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4 Trends Shaping Advanced Manufacturing

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The World as the Market

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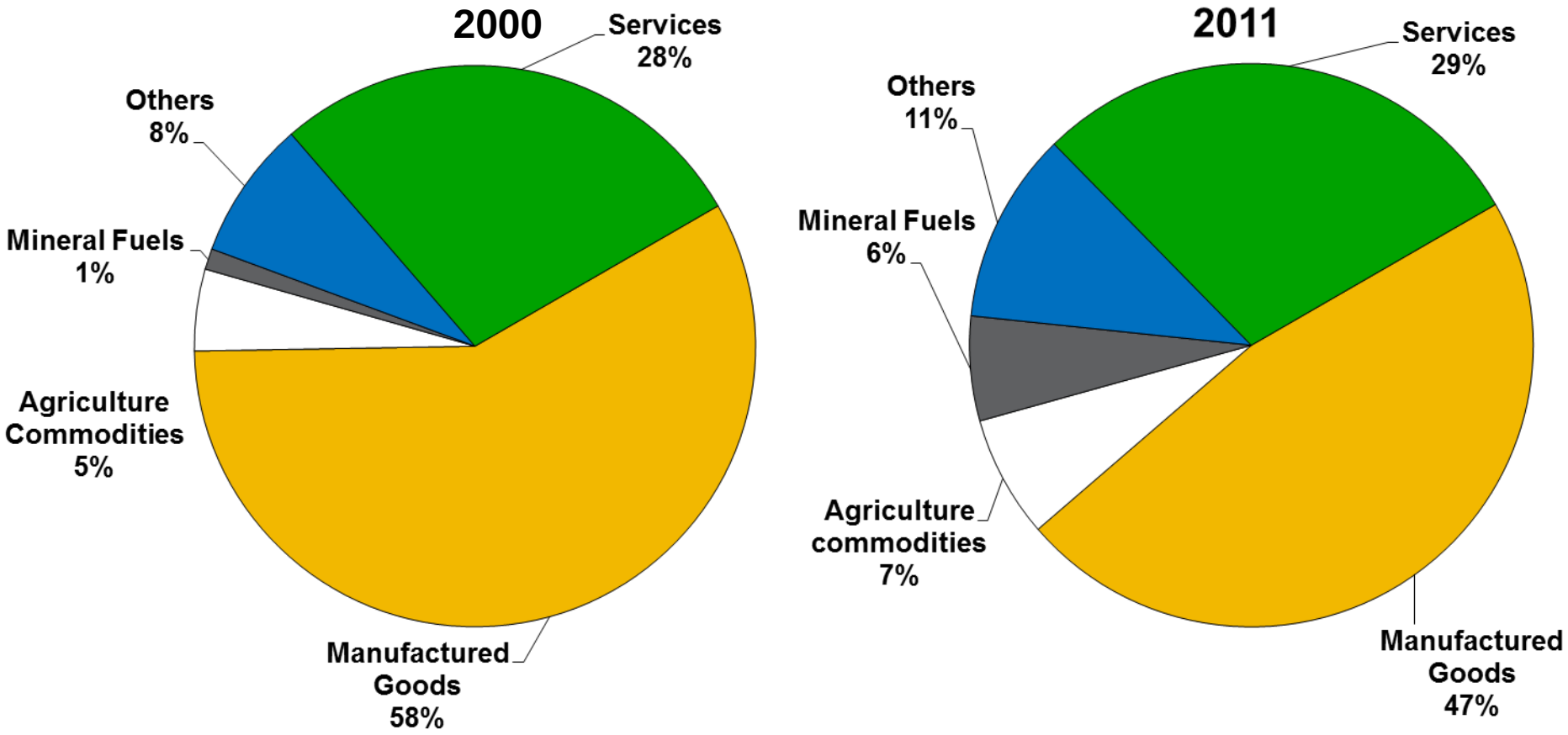
Figure 32 – Manufacturing Still Dominates U.S. Exports, But Its Share Is Declining



Source(s): U.S. Census Bureau and MAPI calculations

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Industrial Sectors

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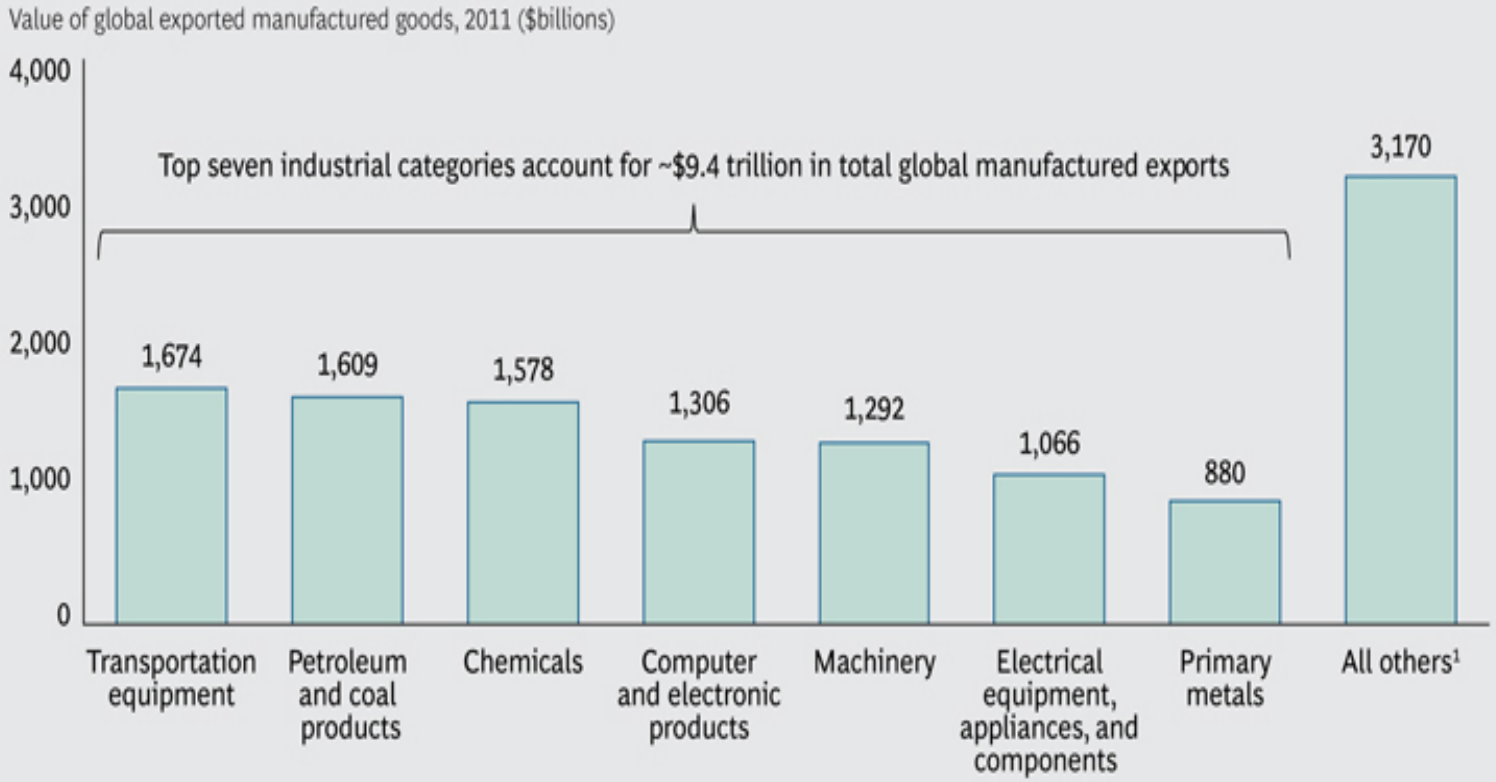
EXHIBIT 5 | Three-Quarters of Global Manufactured Exports Are Concentrated in Seven Industrial Categories



Sources: OECD, BCG analysis.
Note: Nominal US$. Excludes countries where industry-level export data are not available (e.g., South Korea, Hong Kong, Singapore, and Malaysia).
[1]Includes food products, textile product mills, miscellaneous, plastic and rubber products, fabricated metal products, paper, nonmetallic mineral products, and wood products.

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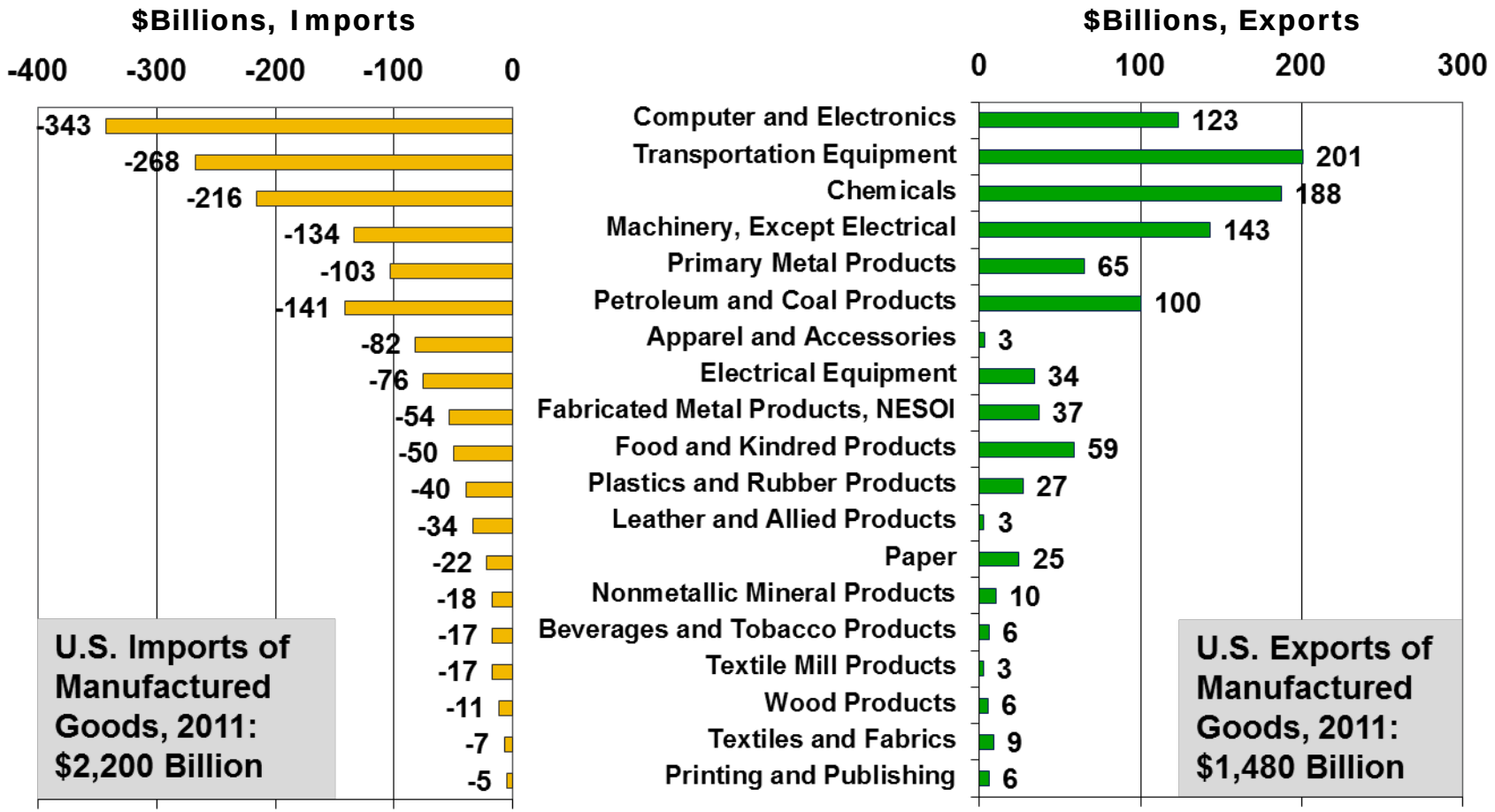
Figure 65 – A Few Core Industries Dominate Foreign Trade in Manufactures



Source(s): U.S. International Trade Commission and MAPI

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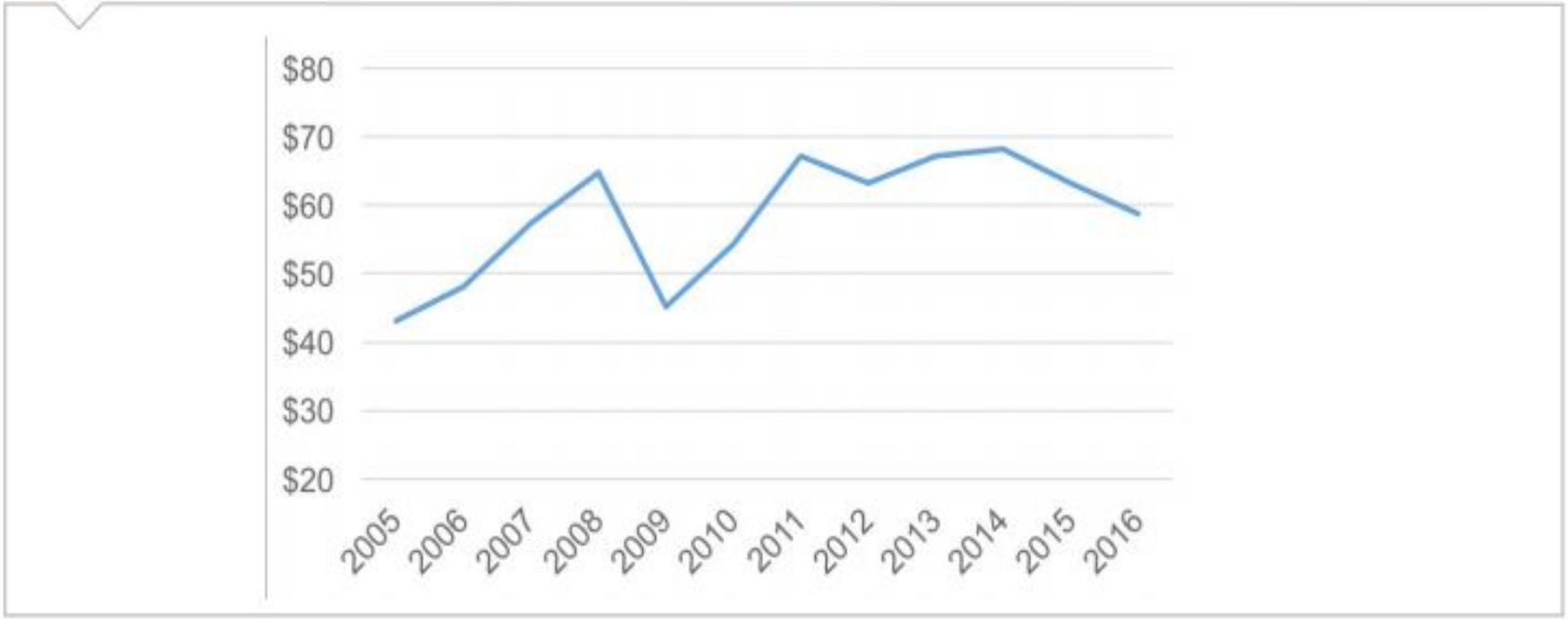
Figure 3: New York's Manufactured Goods Exports, in Billions of Dollars, 2000-2016



NAM Manufacturing Facts, April 2017

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MRI Study Results

Manufacturing Research Institute of New York State
Strengthening New York's Manufacturing Sector Through Knowledge and Research

Manufacturing Export Intensity by State (2008)		
1	Florida	39%
2	Washington	38%
3	**New York**	**35%**
4	Vermont	33%
5	Nevada	32%
6	Arizona	30%
7	Massachusetts	27%
8	Texas	27%
9	Idaho	24%
10	California	24%

Source: Annual Survey of Manufactures, U.S. Census Bureau, TradeStats Express, International Trade Administration

Upstate New York Metro Areas	2009 Exports ($ billion)
Rochester	$4.9
Buffalo/Niagara Falls	3.6
Albany/Schenectady/Troy	3.2
Poughkeepsie/Newburgh/Middletown	2.2
Syracuse	1.3
Utica/Rome	0.5
Binghamton	0.3
Ithaca	0.2
Glen Falls	0.2
Kingston	0.2
Elmira	0.1

Source: Sub-National Trade Statistics, International Trade Administration.

