
ECONOMIC VITALITY

A healthy, vibrant economy is important to maintaining Baltimore County's quality of life: a rich variety of family-supporting jobs and tax revenue to pay for schools, roads and other public services.



A healthy, vibrant economy is important to maintaining Baltimore County's quality of life: a rich variety of family-supporting jobs and tax revenue to pay for schools, roads and other public services. This economic strength cannot be taken for granted. The County must ensure that the ingredients for future economic health be in place. This Master Plan lays the policy groundwork for achieving this long-term success.

FOUNDATION OF BALTIMORE'S ECONOMY

Baltimore County is the major economic engine in terms of jobs (515,000) in the region with the second-largest number of jobs of any Maryland jurisdiction. The County economy is highly diversified, not dependent on

ECONOMIC VITALITY

any single industry or company. Among the sectors where the County is strong: financial services, defense, manufacturing, transportation, information technology and life sciences. The federal government also has a major presence in the County, as the national headquarters for both the Social Security Administration (SSA) and the Centers for Medicare and Medicaid (CMS) are located in Woodlawn. The County's inter-connected web of large, medium and small firms in traditional and high technology sectors, and the high quality of the local workforce, also fosters stability and resilience.

An important determinant of the County's economic health is the balance between export industries and local-serving industries. The difference between the local-serving and export-oriented sectors is critical because they depend on distinct revenue bases and infuse wealth into the local economy in different ways.

Export Industries Play a Unique Role in Adding Wealth to the Area

Export businesses produce goods and services sold mainly outside the local area. As a result, they play a unique and irreplaceable role in determining the community's standard of living. Examples include manufacturers, Research and Development (R&D) firms, major financial services operations, health care facilities, corporate headquarters, agriculture, and state and federal government facilities. Businesses in these industries bring in money from outside the area because they sell their products and services to national or international markets. This outside money is pumped into the local economy through wages and business income, and creates the market for local-serving businesses.



Jobs created in export industries also tend to create more spin off jobs (i.e., have a greater multiplier effect), than do jobs in retail or services. The more inputs purchased locally and the more consumer expenditures at local shops, the higher the multiplier. For example, the table below highlights multipliers for four different sectors.

Local-Serving Businesses are Central to the County's Quality of Life

Local-serving businesses are those whose products or services are primarily consumed in the County, such as restaurants, grocery stores, bookstores, medical offices, banks, dry cleaners, home furnishing stores, convenience stores, pharmacies, etc. They range from national retailers to local, family-owned businesses. Regardless of their size, these companies provide the



Employment Multipliers per 100 Jobs in Major Sectors				
	Manufacturing	Health Services	Retail Trade	Personal/ Business Services
Supplier jobs: materials	128.92	28.3	24.1	54.08
Supplier jobs: capital services	38.63	22	16.71	27.95
Responding employment	116.46	66.05	46.35	68.8
state + local government	6.78	1.6	1.29	2.88
TOTAL	290.78	117.94	88.45	153.71

goods and services that County residents need and want and provide employment to a large number of County citizens. Retailers and other local-serving businesses also have a special role in main street or mixed-use settings. Attractive storefronts and restaurants create an active street level that is critical to successful, pedestrian friendly developments or older downtowns. They contribute to a vibrant, vital and visually appealing walking experience, as well as providing the goods and services needed by nearby residents and office workers.

Fostering Economic Vitality in 2020 and Beyond

Together, export and local-serving businesses form the basis for a strong local economy. In short, residents follow good jobs and retail follows residents. The greater the County's success in retaining and attracting export businesses, the greater the spending power will be and demand for local-serving goods and services. As these businesses thrive, the County is able to offer an appealing quality of life to its residents. Employees in turn serve as customers for other businesses, circulating dollars back through the local economy. County businesses pay significant taxes that provide revenue to pay for schools, roads, parks and other public services.

