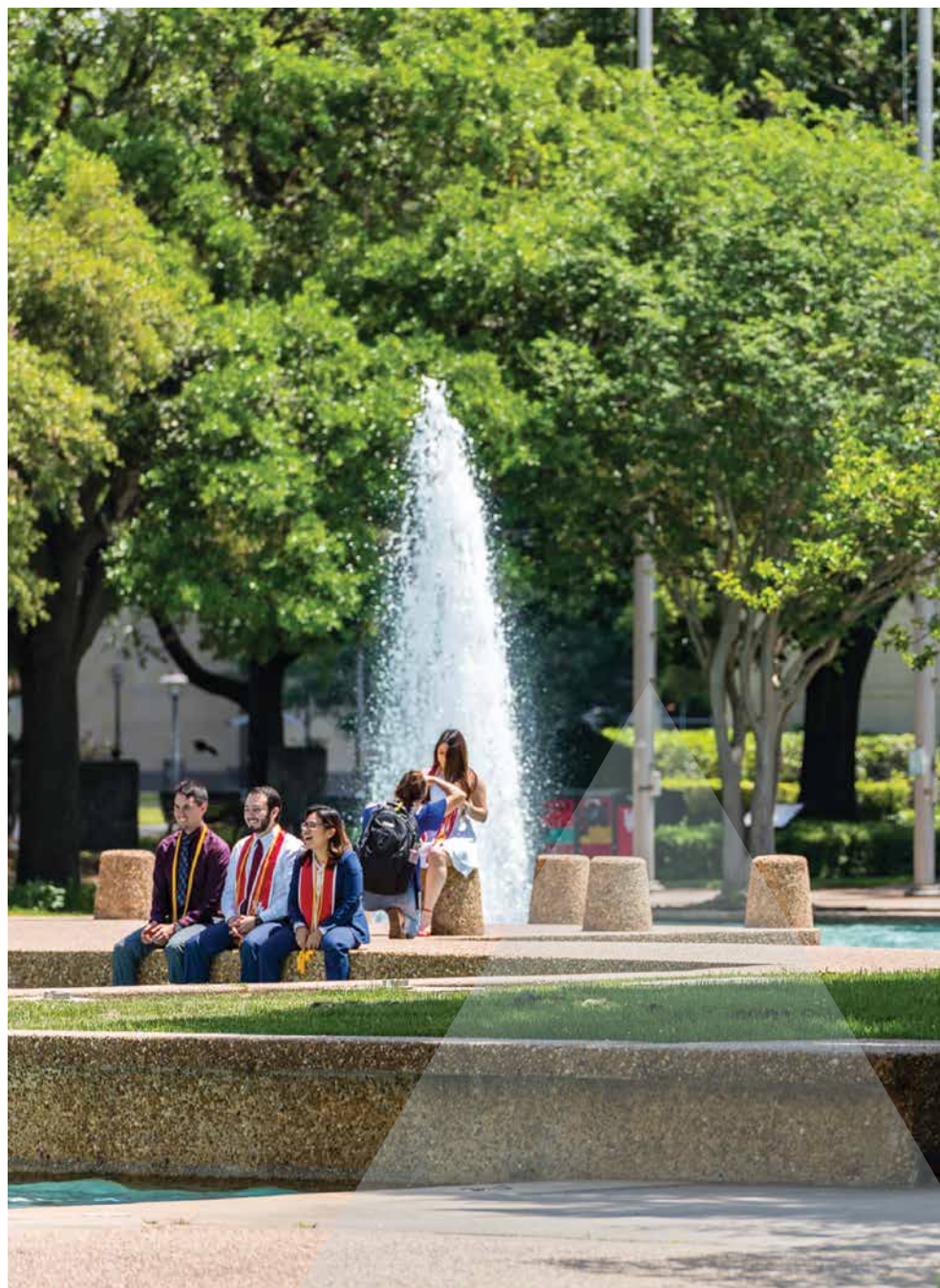
- **Partnering with Accenture** to develop a workforce strategy and implementation plan to uplift residents of disadvantaged communities into Hydrogen jobs and bridge the middle-skills gap in Houston's emerging Hydrogen economy.
- **Preparing for its 10th anniversary in 2024** by partnering with the Burning Glass Institute to assess and deploy a new and innovative data-driven approach that uses skills adjacencies to help achieve greater mobility for workers in low-wage jobs by transitioning them into "Jobs That Mobilize" in the Houston region.
- **Holding UpSkill Works Forums** to enable and inspire partners to advance critical workforce development priorities in the region, including skills-based hiring and more effective employer/education/community partnerships.