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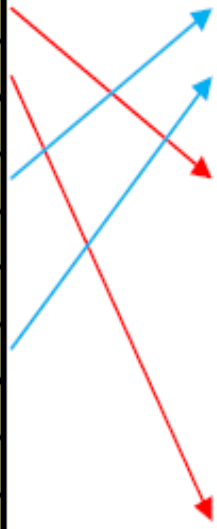
MRI Study Results

Manufacturing Research Institute of New York State
Strengthening New York's Manufacturing Sector Through Knowledge and Research

2000 NYS Manufacturing Exports (billions)	
Canada	$9.2
Switzerland	3.2
Japan	3.1
United Kingdom	3.1
Israel	1.8
Mexico	1.7
Germany	1.6
Hong Kong	1.4
Belgium	1.2
France	1.2
South Korea	0.8



2010 NYS Manufacturing Exports (billions)		2000 Rank	Annual % Change
Canada	$8.7	1	-1%
Israel	4.1	5	9%
Hong Kong	4.1	8	12%
United Kingdom	3.2	4	0%
Switzerland	2.6	2	-2%
Germany	2.4	7	4%
China	2.2	13	13%
Belgium	2.1	9	6%
Mexico	2.1	6	2%
India	1.8	14	14%
Japan	1.8	3	-5%

Source: Foreign Trade Statistics, U.S. Census Bureau

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Technology Explosion

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EXHIBIT 1 | Nine Technologies Are Transforming Industrial Production

Source: BCG.

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TOP 8 EMERGING TECHNOLOGIES

- Big Data
- Internet of Things
- Robotics and Artificial Intelligence
- Virtual and Augmented Reality
- Miniaturized Electro-mechanical Elements
- Biotechnology
- Nano Materials
- 3D Printing

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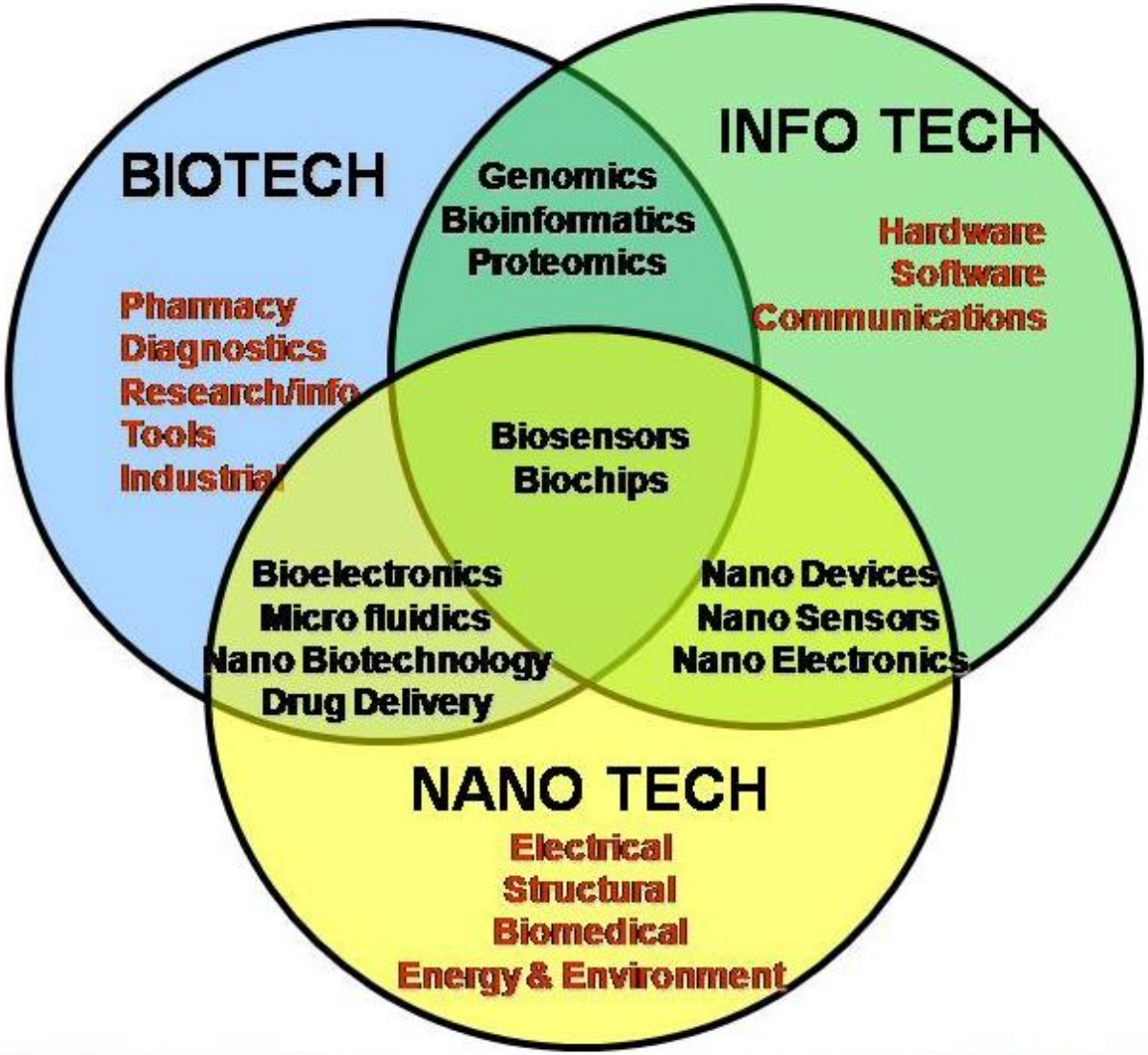
CONVERGENCE OF TECHNOLOGIES

BIO-INFO-NANO



Technology Explosion

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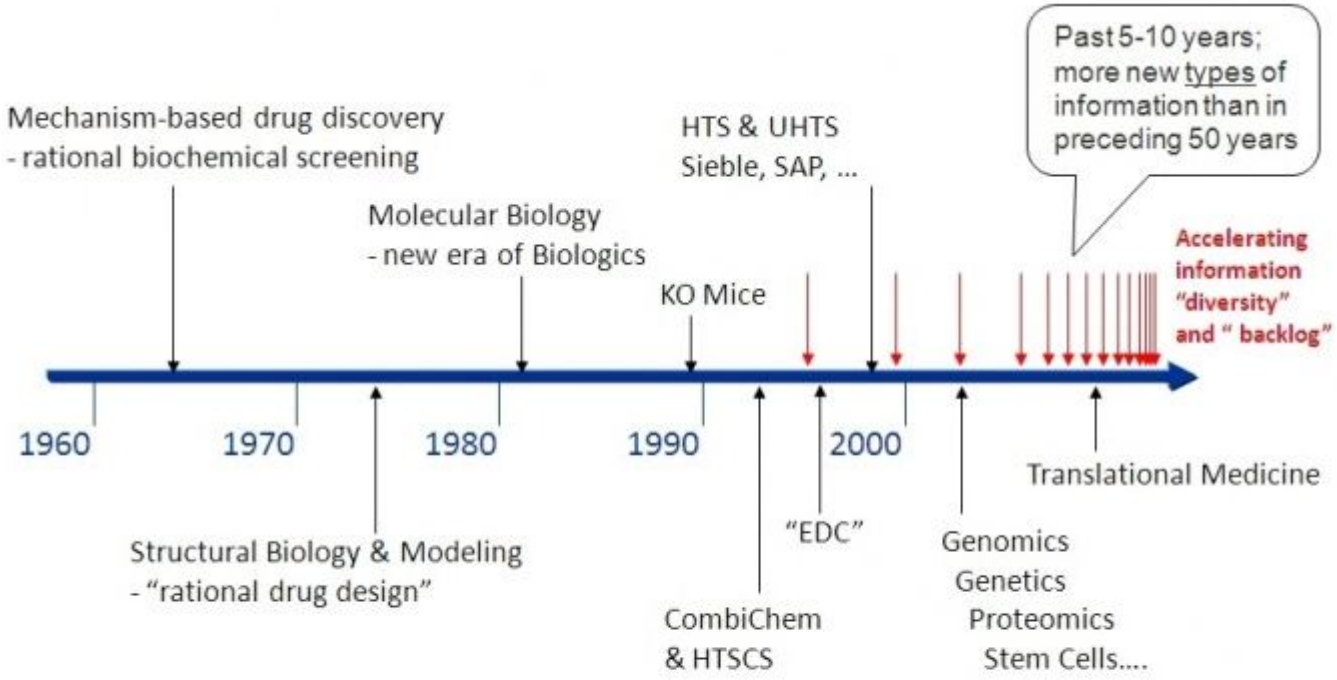
Speed of Technology



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Brains not Brawn

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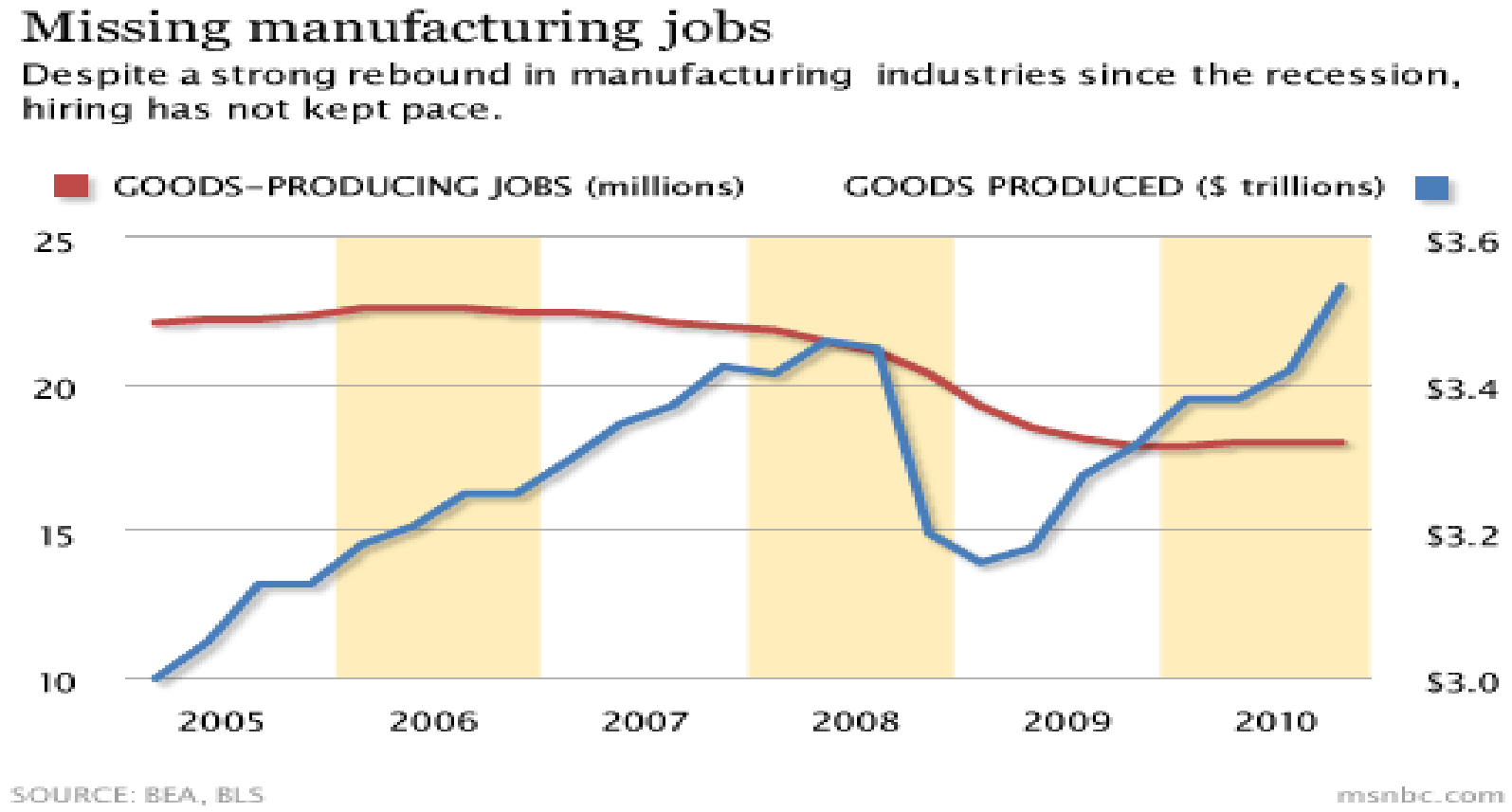
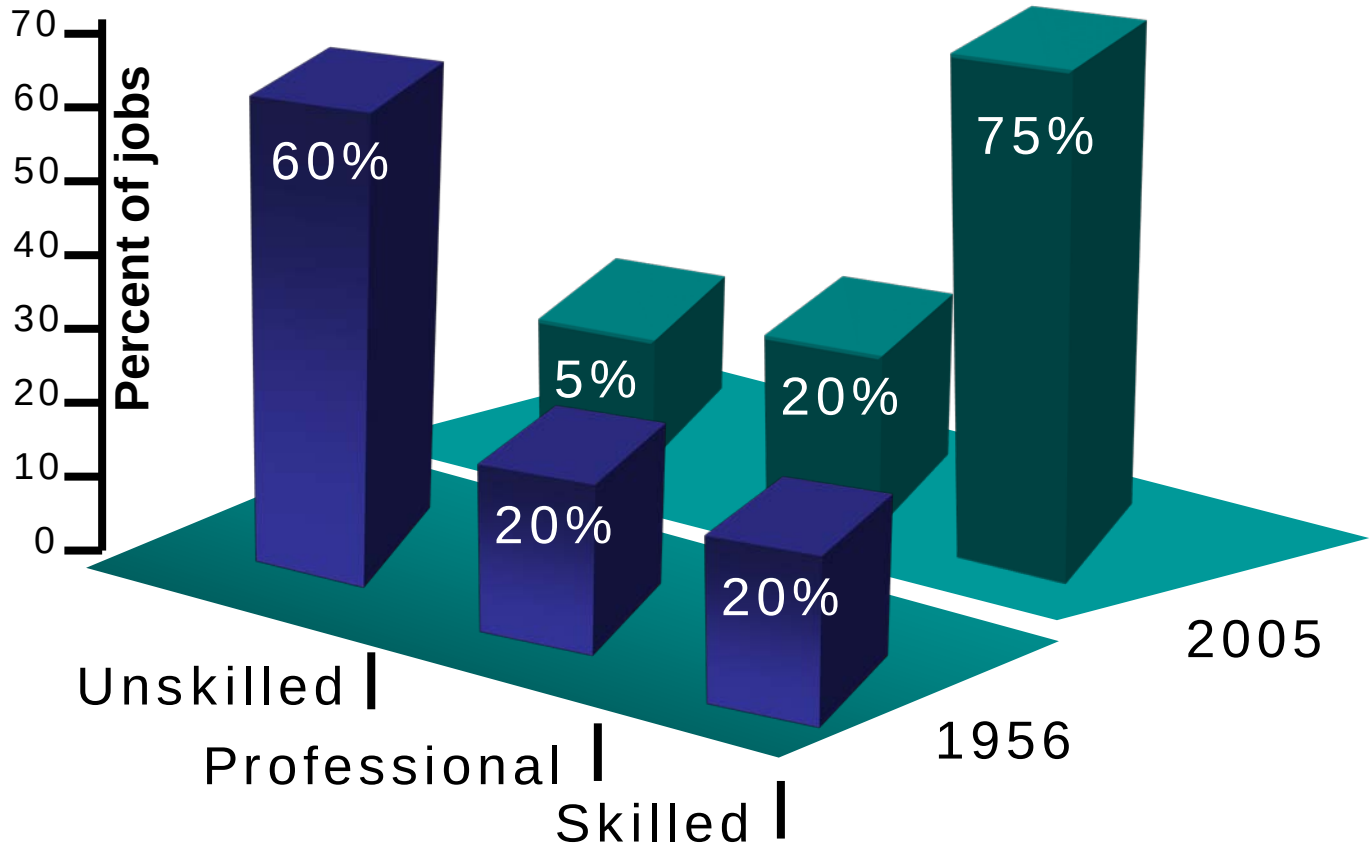
Brains not Brawn

Where have all the jobs gone?



