GREATER HOUSTON **PARTNERSHIP**



HOUSTON **NEXT**

Advancing Opportunity

# 2026 INVESTOR REPORT

# HOUSTON
# CONTINUES TO WIN

Houston has real momentum: population growth, meaningful jobs, major capital investment and innovation. But we can't take that momentum for granted. We must keep building it so companies continue to choose our region and more Houstonians have access to opportunity.

In 2026, the Greater Houston Partnership remained focused on priorities where collective leadership can make the greatest difference: strengthening Houston's competitiveness, building clearer pathways to economic mobility and reinforcing the critical systems our region depends on.

Through *Houston Next: Advancing Opportunity*, investors are helping translate that focus into action. We are bringing the region's leading employers, educators, public leaders and community partners together to connect people to opportunity; creating new avenues for regional businesses to grow; and advancing a more resilient Houston that can withstand disruption and compete with confidence.

This report reflects the progress made across Prosperity, People and Place—and the work ahead to keep Houston moving forward.



**Katie Pryor**
Executive Vice President
and Chief Operating Officer

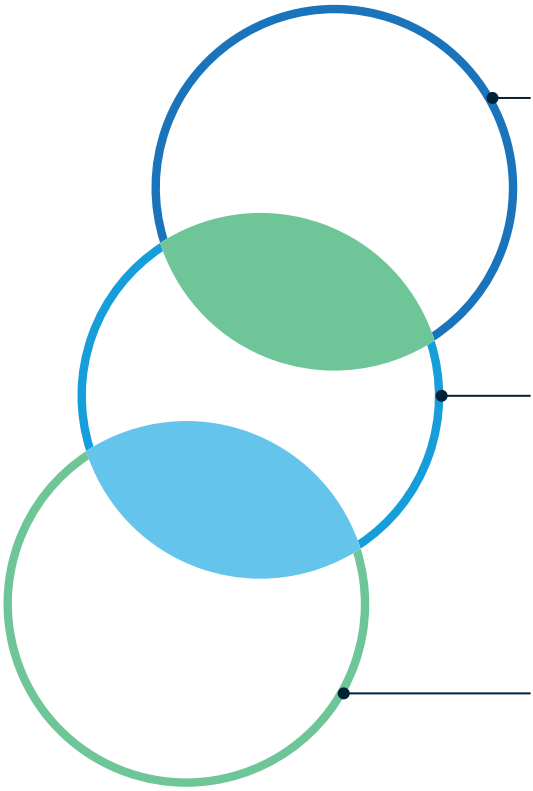


**Steve Kean**
President and Chief
Executive Officer



# VISION & FRAMEWORK

*Houston Next: Advancing Opportunity* is the Partnership's long-term plan to advance economic opportunity across the region.



**PROSPERITY**

Advance a strong, diverse economy through proactive economic development that attracts global investment and drives growth across key industries.

**PEOPLE**

Create inclusive opportunity and drive economic growth by helping people engage into high-demand careers that are aligned with their interests and skills.

**PLACE**

Build a resilient and vibrant region that enhances quality of life and supports long-term economic success.

## TWO STRATEGIC IMPERATIVES CONNECT THE PARTNERSHIP'S WORK ACROSS ALL THREE PILLARS:

### Talent and Economic Mobility

Make Houston the global leader in talent development and economic mobility

### Resilience

Establish Houston as the most resilient coastal city in the world




**Each section of this report provides measures of progress, what we did in 2026, impact stories and what's to come for 2027.**

# PROSPERITY

## ECONOMIC DEVELOPMENT SPOTLIGHT

### WORLD CUP ACTIVITIES EXPAND HOUSTON'S GLOBAL INVESTMENT PIPELINE

The FIFA World Cup created a unique opportunity to put Houston on the international stage. The Partnership conducted a multinational World Cup-related trade mission, domestic and international inbound tours and a major 'Welcome to Houston' digital campaign, generating several new and prospective projects.

- Nine countries represented in trade mission activation
- Three countries traveled to during the trade mission (Germany, Portugal and Netherlands)
- Three international bilateral investment summits
- Hosted five site selector consultants representing five states
- Nine hosted experiences with community partners, including Houston Ballet and Houston First

These efforts strengthened strategic relationships with site selectors, global companies and international partners, while generating new opportunities for membership and business development. By leveraging one of the world's largest sporting events, the Partnership elevated Houston's global brand and showcased the region's leadership on an international stage. Direct impact outcomes included EDP Renewables joining the Partnership at the senior advisory membership level, while the familiarization tour helped position Houston as a potential future host for annual site consultant conferences.

