

NORTH CAROLINA SOUTHEAST CRESCENT REGIONAL COMMISSION

Economic and Infrastructure Development Plan 2026-2030



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**STATE OF NORTH CAROLINA
OFFICE OF THE GOVERNOR**

**JOSH STEIN
GOVERNOR**

December 19, 2025

Dr. Jennifer Clyburn-Reed
Federal Co-Chair
Southeast Crescent Regional Commission
1901 Assembly Street, Suite 370
Columbia, SC 29201

Dear Dr. Clyburn-Reed:

I am pleased to submit North Carolina's 2026-2030 Economic Development and Infrastructure Plan for the Southeast Crescent Regional Commission (SCRC). This document identifies our priorities for investing SCRC funds to enhance the community economic development potential of North Carolina's portion of the region. The information in this submission is consistent with the authorizing language in the Public Law 110-246, the Food, Conservation, and Energy Act of 2008.

We look forward to working with the Commission to build sustainable communities and strengthen economic growth for the people in our SCRC counties. Please contact Reginald Speight, my SCRC alternate, or Olivia Collier, my Program Manager, if there are any questions about this material.

Sincerely,

A handwritten signature in black ink that reads "Josh Stein".

Josh Stein
Governor

cc: Reginald Speight
Olivia Collier

Enclosures

Acknowledgements

This Southeast Crescent Regional Commission (SCRC) State Economic and Infrastructure Development Plan was prepared by North Carolina Department of Commerce's Rural Economic Development Division under the direction of Reginald Speight, Assistant Secretary for Rural Economic Development with support from the Department's Division of Labor and Economic Analysis. Cooperation and support was also provided by the 12 Local Development Districts that serve the Region. These individuals each contributed to the preparation of this report and their assistance is gratefully acknowledged:

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North Carolina Economic and Infrastructure Development Plan

The Southeast Crescent Regional Commission (SCRC) Program in North Carolina supports Governor Josh Stein’s commitment to building a stronger, more inclusive North Carolina— “NC Strong”—where every resident, regardless of their background or zip code, has access to economic opportunity. He believes that where you come from should never limit how far you can go. That’s the promise of North Carolina: ensuring every North Carolinian has a fair shot at prosperity—whether that means starting a small business, accessing job training, or finding a good-paying job in every corner of the state, including rural and small-town communities.



Governor Josh Stein

To help fulfill this vision, Governor Stein will leverage SCRC funding to:

- Create and retain quality jobs
- Strengthen the workforce through targeted training and education
- Invest in critical infrastructure that supports long-term economic growth

This document, in accordance with Section 15731 of the Food, Conservation, and Energy Act of 2008 (The Farm Bill), will serve as North Carolina’s Economic and Infrastructure Development Plan. This plan establishes a process that sets forth goals, objectives, priorities, and policies for North Carolina’s SCRC Program. This plan also identifies broad issues and needs that the Governor has chosen to address with SCRC resources and sets priorities for project development. The implementation of this plan will continue to meet the needs of this region by targeting resources to accomplish the defined goals and objectives of both SCRC and the Governor.

The North Carolina SCRC Program will support the guiding principles of the SCRC. The principles ensure that the investments in the state by the Commission provide the greatest impact. The program is committed to supporting activities and investments that:

- Address persistent economic distress in the Region
- Drive transformational outcomes by utilizing resources, assets, and private investment
- Support coordination across sectors to accelerate economic growth
- Remain flexible to ensure responsiveness to evolving regional economic needs and conditions
- Support community-level capacity to implement effective economic development strategies

- Emphasize outcomes and hold partners and grantees accountable for achieving measurable performance
- Promote infrastructure, workforce, and business development as central to economic competitiveness
- Support the development and use of local assets to drive job creation and private-sector investment

Southeast Crescent Regional Commission Overview

The SCRC was established by the US Congress in the Food, Conservation, and Energy Act of 2008 (The Farm Bill) to address economic and quality of life issues in the seven-state region. The Commission is a partnership between the federal government and seven state governments. The Commission’s mission is to strengthen economic growth across the region.

Federal-State Partnership

This federal-state partnership works to create opportunities for economic development and improved quality of life for the people of the Southeast Crescent Region. The region includes 428 counties stretching from Mississippi to Virginia and includes the entire state of Florida. The governors from the seven southern states and the Federal Co-Chair, appointed by the President, comprise the Commission. Governor Josh Stein is North Carolina’s member of the Commission; Reginald Speight, Assistant Secretary for the Rural Economic Development Division at the North Carolina Department of Commerce, serves as his Alternate. The North Carolina Department of Commerce is responsible for the administration of the North Carolina SCRC Program.

The North Carolina portion of the SCRC consists of 69 counties: Alamance, Anson, Beaufort, Bertie, Bladen, Brunswick, Cabarrus, Camden, Carteret, Caswell, Chatham, Chowan, Columbus, Craven, Cumberland, Currituck, Dare, Davidson, Duplin, Durham, Edgecombe, Franklin, Gaston, Gates, Granville, Greene, Guilford, Halifax, Harnett, Hertford, Hoke, Hyde, Iredell, Johnston, Jones, Lee, Lenoir, Lincoln, Martin, Mecklenburg, Montgomery, Moore, Nash, New Hanover, Northampton, Onslow, Orange, Pamlico, Pasquotank, Pender, Perquimans, Person, Pitt, Randolph, Richmond, Robeson, Rockingham, Rowan, Sampson, Scotland, Stanly, Tyrrell, Union, Vance, Wake, Warren, Washington, Wayne, and Wilson.

The 69 counties are served by 12 Local Development Districts (LDDs), which are either Economic Development Districts established under the U.S. Economic Development Administration or Regional Councils established under [G.S. 143-341](#) and [G.S. 160A-470-478](#). They serve as the lead regional organizations. The LDDs are:

- **Centralina Regional Councils (Region F):** Anson, Cabarrus, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union

- **Piedmont Triad Regional Council (Region G):** Alamance, Caswell, Davidson, Guilford, Montgomery, Randolph, and Rockingham
- **Central Pines Regional Council (Region J):** Chatham, Durham, Johnston, Lee, Moore, Orange and Wake
- **Kerr-Tar Council of Governments (Region K):** Franklin, Granville, Person, Vance and Warren
- **Upper Coastal Plain Council of Governments (Region L):** Edgecombe, Halifax, Nash, Northampton and Wilson
- **Mid-Carolina Council of Governments (Region M)*:** Cumberland, Harnett and Sampson
- **Lumber River Council of Governments (Region N)*:**Bladen, Hoke, Richmond, Robeson and Scotland
- **Cape Fear Council of Governments (Region O)*:** Brunswick, Columbus, New Hanover and Pender
- **Eastern Carolina Council (Region P):** Carteret, Craven, Duplin, Greene, Jones, Lenoir, Onslow, Pamlico and Wayne
- **Mid-East Commission (Region Q):** Beaufort, Bertie, Hertford, Martin and Pitt
- **Albemarle Commission (Region R):** Camden, Chowan, Currituck, Dare, Gates, Hyde, Pasquotank, Perquimans, Tyrrell and Washington
- **Southeastern Economic Development Commission*:** Bladen, Brunswick, Columbus, Cumberland, Harnett, Hoke, New Hanover, Pender, Richmond, Robeson, Sampson, and Scotland

*The Southeastern Economic Development Commission is an Economic Development District as designated by the U.S. Economic Development Administration. It serves the same counties as the Cape Fear Council of Governments, Lumber River Council of Governments, and the Mid-Carolina Council of Governments.