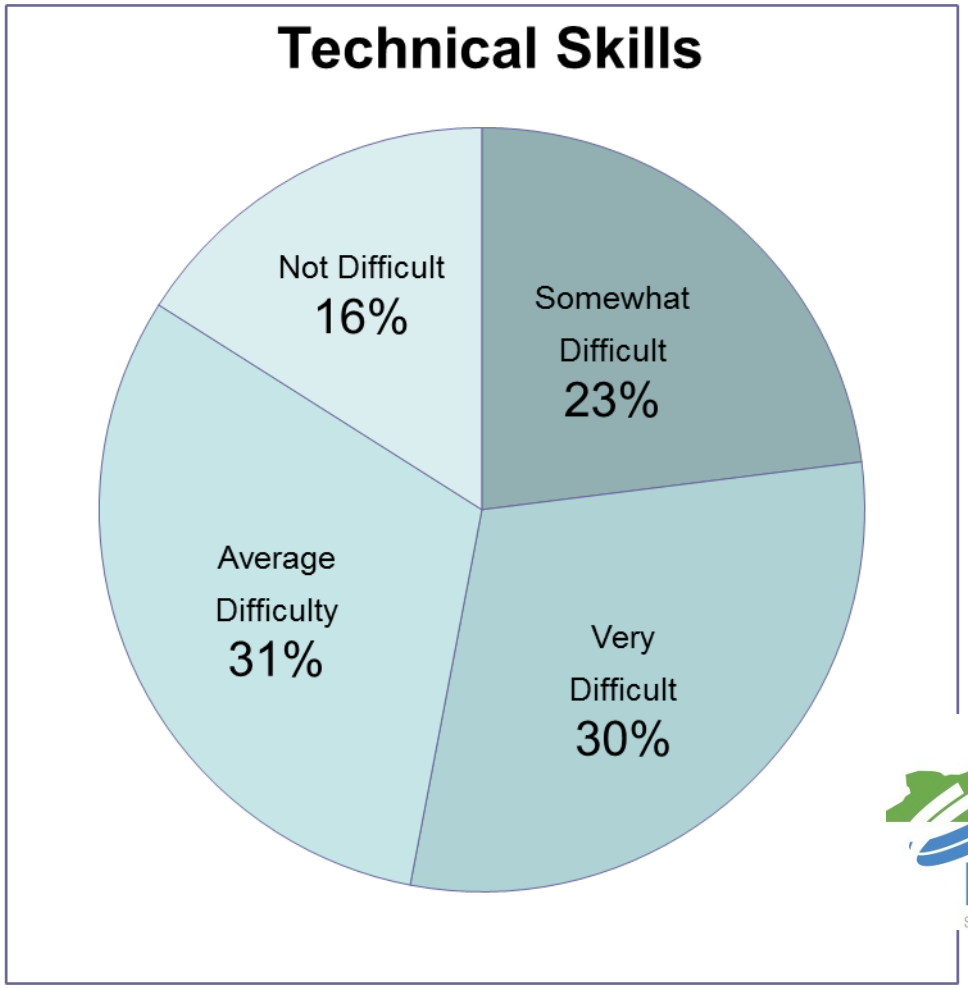
Workforce Skills Level Needed



What would you say is the **best thing about having manufacturing business operations** within the State of New York?

2012

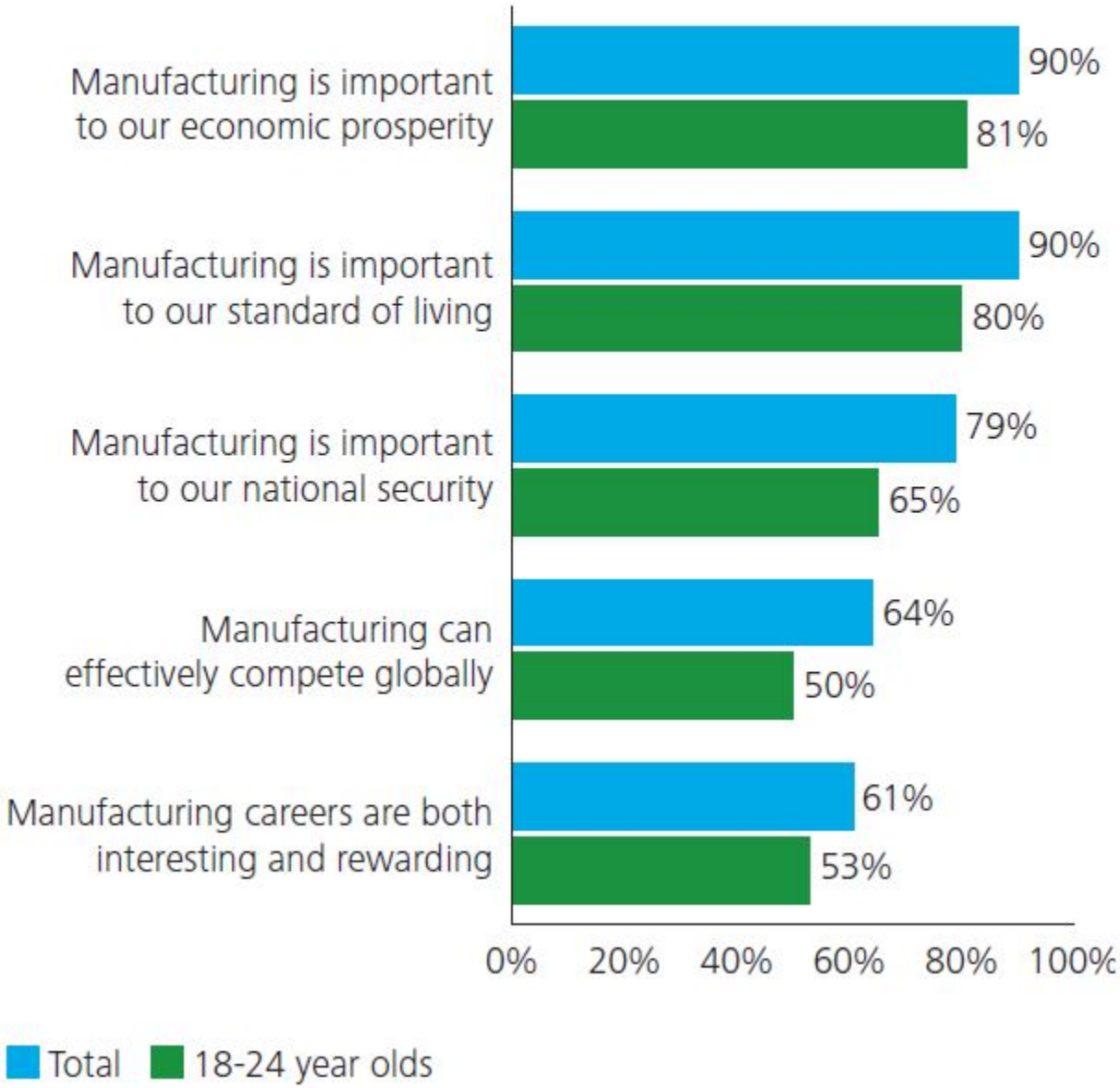
Indicate the degree of difficulty your business has in filling the following job categories.



2014

Manufacturing Research Institute OF NEW YORK STATE
Strengthening New York's Manufacturing Sector Through Knowledge and Research

Chart 13. Comparison of total respondents to 18-24 year olds who strongly agree or agree with each statement



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Clusters Matter

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What are Clusters?

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Clusters are geographic concentrations of interconnected businesses, suppliers, service providers, and associated institutions in a particular sector.

As defined by The Brookings Institution,

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What is a Cluster?

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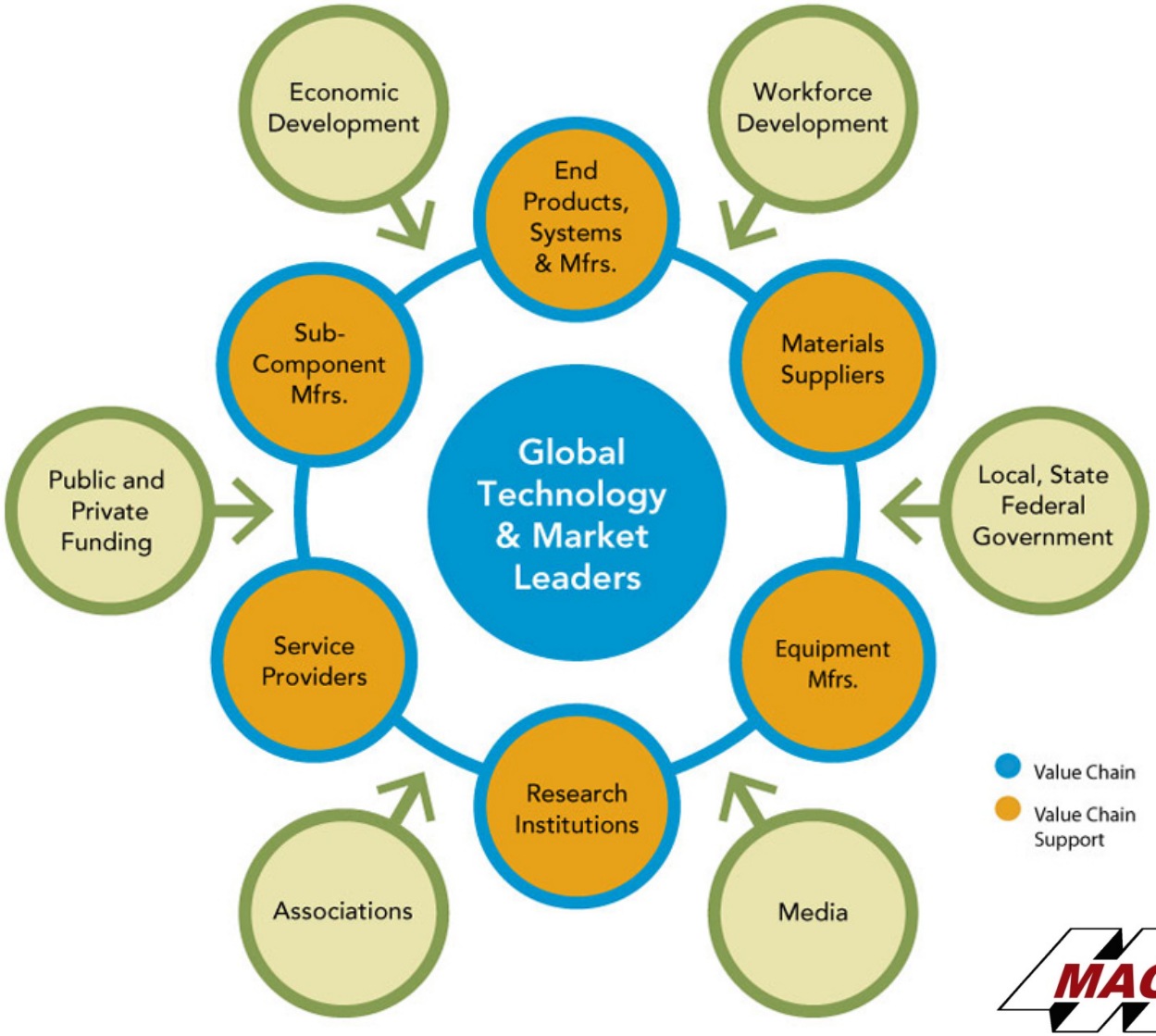

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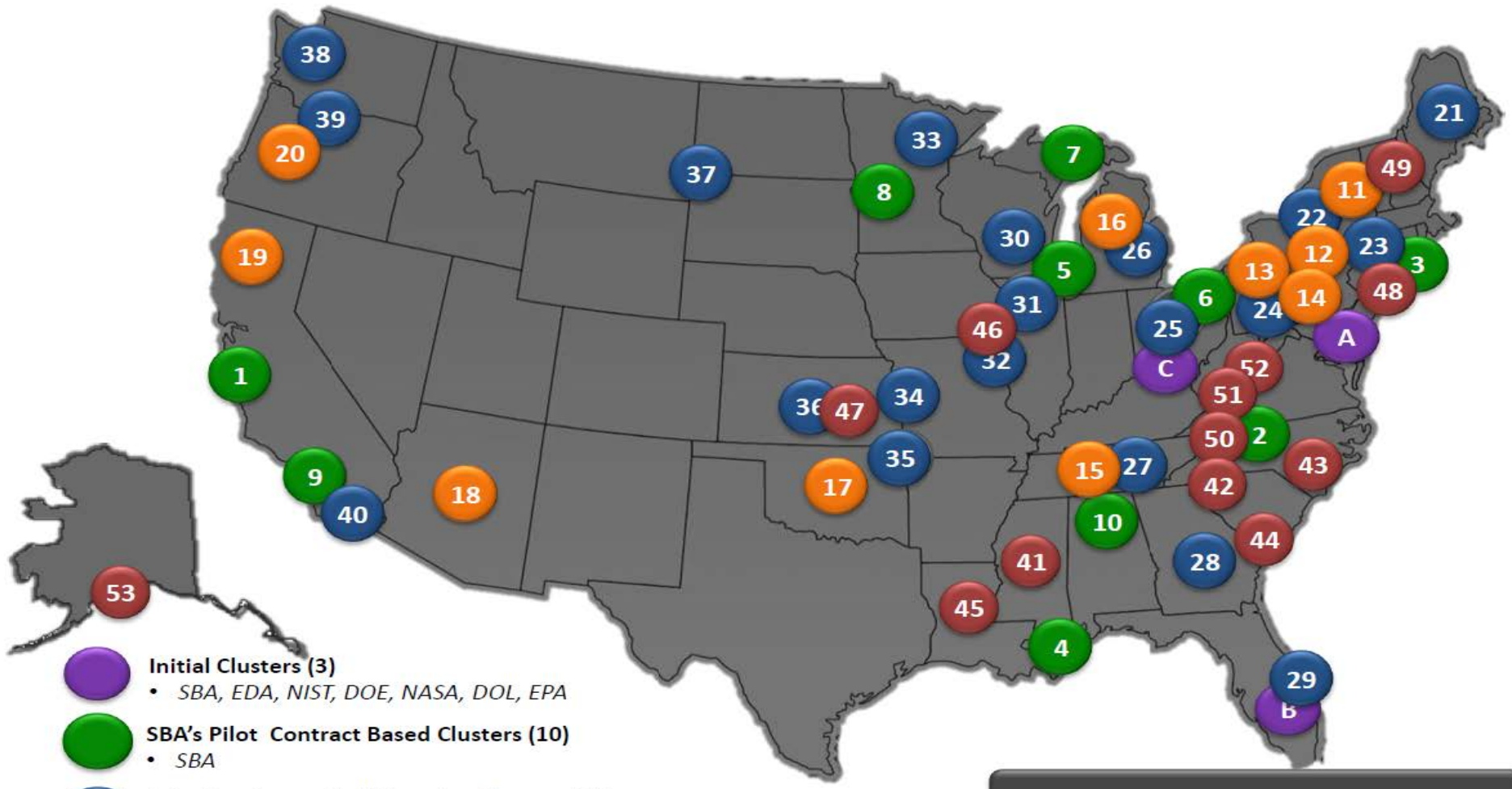

