



Carl Vinson
Institute of Government
UNIVERSITY OF GEORGIA



GAZA
Georgia Association of Zoning Administrators



APA
GA

Silicon Meets Suburbia: Solving the Zoning Puzzle of Data Centers

Presenters:

Dr. Alfie Meek: Georgia Tech Center for Economic Development Research

Chris Pumphrey: President, Elevate Douglas Economic Partnership

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Understanding the Fiscal Impact of Data Centers

Dr. Alfie Meek
Director, Center for Economic Development Research

August 14, 2025




Georgia Tech Enterprise Innovation Institute
Center for Economic Development Research

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Fiscal Impact Analysis

BASED ON SPECIFIC CHARACTERISTICS OF YOUR COMMUNITY:




LAND USE, TAX STRUCTURE, COMMUTING PATTERNS, SERVICE DELIVERY, ETC.

CAN HELP COMMUNITIES WEED OUT BAD DEALS!!




EXPENSE

EDUCATION
PUBLIC SAFETY
INCENTIVES, ETC.





REVENUE

PROPERTY TAX
SALES TAX
FEES, ETC.




CHARACTERIZES INCENTIVES AND ECONOMIC DEVELOPMENT SPENDING AS AN INVESTMENT AND CAN DEMONSTRATE TO THE PUBLIC THAT INCENTIVE DECISIONS ARE NOT TAKEN LIGHTLY.



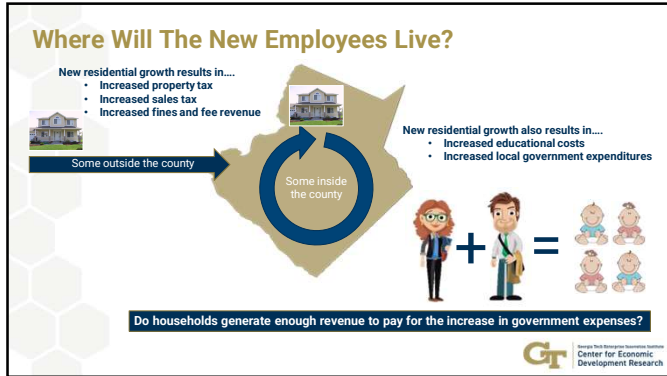


CAN BE POSITIVE OR NEGATIVE!