The North Carolina SCRC Program works closely with the LDDs to develop projects that are consistent with the SCRC Authorizing Legislation and guidelines. Each LDD is governed by a Board of Directors comprised of local government representatives. The LDDs are an active and critical part of the SCRC partnership. The North Carolina SCRC Program Manager meets with the LDDs regularly to discuss regional issues and to gauge the need for SCRC resources.

SCRC Economic Status

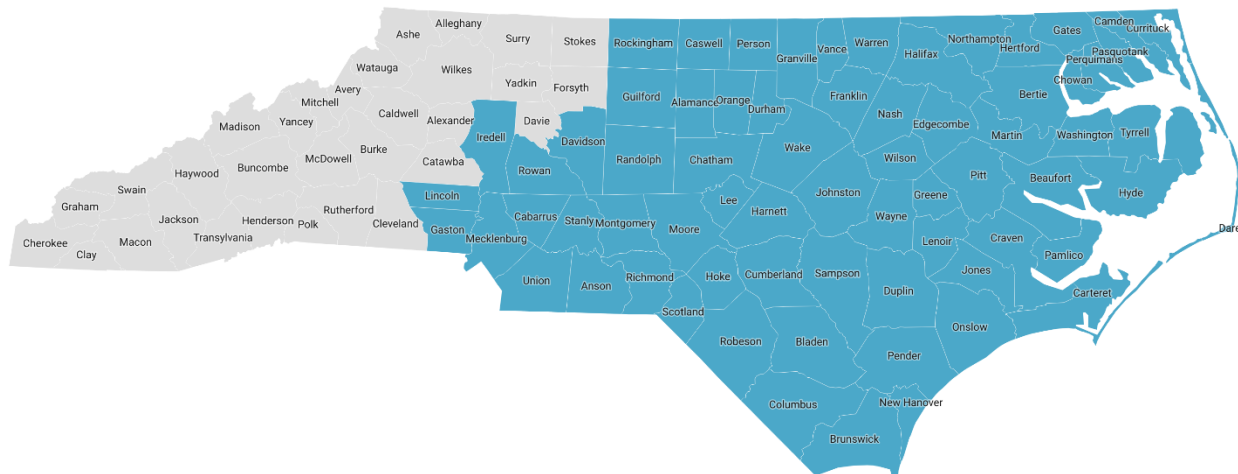
The SCRC uses an index-based county economic classification system to identify and monitor the economic status of Southeast Crescent counties. The system compares each county's averages for three economic indicators—three-year average unemployment rate, per capita market income, and poverty rate—with national averages. The resulting values are summed and averaged to create a composite index value for each county. Each county in the nation is then ranked, based on its composite index value. Based on ranking in this index, counties are designated as distressed, transitional, or attainment.

- **Distressed** - Distressed counties are the most economically depressed counties. They rank in the bottom 25% of the nation's counties.
- **Transitional** - Transitional counties are those transitioning between strong and weak economies. They make up the largest economic status designation. Transitional counties rank between the worst 25% and the best 25% of the nation's counties.
- **Attainment** - Attainment counties are the economically strongest counties. Counties ranking in the best 25% of the nation's counties are classified attainment.

The Commission also recognizes isolated areas of distress. These areas have higher rates of poverty, unemployment, or outmigration.

North Carolina Southeast Crescent Regional Profile¹

The Southeast Crescent Region in North Carolina consists of 69 counties in the Piedmont and Coastal Plain areas of the state. To the west, the region is bordered by the remaining 31 of the state's 100 counties (comprising the Appalachian Region of the state), and the region is bordered by Virginia to the north, South Carolina to the south, and the Atlantic Ocean to the east. The region includes the state's major metropolitan areas of Charlotte and Raleigh, as well as several mid-sized cities in the Piedmont Triad and Wilmington on the coast. These relatively populous and prosperous metros are surrounded by smaller metros, micropolitan towns, and rural areas.



Map: North Carolina Southeast Crescent Region • Created with Datawrapper

Demographics and Population

In 2023, more than 8.7 million people or 80.9% of the total North Carolina population resided in the 69 counties of the Southeast Crescent Region. As of 2020, 70% of the region's population

¹ North Carolina Southeast Crescent Regional Profile compiled by the NC Department of Commerce, Labor & Economic Analysis Division.

lives in urban areas while large geographic portions of the region are rural areas with lower populations. The Region’s population increased by 11% from 2010 to 2020, a faster growth rate than the state as a whole (9.5%). From 2020 to 2023 the region’s population grew by 4.3% compared to the state’s 3.9% growth. However, the growth of the region was not uniform as 33 counties had fewer people in 2023 than in 2010.

The Region is projected to add over 1.1 million people by 2030, an increase of 13.9% from 2020 levels. This projected growth is also faster than the state’s (12.5%). Despite this overall projected growth, 18 counties in the region are projected to lose population by 2030. Much of the Region’s growth has been the result of migration from other parts of the country to the state (vs. natural increase), a trend that is projected to continue. Migration is projected to account for 88% of regional growth from 2020 to 2030.

NC Southeast Crescent Region and North Carolina Population, 2010-2020

Southeast Crescent Region		North Carolina	
2010 Population	7,584,139	2010 Population	9,535,483
2020 Population	8,415,015	2020 Population	10,439,539
% Change in Population (2010-2020)	11.0%	% Change in Population (2010-2020)	9.5%

Source: NC Office of State Budget and Management

In 2020, the Region’s population was 51.5% female and had a median age of 37, similar to the state. Approximately 15.5% of the Region’s residents were age 65 or older, a percentage that is projected to grow to 18.9% by 2030. In 2020, 56.8% of the region’s total population reported themselves as White (not Hispanic), followed by 22.8% Black (not Hispanic) and 11.2% Hispanic. The population reporting “Some Other Race” had the fastest growth from 2010 to 2020 (160.7%), followed by the Asian population, which grew by 68.3%, and the Hispanic population at 40.6%.

Southeast Crescent Region Population by Race, 2020

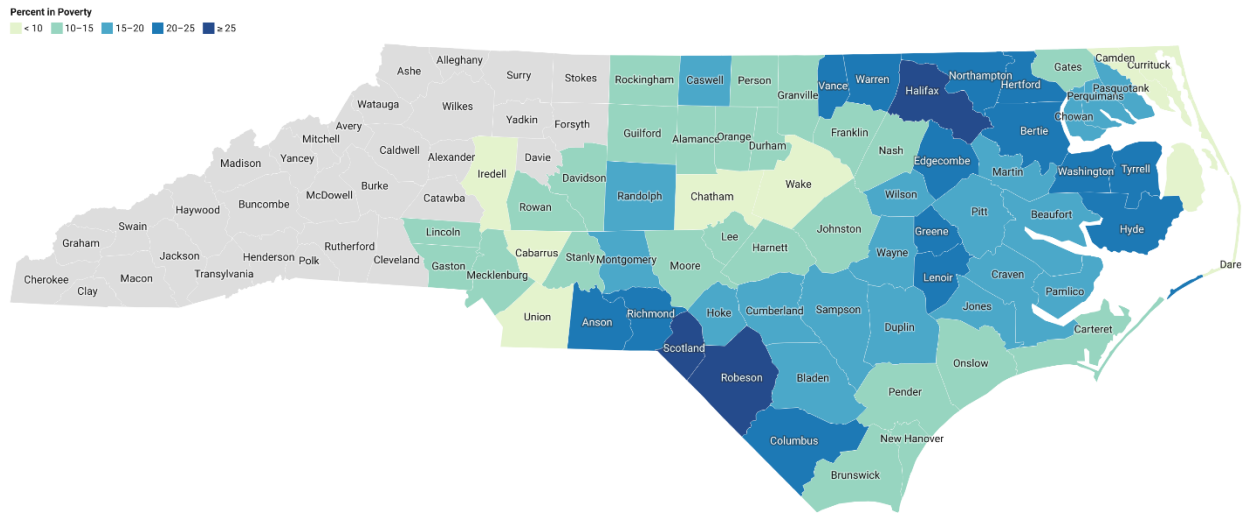
Race Reported	Number of Persons	Percentage of Region Population	Percentage Change 2010-2020
White	4,783,499	56.8%	2.7%
Black or African-American	1,918,706	22.8%	4.8%
Hispanic	938,614	11.2%	40.6%
Asian & Pacific Islander	315,241	3.7%	68.3%
American Indian	87,301	1.0%	-8.9%
Some Other Race	371,086	4.4%	160.7%

