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OUR MANUFACTURING FUTURE

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4 Trends Shaping Advanced Manufacturing

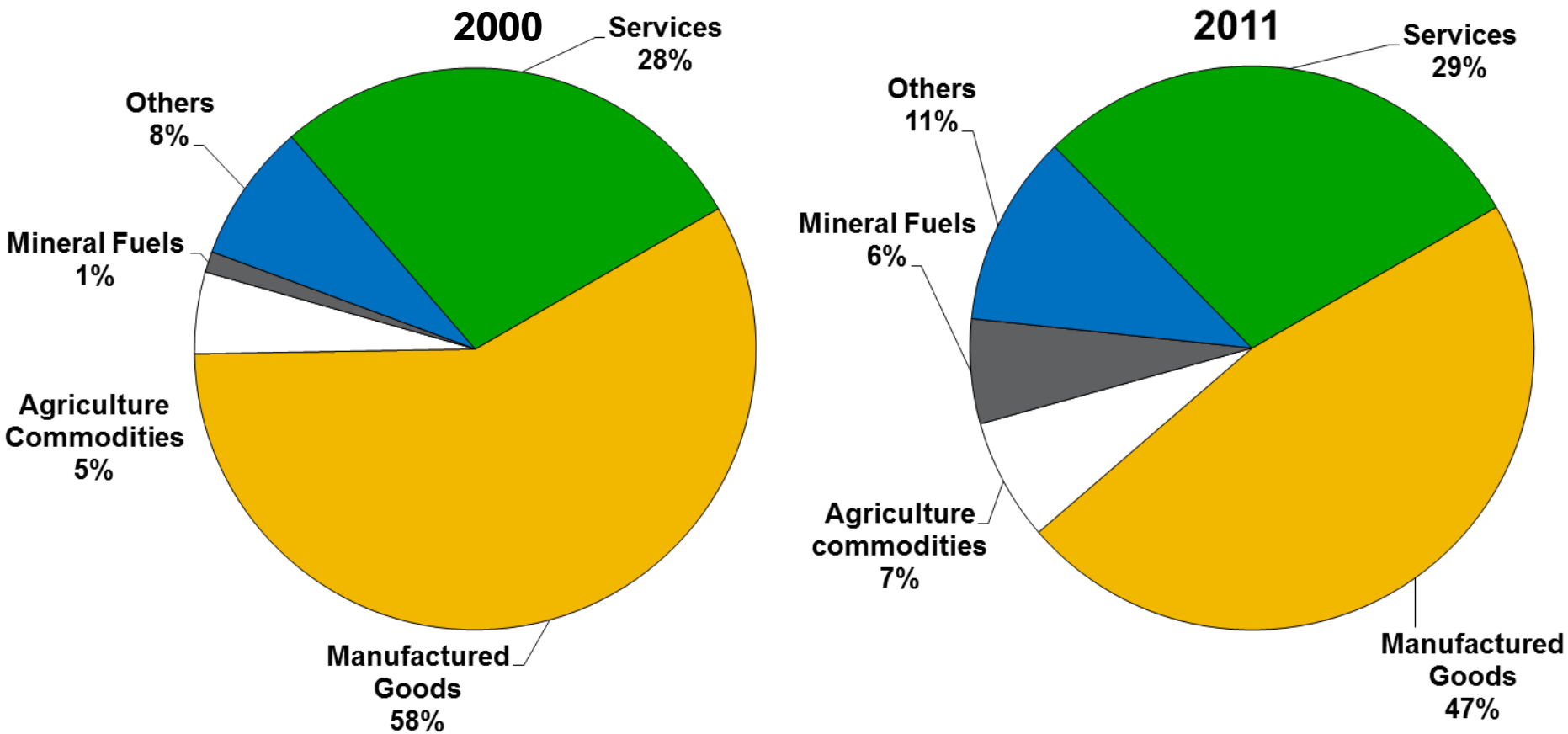
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The World as the Market