### HOUSTON EMERGES AS A LIFE SCIENCES MANUFACTURING HUB

Bristol Myers Squibb announced an Bristol Myers Squibb announced plans to build a $2.3 billion manufacturing facility at Generation Park in northeast Houston. The 600,000-square-foot facility is expected to create 489 jobs.

This project underscores Houston's growing strength as a life sciences manufacturing hub, building on momentum that includes Lilly's 2026 groundbreaking for its $6.5B billion manufacturing campus.

### Other Major Houston Announcements:

Davie Defense

**$511M**
in capital investment

**1,800**
new jobs

Cooler Master

**$25M**
in capital investment

**300**
new jobs

“As part of our $40 billion commitment to the United States, we’re building the domestic manufacturing capabilities needed to deliver the next generation of medicines and support future scientific breakthroughs.

Houston and the state of Texas offer the talent, infrastructure, and partnership needed to help bring that vision to life."

**CHRISTOPHER BOERNER, Ph.D.**
**Board Chair and CEO**
Bristol Myers Squibb

# MEASURES OF PROGRESS

**4,500**
new jobs

**21**
economic development project wins



**$16.85B**
in capital investment

**22**
corporate and institutional leaders engaged through Houston Business Exchange

**30**
small and mid-sized businesses connected through Houston Business Exchange

**100**
companies and regional businesses engaged through procurement-focused convenings

# WHAT WE DID IN 2026

- Supported major advanced manufacturing wins, including Davie Defense's $511 million investment and 1,800 new jobs, Apple's Advanced Manufacturing Center and Cooler Master's $25 million investment and 300 new jobs.
- Advanced Houston's energy competitiveness through Houston Energy Transition Initiative (HETI) research on power readiness, energy efficiency, demand response and faster technology commercialization.
- Convened energy leaders, entrepreneurs and investors through the third annual Houston Energy and Climate Startup Week and HETI's first fly-in to Argonne National Laboratory.
- Completed a comprehensive economic development strategy refresh with the Boston Consulting Group (BCG), establishing a clear path to execute a business-led program, accelerate sector-specific growth plans, deepen collaboration with regional and private-sector partners, and sharpen Houston's industry-specific positioning.
- Launched Houston Business Exchange to build stronger connections between corporate and institutional decision-makers and regional small and mid-sized businesses.
- Continued Procurement Exchange conversations to help members adapt to changing expectations and headwinds, identify practical ways to expand supplier access and visibility and stay ahead of industry trends through resources on emerging topics such as AI in procurement.
- Advanced business-led federal permitting reform recommendations focused on more predictable, efficient and transparent project reviews.
- Continued to elevate immigration as a workforce and competitiveness priority, emphasizing the importance of a modern immigration system to Houston employers and the region's long-term growth.
- Hosted more than 70 state legislators for Houston Day, a two-day immersion and tour of the assets driving the future of Houston and Texas. The visit strengthened relationships, highlighted Houston's economic and cultural significance and built support for the Partnership's 2027 legislative agenda.



"Such a great visit last week with the Greater Houston Partnership and all their allies. Having worked many site selection projects in the region - FMC, Davie Defense, TMEIC - it was nice to also see the fun side of the region. Thank you so much for including me in last week's visit to Houston. I had such a great time and thoroughly enjoyed my time in the region. It was great to see the "fun" side of Houston, and I also enjoyed the chance to really talk with you."

**CHRIS LLOYD**
**Senior VP & Director, Infrastructure & Economic Development**
McGuireWoods



## What's Next for 2027

- Continue Houston Business Exchange and supplier convenings.
- Implement updated economic development strategy priorities.
- Advance policy conditions that support investment, workforce availability and infrastructure readiness.
- Convert business attraction and World Cup-related engagement into active projects.
- Continue business recruitment in priority sectors.
- Launch Export Houston's intensive export-readiness cohort.
- Establish a Houston Business Exchange dashboard to measure connections, engagement and business outcomes.
- Continue supplier and procurement convenings that help companies and regional businesses build practical relationships.
- Advance the Partnership's 2027 state and federal policy priorities in support of a competitive business environment.
- Convert business attraction and World Cup-related engagement into active projects.

# PEOPLE

## STRATEGIC IMPERATIVE SPOTLIGHT: TALENT & ECONOMIC MOBILITY

### AMBITION

Make Houston the global leader in talent development and economic mobility.