Source: NC Office of State Budget and Management

Income and Poverty

Poverty rates vary widely across the region. In 2023, 46 counties in the Region had poverty rates above the state average of 12.8%, while 23 counties in the Region are below the state rate. Wake County had the lowest rate of 7.2% while Scotland County had the highest rate of 28.6%. Of particular concern, 17 counties in the Region had poverty rates of 20% or higher.

Southeast Crescent Poverty Rates (2023)



Median Household Income

Median household income is defined as the income of the household in the middle of the income distribution for all households—meaning half of households earn more and half earn less. In 2023, the state median household income was \$70,838. Forty-nine counties in the Region had a lower median household income than the state, while 20 counties had a higher median household income. Wake County had the highest median household income (\$103,084), followed by Union County (\$98,776) and Chatham County (\$95,716). At the other end of the spectrum, Robeson County had the lowest household income (\$42,180), followed by Northampton County (\$44,182) and Bertie County (\$44,371).

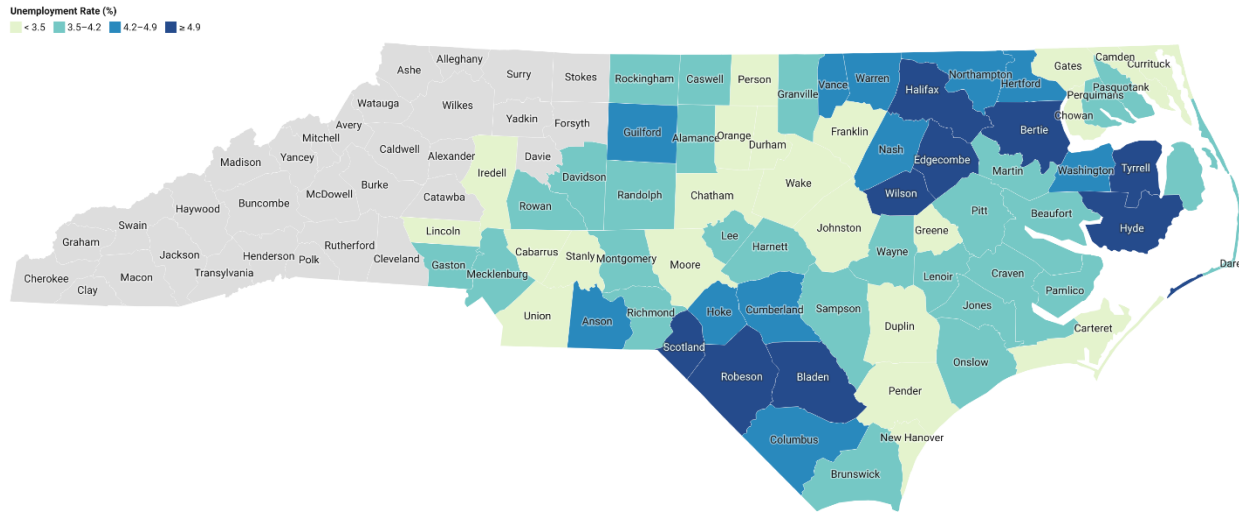
Unemployment, Industry Jobs and Wages

Unemployment rates in the Region and the State have declined since the pandemic recession in the spring of 2020 and were lower in 2024 than in 2019.

In 2024, 39 counties in the Region had unemployment rates above the state average of 3.6%. Hyde County (5.6%), Edgecombe County (5.2%), Halifax County (5.2%) and Scotland County (5.2%) had the highest unemployment rates, while Currituck County (2.8%), Camden County

(2.8%) and Wake County (3.1%) had the lowest unemployment rates. All counties in the Region had lower unemployment rates in 2024 compared to 2019 with the exception of Guilford County, which was 0.1 percentage points higher.

Southeast Crescent Unemployment Rates (2024)



Source: NC Department of Commerce, 2024 Local Area Unemployment Statistics (LAUS) - Created with Datawrapper

Total industry employment in the Region grew by 8.0% from 2019 to 2024, a lower rate than the state at 8.9%. Private Industry, which made up 85% of total jobs in the Region, grew by 9.3% while Government jobs grew by 1.1%. Industries that added the most jobs from 2019 to 2024 were Health Care and Social Assistance (52,814), Professional, Scientific and Technical Services (50,553), and Transportation and Warehousing (37,797). The only sectors with fewer jobs were Manufacturing (-6,557), Agriculture (-1,849), and Management of Companies (-1,209).

The Region has a similar percentage of employment by industry compared to the state as whole. In 2024, the largest industry sectors were Health Care and Social Assistance (14.2% of regional jobs), Retail Trade (11.0%), Accommodation and Food Services (9.6%), Manufacturing (9.1%), and Educational Services (7.9%).

Average Employment

Industry	SCRC Region				North Carolina			
	2019	2024	Growth		2019	2024	Growth	
Total Federal	63,472	66,891	3,419	5.4%	74,248	82,195	7,947	10.7
Total State	154,05	153,10	-944	-0.6%	182,345	180,04	-2,302	-1.3%
Total Local	364,71	368,42	3,714	1.0%	448,536	454,34	5,813	1.3%
Total Private	2,975,4	3,252,9	277,5	9.3%	3,792,33	4,183,0	390,73	10.3
Total	3,557,6	3,841,4	283,7	8.0%	4,497,45	4,899,6	402,18	8.9%