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

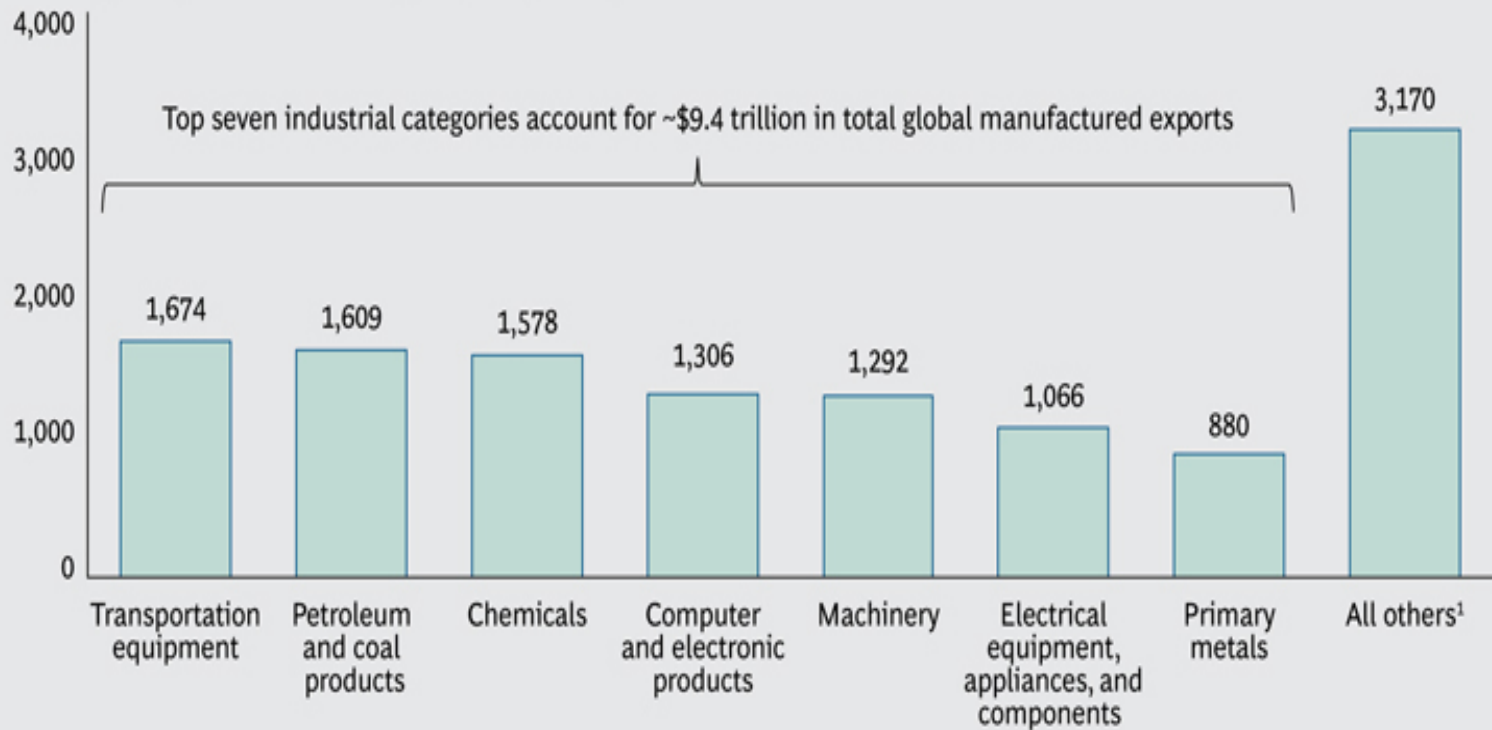


Source(s): U.S. Census Bureau and MAPI calculations

Industrial Sectors

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

Value of global exported manufactured goods, 2011 (\$billions)

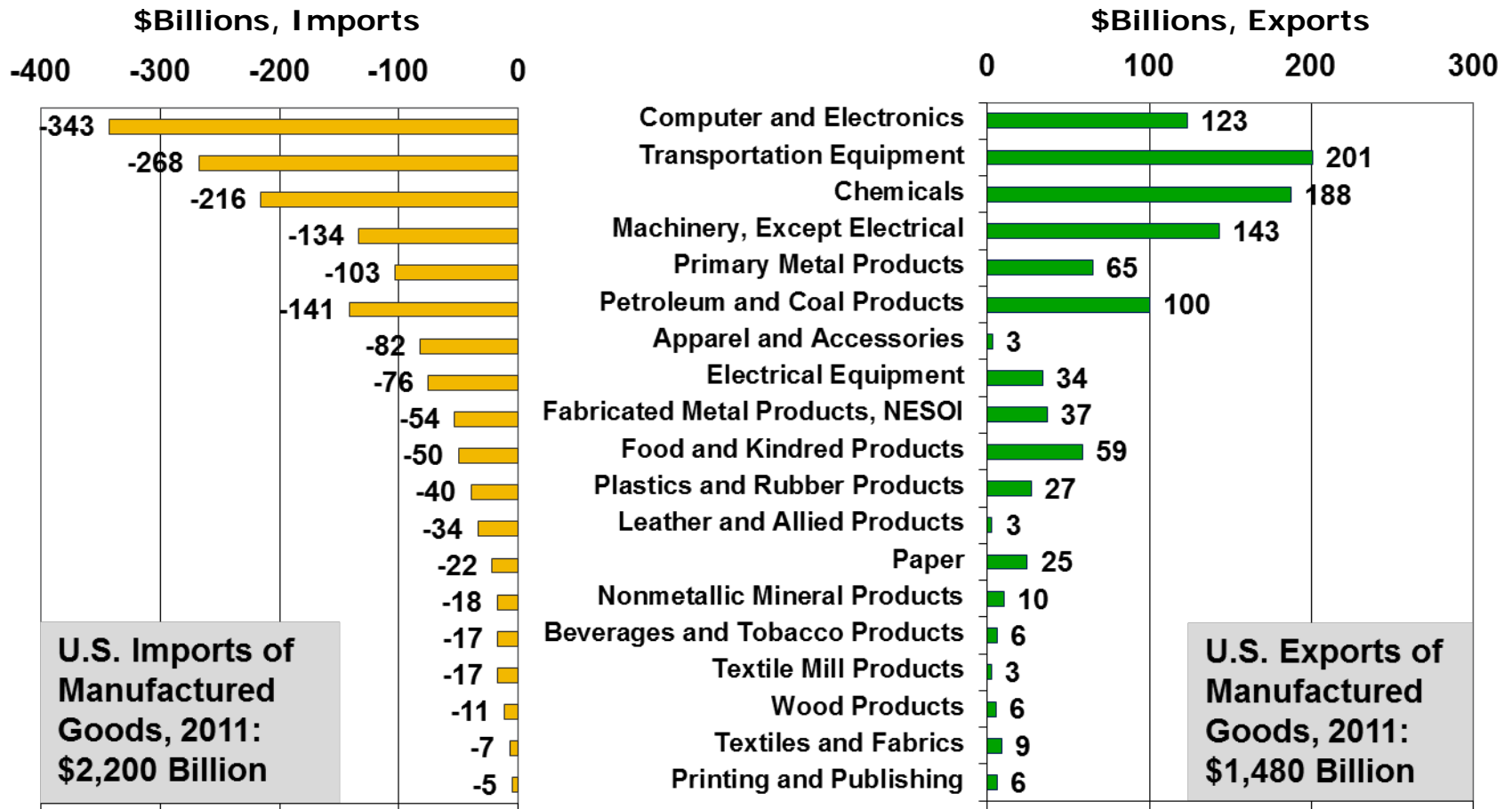


Sources: OECD, BCG analysis.

Note: Nominal US\$. Excludes countries where industry-level export data are not available (e.g., South Korea, Hong Kong, Singapore, and Malaysia).

¹Includes food products, textile product mills, miscellaneous, plastic and rubber products, fabricated metal products, paper, nonmetallic mineral products, and wood products.