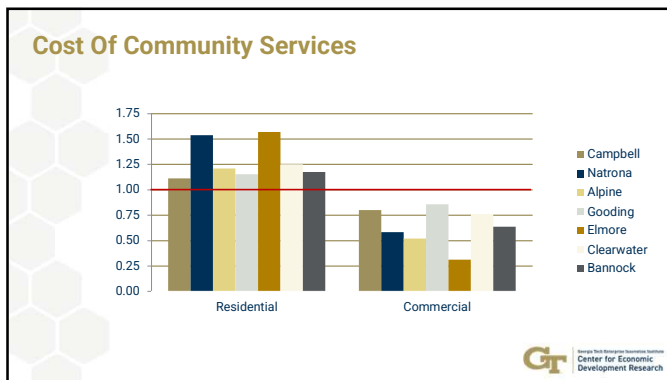


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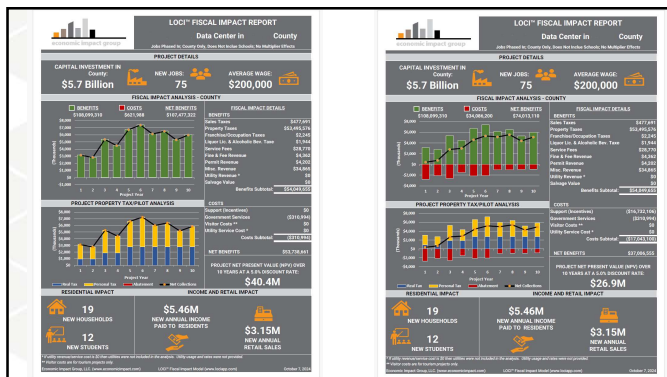
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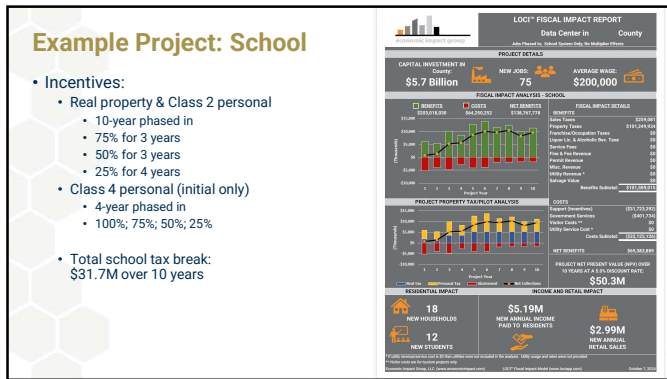
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Questions?

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HISTORY OF ECONOMIC DEVELOPMENT IN DOUGLAS COUNTY					
1974	1970's	1999	2003	2012	2023
Westfork Business Park was developed creating Douglas County's first business park and positioning Douglas County as a destination for logistics companies due to its access to Hartsfield-Jackson International Airport and the Norfolk Southern Intermodal Yard.	Expansion of I-20 from the South Carolina Line to the Alabama Line; this connection created an economic corridor through Douglas County.	Arbor Place Mall opens - positioning Douglasville as a retail and commercial destination for West Metro Atlanta and East Alabama.	Google opens a data center in Lithia Springs, GA.	Douglas County begins to proactively recruit data centers. The focus on data centers addressed the concern of impact from logistics companies on roads and schools and transitioned the goal of economic development from quantity to quality. It also allowed for the diversification of the tax base following the Great Recession of 2008.	Updated Target Industry Sectors: <ul style="list-style-type: none"> Advanced Manufacturing Professional & Technology Services Life Science & Healthcare Media & Entertainment

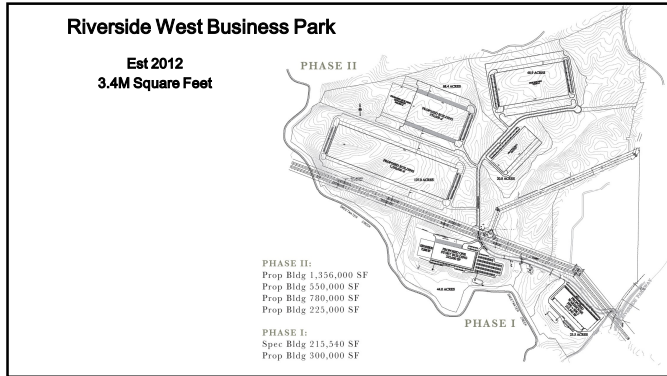
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	 Advanced Manufacturing	 Life Sciences & Healthcare	 Media & Entertainment	 Technology & Professional Services
NEW	<ul style="list-style-type: none"> Fabricated metals and machinery manufacturing Aviation & aerospace suppliers Automotive suppliers 	<ul style="list-style-type: none"> Pharmaceuticals Medical devices Healthcare services 	<ul style="list-style-type: none"> Film & television production Marketing, advertising, PR Arts & entertainment 	<ul style="list-style-type: none"> Computing processing and technology Finance & technology Logistics consulting Back-office support Headquarters
PREVIOUS	<ul style="list-style-type: none"> Food manufacturing Aerospace product and parts manufacturing Fabricated metal product manufacturing Machinery manufacturing 		<ul style="list-style-type: none"> Arts, entertainment, and recreation Retail trade Full-service restaurants Information (except data processing, hosting, and related services) 	<ul style="list-style-type: none"> Office admin services Business support services Other support services Data processing, hosting Finance and Insurance