Average Employment by 2-Digit NAICS

Industry	SCRC Region				North Carolina			
	2019	2024	Growth		2019	2024	Growth	
Health Care & Retail Trade	494,347	547,161	52,814	10.7%	632,771	696,546	63,775	10.1%
Manufacturing	405,761	421,559	15,798	3.9%	508,186	531,994	23,808	4.7%
Accommodation / Food Services	354,465	347,908	-6,557	-1.8%	477,043	465,639	-	-2.4%
Educational Services	352,808	368,302	15,494	4.4%	440,854	458,573	17,719	4.0%
Administrative & Waste	279,620	302,278	22,658	8.1%	386,195	391,172	4,977	1.3%
Professional / Technical	233,498	242,392	8,894	3.8%	302,829	325,812	22,983	7.6%
Public	214,161	264,714	50,553	23.6%	267,185	335,885	68,700	25.7%
Construction	201,460	214,567	13,107	6.5%	248,032	266,141	18,109	7.3%
Finance & Insurance	184,649	220,218	35,569	19.3%	231,802	272,049	40,247	17.4%
Wholesale	147,592	168,245	20,653	14.0%	184,912	232,295	47,383	25.6%
Transportation & Warehousing	140,401	149,753	9,352	6.7%	187,322	207,630	20,308	10.8%
Other Services	134,651	172,448	37,797	28.1%	165,432	207,078	41,646	25.2%
Information	92,196	103,573	11,377	12.3%	116,507	132,097	15,590	13.4%
Management of Companies	64,173	65,579	1,406	2.2%	76,886	86,834	9,948	12.9%
Arts, Entertainment, Recreation	61,847	60,638	-1,209	-2.0%	84,873	83,906	-967	-1.1%
Real Estate & Rental and	60,018	66,202	6,184	10.3%	79,689	87,770	8,081	10.1%
Agriculture	51,507	60,351	8,844	17.2%	61,601	72,212	10,611	17.2%
Utilities	15,355	13,506	-1,849	-	26,653	24,770	-1,883	-7.1%
Mining	10,657	11,335	678	6.4%	15,571	17,113	1,542	9.9%
Unclassified	1,217	1,673	456	37.5%	3,117	3,689	572	18.4%
Total *	-	141	141	-	-	444	444	-
Total *	3,500,3	3,802,54	302,16	8.6%	4,497,4	4,899,64	402,18	8.9%

Source: NC Department of Commerce; Quarterly Census Employment and Wages (QCEW) * 2-digit level data may be impacted by data suppression

In 2024, North Carolina's average annual wage for all industries was \$68,742. Only four counties in the Region had higher average annual wages: Durham County (\$98,837), Mecklenburg County (\$88,085), Orange County (\$79,234) and Wake County (\$76,807). At the other end of the

spectrum, counties with the lowest average annual wages in the Region include Pamlico County (\$37,039), Martin County (\$38,562), Warren County (\$42,072) and Hyde County (\$42,473).

Education

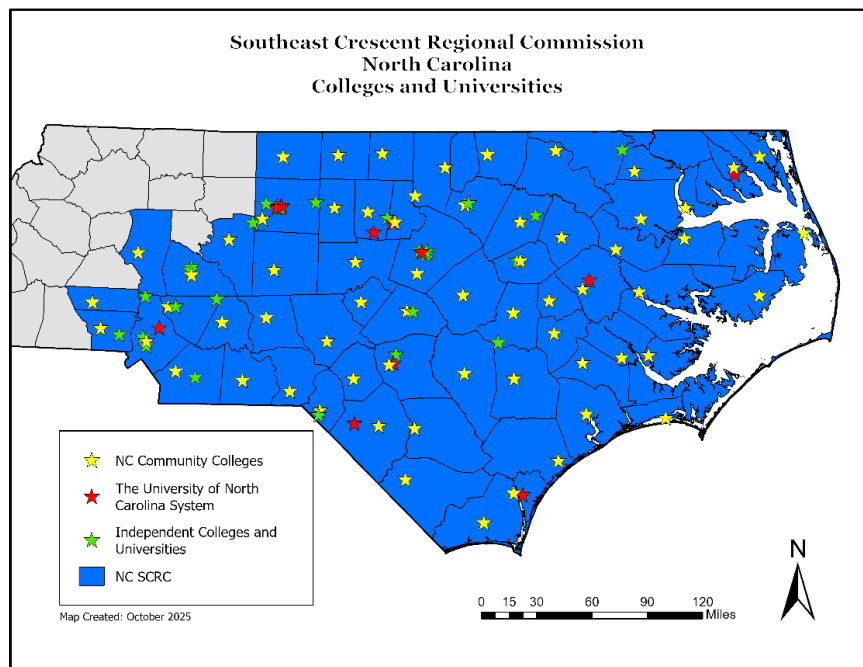
As shown below, the SCRC Region was very similar to the state in highest educational attainment in 2023, although the Region had slightly higher levels of those with a bachelor’s degree and a graduate or professional degree.

SCRC Highest Educational Attainment by Population 25 Years and Older, 2023

Categories	SCRC Region	North Carolina
High School Graduate	24.1%	25.0%
Some College, No Degree	19.9%	20.0%
Associate Degree	10.0%	10.1%
Bachelor's Degree	22.6%	21.8%
Graduate or Professional Degree	13.4%	12.9%

Source: U.S. Census Bureau, American Community Survey 5-year estimates

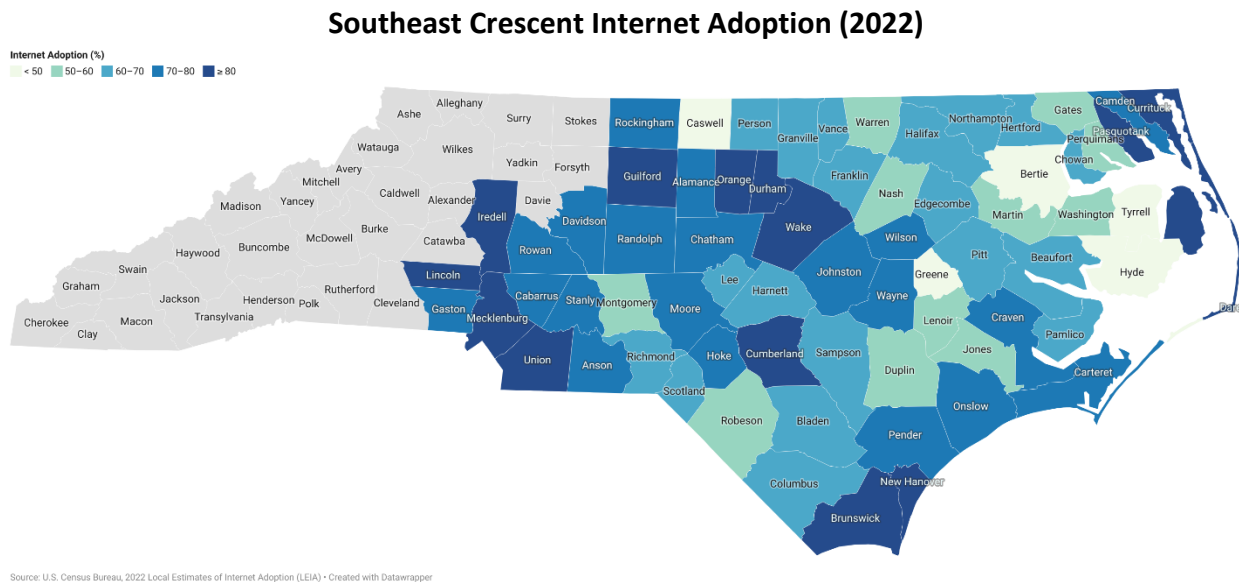
The Region is served by eleven public universities in the University of North Carolina System, as well as 58 Community Colleges and numerous private liberal arts colleges. The North Carolina Community College System (NCCCS) is the nation’s third-largest community college system, pioneering the nation’s most advanced vocational and technical programs. More than 615,000 students were enrolled in one or



more courses at one of NCCCS’s 58 campuses during the 2023-2024 school year. According to the NC Community Colleges System, every North Carolina resident lives within a 30-minute drive of a community college, making high quality education accessible to the Region’s workforce.