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

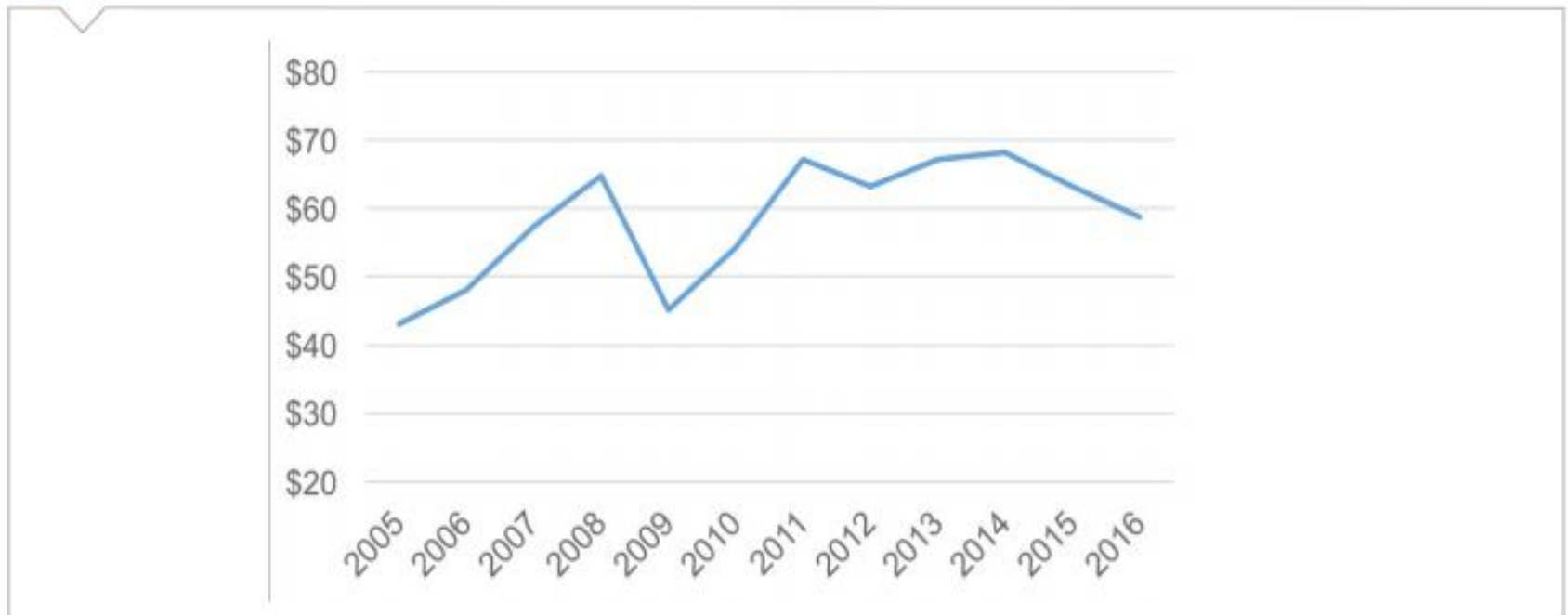


Source(s): U.S. International Trade Commission and MAPI



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



NAM Manufacturing Facts, April 2017



MRI Study Results

| 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.

MRI Study Results

| 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



Industry 4.0 is the vision of the industrial production of the future

Source: BCG.

TOP 8 EMERGING TECHNOLOGIES

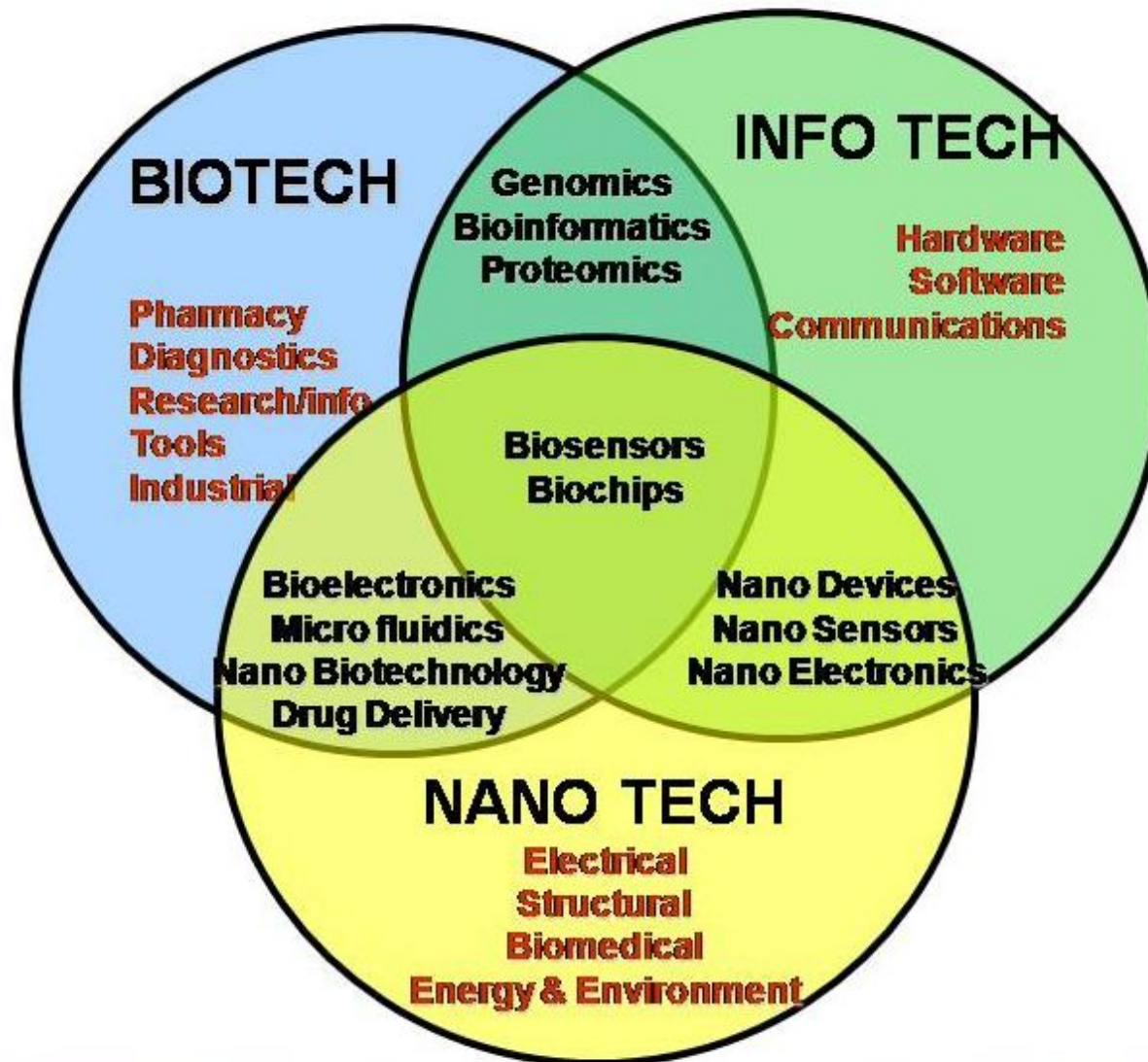
- » Big Data
- » Internet of Things
- » Robotics and Artificial Intelligence
- » Virtual and Augmented Reality
- » Miniaturized Electro-mechanical Elements
- » Biotechnology
- » Nano Materials
- » 3D Printing