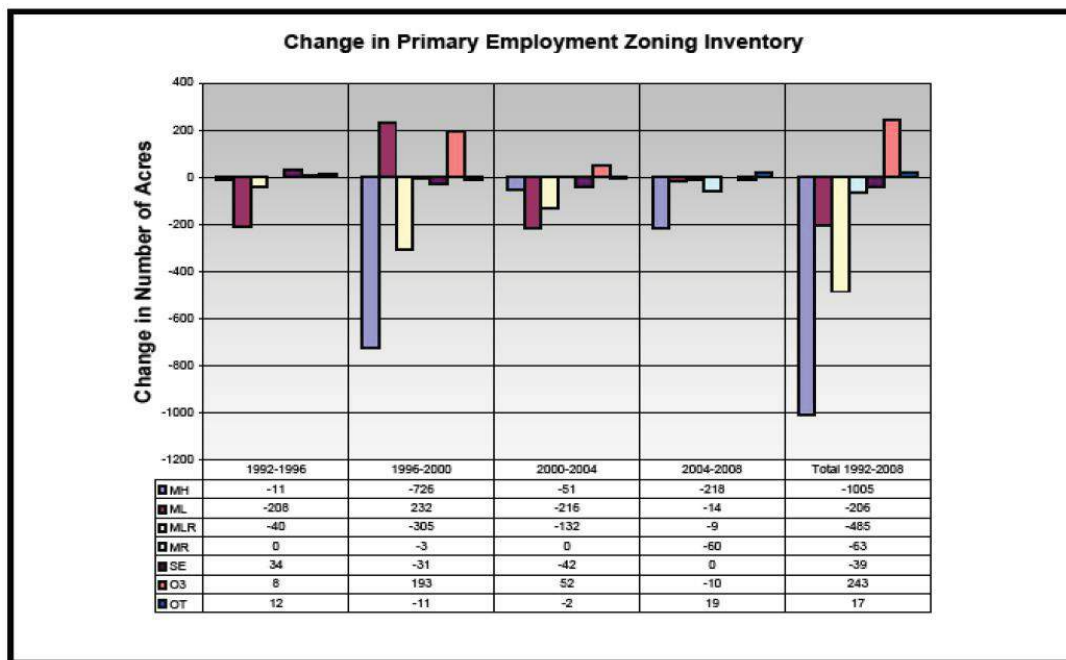
Baltimore County's economy faces several challenges as we look to 2020 and beyond. The ongoing health of the County's economy, and the health of its residential communities, will depend on how these challenges are addressed.

The future economic health of the County depends heavily on retaining and growing companies that export goods and services outside the region.

Baltimore County is fortunate to have a well-diversified economy. The County is home to a large number of export employers in a wide range of sectors: financial services, manufacturing, transportation, information technology, life sciences and agriculture. Goods produced range from unmanned aerial vehicles, flu testing kits, and steel to computer games, flavored rum, titanium horseshoes and packaged food flavorings. Baltimore County is now the largest job center in the Baltimore region, offering an abundance of employment opportunities. The breadth and depth of the economy is a major reason for the County's AAA bond rating, which allows the County to borrow for schools and public projects at a much lower interest rate than most other jurisdictions in the nation.

Land use policy is a critical factor in growing and supporting new business opportunities. The ability to attract, retain and expand the employment based depends on having appropriately zoned land available to accommodate companies when they need to move or expand.

Between 1992 and 2008, the County's supply of employment zoned land, especially sites with ML, MH, OT and O3 zoning, decreased by more than 1,538 acres. Several hundred additional acres were effectively converted to non-employment classifications through residential and retail PUDs in these zones, and exclusively residential projects in OT zones.



Policy: *Identify areas with significant potential to accommodate future employment growth and develop and implement strategies to prepare areas for business attraction.*

Actions:

(1) Continue to work with the State, property owners, and Amtrak to achieve a quality mixed-use transit oriented development at the GSA Depot in Middle River.

(2) Seek additional ways to increase the economic spin off from the County’s institutions of higher education both as job creators and sources for cutting edge research.

(3) Continue to pursue coordinated complementary high-density development at Metro Center at Owings Mills and Owings Mills Mall.

(4) Encourage TOD, mixed-use and other redevelopment opportunities along the Red Line that support ridership, while minimizing negative impacts on existing businesses and properties.

(5) Identify ways to provide incentives for higher value office/industrial development at older business parks.

(6) Implement the recommendation of the interagency Pulaski Highway Study to attract spin-off development related to BRAC.

(7) Intensify mixed-use development in designated growth areas, employment centers and Community Enhancement Areas.

(8) Work with Severstal Steel or any subsequent owner at Sparrows Point regarding the future use of surplus land.

(9) Support existing and prospective businesses in the Woodlawn area and initiate land use decisions that will capitalize on the expansion of the facilities for the Social Security Administration (SSA) and the Centers for Medicare and Medicaid Services (CMS). The SSA and CMS operations, and any expansion of them, are an economic engine in western Baltimore County, creating a demand for a wide range of businesses and services to accommodate the area.