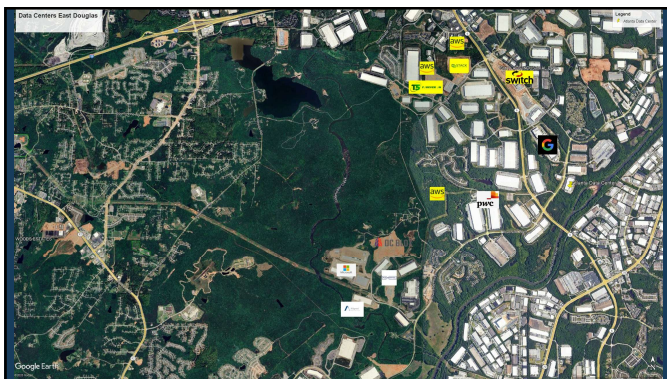
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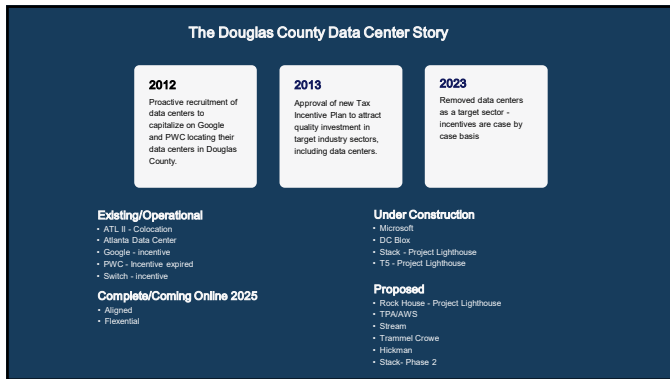
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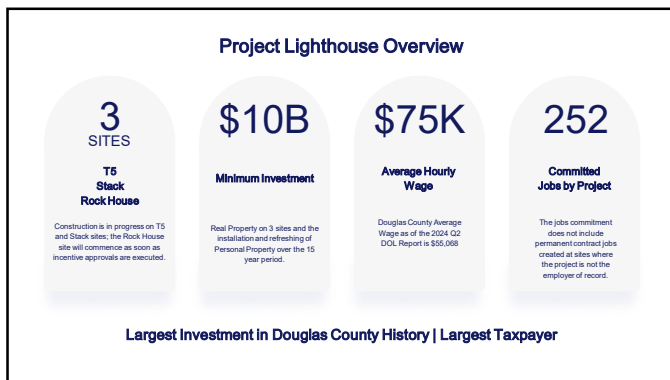
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[WFD Home - AWS Workforce Development](#)

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AWS Think Big Experience | Empowering Youth in Technology, Programming & Robotics - AWS Think Big Experience

* Estimated taxes due

What's Driving Data Center Growth?



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State of the Industry

- Atlanta Led the Country in Growth in 2024
- Georgia's robust infrastructure, favorable power pricing, great labor pool and existing data center incentives
- Primary markets had a record 6,350 MW under construction at the end of 2024, more than double the 3,077.8 MW at year-end 2023. This surge was driven by robust demand and extended construction timelines due to power constraints and supply chain delays.
- The overall vacancy rate in primary markets fell to a record-low 1.9% at year-end. Only a handful of facilities with 10 MW or more are slated for delivery in 2025 and are not yet leased, reflecting the scarcity of large-scale available inventory.
- Atlanta led all primary markets for net absorption in 2024 with 705.8 MW, well above perennial leader Northern Virginia's 451.7 MW. This was the first time any market surpassed Northern Virginia in annual net absorption.
- The average monthly asking rate for a 250-to-500-kilowatt (kW) requirement across primary markets increased by 12.6% year-over-year to \$184.06 per kW, reflecting continued demand amid tight supply.
- The rise of artificial intelligence (AI) workloads is transforming the data center industry, driving unprecedented demand for power-intensive infrastructure. AI-related occupiers are increasingly influencing site selection, design and operational requirements, prioritizing markets with scalable power capacity and advanced connectivity solutions.
- Markets like Charlotte, Northern Louisiana and Indiana are seeing significant investment due to tax incentives, available land and greater power accessibility. These markets are poised to grow as they attract hyperscale and colocation providers alike.