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CONVERGENCE OF TECHNOLOGIES

BIO-INFO-NANO



Technology Explosion

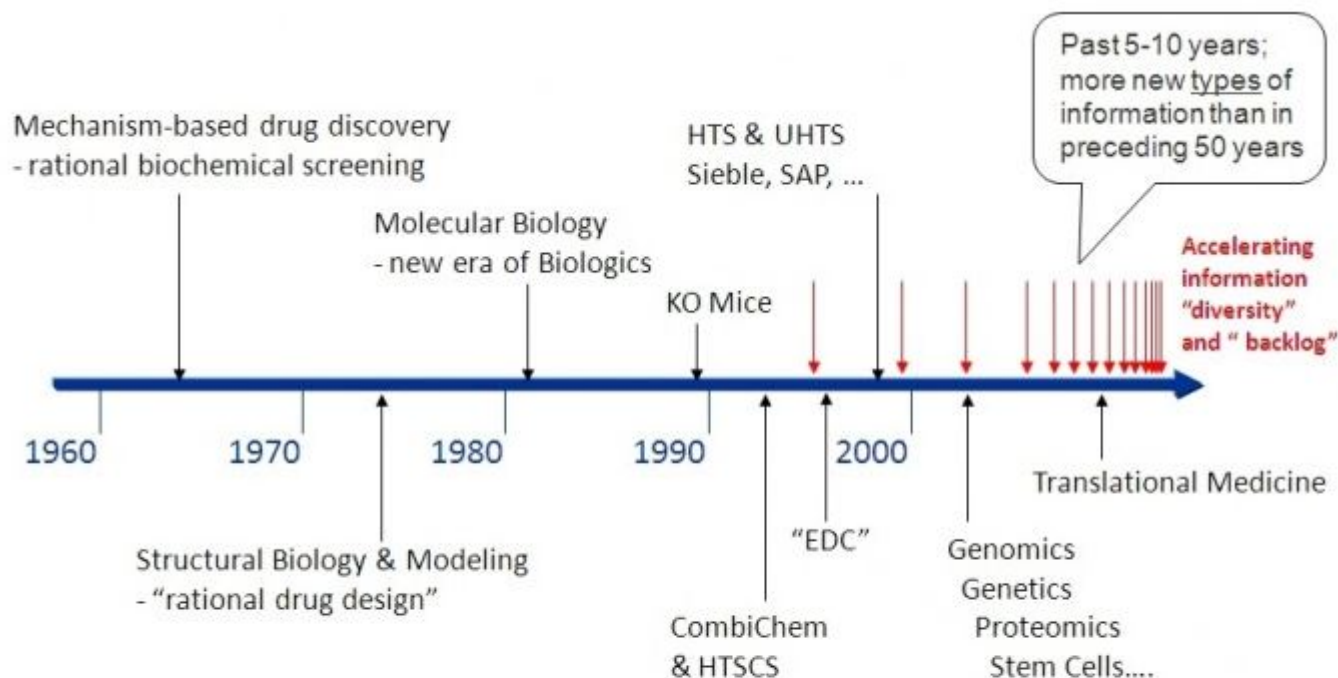


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Speed of Technology



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Brains not Brawn