Broadband

The U.S. Census Bureau and the National Telecommunications and Information Administration (NTIA) recently released the 2022 Local Estimates of Internet Adoption (LEIA), an experimental data product that measures Internet adoption at the county level. According to these estimates, 30 counties in the Region were below the state’s adoption rate of 68%. The lowest adoption rates were in Hyde County (34%), Bertie County (42%) and Greene County (45%). The counties with the highest adoption rates were Mecklenburg County (87%), Wake County (86%) and Orange County (84%).



Electricity and Gas

Electric utilities for the Region are served by Duke Energy Carolinas, Duke Energy Progress and Dominion Energy North Carolina and several electric membership corporations, commonly known as EMCs or Co-ops. Municipal electric providers also serve several communities in part of the region. According to the US Energy Information Administration, North Carolina’s electricity costs were about 16.3% below the national average in 2023. Natural gas service is furnished by three companies: Piedmont Natural Gas, Enbridge Gas (formerly Dominion) and Frontier Natural Gas.

Water and Sewer

While the Region has an extensive water and wastewater system, there are persistent challenges throughout the state. North Carolina’s 2017 Statewide Water and Wastewater Infrastructure Master Plan describes the state’s challenges as “a combination of poor water infrastructure condition, the need for modernization and the lack of sufficient revenues that threaten the viability of some water utilities.” One issue is the state’s large number of small, independent systems, many of which have unique challenges such as small customer bases and

limited revenue. According to the Master Plan, of the 2,000 community water systems operating in the state, one-third of these systems have customer bases of 100 people or less. The smallest 1,800 of these systems serve about 10% of the state’s population. In contrast, the ten largest water systems serve 30% of the state’s population. In addition, the two main previous funding sources for the construction of these systems—federal grant funds or revenue from large manufacturers—have both declined over time. While new users can help pay for infrastructure in growing communities, paying for aging infrastructure is more difficult in areas with low population growth and a smaller industrial base. Annual reports from the State Water Infrastructure Authority are available at <https://www.deq.nc.gov/about/divisions/water-infrastructure/state-water-infrastructure-authority/authority-reports>.

Tourism

According to Tourism Economics, visitors to the Region spent an estimated \$26.5 billion in 2023, roughly 75% of the state total. This spending was an 8.9% increase over 2022 levels—a greater increase than the state as a whole (6.9%). More than 170,000 jobs and \$7.1 billion in payroll were directly attributable to travel and tourism in 2023. State and local tax revenues from travel to the Region amounted to \$1.9 billion.²

The Region is home to a wide variety of tourist destinations, from the largest cities in the Piedmont including Charlotte, Raleigh, Greensboro and Durham, to coastal towns like New Bern and Wilmington, and 300 miles of beaches along the coast. Coastal attractions include Cape Lookout National Seashore, Cape Hatteras National Seashore and the islands of the Outer Banks, among many others. In addition, the Region contains numerous state parks and trails, in addition to the North Carolina Zoo, state historical sites, golf courses, NASCAR and other sports-related attractions, and a variety of museums and other cultural attractions.

² The Economic Impact of Travel on North Carolina Counties. This study was prepared for Visit North Carolina by Tourism Economics. <https://www.visitnc.com/industry/research/economic-impact-studies>

Economic Challenges

The Southeast Crescent region of North Carolina faces many economic challenges. The SCRC program will work with our partners and grantees to develop solutions to these challenges which include:

Educating and Sustaining a Skilled, Healthy Workforce

The lack of a skilled workforce to meet the needs of a global economy is a challenge in addressing the region's economic needs. Those challenges include insufficient access to affordable healthcare, housing, childcare, and transportation. These obstacles hinder residents from accessing job opportunities as well as participating in training and educational programs. The region, as well as the State, faces difficulty matching the current workforce with the available jobs. The region also struggles to guarantee that educational (including k-12 schools) programs and workforce training reach the populations who need enhanced skills to gain employment and address skill gaps in the region. Attracting and retaining younger individuals in the local workforce is an additional challenge.

Building and Managing Infrastructure

Outdated infrastructure continues to be problematic and impedes the region's ability to retain and grow businesses. Infrastructure requires continual investments, and many communities have financial difficulty maintaining and improving systems to meet state requirements and economic development goals.

Water and Sewer

According to the [Statewide Water and Wastewater Infrastructure Master Plan](#), aging water and sewer infrastructure, maintenance costs, and the need for expansion of services are challenges to continued economic development. This often creates a financial burden on local governments. This is particularly true for jurisdictions with small, often declining, populations.

Broadband

Many areas of the region lack access to broadband internet. According to the North Carolina Department of Infrastructure Technology, even when broadband is available there is a significant digital divide regionwide. Increased access to broadband and improved digital literacy are needed for residents of the region. This will allow them to fully engage in the economic opportunities, education and lifelong learning, civic and cultural participation, and access to essential services that are made possible by the internet.

Natural Disasters



Flooding causes damages to public roads in Moore County. Photo Credit: NCDOT

North Carolina's extensive coastline makes the region prone to frequent natural disasters. The Region has experienced intense weather events that have caused damage to roads, businesses, and homes. The area has experienced long term drought conditions that caused water restrictions. These weather events have increased heat which affects those who work outdoors and affects crop production. These natural disasters have devastating impacts on peoples' lives, local economies, and community vitality. Strategies to make communities less

susceptible to natural disaster damage and more resilient in the wake of these disasters are needed.

Building Local Leadership Capacity

Rural communities face significant systemic and economic challenges that limit their ability to compete for economic development projects. The challenges communities face are magnified as shrinking resources, talent drain, and changes in public policy have fueled an ever widening "rural and urban divide". Staff at local governments and non-profit organizations are stretched thin with a limited number of personnel who are often responsible for multiple duties. This places a strain on employees and often does not allow time for staff to engage in additional tasks that are needed for economic development.

Access to Affordable Housing

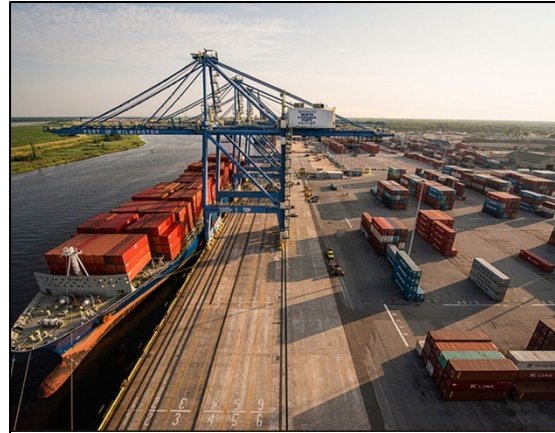
According to the State's [Consolidated Plan 2021-2025](#), the affordability and availability of quality housing remains a need in North Carolina. The State conducted a Housing Needs Assessment that underscored the need for affordable housing. The Assessment showed that the cost of housing is continuing to rise and is not affordable for many. In addition to housing, communities are struggling to provide public services such as short-term housing, emergency payments for rent, mortgage, and utilities, and food distribution; and preserving and creating public facilities such as community centers, parks, transitional housing, supportive housing, and emergency

shelters. There is a growing understanding that access to quality, affordable housing is critical to attracting and retaining adequate workforce.

Economic Opportunities

Establishment of Economic Development Products

For communities across the Southeast Crescent Region to be successful in attracting new businesses and supporting expansion of current businesses, they must have sites available for those businesses. Several organizations, including the NC Department of Commerce, Economic Development Partnership of North Carolina, and the Golden Leaf Foundation work with communities to support the preparation of sites, extend public infrastructure, site grading, and clearing.