### ANCHORED WORK

The Partnership's Talent & Economic Mobility work connects the region's leading employers, educators, workforce organizations and community partners around a shared goal: helping more Houstonians move from career awareness to skill development and connection to meaningful careers

UpSkill Houston provides the regional platform for employer-informed workforce alignment. Ready Set Next is an ambitious expression of that work: a Houston-built, AI-powered career-navigation platform that brings together career discovery, education pathways, work-based learning, employers and community resources. By connecting the region's education, workforce and employer ecosystems in one shared platform, it creates a scalable model for helping people move from awareness to action while better aligning talent supply with employer demand.

Our Inclusive Leadership & Opportunity (ILO) work brings a complementary focus to this effort while advancing a distinct priority: helping members strengthen workplaces, advance talent and expand access to business opportunity.

### WHY THIS MATTERS

Each year, roughly 90,000 students graduate from Houston-area high schools, yet too few have a living-wage job six years later, even as employers cite talent acquisition and development as a leading challenge.

The Partnership is working to close this gap by aligning education and workforce pathways with employer demand while helping companies strengthen workplaces that support talent advancement and access to opportunity. This gives more Houstonians clearer paths to career growth and companies a stronger connection to the talent they need.



“We firmly believe that as Houston grows, everybody that lives here in Houston should be able to have an opportunity to benefit from that growth. I think the beauty of this work is that everybody really benefits. Those that are looking for a career will be able to find the training that they need to be prepared for that career and as employers, we don't have to go looking for talent outside of the area because that talent is already here."

2026 PARTNERSHIP CHAIR
**ARMANDO PEREZ**
**Executive Vice President**
**Houston**
H-E-B

# MEASURES OF PROGRESS

## PILOT LAUNCH
of an unprecedented Gen-AI powered platform to connect people, organizations and employers at scale

## 1,000+
users engages with Ready Set Next during the initial pilot phase

## 23
organizations including ISDs, charter schools, colleges and community partners participated in Ready Set Next pilots

## 7
regionals partners convened as founding members of a new Houston Econommic Mobility Coalition

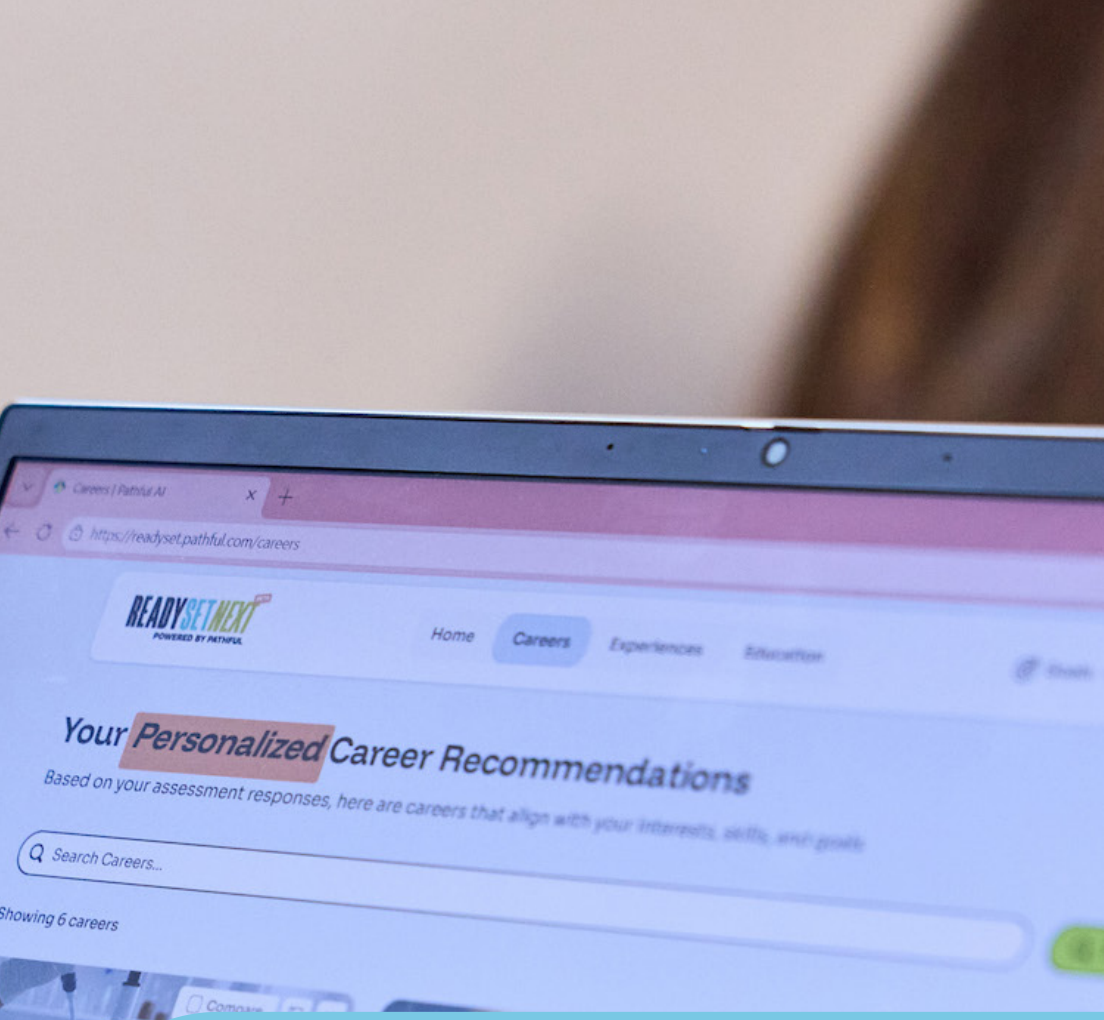
## 100
companies and regional business engaged through talent advancement-focused convenings