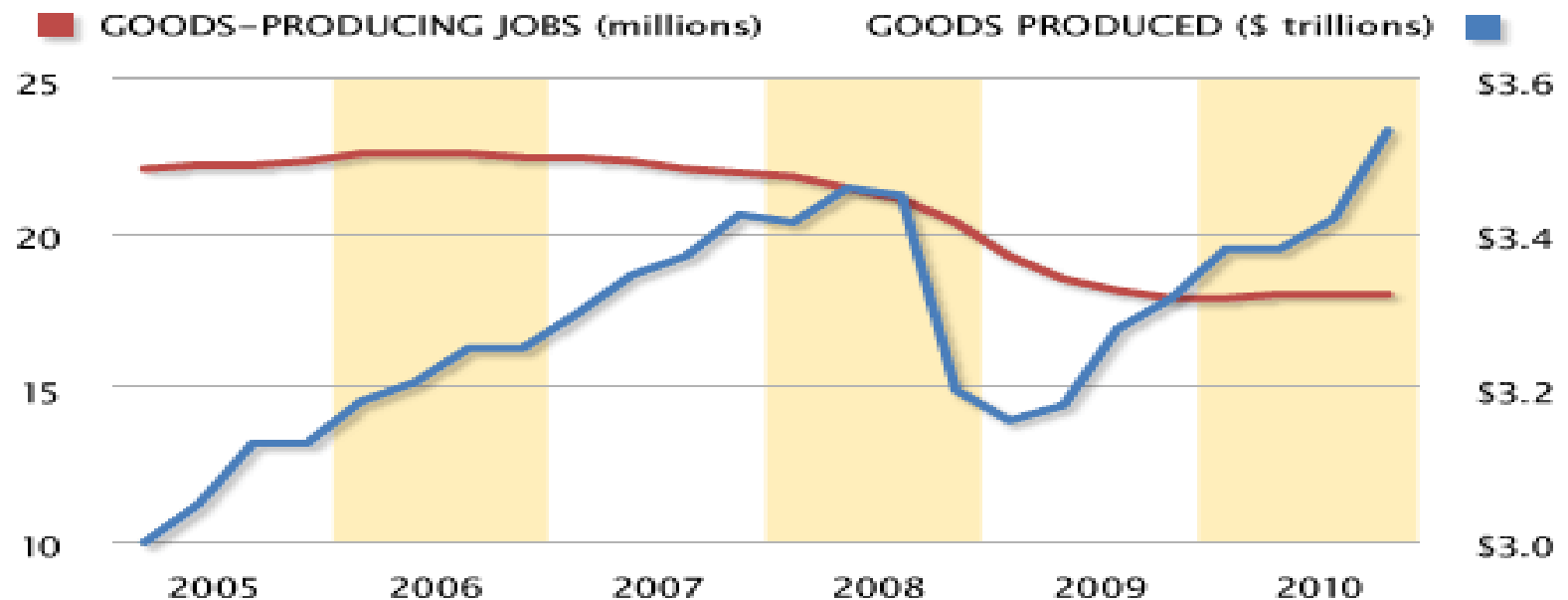
Brains not Brawn



Where have all the jobs gone?

Missing manufacturing jobs

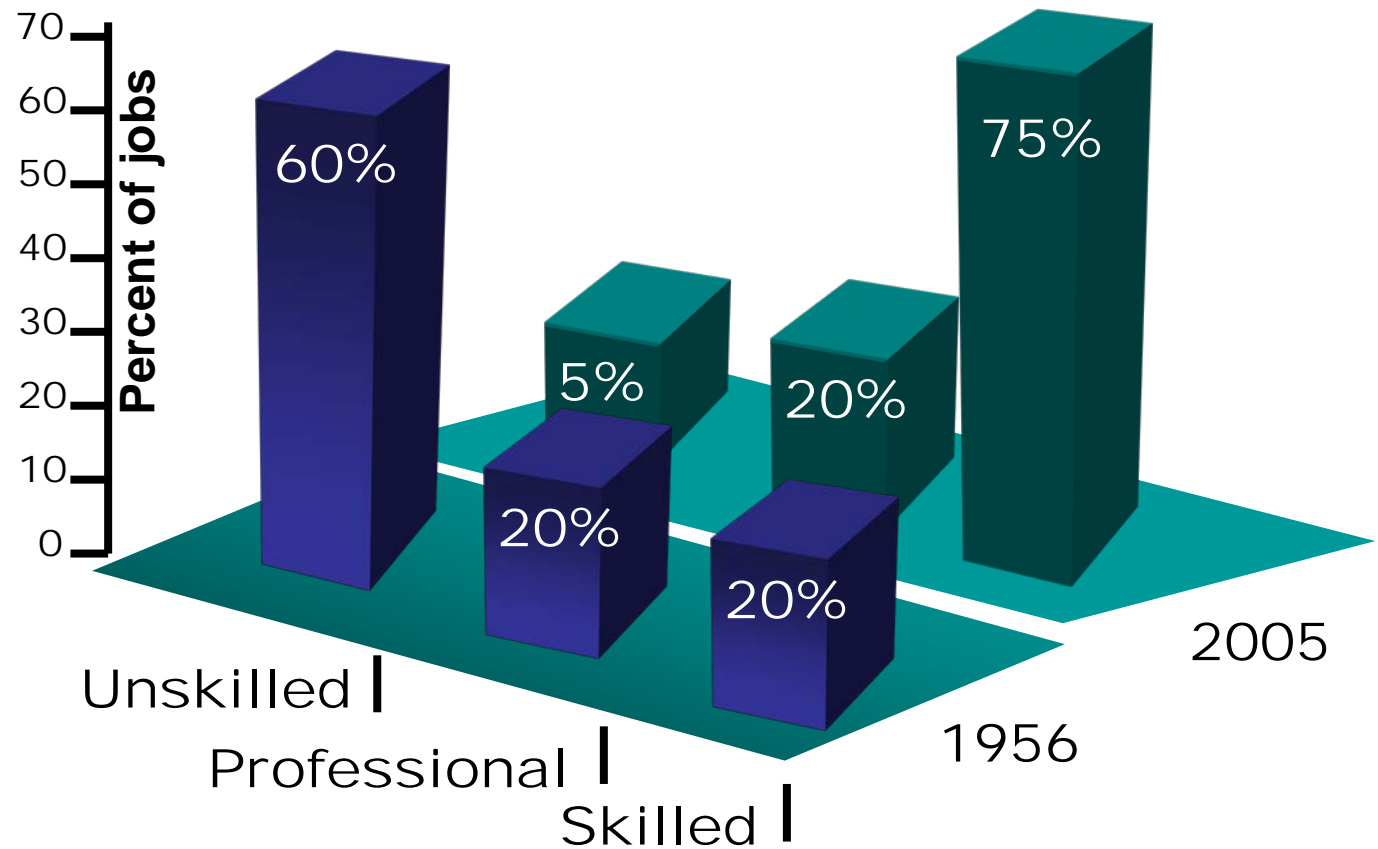
Despite a strong rebound in manufacturing industries since the recession, hiring has not kept pace.