Uniting forces for a common goal



Collaborative minds at work: Enabling and inspiring progress through the exchange of ideas and practices



Greater Houston Apprentice Network

With UpSkill Houston serving as its backbone, the Greater Houston Apprentice Network (GHAN) engages and supports employers to create and expand talent pipelines for individuals who do not have a four-year bachelor's degree but do have skills to fill roles in critical occupational pathways in business, technology, finance and administrative functions. Through "earn and learn" apprenticeship programs, GHAN's 13 employers are developing, to their specifications, more resilient, skilled and diverse talent pipelines in partnership with community colleges and community partners, along with the mentors and managers within the businesses. Today, GHAN has more than 370 apprentices toward our goal of 500 by 2025.

Houston Back on Track

BACK HOUSTON TRACK JOB RECOVERY INITIATIVE

Our Houston Back on Track initiative connects low-wage workers to community and education partners who provide upskilling and reskilling support into key occupational pathways that provide gateways for Houstonians to long-term economic mobility and improved skills. Over the last year, Back on Track connected more than 10,000 Houstonians to community and education partners that provide career coaching and access to short-term training and certification programs to prepare residents for better jobs with increased economic opportunity. Back on Track is an employer-led, jobs-first program that works with Houston employers who have current openings for quality, future-focused jobs in health care, customer service, construction and transportation.

Houston Energy Transition Initiative

In 2021, the Houston Energy Transition Initiative (HETI) was launched to support Houston's continued economic growth and prosperity through the transition to an energy-abundant, low-carbon world. The economic vitality and growth of our region's economy is inextricably tied to the energy industry. HETI builds on the best of traditional energy skills and systems to leverage Houston's industry leadership to accelerate global solutions for an energy-abundant, low-carbon future.





Since its launch in 2021, HETI continues to support the region's progress across the entire energy ecosystem. Over the last two years,

there has been a material increase in the number of projects announced, new companies established, and capital invested in all aspects of the energy transition – highlighting Houston's continued global leadership in meeting the dual challenge of more energy with less emissions.

Meeting The Dual Challenge

- The energy transition will **reshape Houston's economy** and the role Houston will play in the global economy.
- With decisive action to lead, Houston can ensure its future economic prosperity, creating as many as **560,000 jobs**.
- Houston's incumbent industry and growing innovation ecosystem will ensure that the region remains a destination for and producer of energy transition talent and home to a thriving energy innovation ecosystem.
- This also creates **a unique opportunity to drive sustainable and equitable economic growth for the region**, ensuring all Houstonians benefit from the world's transition to low-carbon energy solutions.

HETI Working Groups

HETI has established sector-specific working groups to advance areas where Houston has a strategic advantage. Active working groups include:

CCUS

This working group is focused on identifying and removing barriers to CCUS deployment in Houston. The region is increasingly recognized as a hub for carbon capture. HETI partners with other initiatives in the region like the Houston CCS Alliance and University of Houston/SSEB CCUS Commercialization Consortium to progress large-scale CCUS deployment in the region.

CLEAN HYDROGEN

Led by the Center for Houston's Future, this working group created a vision for "Houston as the epicenter of a global clean hydrogen hub" and worked collaboratively on a successful proposal for a DOE funded hydrogen hub, building an ecosystem to enable clean hydrogen development and deployment across the Texas Gulf Coast.

INDUSTRIAL DECARBONIZATION

Working with a cross-sector of industry leaders, this group is developing a unified narrative to highlight industry's role in meeting its emissions reduction goals and to create a regional decarbonization vision and roadmap for the Houston region.