Port of Wilmington in New Hanover County, NC. Photo Credit: Economic Development Partnership of NC.

Enhancement of Digital Infrastructure

The North Carolina Department of Information Technology’s Broadband Infrastructure Office is leading statewide efforts to expand high-speed internet access across the 69 counties served by the SCRC. Through programs such as the [Growing Rural Economies with Access to Technology](#) (GREAT) and [Completing Access to Broadband](#) (CAB) initiatives, the state is investing hundreds of millions of dollars to extend reliable, high-speed service to unserved and underserved communities. These programs combine state, federal, and local resources—often in partnership with internet service providers—to deliver broadband with speeds of at least 100 Mbps download and 20 Mbps upload, scalable to symmetrical 100/100 Mbps.

Together, the GREAT and CAB programs are helping to close the digital divide in rural and economically distressed areas. These investments improve access to education, healthcare, and economic opportunity. Counties across the SCRC region have received multiple rounds of funding and technical assistance to plan, prioritize, and implement broadband projects. While challenges remain to reach the most remote areas, NCDIT’s coordinated approach is ensuring that more North Carolinians—regardless of where they live—can connect to the infrastructure needed to participate fully in today’s digital economy.

Growing Workforce Development Opportunities

North Carolina is advancing several workforce development efforts that directly strengthen economic opportunity in the SCRC region. Efforts are focused on aligning education, training, and employer needs in rural communities to build pipelines of skilled workers.



Photo Credit: North Carolina Community Colleges.

Through the [North Carolina Community College System's Rural Advanced Manufacturing Partnerships Toolkit](#), the state is helping colleges collaborate with local employers to expand training programs in advanced manufacturing and related technical fields in rural communities. This effort equips students with in-demand skills while supporting the growth of industries critical to regional economies.

Complementing this work, the NC Department of Commerce's NCWorks Division administers grants that expand work-based learning, apprenticeship, and small business training programs. These programs help jobseekers overcome barriers to employment and connect directly with employers seeking skilled talent. In addition, the [NC Work Ready Communities Initiative](#) enables counties to demonstrate workforce preparedness through data-driven certification, signaling to prospective employers that their communities have the skilled labor force necessary for business investment and growth.

Transportation

A safe, reliable and strategic multi-modal transportation network is critical to economic development and quality of life. [NC Moves 2050](#), the statewide strategic transportation plan, focuses on the future of transportation in North Carolina. A key objective of the plan is to support a strong economy. Strategies to achieve these goals include connections to statewide opportunities, improved access to regional jobs and services, and links to industry clusters.

NCDOT's [Strategic Transportation Corridors](#) form a well-connected network of multi-modal transportation routes serving nearly all areas of the state's Southeast Crescent region. These



The U.S. 70 bypass in Johnston County (shown here) has been approved to become Interstate 42. Photo Credit: NCDOT

routes can move high volumes of people, goods, and services over longer distances and provide high-quality access to principal economic activity centers within and outside of North Carolina.

Agricultural Economy

According to the North Carolina Department of Agriculture and Consumer Services, agriculture is the largest industry in North Carolina. In 2022, agriculture contributed over \$111.1 billion to the state's economy and employs more than 770,000 individuals.³ The state is the largest producer of sweet potatoes, poultry and eggs, and tobacco in the nation, and ranks highly among the top producers



Vast cotton fields cover Chowan County, NC.

of many other agricultural commodities including hogs and pigs, turkeys, cucumbers, and peanuts.⁴ Forestry is a major component of the agricultural economy, and the state has a robust forestry industry, especially within the NC SCRC Region. According to the NCSU Forestry Extension, the forestry industry had total contributions of over 143,000 individuals employed and an industry output of \$40.5 billion for the state in 2023.⁵ In addition to commodity agriculture, there are growing opportunities for small-scale agricultural producers and value-added products. The state has university extension offices in every county which provide researched based information, training, and resources for production and marketing of local foods and value-added production. A network of local food advocate organizations operate throughout the state to promote economic opportunity, healthy communities, and vibrant farms and fisheries through enhancing the local food system.

Supporting Asset-Based Economic Development

Asset-based economic development is a community centered approach to economic development that seeks to leverage existing local strengths and resources to encourage economic opportunity. This method of economic development relies heavily on community

³ Agriculture and Agribusiness: North Carolina's Number One Industry. NC State University.

<https://cals.ncsu.edu/agricultural-and-resource-economics/wp-content/uploads/sites/46/2017/07/AgricultureAgribusinessReport-2023-digital.pdf>

⁴ 2024 North Carolina Agricultural Statistics. NC Department of Agricultural & Consumer Services.

https://www.nass.usda.gov/Statistics_by_State/North_Carolina/Publications/Annual_Statistical_Bulletin/AgStat/NCHighlights.pdf

⁵ Economic Contribution Data. NCSU Extension Forestry. <https://forestry.ces.ncsu.edu/economic-impact-data/>

input, identification of assets and opportunities, and strong collaboration among stakeholders. The NC Main Street & Rural Planning Center employs this process while working across the NC SCRC footprint to help communities prepare for and respond to economic growth opportunities in ways that improve quality of life and prosperity, build community capacity, enhance placemaking, and maintain rural character. NC’s SCRC Program works closely with the NC Main Street & Rural Planning Center, and other partners, to strengthen relationships within the region, identify local needs and opportunities, and build local capacity.

Tourism

From quaint coastal communities to bustling metro cities and everywhere in between, North Carolina’s Southeast Crescent region offers numerous tourism destinations that have significant economic impact in the region. According to VisitNC, visitor spending increased by 3.1% statewide in 2024.⁶ There are additional opportunities to improve attractions, hospitality services, and venues to draw visitors into the region. Local culture, arts, food and beverage, history and heritage, outdoor recreation and much more contribute to a tourism sector that draws individuals from around the state and the country to visit North Carolina. Additionally, strategic planning to leverage the outdoor recreation economy in the region offers opportunities in related industries including manufacturing, small business, hospitality, and more.

The NC Outdoor Economy Office

The North Carolina Outdoor Economy Office housed within the NC Department of Commerce assist communities leverage their natural assets to drive economic growth and job creation. For the 69 counties served by the SCRC, the Office serves as a central hub connecting state agencies, local governments, nonprofits, and private sector partners to grow the outdoor economy. Its work supports small business development, tourism, and workforce opportunities while promoting conservation and access to outdoor spaces.

By identifying recreation and tourism opportunities, assisting with planning, and helping local



A marina in Pamlico County, NC.

⁶ The Economic Impact of Travel on North Carolina Counties. This study was prepared for Visit North Carolina by Tourism Economics. <https://www.visitnc.com/industry/research/economic-impact-studies>

leaders access state and federal funding, the Office strengthens rural communities. This focus is particularly important for SCRC counties, where outdoor recreation offers a pathway to economic diversification.