SOURCE: BEA, BLS

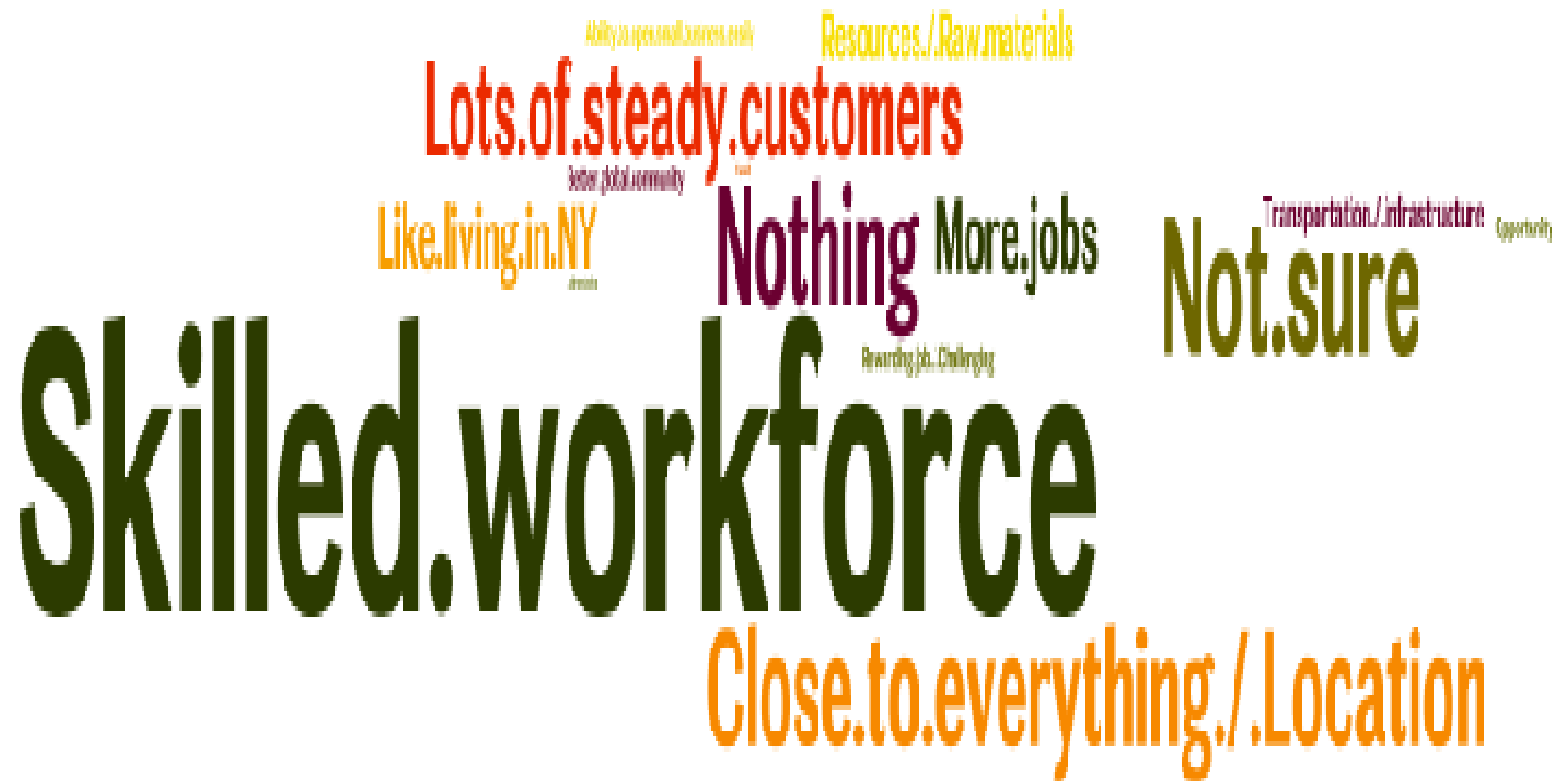
msnbc.com

Workforce Skills Level Needed

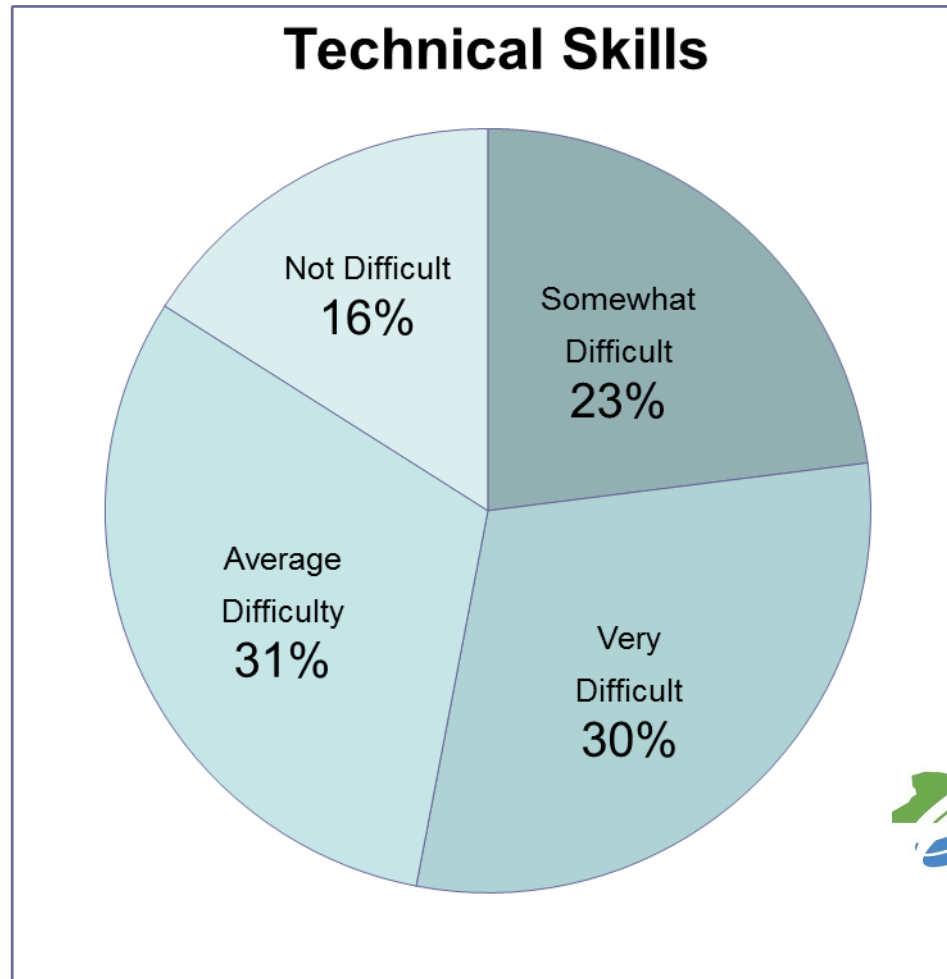


What would you say is the **best thing about having manufacturing business operations** within the State of New York?