Initial Clusters (3)
- *SBA, EDA, NIST, DOE, NASA, DOL, EPA*

SBA's Pilot Contract Based Clusters (10)
- *SBA*

Jobs Accelerator Collaboration Clusters (20)
- *EDA, ETA, SBA*

Advanced Manufacturing Jobs Accelerator Collaboration Clusters (10)
- *EDA, ETA, NIST, DOE, SBA*

Rural Jobs Accelerator Collaboration Clusters (13)
- *EDA, USDA, DRA, ARC*

56 Federally Funded Cluster Initiatives

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56 Federally Funded Cluster Initiatives

SBA's Pilot Contract-Based Clusters

1 CA - Agriculture Innovation Cluster / Project 17 Ag *Tech Agriculture Innovation*

2 SC - Carolinas' Nuclear Cluster *Nuclear energy technology and components*

3 CT - Northeast Electrochemical Energy Storage *Fuel cell and hydrogen fueling systems*

4 MS - Enterprise for Innovative Geospatial Solutions *Geospatial technology*

5 IL - Illinois Smart Grid Regional Innovation Cluster *Smart grid / efficient energy*

6 OH - NorTech Flexmatters *Flexible electronics*

7 MI - Upper Michigan Green Aviation Coalition *Green aviation*

8 MN - Defense Alliance of Minnesota *Advanced power and energy (DoD Focused)*

9 CA - San Diego Advanced Defense Cluster *Autonomous systems and cyber security (DoD Focused)*

10 AL - Huntsville Advanced Defense Technology *Initiative Aero-space technology (DoD Focused)*

Jobs Accelerator Advanced Manufacturing

Economic Development Agency, Employment and Training Agency, Small Business Administration, National Institute of Standards and Technology, Department of Energy

11 NY - Rochester Regional Optics, Photonics & Imaging Accelerator

12 NY - Advanced Manufacturing of Thermal and Environmental Control Systems

13 PA - Agile Electro-Mechanical Product Accelerator

14 PA - Greater Philadelphia Advanced Manufacturing Innovation and Skills Accelerator

15 TN - Advanced Manufacturing and Prototyping Center of East Tennessee

16 MI - Advanced Contract Manufacturing of Southeast Michigan Cluster

17 OK - Manufacturing Improvement Program for the Oil and Gas Industry Supply Chain

18 AZ - Southern Arizona Aerospace and Defense Cluster

19 CA - Advanced Manufacturing Medical/Biosciences Pipeline for Economic Development (AM2PED)

20 OR - Innovations in Advanced Materials and Metals Cluster (IAM2)

Jobs Accelerator Collaboration Clusters

Economic Development Agency
Employment and Training Agency
Small Business Administration

21 ME - GreenME *Renewable Energy Industry Cluster*

22 NY - Finger Lakes Food Processing *Cluster Initiative Food Processing*

23 NY - New York Renewable Energy Cluster *Renewable Energy*

24 PA - Southwestern Pennsylvania Revitalization *Energy/ Health Care*

25 OH - Northeast Ohio Speed-To-Market Accelerator *Energy /Flexible Electronics*

26 MI - Southeast Michigan Advanced Energy Storage Systems Initiative *Advanced Energy Storage Systems*

27 TN - Advanced Composites Employment Accelerator *Advanced Composites with Focus on Low-Cost Carbon Fiber Technology*

28 GA - Atlanta Health Information Technology Cluster *Health Information Technology*

29 FL - Space Coast Clean Energy Jobs Accelerator *Clean Energy*

30 WI - Milwaukee Regional Water Accelerator Project *Water*

31 IL - Rockford Area Aerospace Cluster Jobs and Innovation Accelerator *Aerospace*

32 MO - St. Louis Bioscience Jobs and Innovation *Accelerator Project Bioscience*

33 MN - Minnesota's Mining Cluster *Energy*

34 MO – Kansas City Regional Jobs Accelerator *Advanced Manufacturing &Information Technology*

35 AR - Launching the ARK: Acceleration, Resources, Knowledge *Information Technology*

36 KS - Center for Innovation and Enterprise Engagement *Advanced materials*

37 ND - Upper Missouri Tribal Environmental Risk Mitigation Project *Environmental Risk Mitigation*

38 WA - Washington Interactive Media Accelerator - *Interactive Media*

39 OR - Portland Regional Clean Tech Advance Initiative *Clean Tech*

40 CA - San Diego-Imperial Valley Renewable Energy Generation *Training and Demonstration Center Renewable Energy*

Initial Clusters

A PA – Greater Philadelphia
Energy-Efficient Buildings Hub (SBA, EDA, NIST, DOE)

B FL – Space Coast– *Space Shuttle Shutdown Transition (SBA, EDA, NASA, DOL)*

C OH- Southwest Ohio Water Cluster – *Water Research (EPA)*

Rural Jobs Accelerator

Economic Development Agency
U.S. Department of Agriculture
Delta Regional Authority
Appalachian Regional Commission

41 MS – Community and Economic Development in Rural Mississippi *Automotive, Furniture, Agribusiness*

42 NC - WNC AgriVentures -- Cultivating Jobs and Innovation Project *Agribusiness*

43 NC - North Carolina Eastern Region Aerospace and Automotive Cluster Project *Aerospace, Automotive*

44 SC - South Carolina Alliance Rural Jobs and Innovation Accelerator Challenge *Nuclear Energy*

45 LA- I-20 Corridor Regional Accelerator *Bioscience*

46 IL - Henry-Rural Rock Island-Mercer County Economic Development Consortium *Agribusiness/Food processing*

47 KS - Project 17: Together We Succeed *Advanced Manufacturing*

48 CT - New England Food Hub Cluster Initiative *Food Processing*

49 NH - Northern Tier Farm and Forest Jobs Accelerator *Agribusiness*

50 VA - Appalachian Spring – Using Asset-Based and Creative Economy Methods to Catalyze Rural Job Acceleration *Music/Craft/Local Tourism*

51 WV - Southern West Virginia Rural Jobs Accelerator Partnership *Music/Craft/Local Tourism*

52 WV – Value Chain Initiative *Food Processing*

53 AK - Bristol Bay Jobs Accelerator Project *Fisheries, Seafood Processing*

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RETURNING U.S. MANUFACTURING

Companies cite numerous reasons for locating manufacturing in the US to include:

- Talent Availability & High Productivity
- Quality Control of Complex Products
- Shorter Supply Lines
- Protecting IP
- Energy Cost Competitiveness & Availability

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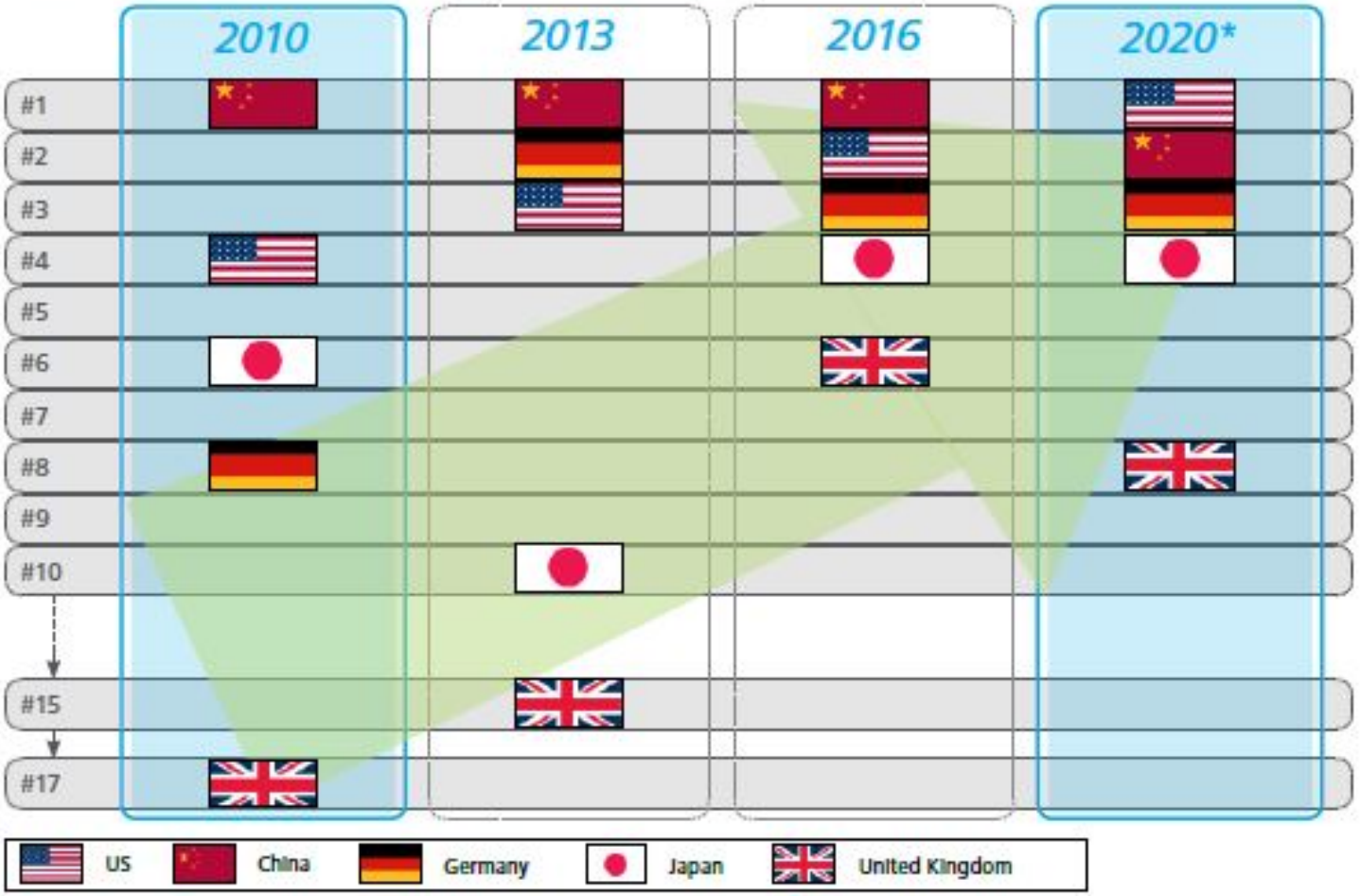
Figure 1: Global CEO survey: Manufacturing powerhouse rank trending and future forecast



Source: Deloitte and US Council on Competitiveness, 2016 Global Manufacturing Competitiveness Index
* represents projected 2020 ranks

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How Global Manufacturing Cost Competitiveness Has Shifted Over the Past Decade

Source: BCG analysis; Economist Intelligence Unit; Euromonitor International; International Labour Organization; U.S. Bureau of Economic Analysis; U.S. Bureau of Labor Statisics; and U.S. Economic Census.
Note: The index covers four direct costs only: wages, productivity growth, energy coasts, and currency exchange rates. No difference are assumed in other costs (for example, raw-material inputs, machine and tool depreciation); the cost structure is calculated as a weighted average across all industries.
[1]Productivity-adjusted.

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US as Low Cost?

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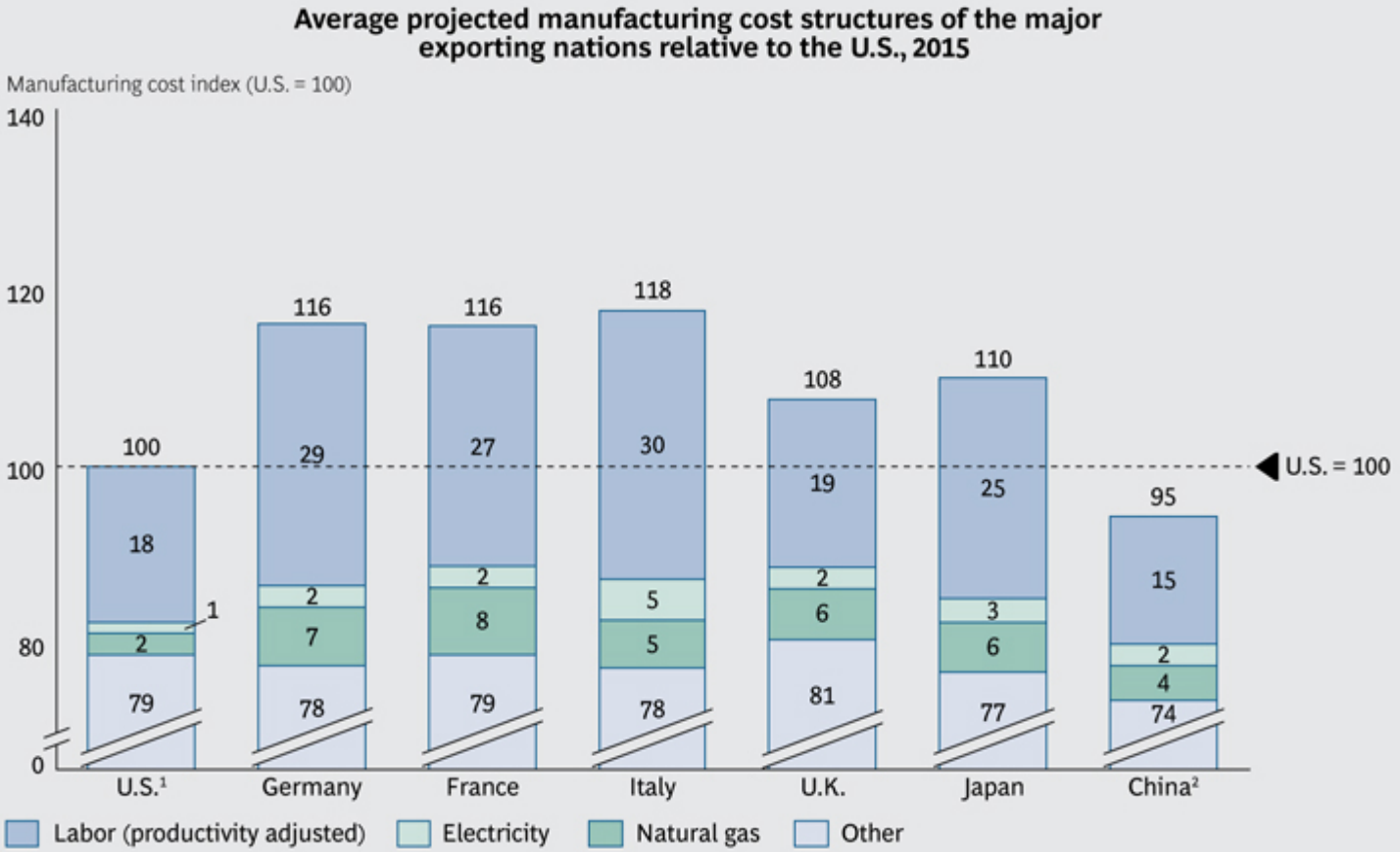
EXHIBIT 1 | Labor and Energy Cost Advantages Will Make the U.S. One of the Developed World's Lowest-Cost Countries



Sources: U.S. Economic Census; U.S. Bureau of Labor Statistics; U.S. Bureau of Economic Analysis; International Labour Organization.
Note: Cost structures were calculated as a weighted average across all industries. No difference was assumed in "other" costs (e.g., raw materials inputs and machine and tool depreciation). Differences in values are a function of the industry mix of each exporting country.
[1]U.S. figures represent costs in a set of select lower-cost states specified in previous publications.
[2]Chinese figures represent the Yangtze River Delta region.