Policy: *Maintain zoning appropriate for major employment on infrastructure-served land with good access.*

Actions:

- (1) Recommend that the County Council evaluate rezoning and PUD proposals that convert M or OT zoned land to residential or retail use to consider the long-term effects on the economy.
- (2) Ensure that adequate land and structures remain available to accommodate new and expanding primary employers not suited for mixed-use environments.
- (3) Consider ways to guide new employment opportunities to quality mixed-use development.
- (4) Preserve the County's limited deep-water access for industrial uses.
- (5) Consider amending the BCZR to limit the amount of residential development permitted in the OT zoning classification.

LAND USE BALANCE

A fiscally strong jurisdiction must maintain a healthy balance between residential and non-residential land uses. Different types of land use have variant effects on a county's finances. Some land uses contribute more in tax revenue than they consume in public services, such as schools, police and fire services. Some land uses consume more services than they pay for directly through property taxes. A balanced economy is needed to provide a healthy place to live, work and play. A strong employment sector: industrial, office, and commercial, provide jobs and tax revenue. A diverse choice of housing is essential to providing a qualified work force to fuel the employment sector.

Policy: *The County should maintain a healthy balance between residential and non-residential land uses inside the URDL.*

Actions:

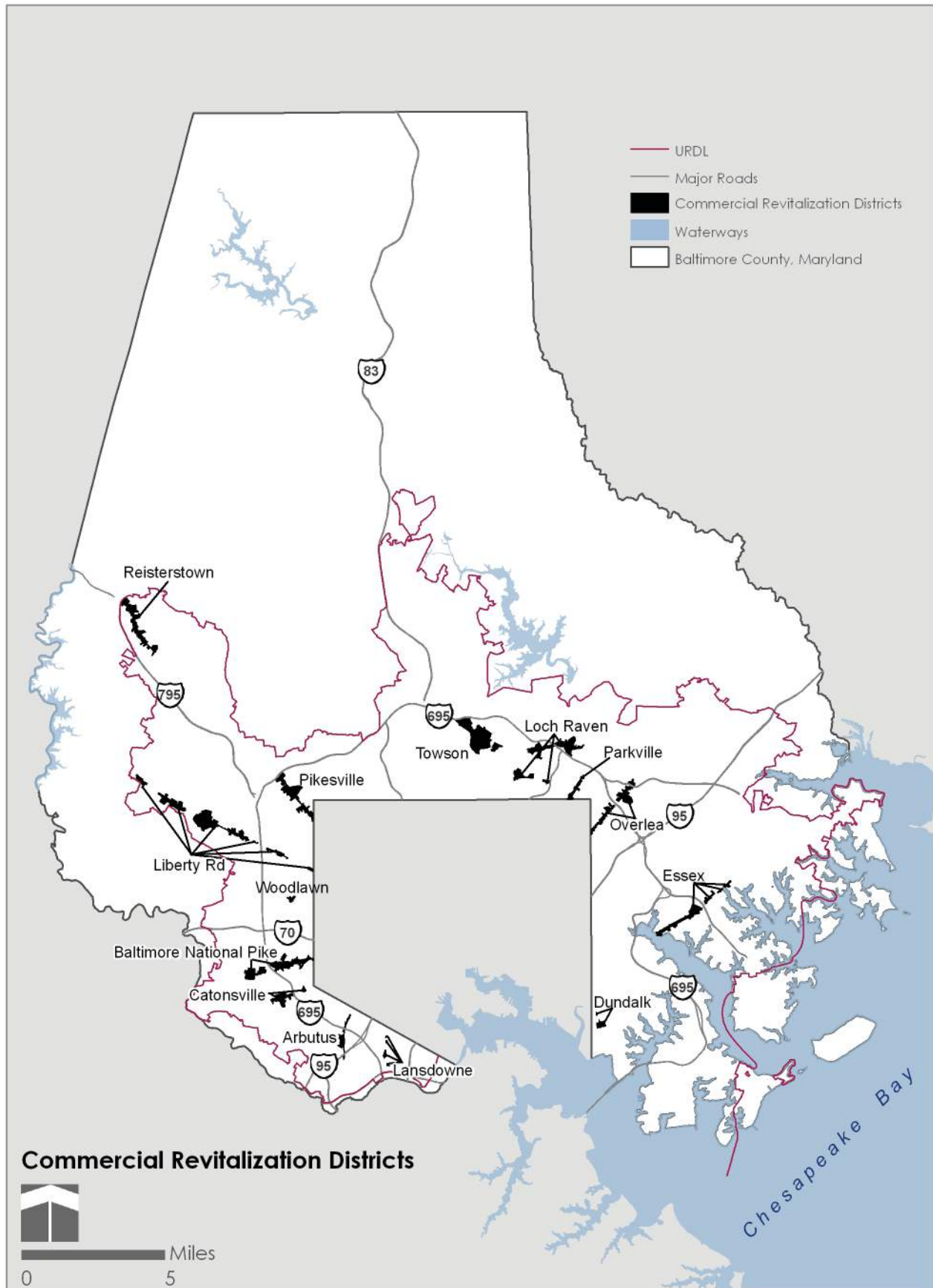
- (1) Consider encouraging zoning requests that promote mixed-use development.
- (2) Ensure that land use proposals contribute to a healthy balance of residential and non-residential uses and open space.
- (3) Work proactively to promote employment driven projects compatible with residential uses.
- (4) Direct mixed-use development to Community Enhancement Areas.