2012



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

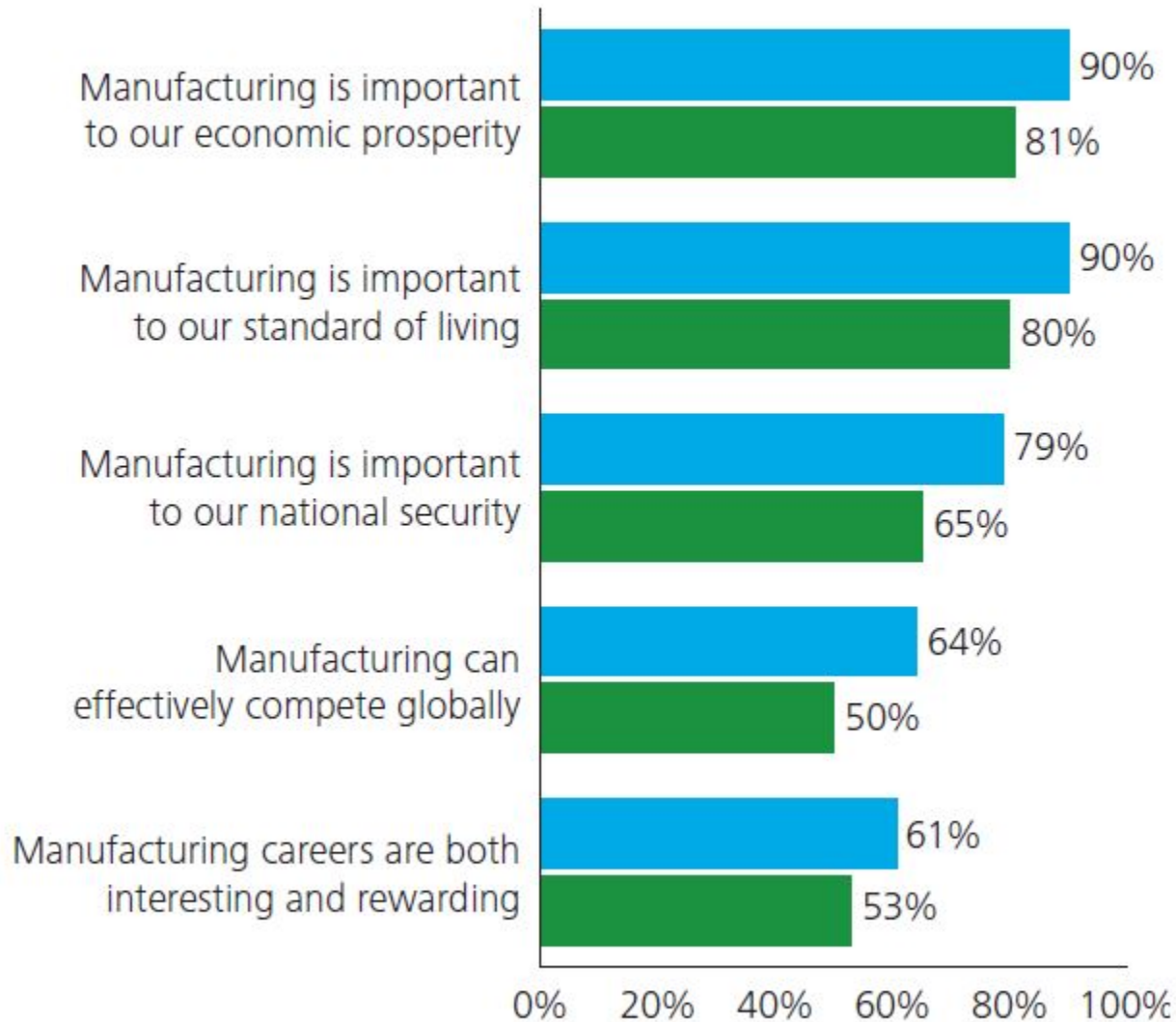


2014

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



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■ Total ■ 18-24 year olds



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Clusters Matter

What are Clusters?