CAPITAL FORMATION

This working group is identifying opportunities to catalyze Houston's leadership in the energy transition through capital investment. Through its leadership in energy transition finance, this group is identifying the barriers and unlocks to enable early-stage energy innovation, infrastructure and large-scale project investment to support the energy transition.

POWER MANAGEMENT

This working group is analyzing electrification through the energy transition in greater Houston to develop demand-side insights that will enable sustainable growth for a resilient and low-carbon regional electricity grid.

CERA Week 2023

CERAWeek brings together global leaders to advance new ideas, insights and solutions to the biggest challenges facing the future of energy, the environment and climate. The Innovation Agora has become the cornerstone of CERAWeek, highlighting the latest energy innovation, emerging technologies and solutions.

This year, in addition to hosting the annual Energy Ventures Pitch Competition and Innovators Dinner, HETI expanded its presence with the HETI House – a landing pad designed to showcase Houston’s growing energy transition ecosystem and action. During the week, HETI had the opportunity to host U.S. Secretary of Energy, Jennifer Granholm, Undersecretary for Science and Innovation, Dr. Geri Richmond, and Assistant Secretary for Fossil Energy, Brad Crabtree, as well as the Honorable Christopher Skeete of Quebec and Mayor Sylvester Turner.

The Energy Ventures Pitch Competition brought together 16 startups from across the globe to compete for prizes and recognition in several funding categories. Start-ups and entrepreneurs with businesses providing cleaner and more sustainable energy competed for non-dilutive cash prizes and awards from Chevron, TEX-E/Greentown Labs, SLB, HX Venture Fund, Alchemy Industrial and Pana Low-Carbon Economy (LCE) Investments.

The activation showcased the region’s research universities, incubators/accelerators and rising start-ups, including:

- **Universities:** University of Texas, Texas A&M University, Rice University, Texas Southern University and University of Houston
- **Incubators/Accelerators:** Eunike Ventures, Greentown Labs, Activate and The Ion
- **Rising startups:** Cemvita, Criterion Energy Partners, Kanin Energy, Syzygy Plasmonics and Revterra

EnergyCapitalHTX Announcement

In June 2023, HETI was proud to be the inaugural sponsor for the new media outlet, energycapitalhtx, with Gow Media. Gow is a large multi-platform media company that includes CultureMap, SportsMap, InnovationMap and ESPN Radio.

The new website covers the energy industry, including key project announcements, funding and capital news, and academic institutions and industry leaders that are focused on advancing the global energy transition in the region.

Future of Global Energy Conference

In June, nearly 1,800 participants gathered for dynamic and insightful events and activities over the course of the three-day conference to highlight the Partnership’s involvement in Houston’s energy transition.

The Future of Global Energy conference, presented by Chevron, kicked off with a reception at the Ion. The following day, virtual sessions featuring nearly 40 leaders in industry, academia and public interest organizations shared insights on the changing energy landscape and other key topics including climate equity, workforce, innovation and technology and investment in energy transition.

The conference concluded with a luncheon of 700 guests at the Hilton Americas. Attendees heard from Dr. Evelyn N. Wang, the Director of Advanced Research Project Agency-Energy (ARPA-E) and remarks from Bobby Tudor, CEO, Artemis Energy Partners and Chair, HETI and Eric Mullins, Chairman and Chief Executive Officer, Lime Rock Resources and Vice Chair, HETI.

HETI STEERING COMMITTEE

Baker Hughes	LyondellBasell
Bechtel Energy	NRG
bp America Inc.	Occidental Petroleum
Calpine	Plains All American
Centerpoint	Shell USA
Chevron	SLB
ConocoPhillips	Sunnova
Dow Inc.	TC Energy
ExxonMobil	Wood Group
Hess	Woodside Energy
HIF	
Intel Global	

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AEP	Mitsui
Air Liquide	Motiva
Bloom Energy	NextEra Energy
Chart Industries	Phillips 66
Energy Transfer	Plug Power
Equinor	Sempra
Evonik	Sodexo
FuelCell Energy	Sumitomo Corporation of Americas
GCL Solar Materials	Thyssenkrupp nucera
Gulf States	Vopak North America
Toyota	
HyAxiom	
Linde	



U.S. Secretary of Energy, Jennifer Granholm visits HETI House at CERAWEEK



Future of Global Energy Conference



One Houston Together: Advancing Racial Equity

Through One Houston Together, the Greater Houston Partnership galvanizes the business community to transform our region into a more equitable and inclusive place to live, work and build a business. More than 120 participating member companies are focused on driving change in two areas where the business community can have the greatest impact – creating pathways for talent advancement and leveraging our buying power.