COMMERCIAL REVITALIZATION DISTRICTS

Baltimore County has 14 officially designated Commercial Revitalization Districts (CRDs). These areas were once the commercial hubs of the County's older beltway communities and offered a range of retail, service, and entertainment uses. However, beginning in the 1960s and 70s, changes



Map 35: Commercial Revitalization Districts





in demographics and retail shopping preferences fundamentally altered the role of these main street commercial centers. As people became more dependant upon the automobile, they moved farther out preferring the greater range of retail choices and convenient free parking over smaller mom and pop neighborhood shops along older commercial main streets. This trend continues. Most suburbanites patronize full service grocery stores, big and junior box retailers (e.g. Target, Wal-Mart, Pet Smart, Best Buy), chain specialty shops, and national restaurants.

To remain viable, the CRDs must differentiate themselves by capitalizing upon their downtown development patterns, strengthening the existing base of small businesses, and attracting new and different uses. Each district is unique with its own set of attributes and liabilities and revitalization efforts must be tailored to address these differences. Successful revitalization in smaller districts is built upon a series of small complementary successes and larger districts

may benefit from key redevelopment projects that restructure the local economy. Attaining a sufficient and balanced mix of quality uses is an important goal that should be accompanied with creating a safe, attractive, and walkable environment. Another goal is using creative marketing of the districts to businesses and customers.

The most successful downtowns have a mix of synergistic uses that support each other. Downtown housing and office uses have residents and employees that patronize retail shops, restaurants, and service uses such as hair salons, banks, and dry cleaners. Theaters and other entertainment uses are destinations that draw customers into the downtown, who then also patronize restaurants and bars before and after a movie or performance. Institutional uses, supply a high number of patrons and employees for retail and restaurants, and students for downtown housing.

When compared to newer town centers that are trying to replicate the character and qualities of real downtowns, original town centers often have unique challenges. Redevelopment costs can be higher with land assemblage and parking; surrounding household incomes and densities may be more diverse; multiple owners have different perspectives; and the infrastructure may be aging and outdated. Jurisdictions must have an extensive toolbox of incentives to retain and attract the mix of uses needed to keep a CRD healthy. The County has a range of incentives that can be tailored to individual project needs, including: low interest loans, tax credits, and specialized grants, key infrastructure improvements such as parking garages, sewer expansions, and road realignments and improvements, sale of publicly owned land, demolition of obsolete structures, permitting process assistance, flexible zoning, and liquor licensing.

Policy: Retain and attract quality retail, office, service, residential, entertainment, and institutional uses that create well balanced and economically vital mixed-use.

Actions:

- (1) Use targeted public investment to encourage private reinvestment.
- (2) Identify redevelopment/revitalization opportunities in the CRDs and establish a process to determine land use and development goals of the area.
- (3) Conduct specialized analyses of properties and redevelopment proposals.
- (4) Utilize the Consultant on Call Program to provide expedited professional studies on market feasibility.
- (5) Continue familiarization tours to provide education about the County's CRDs and community enhancement areas to upgrade and expand the types of uses, improve poorly managed properties and marginal businesses, and fill vacancies.
- (6) Promote the increased use of the Small Business Resource Center that provides free technical, financial, and marketing assistance.
- (7) Study the use of mixed-use codes in designated community enhancement areas.
- (8) Periodically review the range and scope of incentives to maximize their effectiveness.