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Abundant Natural Gas

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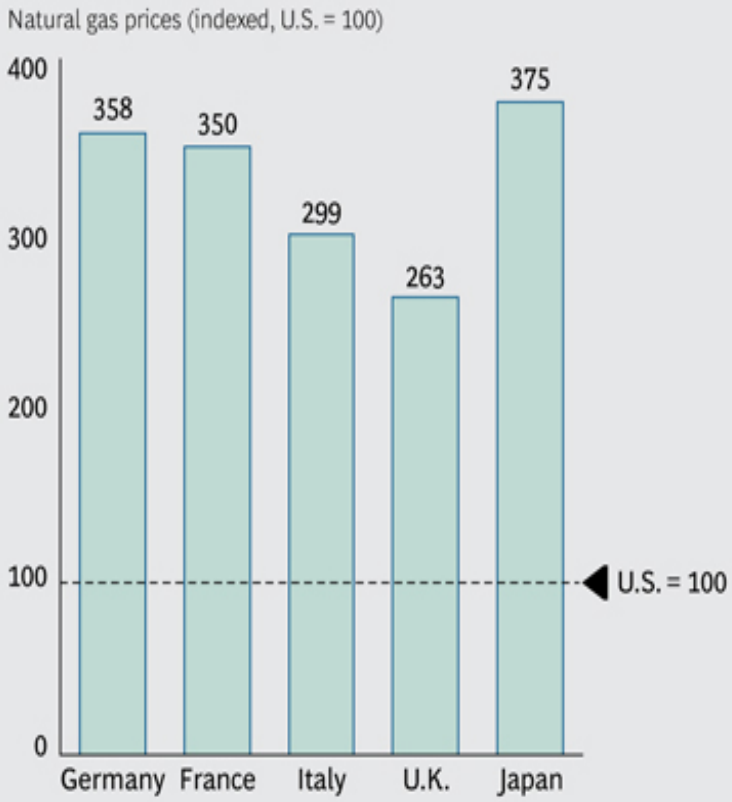
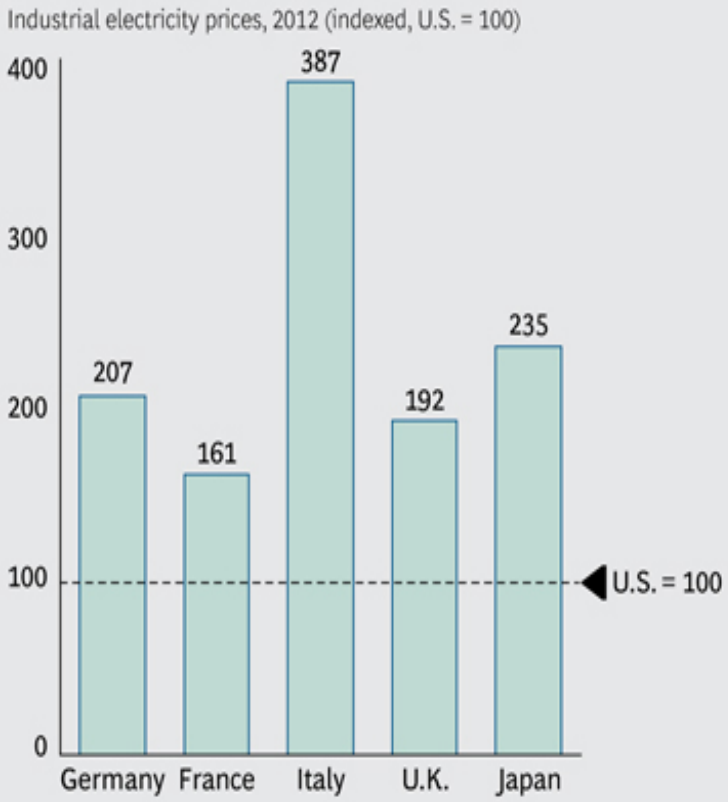
EXHIBIT 3 | Abundant Natural Gas Has Led to a Large Energy-Cost Advantage for Domestic Manufacturers in the U.S.

Natural gas prices in other major manufacturing economies are around 2.6 to 3.8 times higher than in the U.S....



...and industrial electricity prices are around 1.6 to 3.9 times higher



Sources: International Energy Agency quarterly energy price and tax statistics; BCG analysis.
Note: Energy prices based on 2012 averages.

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Linking drivers of competitiveness and country performance

Table 6: Global CEO survey: Focus country performance by key competitiveness drivers

Selected country manufacturing competitiveness drivers	United States	Germany	Japan	South Korea	China	India
TALENT	89.5	97.4	88.7	64.9	55.5	51.5
INNOVATION POLICY AND INFRASTRUCTURE	98.7	93.9	87.8	65.4	47.1	32.8
COST COMPETITIVENESS	39.3	37.2	38.1	59.5	96.3	83.5
ENERGY POLICY	68.9	66.0	62.3	50.1	40.3	25.7
PHYSICAL INFRASTRUCTURE	90.8	100.0	89.9	69.2	55.7	10.0
LEGAL AND REGULATORY ENVIRONMENT	88.3	89.3	78.9	57.2	24.7	18.8

Most competitive — Least competitive

Source: Deloitte Touche Tohmatsu Limited and US Council on Competitiveness, 2016 Global Manufacturing Competitiveness Index

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Why It's Time to Bring Manufacturing Back Home to the U.S.

Consumers have numerous reasons for buying products manufacturing in the US to include:

- Quick turnarounds, prototypes, and innovation
- Customers have come to expect short delivery windows
- "Greener" products
- Societal demand for local, sustainable, and responsible manufacturing is rising

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CHALLENGES FACING NYS MANUFACTURERS

- **Global Competition**
- **Use of Unfair Trade Practices**
- **Increases in Costs Burden on Manufacturing (ie. Taxes and Regulations)**
- **Speed of Technological Change**
- **Shifting of growth markets to Developing World**
- **Growing Skills Gap and Difficulty in Finding Talent**

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OPPORTUNITIES IN MANUFACTURING

- Global Growth Opportunities
- Direct Foreign Investment in the US
- Increasing cost competitiveness of US Manufacturing
- Use of Technology
- Conversation concerning use of Fair Trade Practices

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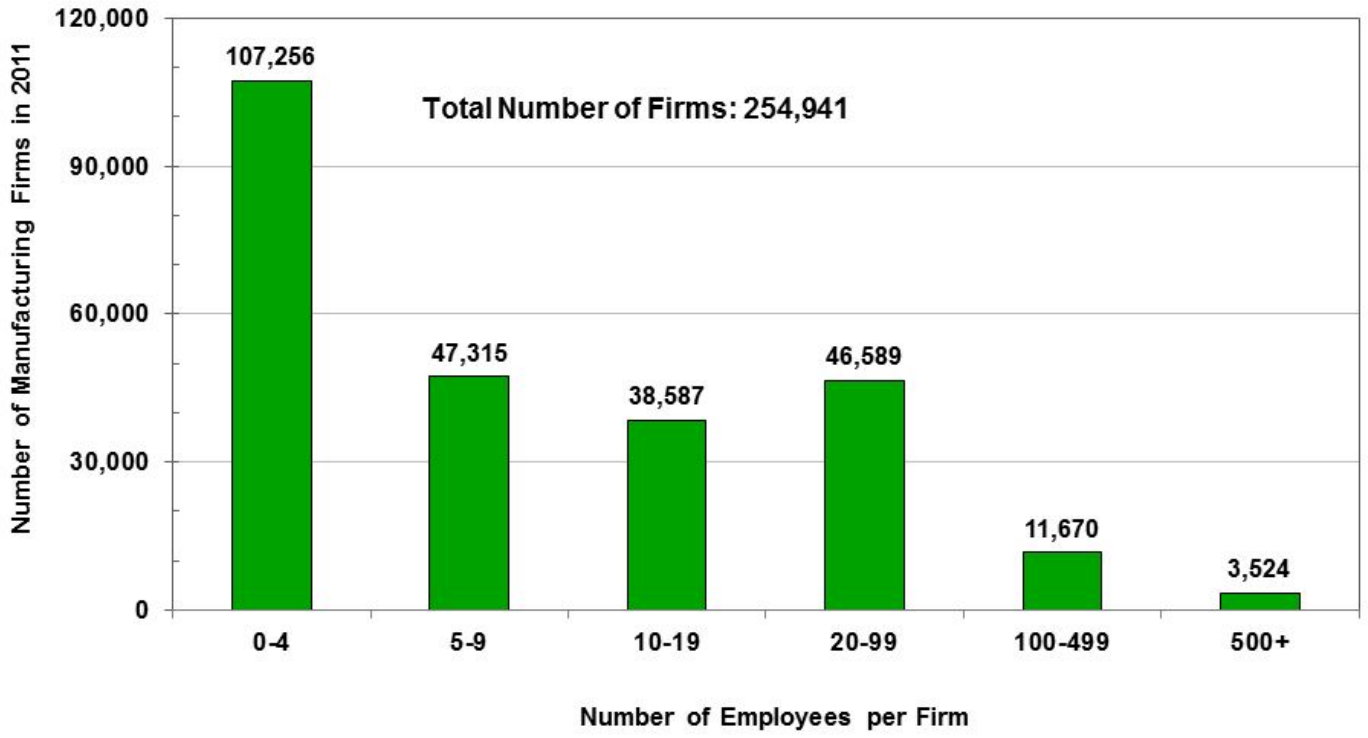
Manufacturing Firms by Number of Employees
(Updated April 2014)



Source(s): U.S. Census Bureau and MAPI

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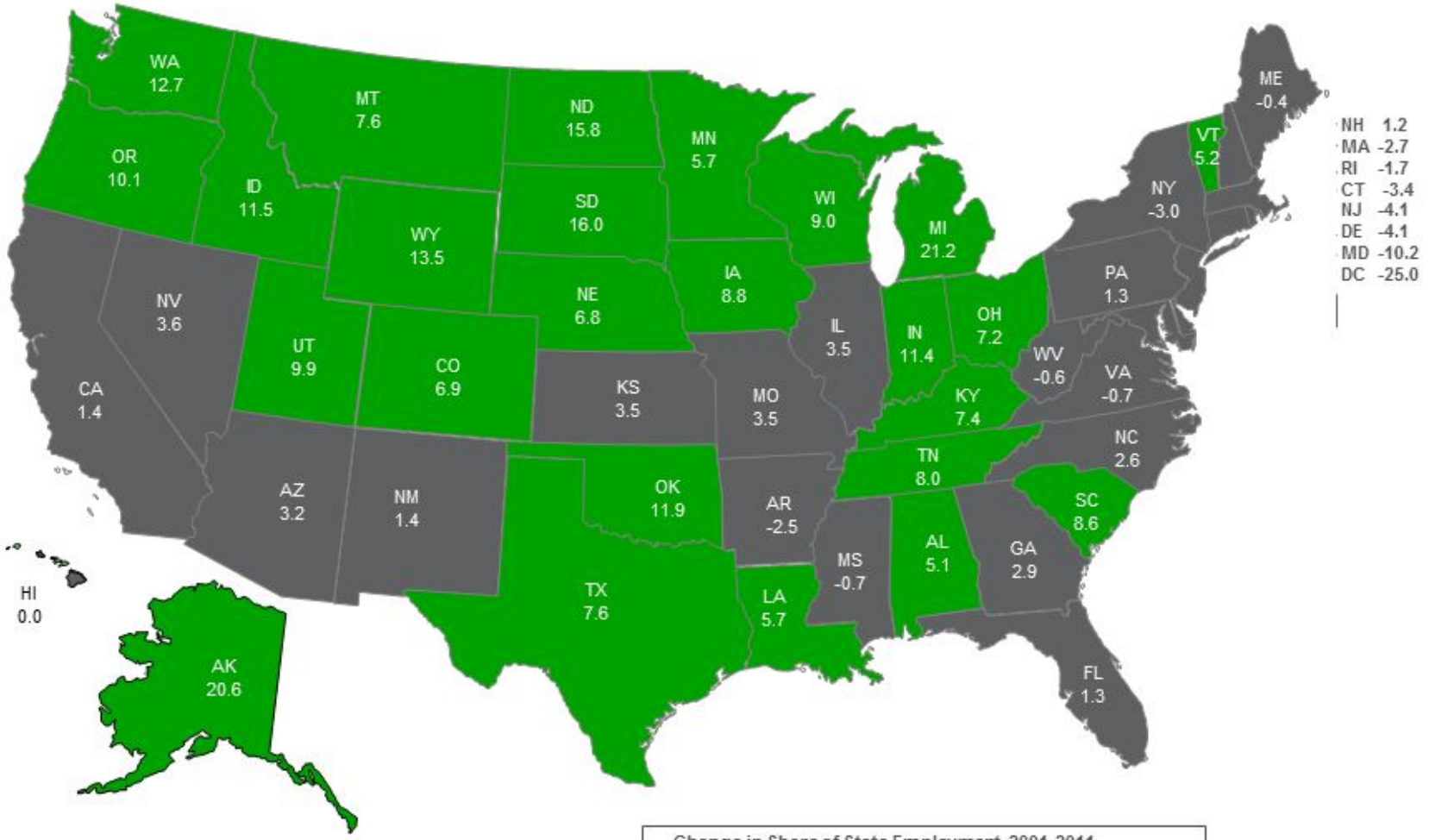
Manufacturing Job Gains Are Largest in the Midwest and Northwest