CBRE North American Data Center
Trends

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Data Center Growth Drivers

- AI workloads are increasing demand for data centers.
- Infrastructure and power pricing attract investments.
- New markets are emerging for hyperscale providers.

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Atlanta's Competitive Edge

- Atlanta leads the U.S. in data center growth.
- Robust infrastructure supports expansion.
- Vacancy rates at record lows indicate high demand.



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Incentives for Data Centers

- States offer tax breaks to attract data centers.
- Incentives vary significantly across regions.
- Tax exemptions are crucial for investment decisions.



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2024 Development Across Major Metros



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What about Incentives?



- Data center sales and use tax exemption is a table stake.
- Ohio, does not have personal property taxes in addition to the sales and use tax exemption. In some instances they are heavily abating RE taxes.
- Most comparably, Virginia provides incentives on Personal property and RE taxes
 - Most hyperscale's will not transact without a clear line of site on incentives.
- Across Metro Atlanta what is offered as an incentive varies.

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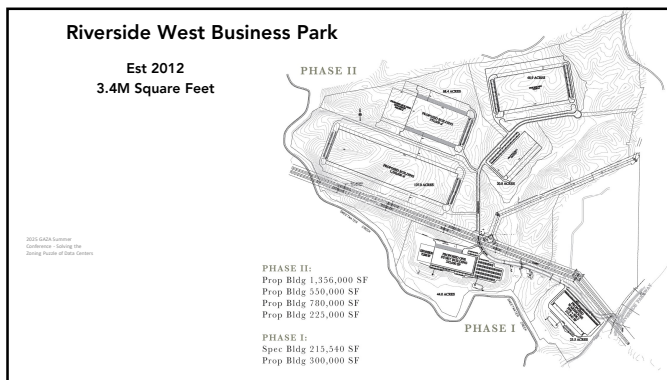
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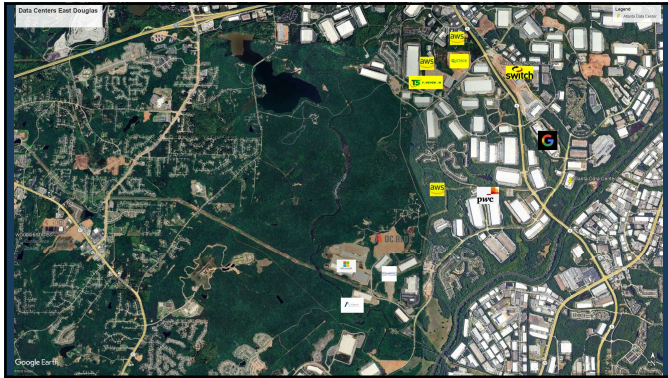
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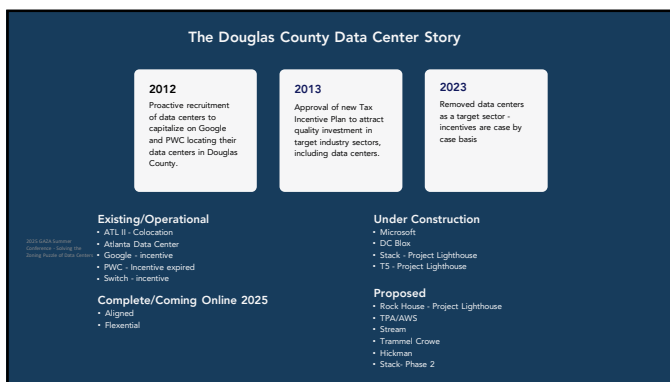
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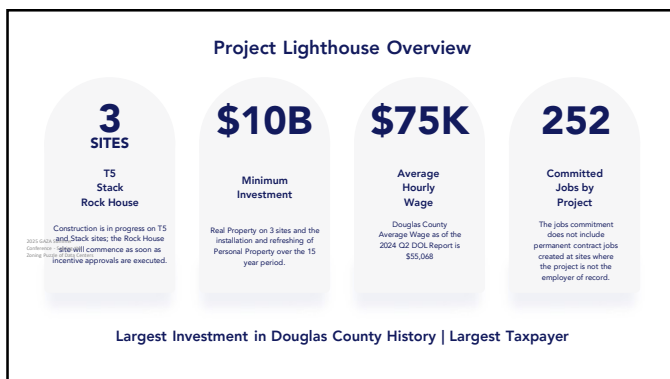
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Project Lighthouse Commitment to Community Engagement - WORKFORCE