# WHAT WE DID IN 2026

- Launched initial, controlled pilots of Ready Set Next, Houston's AI-powered career-navigation platform, and completed pilots with K–12, postsecondary and community partners across the region.
- Convened 19 co-design and advisory sessions with employers, educators, community partners and workforce leaders—covering community input, talent and program management, and work-based learning and skills-first practices—to shape Ready Set Next's next phase. Five additional sessions are planned by year-end.
- Gathered pilot feedback through 16 reflection sessions with participants and facilitators; 24 additional sessions are scheduled by year-end to inform continued refinement of the platform.
- Became a founding partner in a new Houston economic mobility coalition with Good Reason Houston, Greater Houston Community Foundation, Gulf Coast Workforce Board, Kinder Institute for Urban Research, the United Way of Greater Houston and The Harris County Housing and Community Development, and co-hosted the third Economic Mobility Summit.
- Helped secure a $17 million Bloomberg Philanthropies investment in Houston's skilled-trades workforce through a regional collaboration led by Houston City College. The investment will expand pre-apprenticeship and Registered Apprenticeship pathways in electrical, plumbing, welding, HVAC, industrial maintenance and carpentry, connecting more Houstonians to in-demand careers and employers to the talent they need.
- Advanced a regional workforce report to provide a clearer view of Houston's workforce ecosystem and the opportunities for stronger alignment.
- Refreshed UpSkill Houston's strategy, brand and messaging to clarify its role as the Partnership's workforce development initiative.
- Repositioned One Houston Together as Inclusive Leadership & Opportunity (ILO), reflecting the Partnership's commitment to strengthening leadership, advancing talent and expanding small-business access to opportunity through data-driven insights, peer learning and leading practices.
- ILO continued to deliver the Talent Exchange and Virtual Talent Talks, offering regional leaders timely insights and practical strategies.
- Conducted an end-of-year Talent Pulse Survey to identify member priorities, workforce challenges and opportunities for 2027 programming.






## What's Next for 2027

- Expand peer learning through Talent programming and continued Board Exchange to connect CEOs and senior executives with experienced, board-ready leaders.
- Advanced education and workforce policy priorities, including early childhood education, public education accountability and funding and career readiness.
- Expanded initial pilot release of Ready Set Next, scaling career discovery and connections to education and workforce pathways. In parallel, work to develop the second pilot release began, adding administrative tools and more direct connections to employer opportunities and jobs.
- Use insights from the regional workforce report and Talent Pulse Survey to shape employer-focused programming and workforce priorities.
- Continue advancing skills-first hiring, work-based learning and employer-led talent strategies.
- Further integrate Inclusive Leadership & Opportunity across the Partnership's overall talent, economic development and member-engagement work.
- Advance policies that strengthen early childhood education, public education funding and accountability, career readiness and workforce development to help build clearer pathways to high-demand careers and a stronger talent pipeline for employers.

# PLACE

## STRATEGIC IMPERATIVE SPOTLIGHT: REGIONAL RESILIENCE

### AMBITION

Establish Houston as the most resilient coastal city in the world.

### ANCHORED WORK

Regional Resilience brings business, infrastructure, utility and public-sector leaders together around the critical systems Houston depends on: power, communications, transportation, water, flood protection, healthcare and emergency preparedness.