Asset-Based Economic Development in Action

A great example of asset-based economic development is the Roanoke River State Trail, and the Roanoke River Partners. The Roanoke River Partners (RRP) is a multi-county organization with the mission “to support on-going efforts to develop and promote responsible nature and heritage tourism throughout our beautiful six-county region which borders the Roanoke River from our Virginia border to the Albemarle Sound”.⁷ RRP seek to leverage the region’s natural beauty and cultural heritage to promote tourism with a particular emphasis on the Roanoke River State Trail (RRST). This state trail, the first fully designated by the NC Department of Natural and Cultural Resources, is a 215-mile scenic wilderness

paddle trail. The trail maintains 15 access points and more than 20 camping platforms along the route. To date, thousands of individuals have experienced the RRST and associated amenities, and those numbers continue to increase as the paddle trail is more well-established. The Partnership also honors and promotes cultural history through the Roanoke River Underground Railroad Trail which features self-guided tours and other information that helps individuals



Roanoke River State Trail sign and recreational infrastructure.

understand the history of the Underground Railroad within the Roanoke River valley. The RRP and RRST is a great example of partnership and regional economic development. The six counties and 15 towns that make up the RRP continue to work together to leverage this resource to benefit their communities.

United States Economic Development Administration Tourism Grant

In addition to the NC Outdoor Economy Office, the State is leveraging this region’s unique assets in several ways that are providing unique economic development opportunities for numerous communities. These opportunities include:

North Carolina was awarded \$6.4 million to establish a new tourism-focused economic recovery initiative. The new program, Supporting and Strengthening Resiliency in North Carolina’s Travel,

⁷ Roanoke River Partners. <https://roanokeriverpartners.org/>

Tourism, and Outdoor Recreation Sectors Initiative. This initiative will develop and implement economic-building strategies for the recovery of North Carolina’s travel and tourism industries that suffered economic losses due to the pandemic. As part of this initiative, the following programs will be implemented:

Creating Outdoor Recreation Economies (CORE)

The NC Department of Commerce’s Main Street & Rural Planning Center will lead a technical assistance program that offers Outdoor Recreation Economy Strategic Planning and Asset Development services. The outdoor recreation industry is a significant economic driver within North Carolina contributing over \$16.1 billion in value added economic input to the state’s GDP and employing over 145,000 individuals. CORE will offer planning and asset development to leverage the abundant outdoor recreation assets available across the state of North Carolina to bolster local economic vitality. Strategic planning will focus on how communities can leverage outdoor recreation activities to positively impact local economies by: increasing tourism; encouraging small business development; enhancing quality of life for residents; planning for outdoor recreation asset and infrastructure development; and positioning communities to grow and attract outdoor gear manufacturing industries. The individual planning or asset development process will be tailored to meet the needs and objectives of each specific community.

Main to Main Trail

The NC Main to Main Trail is a community economic development initiative, led by the North Carolina Main Street Program, that leverages North Carolina’s regional natural assets for economic prosperity and COVID-19 recovery in North Carolina Main Street communities. Program goals include developing regional connections among neighboring Main Street programs, attracting new and diverse visitors, and enhancing the experiences that both visitors and locals have within each community. Program staff will work with Main Street towns to market and promote the communities’ and regions’ best assets and attractions, destination creation for small businesses, and regional itinerary development.



UPLIFT

This program, led by Appalachian State University, will work with rural and under-resourced communities to strengthen and connect tourism sites, services, and businesses in targeted regions across the state. Program partners will work with tourism practitioners and local leaders to improve local economies with opportunities to leverage natural, recreational, cultural, agricultural, culinary, and other physical assets. UPLIFT will bring together several multi-county cohorts to collaborate regionally. The UPLIFT regions include the following counties, many of which are designated as distressed by the SCRC:

- Caswell, Granville, Person, Vance
- Montgomery, Richmond, Stanly
- Bladen, Columbus, Robeson, Sampson
- Bertie, Edgecombe, Hertford, Martin, Washington

Southeast Crescent Regional Commission Strategic Goals and Objectives

Goal 1: Invest in Critical Infrastructure

- Objective 1.1 – Expand the region’s basic water and sewer infrastructure to be more resilient.
- Objective 1.2 – Expand and improve access to affordable and reliable digital infrastructure (e.g., broadband, cellular).
- Objective 1.3 – Support expanded regional transportation infrastructure systems and transit services.

Examples of potential projects include downtown Wi-Fi, broadband fiber deployment, industrial access roads, water and sewer projects that result in job creation and/or retention, industrial site development, infrastructure planning and transportation planning.

Goal 2: Improve Health and Support Services Access and Outcomes

- Objective 2.1 – Support initiatives that expand access to affordable, high-quality healthcare and services that support overall mental and physical health.
- Objective 2.2 – Provide support to build capacity for navigating and accessing support services.

Examples of potential projects include telehealth programs, peer support programs, health care training programs, and rural health care clinics.

Goal 3: Strengthen Workforce Capacity

- Objective 3.1 – Promote workforce development programs (e.g., apprenticeships, internships, programs at technical and community colleges) for local high-demand job opportunities (e.g., plumbers, electricians, etc.).
- Objective 3.2 – Increase enrollment in and completion of critical training programs by investing in wrap-around supportive services.

Examples of potential projects include, career pathway program development, college access programs, supporting programs that offer employees wrap-round services and workforce development programs.

Goal 4: Foster Entrepreneurial and Business Development Activities Objectives

- Objective 4.1 – Support the expansion of access to business capital (e.g., micro loans) to facilitate innovation, investment, entrepreneurship.
- Objective 4.2 – Invest in programs that address critical challenges facing SCRC communities while providing opportunities to attract and retain talent locally.

Examples of potential projects include shared-use kitchens, co-package plants, small business incubators, regional agriculture markets, community loan funds, industry cluster development, small business plan competitions, and small business mentorship programs.

Goal 5: Expand Affordable Housing Stock and Access

- Objective 5.1 – Increase access to wrap-around supportive services and legal assistance to resolve title, heirship, land tenure, and eviction issues.
- Objective 5.2 – Support enrollment in and access to homebuyer programs.
- Objective 5.3 – Invest in efforts to improve the affordability and availability of quality housing across the region.

Examples of potential projects include programs that provide services on title, heirship, land tenure and eviction issues, support programs that provide homebuyer education and training, regional planning projects, community economic development planning efforts. Programs benefitting under this goal should aid a wide-ranging population and strive to build capacity to provide these services over a long period of time.

Goal 6: Promote Environmental Conservation, Preservation, and Access

- Objective 6.1 – Invest in air, water, and soil clean-up efforts that impact distressed communities.
- Objective 6.2 – Preserve and expand access to the SCRC region’s natural resources to increase outdoor recreation and tourism opportunities.

Examples of potential projects include regional planning projects, community economic development planning, local food, farm and forestry programs with a focus on economic impact, downtown streetscape projects, downtown revitalization, tourism development, establishment of gateway community programs, and outdoor recreation economy planning and development.

Southeast Crescent Regional Commission Investment Focus for North Carolina

Governor Stein will leverage the resources of the SCRC to strengthen North Carolina’s capacity to meet the demands of the 21st-century economy and ensure communities are prepared for emerging opportunities. His priorities include advancing long-term infrastructure projects that promote job creation and commerce, helping local governments build systems that can better withstand future disruptions, and expanding workforce development through stronger partnerships among K–12 schools, community colleges, and local industries.

The state will use SCRC resources to provide technical assistance and targeted financial investments in the 69 SCRC counties, with special emphasis on isolated and economically distressed areas. These efforts will enhance the region’s ability to adapt to technological change, strengthen the workforce, and expand access to economic opportunity.

Following a comprehensive process to engage and receive input from a variety of partners and stakeholders across the state, the North Carolina Department of Commerce’s next strategic plan for economic development is currently underway and is anticipated to be finished in the spring of 2026. The NC SCRC Program will align priorities with this plan, in addition to other priorities indicated with the NC SCRC 2026-2030 Economic and Infrastructure Development Plan.