Pursuing these goals requires bold, intentional and systematic action, so our approach is deliberate. Our efforts have proven effective in supporting efforts to implement positive change that increase opportunity and ensure the long-term economic success of our region.

2023 Key Accomplishments

Ninety-two companies and organizations participated in the second biennial **Houston Regional Equity & Inclusion Assessment**.

One Houston Together Buyer Cohort compiled a **directory of 250 Houston Minority Business Enterprises** currently providing goods and services to members.

In 2023, One Houston Together convenings reached 600 participants, including:

- **Four Talent Roundtables** covering topics such as developing formal sponsorship (Chevron), factors proven to influence talent advancement (Accenture), and advancing talent through mentorship and sponsorship (PwC)
- **Four Supplier Diversity Roundtables** covering topics including enhancing MBE capacity (American Petroleum Institute Blue Wave pilot) and coaching purchasers to drive increased spend with Houston-region MBEs and growing scalable MBEs (Cincinnati Minority Business Accelerator)
- **Two CPO Convenings** featuring Partnership member JPMorgan Chase along with US Chamber of Commerce and Phoenix Strategies
- **Talent Talk** virtual peer idea exchange calls

2023 Houston Regional Equity & Inclusion Assessment

Workplace Diversity, Minority Business Spending in Houston Outperforms National Benchmarks

In October, the Partnership released the results of its second Houston Regional Equity & Inclusion Assessment. Houston companies have advanced on a set of key metrics that measure progress on removing barriers to opportunity for all. Participants in the 2023 Regional Assessment included 92 companies and organizations employing more than 265,000 Houstonians across the 12-county region, with 64 organizations returning from the 2021 assessment.

Compared to national trends, Houston performs better on gender diversity, most upward mobility categories and spending with minority businesses. The 2023 results indicate the representation of Black, Indigenous and People of Color (BIPOC) in the workforce has increased along with the group's share of workforce promotions over the last two years. The biennial assessment also demonstrated a significant commitment to adopting best practices that advance diversity, equity and inclusion within an organization.

Assessment highlights include:

UPWARD MOBILITY

- Representation of **Hispanics** in the **workforce has increased by 15%** (20% '21 vs 23% YTD); nonetheless, the group **remains underrepresented** in all levels.
- BIPOC representation in the workforce has increased; however, **promotion of BIPOC talent** to senior management positions has **dropped by 40%** going from 55% in 2021 to 33% in 2023.
- Noticeable **rise in new female hires (~21%), promotions (~16%), and overall workforce representation (~8%)**; however, the representation of women at **senior levels has remained relatively similar at 34%** compared to 35% in 2021.

SUPPLIER DIVERSITY

- Initiatives put in place appear to have had a positive impact on supplier diversity, with **25%** of companies now setting **MBE spend targets**; up from 9% in 2021.
- In Houston, **32%** of companies require **third party verification**, and companies have an **average of 66 MBE vendors** compared to the national average of 10.6 MBE vendors. Nationally, top 10% companies have an average of 50 MBE vendors.
- In **Houston**, the average organization's **MBE spend is 5.4%** of total spend. This is higher than the **national average of 3.6%**.

MATURITY OF DEI BEST PRACTICES

- Houston's maturity of DEI Best Practices continues to average at **proactive** (46% adoption of best practices) across **15 categories**, with several categories' average progressive (over 50% adoption of best practices).
- **Law and Professional services** industries lead on DEI Best Practices Maturity, **outperforming the Houston region** on 13 out of 15 categories.

The improvement demonstrated by the 2023 assessment results is evidence of the business community's commitment to this important work, while also identifying areas of opportunity where Houston companies can continue to make progress.