The Partnership's role is to build the case for action, convene the right system leaders and help turn shared priorities into measurable progress.

### WHY THIS MATTERS

Reliable systems give companies confidence to invest, operate and recover quickly when disruptions occur. They also make everyday life possible, helping people and communities thrive and withstand disruption.

Strengthening resilience is therefore both a quality-of-life priority and a competitiveness priority, helping ensure Houston remains a global business center prepared for the challenges ahead.



“Regional resilience is not the responsibility of any single organization; it is a shared capability we build together. For Memorial Hermann, the Resilience Imperative means strengthening the partnerships, coordination and preparedness needed to protect our workforce, sustain critical services, and ensure continuity of care when disruption occurs. A more connected and prepared Greater Houston is better equipped to respond collectively, recover faster and emerge stronger."

**ADAM LEE, MBA, MS, CEM®**
**Director, Emergency Management & Organizational Resilience**
Memorial Hermann Health System



# MEASURES OF PROGRESS

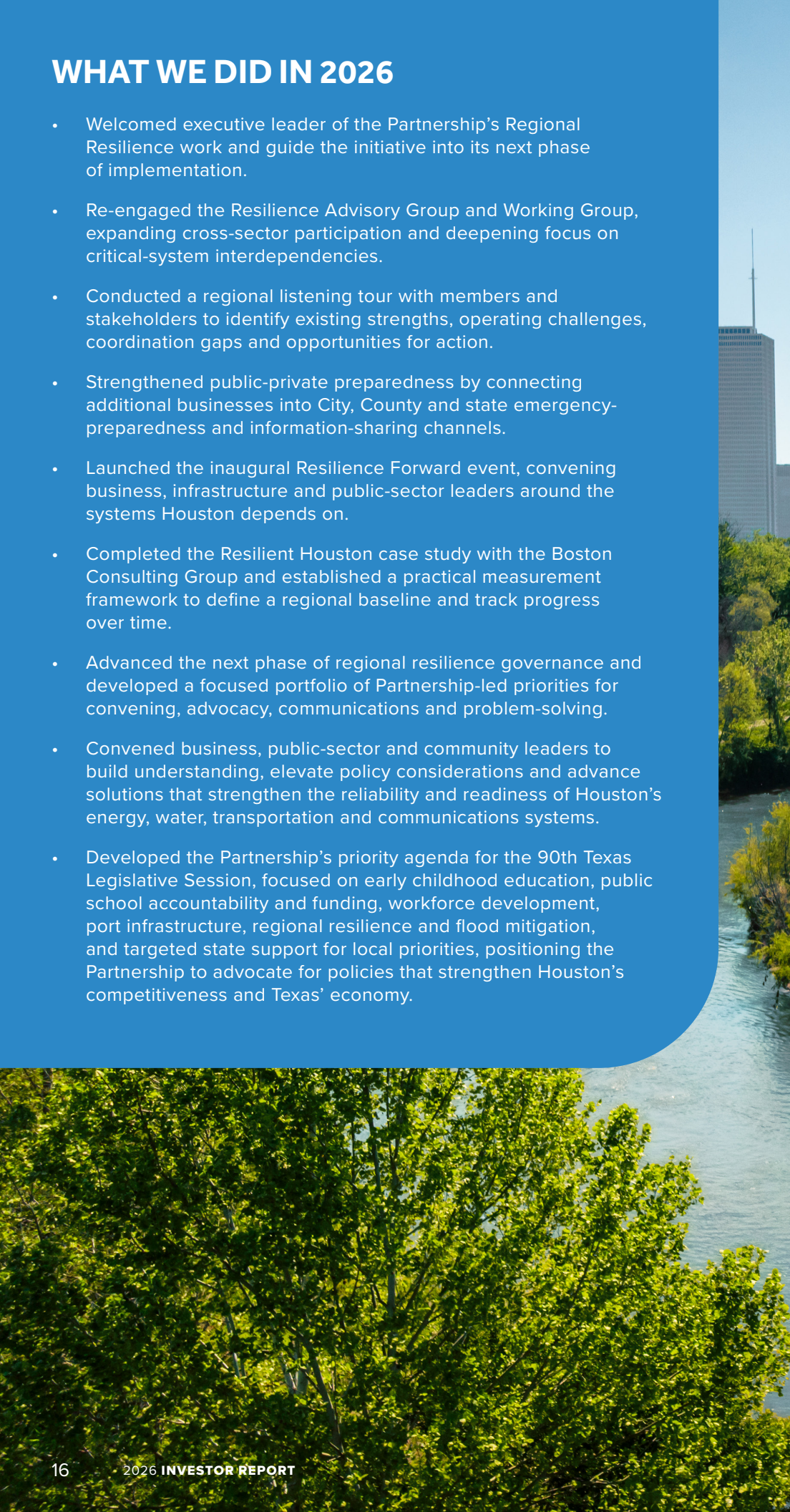
**320**
attendees convened at the inaugural Resilience Forward event