The districts, like community enhancement areas, should be the “front door” to the residential neighborhoods, and help establish the overall image of a community. The appearance of the CRD is important to the business and residential communities, and is both a private and public responsibility. The government, primarily through streetscape programs, is generally responsible for the streets, sidewalks, medians, and sometimes alleys. Individual property owners are responsible for a building's façades, and any private parking lots. Improvements should focus on views from the public areas. A commercial center or corridor with attractive curb appeal and stable and desirable uses may encourage people to invest in the community.

Policy: Improve the appearance and walkability of the Districts.

Actions:

- (1) Continue to promote the Architect on Call Program that provides free professional design advice for business or property owners seeking to improve the exterior of their building and/or lot.
- (2) Promote the Building Investment Loan Program that provides zero percent loans for exterior and interior improvements through annual mailings to property and business owners, the business organizations, specialized advertising, and “word of mouth” examples.
- (3) Promote walkability and enhance the attractiveness of older village centers through implementation of streetscape programs managed by the Baltimore County Office of Community Conservation.
- (4) Develop streetscape design around a Complete Streets Program.
- (5) Continue beautification-landscaping partnerships with business organizations.
- (6) Enforce the County code and fund the Commercial Revitalization Action grants for programs to improve the physical appearance of the business environment.



Studies consistently show that when customers buy from an independent, locally owned business, over two thirds of the money spent stays in the community and is used for purchases from other local businesses. These businesses create more jobs locally, and often provide better wages and benefits than nationwide chains. Owners frequently live in the community where their business is located.

Policy: Market Commercial Districts to potential businesses and patrons.

Actions:

(1) Media campaigns including radio, television, print advertising and social media marketing will be developed and utilized during the winter holiday and spring shopping seasons.

(2) Continue to provide design support in promoting community events and districts through the use of Designer On Call, a resource that offers design services for

local initiatives involving the ReDiscover Your Neighborhood Downtown branding.

(3) Maximize partnership with the Baltimore County Revenue Authority to provide convenient parking opportunities.

(4) Promote the County's CRDs and CEAs at regional and national conferences.

(5) Update district profiles and county websites to attract businesses to the districts.

(6) Participate in statewide organizations and programs that promote the revitalization of downtowns across Maryland.

(7) Continue neighborhood promotional campaigns to encourage consumers to shop and eat in locally owned businesses.

TOURISM

Visitors to Baltimore County added \$1.97 billion to the local economy in 2008, according to a study by IHS Global Insight. The study reports that the County's tourism industry supported almost 20,000 jobs, \$545 million in wages, and contributed \$15 million in hotel, amusement and admission taxes.

Baltimore County's 219 miles of Chesapeake Bay waterfront offer unrealized potential to enhance the visitor experience and quality of life for County residents. Over the past decade, eastern Baltimore County has seen over \$600 million in public and private investment. County initiatives have eliminated many aging, blighted apartment complexes, replacing them with open space and hundreds of modern single family and townhomes. Many of the County's 90 marinas and yacht clubs have made significant improvements to their facilities, with waterfront restaurants and a water taxi service adding to eastern Baltimore County's amenities.

Policy: Increase visibility and access to visitor destinations in Baltimore County.

Actions:

(1) Explore methods to unify the waterfront as a regional destination.

(2) Further develop the County's network of bike and walking trails to connect parks, waterfront amenities, and nature centers with



**Baltimore County Agriculture
Maryland Agricultural Statistics (2006)**

Source: Agriculture in Maryland Summary for 2007, MDA

Crop Products	62,160,000 ⁽¹⁾
Nurseries & Greenhouses	124,000,000 ⁽²⁾
Equine	121,800,000 ⁽²⁾
Vegetables	6,398,000 ⁽¹⁾

Total Value Agricultural Sales (2006)

Sources: (1) Agriculture in Maryland Summary for 2007, MDA (2) Baltimore County, MD

Number of Farms	784
Average Farm Size	91 acres
Total Farmland	71,227 acres
Total Cropland	48,525 acres

visitor attractions and local communities

(3) Create wayfinding signage to major visitor sites.