(Updated March 2014)

Percentage Change in Manufacturing Employment by State, Dec 2009 – Oct 2013



Source(s): U.S. Bureau of Labor Statistics

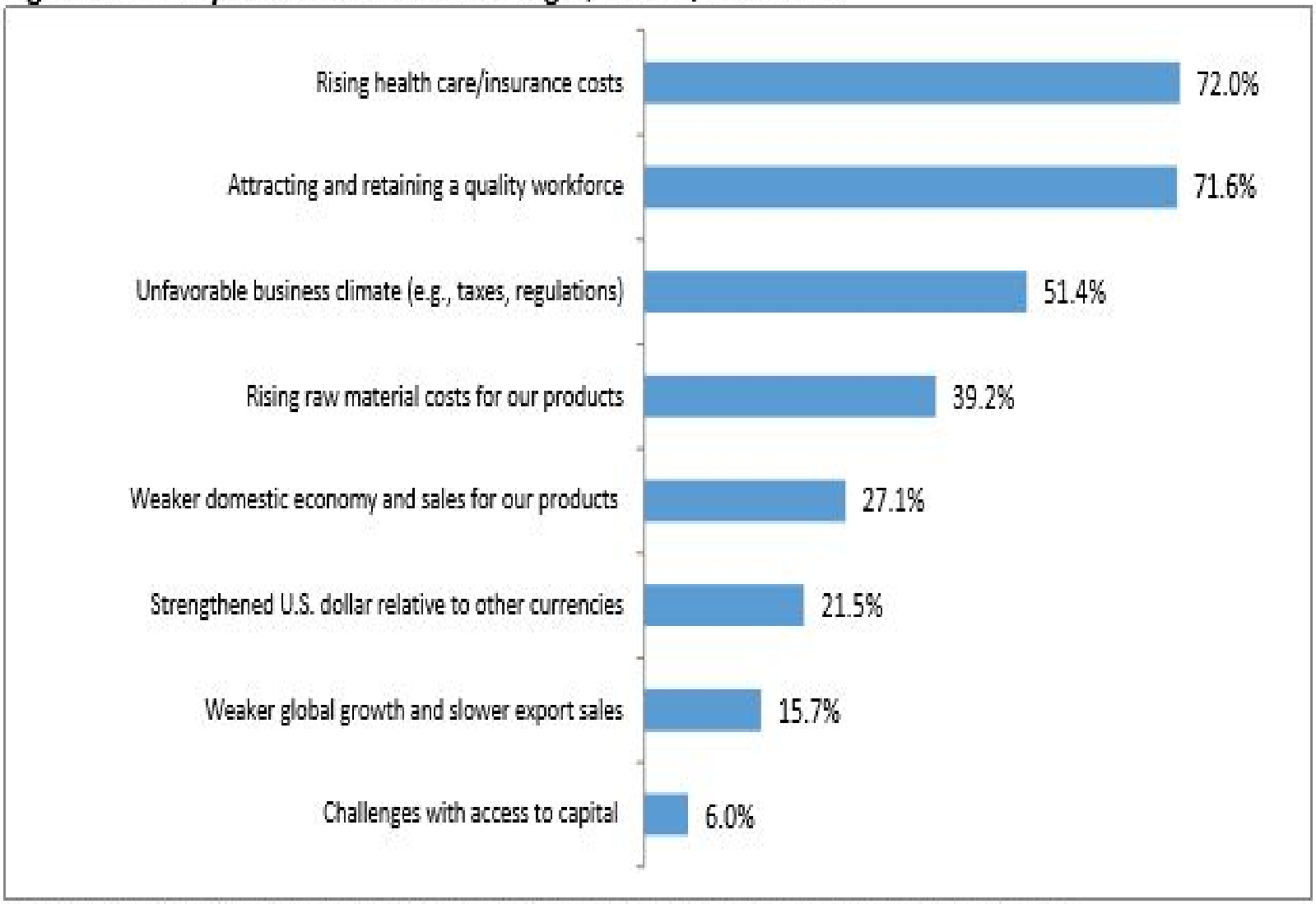
MAPI

NAM MANUFACTURERS' OUTLOOK SURVEY
THIRD QUARTER 2017

September 29, 2017

Percentage of Respondents Positive in Their Own Company's Outlook	NAM Manufacturing Outlook Index
89.8% *(June: 89.5%)* Small Manufacturers: **85.1%** *(June: 84.8%)* Medium-Sized Manufacturers: **89.8%** *(June: 90.6%)* Large Manufacturers: **94.9%** *(June: 92.8%)*	**61.0** *(June: 60.8 – revised)*
	Expected Growth Rate for SALES **Over the Next 12 Months** ↑ 4.5% *(June: ↑ 4.8%)*
Expected Growth Rate for PRODUCTION **Over the Next 12 Months** ↑ 4.5% *(June: ↑ 4.8%)*	**Expected Growth Rate for EXPORTS** **Over the Next 12 Months** ↑ 1.3% *(June: ↑ 1.1%)*
Expected Growth Rate for CAPITAL INVESTMENTS **Over the Next 12 Months** ↑ 2.7% *(June: ↑ 3.2%)*	**Expected Growth Rate for PRICES** **Over the Next 12 Months** ↑ 1.8% *(June: ↑ 1.7%)*
Expected Growth Rate for FULL-TIME EMPLOYMENT **Over the Next 12 Months** ↑ 2.2% *(June: ↑ 2.7%)*	**Expected Growth Rate for INVENTORIES** **Over the Next 12 Months** ↑ 1.0% *(June: ↑ 1.3%)*
Expected Growth Rate for EMPLOYEE WAGES **Over the Next 12 Months** ↑ 2.2% *(June: ↑ 2.1%)*	**Expected Growth Rate for HEALTH INSURANCE COSTS** **Over the Next 12 Months** ↑ 8.3% *(June: ↑ 8.4%)*
"Do you think the United States is headed in the right direction, or is our country on the wrong track?" **RIGHT TRACK: 46.4% WRONG TRACK: 21.4% UNSURE: 32.2%** *(June: Right Track: 56.9%, Wrong Track: 14.3%, Unsure: 28.9%)*	

Figure 4: Primary Current Business Challenges, Third Quarter 2017



Note: Respondents were able to check more than one response; therefore, responses exceed 100 percent.

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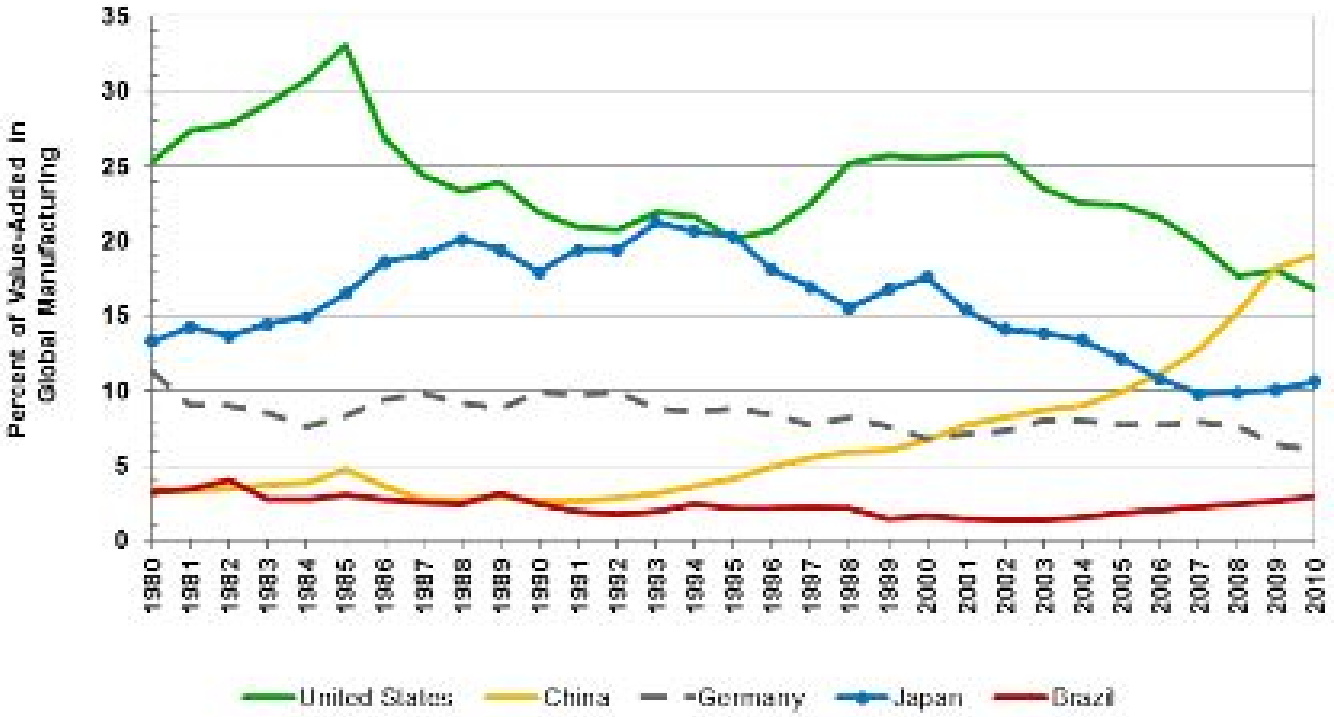
According to the World Bank, U.S. and China are Comparable
(Updated March 2014)



Source(s): World Bank, WDI and GDF databases and MAPI

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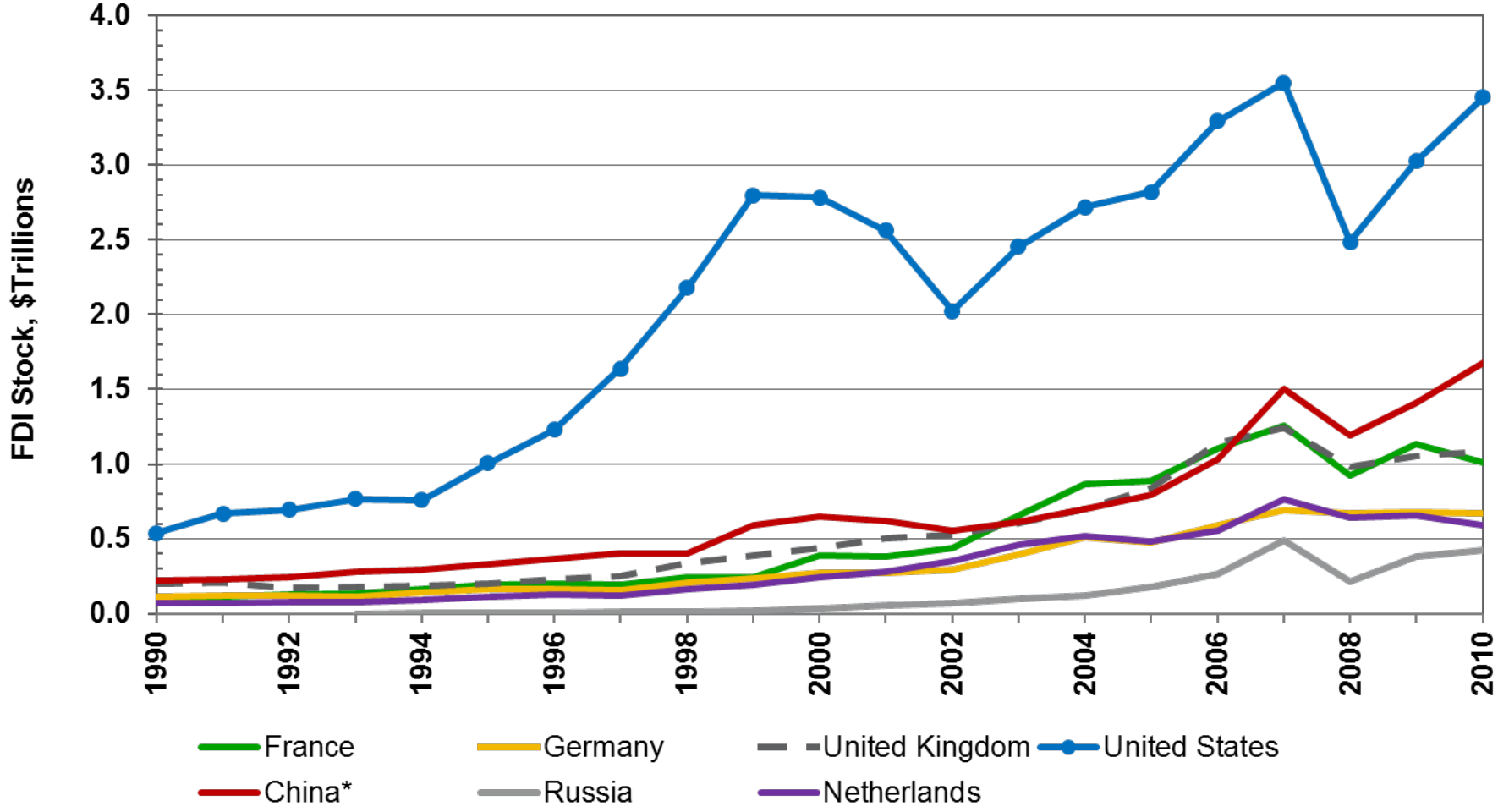
Figure 35 – The U.S. Is the #1 Destination for Foreign Direct Investment



* Includes Hong Kong
Source(s): UNCTAD World Investment Report

New York Manufacturing

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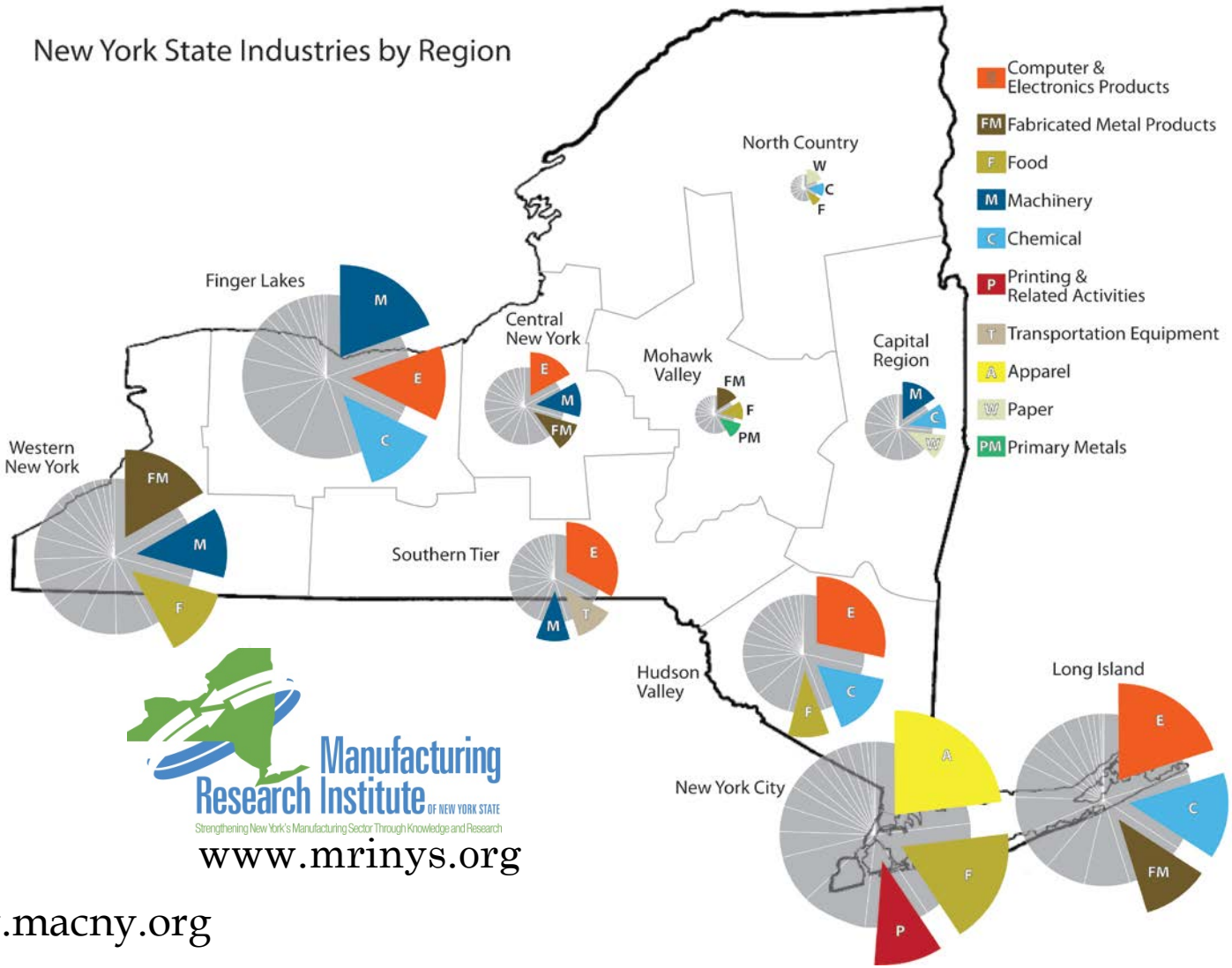