2023 DiverseCity Summit

The Houston DiverseCity Summit convened 500 business leaders for an interactive experience catalyzing change, inspiring action and supporting companies across the Houston region in their efforts to create opportunity for all.

The one-day symposium featured more than 25 speakers offering real-world insights on how to navigate the changing landscape around diversity, equity and inclusion and ways to deliver value and harness the full spectrum of human potential.



DiverseCity Summit attendees



DiverseCity Summit Luncheon panel Antonio Robinson, Carter's; Pamela Skaufel, ExxonMobil; the Partnership's LaTanya Flix; and Dr. Marc L. Boom, Houston Methodist

“What gets measured gets done, and Houston is doing just that.”

– Debby Asuquo, BCG

“If your culture is intentional, then DEI is just a given.”

– Dr. Marc Boom, Houston Methodist



Melanie Johnson, co-chair of the Partnership's Racial Equity Committee speaks at DiverseCity Summit



Boston Consulting Group's Debby Asuquo and Ilshat Haris, with the Partnership's LaTanya Flix, present key findings from the 2023 Houston Regional Equity and Inclusion Assessment

Engaging Members

Partnership member companies are as diverse as the region itself, representing a broad range of industries and occupations that do business across the country and around the world.

PARTNERSHIP MEMBERS REPRESENT

Companies and Organizations
with Employees Ranging from

1–10K+

1/5 of the Region's
Workforce

162+
Industries

12
County Region



Advancing Houston Through Engagement

In 2023:

- **8,066 business and community leaders attended 96 Signature Events, webinars, Forums and Business Resource Groups events.**
- **1,582 convened in 75 committee meetings, influencing areas critical to the region's growth.**

Membership at the Partnership offers the opportunity to work alongside other business leaders to make a positive impact on our region, making it one of the best places to live, work and build a business. Membership also provides exclusive connections to people, businesses and professional development, and to information to help make informed business decisions. Partnership members immerse themselves in the organization through a variety of member engagement opportunities.

Here are some of the activities held in 2023.

PARTNERSHIP WEEK AND ANNUAL MEETING

The third annual Partnership Week, a series of engaging events, provided a unique opportunity for participants to delve into the organization's initiatives and discover ways in which members can actively contribute to our mission. The week's cornerstone event, Annual Meeting, featured 2023 Chair Dr. Marc L. Boom who spoke on the significant opportunity the business community has to play a positive role in finding compromise solutions in today's increasingly polarizing environment. The event also celebrated Bob Harvey's more than 10 years of leadership for the region's principal business organization and awarded the 2023 Robert C. McNair Award for Civic Leadership to Houston philanthropists and business leaders, the Chao family.

FUTURE OF HEALTH CARE

To highlight one of the Houston area's most important industry sectors, the Partnership proudly introduced a new event, the Future of Health Care, which featured a lineup of some of the region's top leaders from health systems, clinical care and research. Panelists included Dr. Juliet Breeze, CEO, Next Level Medical, LLC; Dr. David Callender, President and CEO, Memorial Hermann Health System; Dr. Tony Lin, Chairman of the Board & Managing Director, Kelsey-Seybold Clinics; and Dr. Esmaeil Porsa, President and CEO, Harris Health System. Dr. Marc L. Boom, CEO, Houston Methodist, also delivered remarks.



Albert Chao and Bob Harvey, Annual Meeting



Luncheon Panelists, Future of Health Care

FUNDRAISING EVENTS

SOIRÉE: The 2023 Soirée, themed Internationally Inspired, welcomed more than 600 guests who gathered for an evening celebrating the Houston region's unique tapestry of ideas, industry and influence that positions us among the great global cities of the world. The special celebration, co-chaired by Amy and John Chronis and Cynthia Hansen and Joe Concini, showcased Houston's dynamic cuisine and entertainment, representing the varied and diverse regions from around the world with a cultural presence here in the Houston region. The valuable exchanges catalyzed by the networking opportunities through this convening deepened connections between members of Houston's business community while raising vital funds for the Partnership's mission.