AWS Information Infrastructure Pre-Apprenticeship (I2PA)

A paid 4-week training program with hands-on learning to help enter careers that build, connect, power, and operate the infrastructure that powers our information economy.

[Learn More](#)

AWS Information Infrastructure Workshop (I2W) for Educators

One day professional development workshop for education and workforce development leaders to learn about careers related to information infrastructure and connect directly with employers-AWS and our network of contractors.

[Learn More](#)

AWS Fiber Optic Fusion Splicing

Short form (4-hour and 2-day) workshops to learn about optical fiber technology, fiber optic fusion splicing, and connect directly with employers looking for splicing talent.

[Learn More](#)

Douglas County residents will receive priority admission for workforce development programs

[WFD Home - AWS Workforce Development](#)

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Project Lighthouse Commitment to Community Engagement - EDUCATION

Our programs tangibly demonstrate our commitment to positively impact the locations where AWS has a physical presence.

Think Big Space

Conference - Solving the Zoning Puzzle of Data Centers

AWS Think Big Space provides a place beyond the standard classroom for students to explore and cultivate an interest in STEM. These labs encourage a hands-on approach where students Think Big to solve real-world problems.

Think Big Circle

AWS Think Big Circle is more than just a learning community. It's a collaborative space, both in person and virtually, where educators and students come together to learn, connect, and work on STEM-focused activities.

Girls' Tech Series

AWS Girls' Tech Series is a learning experience which inspires and motivates girls and young women between the ages of 8-24 to pursue interests and careers in technology. It encourages future female innovators to Think Big and guide their imaginations through STEM, as well as participate in fun and engaging workshops and explore exciting career paths in technology.

Partnerships with Douglas County Schools and West Georgia Technical College are underway

[AWS Think Big Experience | Empowering Youth in Technology, Programming & Robotics - AWS Think Big Experience](#)

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Project Lighthouse Incentive Overview

Mutually Beneficial Incentive Package

- Generates revenue for City, County and Schools in Year 1
- Least aggressive than standard incentive formula

[illegible]

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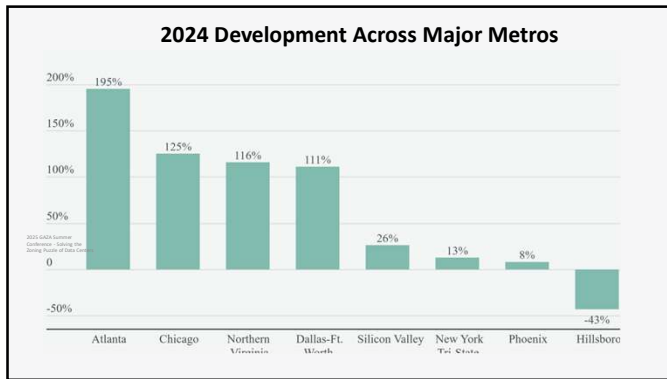
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Elevate Douglas I
ECONOMIC PARTNERSHIP

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