Manufacturing Research Institute of New York State
Strengthening New York's Manufacturing Sector Through Knowledge and Research

www.mrinys.org

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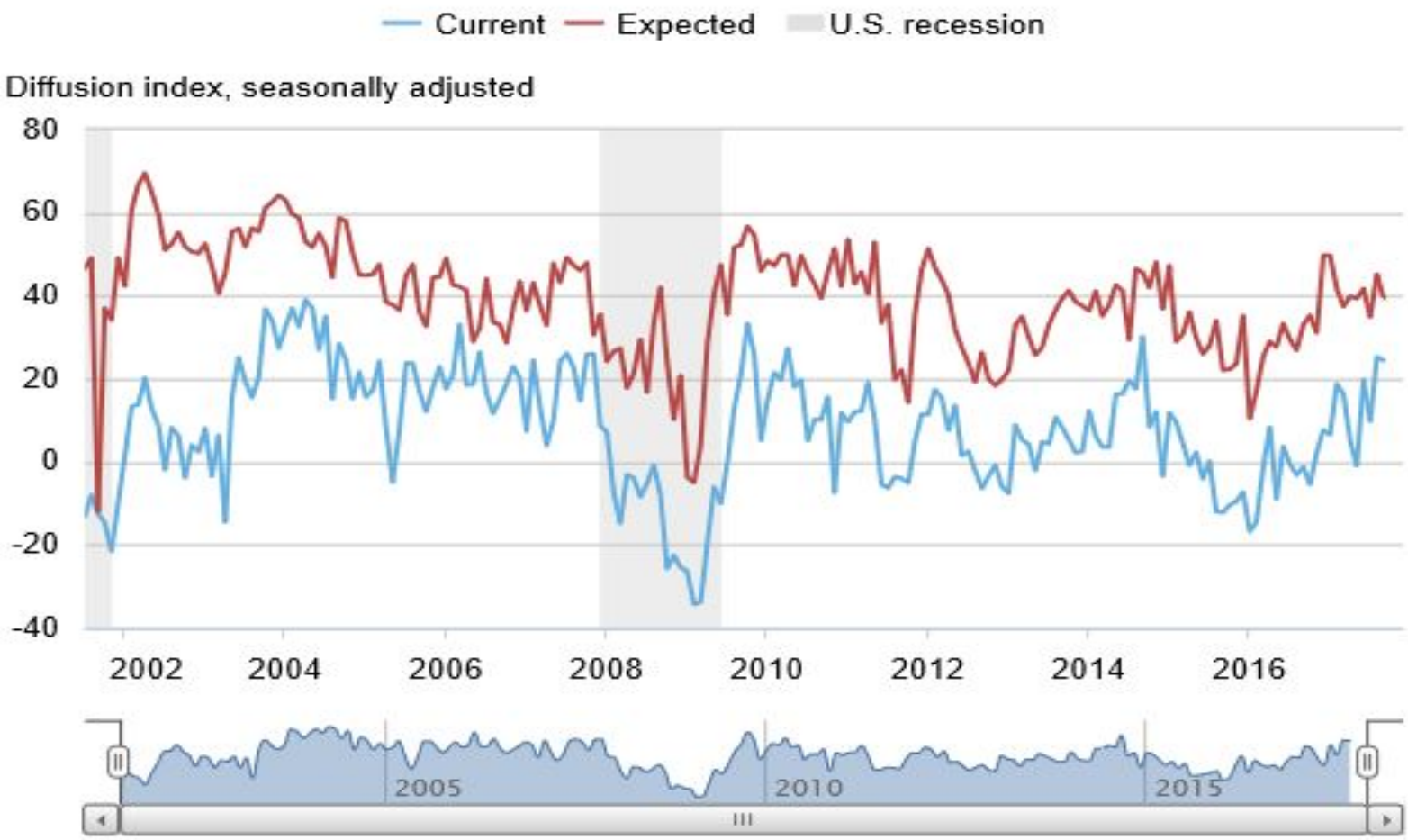
General Business Conditions



Empire State Manufacturing Survey, September 2017

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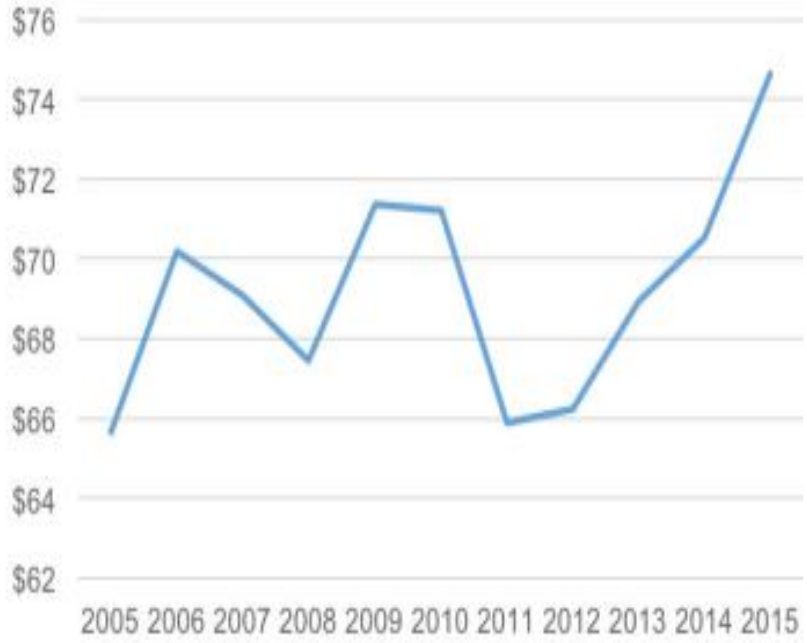
Figure 1: New York Manufacturing Output, in Billions of Dollars, 2005–2015



NAM Manufacturing Facts, April 2017

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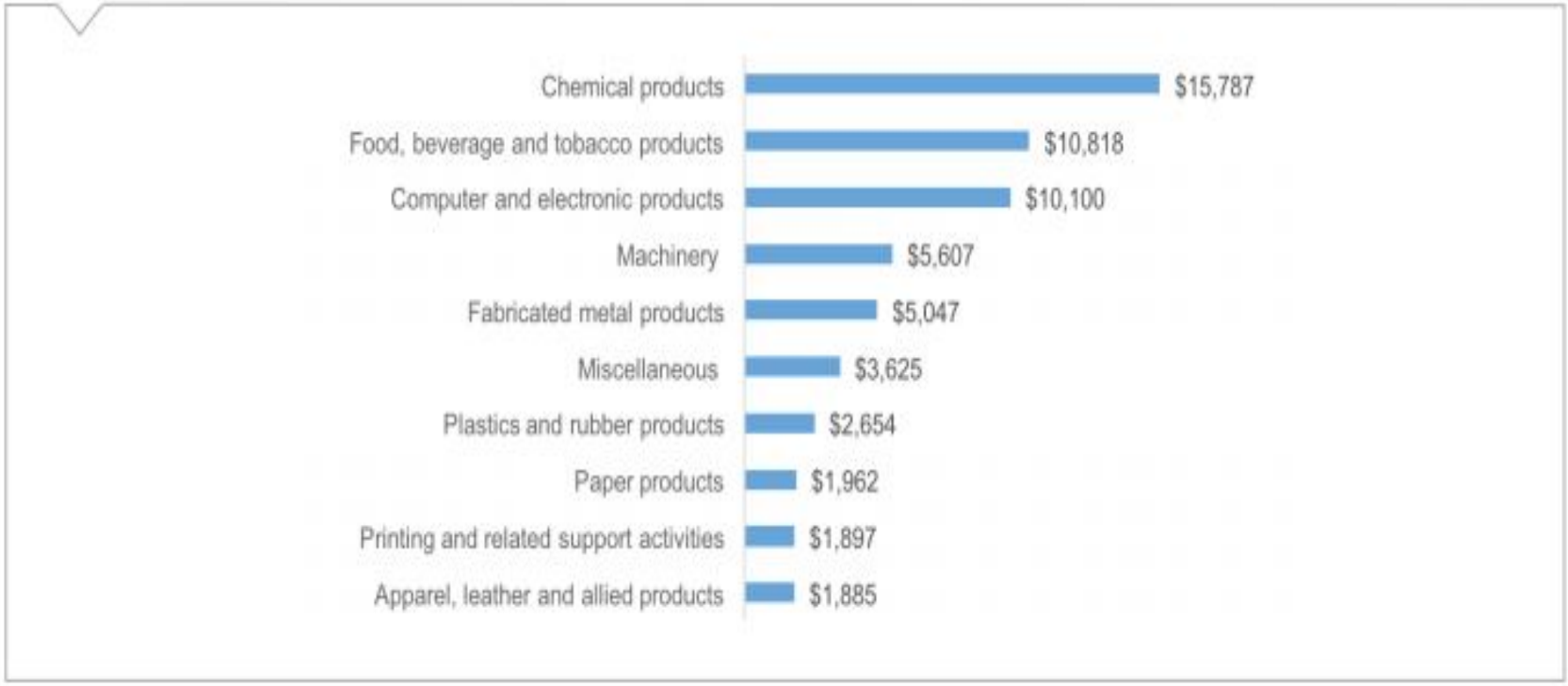
Figure 2: Top 10 New York Manufacturing Sectors, in Millions of Dollars, 2014



Revised March 2017

Center for Manufacturing Research

Manufacturing Employment
New York State Regions and Metro Areas, 2000 and 2010*

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	Employment*		Change:	
Metro Area	**2000**	**2010**	**Net**	**Percent**
New York State	*752,300*	*457,800*	*-294,500*	*-39.1%*
United States	*17,253,700*	*11,546,500*	*-5,707,200*	*-33.1%*
Downstate Region (10 county area)	320,200	178,100	-142,100	-44.4%
New York City	178,300	79,700	-98,600	-55.3%
Putnam-Rockland-Westchester	36,600	26,400	-10,200	-27.9%
Nassau-Suffolk	105,300	72,000	-33,300	-31.6%
Upstate Region (52 county area)	447,200	277,000	-170,200	-38.1%
Albany-Schenectady-Troy Metro Area	28,600	20,100	-8,500	-29.7%
Binghamton Metro Area	23,000	14,400	-8,600	-37.4%
Buffalo-Niagara Falls Metro Area	83,000	47,400	-35,600	-42.9%
Glens Falls Metro Area	7,600	6,100	-1,500	-19.7%
Ithaca Metro Area	4,300	3,000	-1,300	-30.2%
Kingston Metro Area	6,400	3,500	-2,900	-45.3%
Poughkeepsie-Newburgh-Middletown Metro Area	30,500	17,900	-12,600	-41.3%
Rochester Metro Area	103,000	59,300	-43,700	-42.4%
Syracuse Metro Area	44,700	27,800	-16,900	-37.8%
Utica-Rome Metro Area	18,900	11,100	-7,800	-41.3%
Non-Metro Counties	97,200	66,400	-30,800	-31.7%

*Average of January-June employment.

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Central New York Region
Employment Levels* by Supersector, 2000 and 2010
Syracuse MSA; Cayuga and Cortland Counties

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	Employment Level*		Change:	
Supersector	**2000**	**2010**	**Net**	**%**
Total Nonfarm	**368,900**	**356,500**	**-12,400**	**-3.4%**
Total Private	301,600	286,800	-14,800	-4.9%
Natural Resources, Mining and Construction	13,200	13,100	-100	-0.8%
Manufacturing	52,200	33,000	-19,200	-36.8%
Trade, Transportation and Utilities	75,500	68,200	-7,300	-9.7%
Information	8,000	5,400	-2,600	-32.5%
Financial Activities	18,900	18,000	-900	-4.8%
Professional and Business Services	32,900	36,400	+3,500	+10.6%
Educational and Health Services	56,700	66,900	+10,200	+18.0%
Leisure and Hospitality	28,700	31,800	+3,100	+10.8%
Other Services	15,600	14,200	-1,400	-9.0%
Government	67,400	69,700	+2,300	+3.4%

*Average January - June job count.