GOLF CLASSIC: The 28th annual Golf Classic offered an exciting tournament and a day of competition and camaraderie chaired by James (Jim) C. Fish, President and CEO of WM at the Memorial Park Golf Course. More than 80 executive guests came together to participate in the record-breaking tournament which supports our shared efforts and the Partnership's work in building a strong, diverse economy and creating opportunities for all Houstonians.

FORUMS

Forums took a new approach to content in 2023, closely aligning around pillars of the Partnership's strategic plan, *Houston Next*. Through valuable and timely conversations, the industries and initiatives that are moving Houston forward as a great global city were explored. Topics this year included the impact of greater Houston's Historically Black Colleges and Universities; disaster preparedness, supply chain trends and logistics infrastructure; and Houston's life sciences ecosystem.

REGIONS

These gatherings take members on one-of-a-kind, behind-the-scenes journeys across the 12-county region highlighting economic development and growth. This year, participants experienced new projects including Galveston County visiting the new cruise ship terminal; Brazoria County visiting Syzygy Plasmonics' decarbonization operations; and Waller County visiting Daikin's Technology Park.



Soirée



Katie Pryor, Steve Retzloff, Marc Watts, Amy Chronis, Dan Bellow, Ric Campo and Golf Classic Chair Jim Fish



Forum



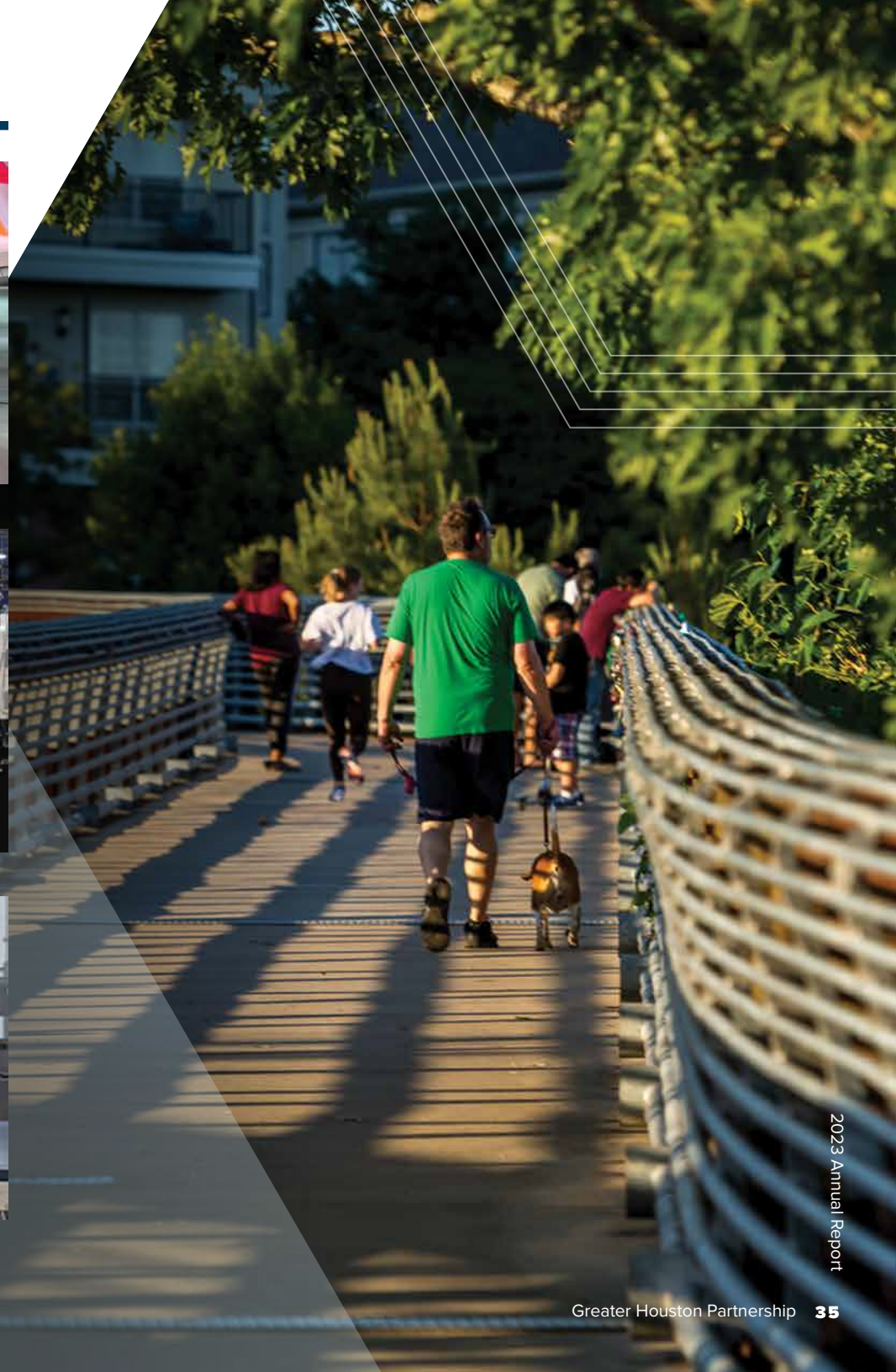
Members explore the new cruise terminal in Galveston