The NC SCRC program will support the implementation of the plan by focusing on the following Investment Priorities:

- Projects that enhance long-term infrastructure commitments that allow for the creation and retention of jobs
- Enrichment of partnerships between local industries, k-12 schools, and community colleges to expand and enhance workforce development opportunities to ensure a pipeline of skilled workers in the region
- Efforts that support local school systems’ ability to enhance k-12 education opportunities
- Projects that spur economic activity in the health care sector and improve the quality of health care services in rural communities throughout the region while supporting local efforts to tackle health care challenges
- Encourage project design and development to specifically target Distressed Counties and Areas that will help improve economic conditions
- Support the strategic deployment of digital infrastructure that promotes conditions that allow individuals to access educational and job opportunities

State Program Operations

The Governor, as the State's member of the Commission, establishes the program's direction and priorities. North Carolina's SCRC priorities track the Governor's agenda for North Carolina and the input received from the region and its leaders. Governor Stein's Alternate, Reginald Speight Assistant Secretary for the Rural Economic Development Division at the North Carolina Department of Commerce, works closely with the Governor's senior staff and oversees daily operation of the program and coordinates the state's work on behalf of the program. The program administration is housed within the Rural Economic Development Division of the North Carolina Department of Commerce.

The North Carolina SCRC Program partners with several organizations both at the state and federal level, along with a number of nonprofits. Staff work daily with colleagues in the Rural Economic Development Division including the North Carolina Main Street and Rural Planning Center and the Community Development Block Grant Program. Staff also work with the Division's Rural Engagement and Investment Program. These programs provide assistance for building reuse and restoration, water and sewer infrastructure, and economic innovation in rural communities. Other Commerce ties include all elements of business and industry development, tourism, and workforce development. Coordination also occurs with other state agencies including:

- The Department of Environmental Quality which currently includes water and wastewater programs for the state as well as other environmental programs
- The Department of Health and Human Services, which provides rural health and child development services
- The State Treasurer's Office, which oversees and regulates local fiscal affairs
- The Department of Public Instruction, which governs elementary and secondary education
- The North Carolina Community College System which oversees 58 public, two-year institutions
- The University of North Carolina System, which oversees 16 institutions, including 5 historically black colleges and universities
- The North Carolina Department of Information Technology, which includes the Division of Broadband and Digital Opportunity who oversee programs such as the Growing Rural Economies with Access to Technology (GREAT) grant and Completing Access to Broadband (CAB) Program.

The program has strong relationships with these federal agencies:

- The United States Department of Agriculture state and district offices that serve SCRC counties

- The Economic Development Administration’s state representative as well as the regional office in Atlanta
- The United States Department of Housing and Urban Development area office in Greensboro, North Carolina

Program staff relies extensively on state and federal agencies for technical review of proposed project activities and request their aid in assessment of project readiness, if a potential project duplicates existing efforts, and for joint funding of projects, when applicable. Close cooperative relationships also are maintained with several non-profits such as the Economic Development Partnership of North Carolina, the North Carolina Rural Center, the National Institute of Minority Economic Development, the Carolina Small Business Development Fund, and the Golden LEAF Foundation. Contact with and information shared among the agencies and partners promotes a coordinated development effort for the state and can resolve problems as well as meet the needs of its communities, especially in efforts to support or develop local capacity.

The 12 LDDs serving North Carolina’s SCRC region are agents of their member governments. They maintain constant contact with the state and provide feedback, suggest areas of efforts, and supply multicounty perspectives on issues. The LDDs also provide most of the direct technical assistance to applicants in the region. Technical assistance runs from the development of projects to the packaging of applications and in some cases, includes aid in bidding, administering, and closing out projects. The state relies heavily on input from the LDDs to develop new project directions and solicit input from other organizations in the region.

Public input comes in many forms. Contacts may be made:

- Through the LDDs
- Directly with the Governor, their Alternate, or members of the Governor’s staff
- Through local government associations (the NC League of Municipalities and the NC Association of County Commissioners)
- Through referrals from other agencies and partners
- Through advisory groups used as a source of program development (such as the State Economic Development Board)

State Program Operating Policies

In North Carolina, the level of SCRC funds requested may not exceed 50% of the total project cost except: 1) in designated distressed counties where the state determines the project is not feasible without the injection of a higher percentage of Southeast Crescent dollars and 2) in multijurisdictional projects that meet requirements set out in the [2008 Farm Bill](#) which generally involve the participation of distressed counties.

Proposals for the following activities are not eligible: construction of schools, libraries, government offices, hospitals, community centers, museums, social services facilities, law enforcement facilities, or recreational facilities. However, the SCRC program will consider the jobs created by these and other facilities as part of the justification for water and wastewater projects. Generally, funding is not available to cultural facilities and activities. However, activities related to sustainable development initiatives may be considered where the jobs and wealth resulting from those activities can be documented and are equivalent to the performance measures generated by more traditional economic development and entrepreneurial activities.

The state will work with the LDDs, local governments, and others to continue efforts to obligate the State's SCRC allocation in a timely manner and to achieve dual objectives of better serving applicants and more efficiently initiating SCRC's investments in North Carolina.

General Information

- Higher priority is given to projects that are deemed ready to go. To meet this requirement, the applicant should have all other funding for the project committed.
- Both the worth of the individual project in achieving the State's objectives and the level of assistance are determined on a case-by-case basis.
- Projects that support activities in a Distressed County will receive a higher priority.

Initial screening of proposals focuses on the following elements:

- Feasibility of the project approach
- Eligibility under [2008 Farm Bill](#)
- Consistency with State and Commission goals and strategies
- Economic impact within the context of the region and the area to be served
- Project applications must include measurable outputs and outcomes that are consistent with federal performance measurement requirements
- Individuals and for-profit enterprises are not eligible for direct grant assistance; but may benefit from, and be served by, the investment of SCRC funds

Funding and Match Guidance

The SCRC has set general guidance that assistance will not exceed \$700,000 for infrastructure projects and \$350,000 for non-infrastructure projects. However, the maximum grant amount may be raised in certain critical and/or promising circumstances that result in significant job creation. Special consideration will be given to projects serving multiple counties and/or states. Assistance may not exceed \$1,000,000 for infrastructure and \$500,000 for non-infrastructure projects.

Cost overruns and significant changes of project scope on previously approved SCRC projects generally will not be considered for funding. Changes required by design modifications or

changes that will generate additional jobs will constitute rationales for consideration of overrun requests.

SCRC funds cannot supplant or diminish the level of other funds (federal, state, or local) going into the region or the project area. SCRC funds cannot replace other funds to continue a project. Nor may SCRC funds be used to allow the diversion of existing resources to other purposes or to reduce the amount of bonds to be sold to finance local improvements.

To comply with Congressional instructions, the matching requirements for SCRC projects vary depending on the county served and the number of counties served. SCRC may contribute 80% toward the cost of a project located in a distressed county, requiring a 20% match. The maximum SCRC contribution can be increased to 90% when the projects involve three or more counties or two or more states. Projects located in transitional counties or isolated areas of distressed will be required to provide 50% match. The match rate can be reduced to 40% if the project involves three or more counties or two or more states. Projects in Attainment Counties are not eligible for funding.

Applicants are encouraged to work closely with other agencies involved in their project to meet deadlines. Proposals involving construction should be especially aware of the time constraints and applicants should alert their engineers to strictly observe these time deadlines.