(4) Support agriculture-related tourist activities such as Shawan Downs, the Maryland State Fair in Timonium, wineries, horse farms, and farmers markets.

Policy: Enhance existing visitor destinations in Baltimore County.

Actions:

(1) Enhance quality and improve access to major War of 1812 heritage sites to maximize economic impact of Maryland’s Star Spangled Banner bicentennial celebration.

(2) Maximize potential of unique museums and galleries throughout the county.

Policy: Improve and expand the visitor experience in Baltimore County.

Actions:

(1) Adopt a “Complete Streets” program to improve aesthetics and safety along local access roads, for use when improvements are being considered.

(2) Expand capacity for county to host additional conferences, large meetings, sports events and cultural activities

SUSTAINABLE AGRICULTURAL INDUSTRY

The policy to foster a sustainable agricultural industry has gained a new level of significance with the success of preserving over 50,000 acres of rural land. The County’s agricultural industry is diverse and robust with an annual economic production estimated to be \$300 million. There is an opportunity now with the land preservation accomplishments and momentum to build an even stronger and more *sustainable* agricultural economy. Without diminishing the support for commodity production, the mainstay of the county’s agricultural industry, there clearly is an opportunity for increasing local food production.



The benefits of local food production are enormous and include energy conservation, sustainability, food security, and the potential for green jobs for the young people of our County.

The majority of land in agricultural production is in grain and livestock production. Large farms must survive on large volumes and low profits per item: to do this they must be efficient and able to get their products to competitive markets. The County can address the local issues of transportation, right-to-farm laws, and local tax benefits to support these operations.

The horse industry is one of the largest economic agricultural industries in the County. Nationally, the thoroughbred horse industry is very strong, with sales and breeding fees up. These increases are typically linked to the quality of the track facilities, promotion, and wagering handles (purses). However, Maryland's

thoroughbred industry is at a crossroads. The County should support State efforts to improve racing facilities and the overall health of the industry.

The County has significant nursery and greenhouse production. Several of its growers are nationally recognized for the quality of their plant production. This industry is constantly changing in order to be successful. Laws, regulations and policies need to be constantly reviewed to promote the success of this industry while protecting the rural character of the surrounding communities.

The County, like the State, is seeing a strong interest in consumers who desire both local agricultural production and an experience relating to agricultural production. Operations such as wineries, pumpkin festivals, community supported agriculture, and direct market business operations are all part of the emerging agricultural economy. As with the nursery and greenhouse production, zoning laws, county regulations, and health department regulations need to be reviewed to remove unattainable burdens from these industries while still protecting public health and community character.

Policy: Foster a sustainable agricultural industry.

Actions:

- (1) Continue to offer loans and economic support for sustainable agricultural operations.
- (2) Consult the Rural Baltimore County Agricultural Profitability Study and Action Plan" (2009), and implement appropriate actions such as mentoring programs for new farmers and agricultural tourism activities on farms.
- (3) Review County Zoning and Development regulations to provide for farm production and processing.
- (4) Support the Baltimore County Center for Maryland Agriculture, which will promote a sustainable agricultural industry by providing educational and recreational opportunities for



the public, and encouraging “agro-tourism” The Center will also serve as an “incubator” for new ideas to help sustain agriculture in many aspects, including protective measures such as “best management practices”.

(5) Facilitate discussions with the agricultural community and surrounding neighbors regarding the new agricultural economies (i.e. sell what you grow, farm markets) and potential impacts on quality of life.

(6) Permit ancillary activities that allow farmers to sell products grown on the farm directly to customers, and promote certain farms as a destination stop for tourists and visitors.

(7) Ensure that County regulations provide flexibility in agricultural operations and enable them to adapt to changing economic conditions.

(8) Work with the Maryland Department of Agriculture (MDA), the University of Maryland Extension (UME), and the County Department of Economic Development to assist farm businesses in marketing to new local, national, and international consumers.

(9) Support Farm Bureau educational activities such as the “Agriculture in the Classroom” program at Hereford Middle and High Schools, and a new mobile agricultural classroom.

(10) Support the Farm Bureau program that identifies agricultural products produced in the County, which assists in the marketing of locally produced goods.

(11) Establish a program to assist young farmers in accessing capital to purchase farmland.

(12) Continue to foster and monitor the relationship between large-scale producers and landowners that lease land.

(13) Actively seek to solicit new agricultural operations.

(14) Encourage sustainable farming practices.