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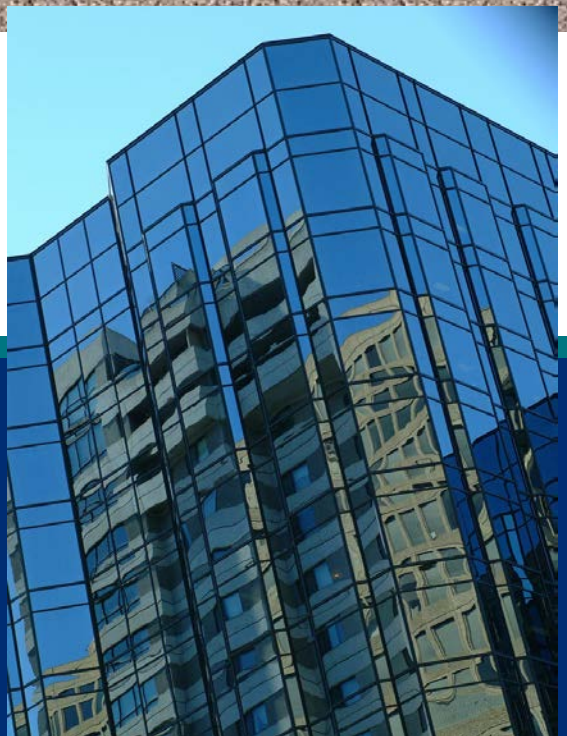
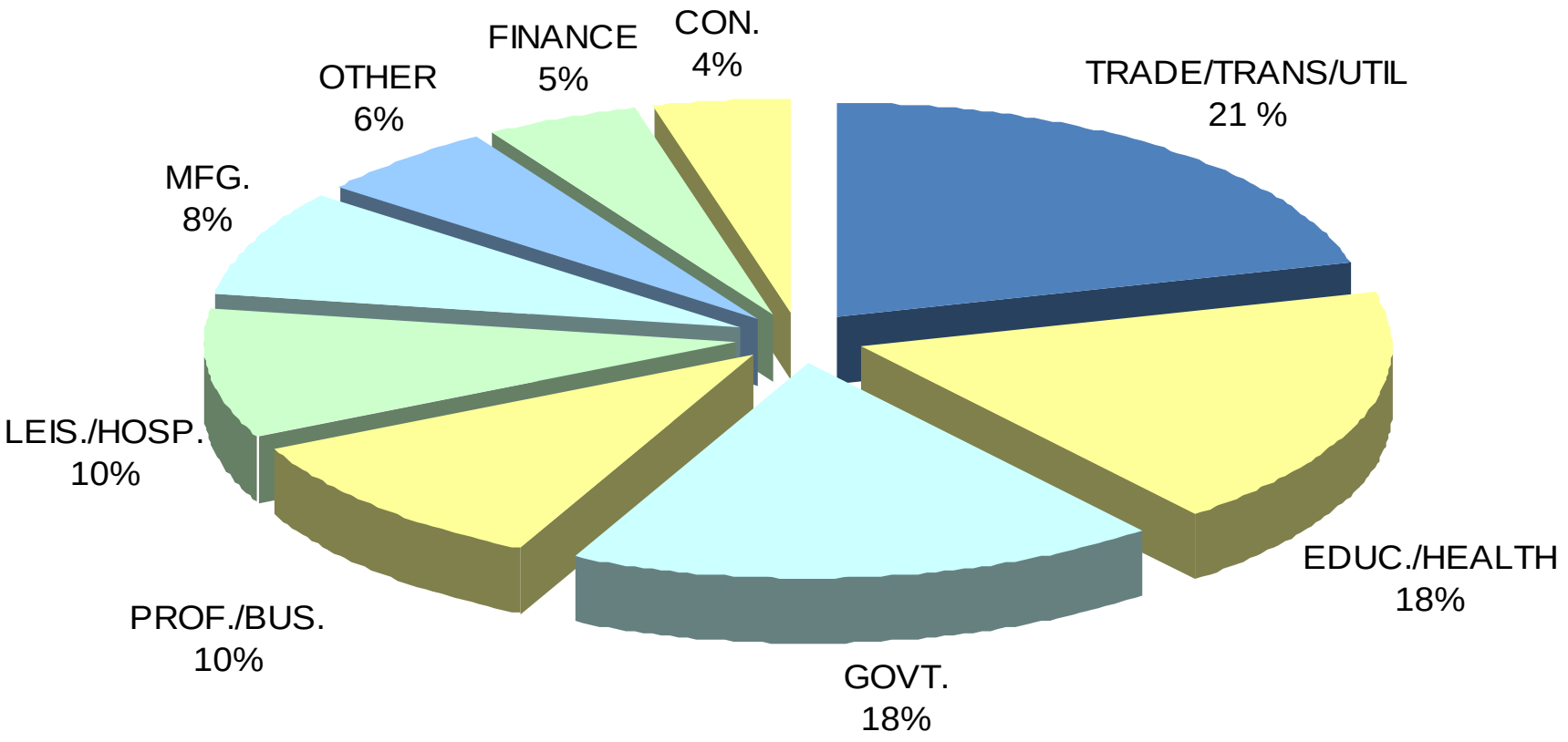
NEW YORK STATE OF OPPORTUNITY. Department of Labor

Job Trends: *Central New York*



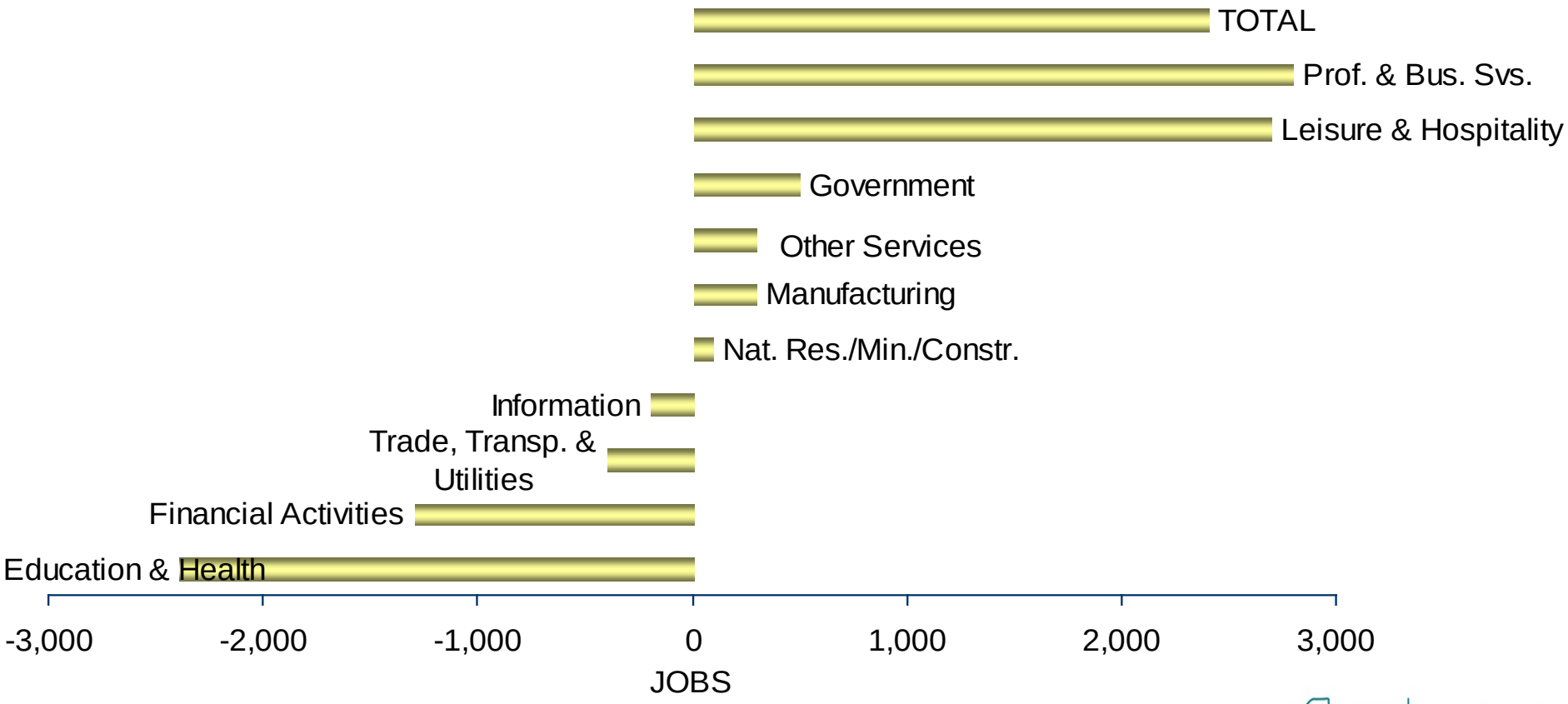
Employment by Industry 4th Quarter 2016



Source: QCEW

* The Syracuse MSA includes Onondaga, Madison & Oswego counties.

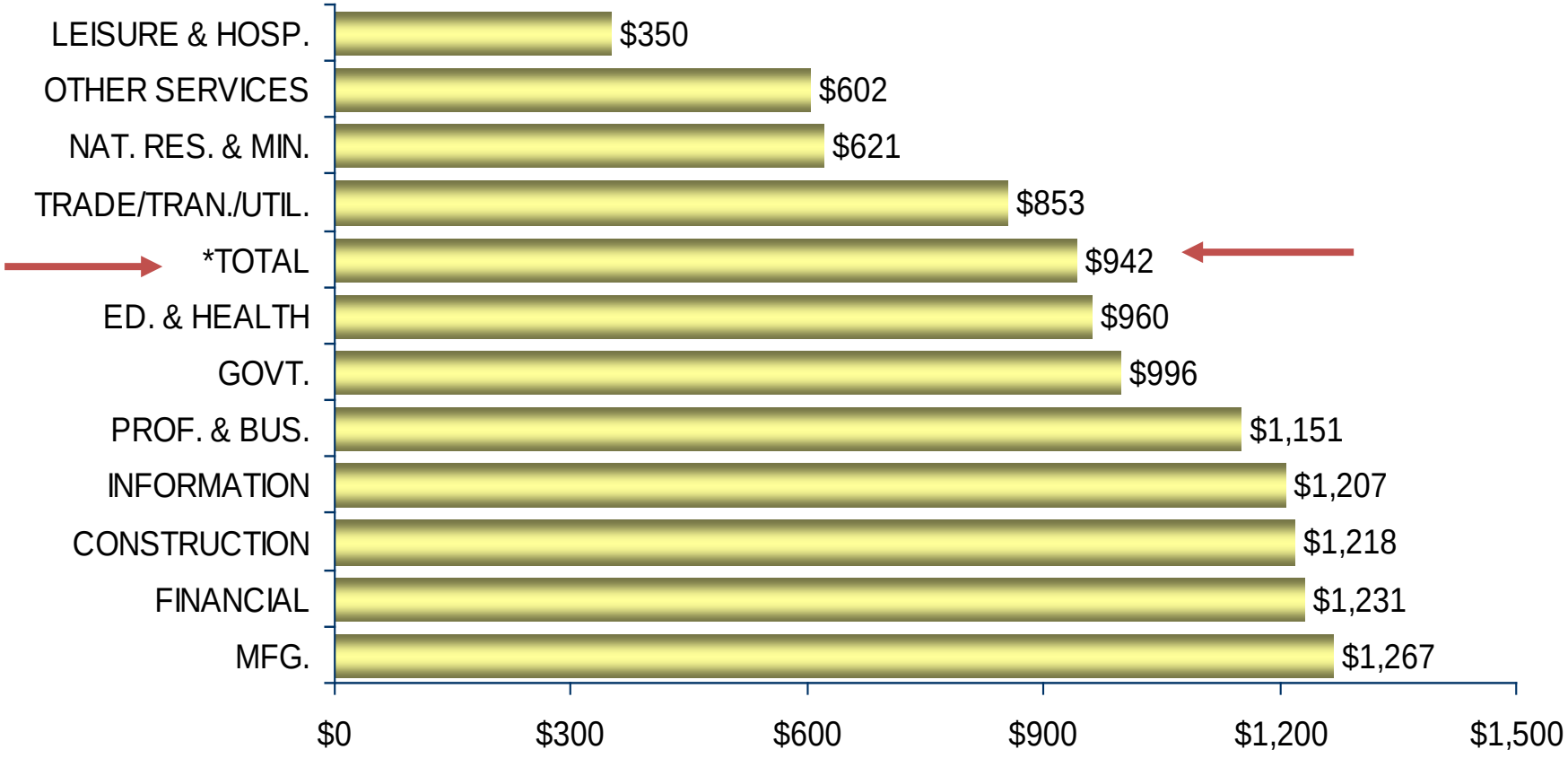
Jobs Gained or Lost
August 2017 vs. August 2016



NEW YORK STATE OF OPPORTUNITY. Department of Labor

*The Syracuse MSA includes Onondaga, Madison & Oswego counties.

Average Weekly Wage by Industry, 4th Quarter 2016



Source: QCEW

* The Syracuse MSA includes Onondaga, Madison & Oswego counties.

Many Companies & Industries Are Growing in Central NY!

- **AGRANA FRUIT US INC** (fruit processing mfg.)
- **ALOFT HOTEL**
- **BITZER SCROLL** (air conditioning/refrigerator compressor mfg.)
- **DESTINY USA** (retail/entertainment/restaurants)
- **DIELECTRIC LABS** (capacitor & film mfg.)
- **DUMAC BUSINESS SYSTEMS** (customizes point-of-sale devices)
- **EMBASSY SUITES BY HILTON SYRACUSE – DESTINY USA**
- **F.W. WEBB CO.** (plumbing supply distributor)
- **G&C FOOD DISTRIBUTORS AND BROKERS INC.** (frozen food distributor)
- **G.A. BRAUN INC.** (maker of commercial washers/dryers)
- **HILL-ROM (WELCH ALLYN)** (medical diagnostics equipment mfg.)
- **HYATT HOUSE HOTEL**
- **JADAK TECHNOLOGIES** (barcode scanner mfg.)
- **JMA WIRELESS** (maker of wireless communications equipment)
- **LABORATORY ALLIANCE OF CENTRAL NEW YORK** (laboratory operations)
- **LIGHT 4 LIFE CANDLES LLC** (candle manufacturing)
- **LOCKHEED MARTIN** (design and build radar/sonar/sensors)

Many Companies & Industries Are Growing in Central NY!

- **NORTHEASTERN ELECTRONICS CO.** (power cables, wiring harnesses mfg.)
- **POINT PLACE CASINO**
- **PROTERRA LED** (produces energy efficient high-output lighting)
- **RAPID RESPONSE MONITORING** (home security & medical monitoring)
- **SAAB DEFENSE AND SECURITY** (radar maker)
- **SHOREGROUP** (systems network management)
- **SPECIALIZED PACKAGING GROUP** (paper printing plant)
- **SRC INC.** (defense-related engineering, design & mfg.)
- **ST. JOSEPH'S HOSPITAL HEALTH CENTER**
- **STERI-PHARMA LLC** (antibiotic maker)
- **TERRADIOL NEW YORK** (medical marijuana grower)
- **TESSY PLASTICS** (plastic molding products mfg.)
- **ULTRA DAIRY LLC** (dairy products mfg.)
- **UPSTATE MEDICAL UNIVERSITY**
- **VERIZON COMMUNICATIONS** (voice, Internet, video services)

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GROWTH CLUSTERS IN CNY

According to Battelle's findings, the clusters with the greatest prospects for growth are:

- (1) biosciences
- (2) digital and electronic devices
- (3) environmental systems (AMTEC)
- (4) packaging
- (5) precision metalworking

For all but the biosciences cluster, the potential clusters are at least 40 percent more concentrated in the region than they are nationally, with environmental systems four times more concentrated.

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HOW GLOBAL MANUFACTURERS CAN SUCCEED

- Make Talent "The" Top Priority
- Embrace Advanced Technologies to Drive Competitive Advantage
- Leverage Strengths of Partnerships Beyond Traditional Boundaries
- Develop a Balance Approach Across the Global Enterprise
- Cultivate Smart, Strategic Public-Private Partnerships

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WHAT IS MACNY DOING ?

- Success Networks
- Workforce Initiatives
- Member Services
- Advocacy & Issues Coalitions

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NEW INITIATIVES

- Individual Members Success Networks
- Senior and Emerging Leaders Services
- PTECH and CTE Initiatives
- Regional Apprenticeships Approach
- Statewide Advocacy Efforts & Networks

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WHAT CAN YOU DO?

- Invest and Pursue Excellence
- Lead and Adapt
- Make Great Products
- Engage with MACNY and our members

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THANK YOU

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