Regions visits Daikin Technology Park



Members explore Syzygy's Plasmonics' decarbonization operations



Financials

Combined Statements of Financial Position

As of December 31, 2023 and 2022

ASSETS	2023 Estimated	2022 Audited
Cash and cash equivalents	\$6,832,357	\$9,880,619
Accounts receivable, net	421,405	364,885
Accounts receivable - other, stimulus receivable	—	553,353
Investments	1,939,036	1,690,420
Pledges receivable, net	8,478,672	10,208,028
Prepaid expenses and other assets	280,088	426,115
Right use of assets	12,403,071	13,161,370
Property, net	3,271,162	3,514,603
Total Assets	\$33,625,791	\$39,799,393

Liabilities And Net Assets

LIABILITIES	2023 Estimated	2022 Audited
Accounts payable and accrued expenses	\$1,427,921	\$1,492,245
Deferred membership revenue	3,642,420	3,645,130
Other deferred revenue	378,046	317,760
Operating lease liabilities	12,970,664	13,690,170
Total Liabilities	18,419,051	19,145,305
NET ASSETS	2023 Estimated	2022 Audited
Without donor restrictions	\$5,906,392	\$6,699,209
With donor restrictions	9,300,348	13,954,879
Total Net Assets	15,206,740	20,654,088
TOTAL LIABILITIES AND NET ASSETS	\$33,625,791	\$39,799,393





Combined Statements of Activities and Changes In Net Assets

Years Ended December 31, 2023 and 2022

REVENUE	2023 Estimated	2022 Audited
Membership dues	\$9,932,334	\$9,401,148
Event registration and sponsorship fees	4,479,101	3,798,511
Publications, merchandise sales, and other revenue	154,323	28,498
Investment return, net of expenses	377,822	(237,564)
Net assets released from restriction	9,273,356	8,229,585
Total Revenue	24,216,936	21,220,178
EXPENSES	2023 Estimated	2022 Audited
Personnel costs	14,494,994	12,667,262
Program services	9,510,656	8,159,346
General and administrative	691,131	975,773
Depreciation	312,972	294,125
Total Expenses	25,009,753	22,096,506
Change in Net Assets without donor restrictions	(792,817)	(876,328)
Change in Net Assets with donor restrictions	(4,654,531)	(3,193,563)
Net Assets, beginning of year	20,654,088	24,723,979
Net Assets, End of Year	\$15,206,740	\$20,654,088

The financial statements reflect the combined balances and results of activities of the Greater Houston Partnership, Inc., and the Greater Houston Partnership Foundation.

Estimates shown above are subject to revision. Send requests for a copy of completed audited financial statements to contact@houston.org.

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Midway

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Lori Garcia

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of Texas

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Mitsubishi Heavy
Industries America

Michael Jamieson

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Silver Eagle Distributors

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Artemis Energy Partners

RACIAL EQUITY

Melanie Johnson
Collaborative for Children
Gretchen Watkins
Shell USA

UPSKILL HOUSTON

Mike Lewis
The Boston Consulting Group

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Senior Vice President and
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Acquisition & Engagement

CRAIG RHODES

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