**80**
member and stakeholder touchpoints informed the Partnership’s regional resilience listening tour since April 1

**46**
organizations connected to Regional Resilience work, doubling 2025 involvement

# WHAT WE DID IN 2026

- Welcomed executive leader of the Partnership's Regional Resilience work and guide the initiative into its next phase of implementation.
- Re-engaged the Resilience Advisory Group and Working Group, expanding cross-sector participation and deepening focus on critical-system interdependencies.
- Conducted a regional listening tour with members and stakeholders to identify existing strengths, operating challenges, coordination gaps and opportunities for action.
- Strengthened public-private preparedness by connecting additional businesses into City, County and state emergency-preparedness and information-sharing channels.
- Launched the inaugural Resilience Forward event, convening business, infrastructure and public-sector leaders around the systems Houston depends on.
- Completed the Resilient Houston case study with the Boston Consulting Group and established a practical measurement framework to define a regional baseline and track progress over time.
- Advanced the next phase of regional resilience governance and developed a focused portfolio of Partnership-led priorities for convening, advocacy, communications and problem-solving.
- Convened business, public-sector and community leaders to build understanding, elevate policy considerations and advance solutions that strengthen the reliability and readiness of Houston's energy, water, transportation and communications systems.
- Developed the Partnership's priority agenda for the 90th Texas Legislative Session, focused on early childhood education, public school accountability and funding, workforce development, port infrastructure, regional resilience and flood mitigation, and targeted state support for local priorities, positioning the Partnership to advocate for policies that strengthen Houston's competitiveness and Texas' economy.





## What's Next for 2027

- Advance state legislative priorities related to flood mitigation, water infrastructure, coastal protection and broader regional resilience.
- Deepen coordination among utilities, telecommunications providers, transportation partners and public agencies.
- Expand focused working groups and action-oriented convenings around shared system challenges.
- Apply the regional measurement framework to prioritize action and track progress over time.
- Advocate for state and federal funding and policy solutions that strengthen port-region infrastructure, regional mobility, coastal protection – including the Coastal Texas Project – and the critical systems supporting Houston's continued growth.

# FINANCIAL PROGRESS



**Campaign Goal**

$35M

over five years

**Raised to Date**

$25.3M

(72% of goal)

## CAMPAIGN LEADERSHIP

**MARC WATTS**
The Friedkin Group Inc. (Chair)

**DAN BELLOW**
JLL

**AMY CHRONIS**
Deloitte (Retired)

**THAD HILL**
Calpine Corporation (Retired)

**MARK KELLY**
Vinson & Elkins LLP

**ARMANDO PEREZ**
H-E-B

**BOBBY TUDOR**
Artemis Energy Partners

**JAY WARING**
Service Corp International

**GRETCHEN WATKINS**
Shell USA, Inc. (Formerly)

# THANK YOU TO OUR INVESTORS

## DIAMOND | $5 million

CenterPoint Energy

QUANTA

## GOLD | $2,000,000

WM

## SILVER | $1,000,000

CALPINE

ExxonMobil

H-E-B

HPE

Steve Kean

nrg

## BRONZE | $500,000

Chevron

Houston Endowment

Huntington Bank

KINDER FOUNDATION

PHILLIPS 66
PROVIDING ENERGY. IMPROVING LIVES.

SCI SERVICE CORPORATION INTERNATIONAL

## ALLY | $250,000

CAMDEN

HCA Healthcare

HOUSTON Methodist LEADING MEDICINE

MEMORIAL HERMANN

MUSTANG CAT

Onstead Foundation

## SUPPORTER | $125,000

AmegyBank of Texas

HARVEY CLEARY

JLL

stellar BANK now part of PROSPERITY BANK

**Investor support continues to advance Houston Next's strategy and implementation, strengthening the conditions for business growth, expanding pathways to opportunity and building a region prepared to succeed for the long term.**

GREATER HOUSTON
**PARTNERSHIP**

Houston.org

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