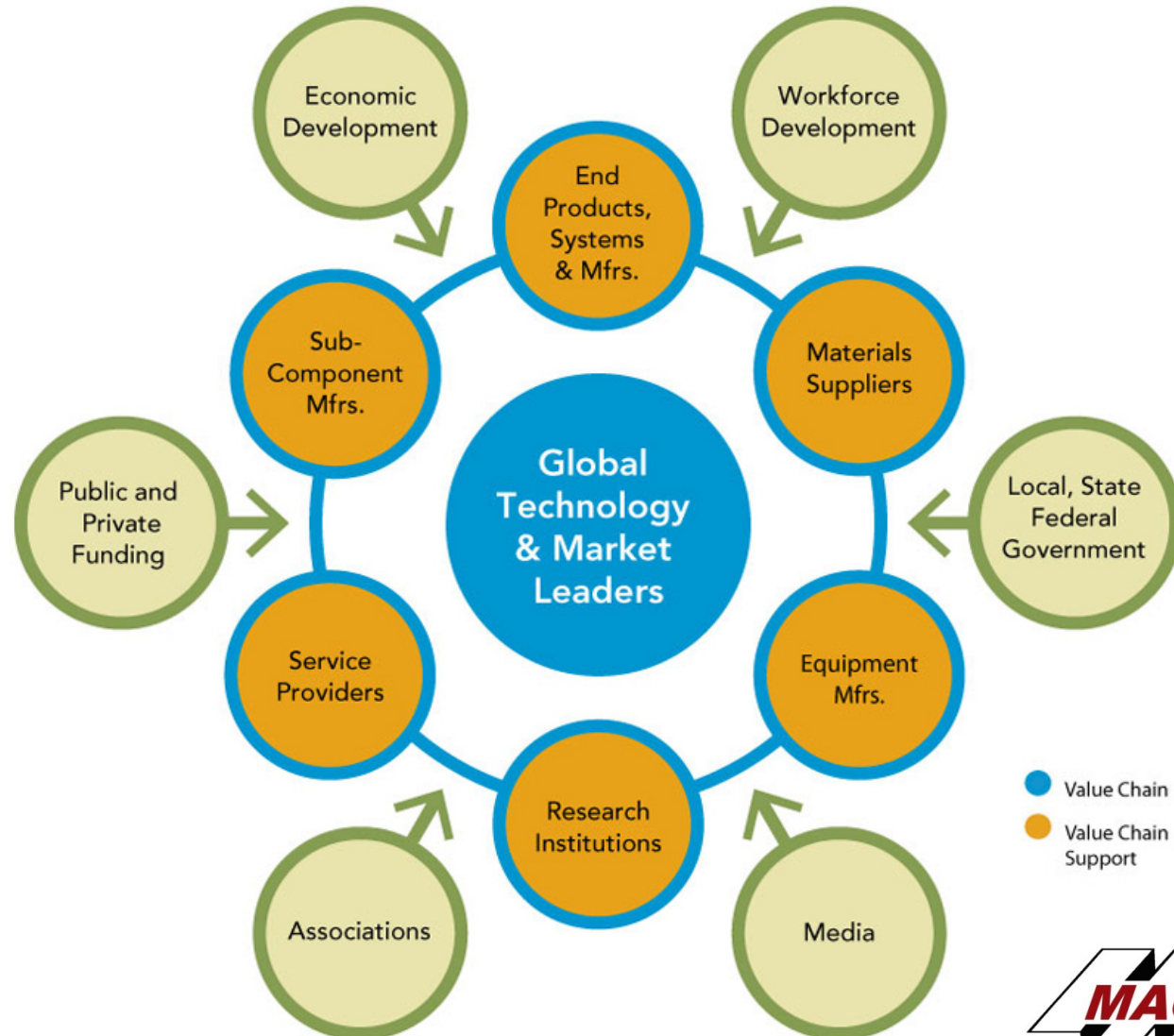
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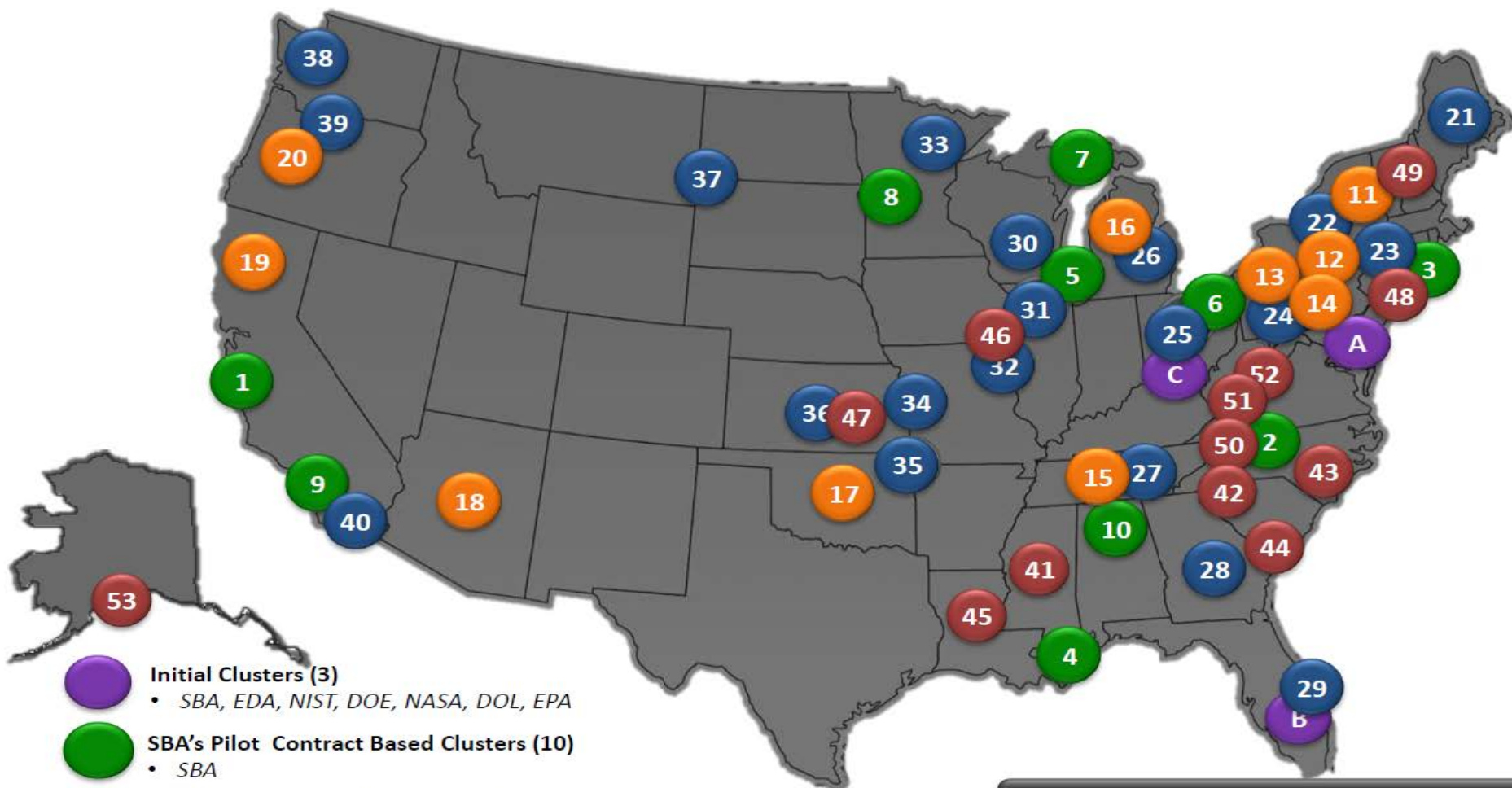
Clusters are geographic concentrations of interconnected businesses, suppliers, service providers, and associated institutions in a particular sector.

As defined by The Brookings Institution,



What is a Cluster?





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**

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

56 Federally Funded Cluster Initiatives

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

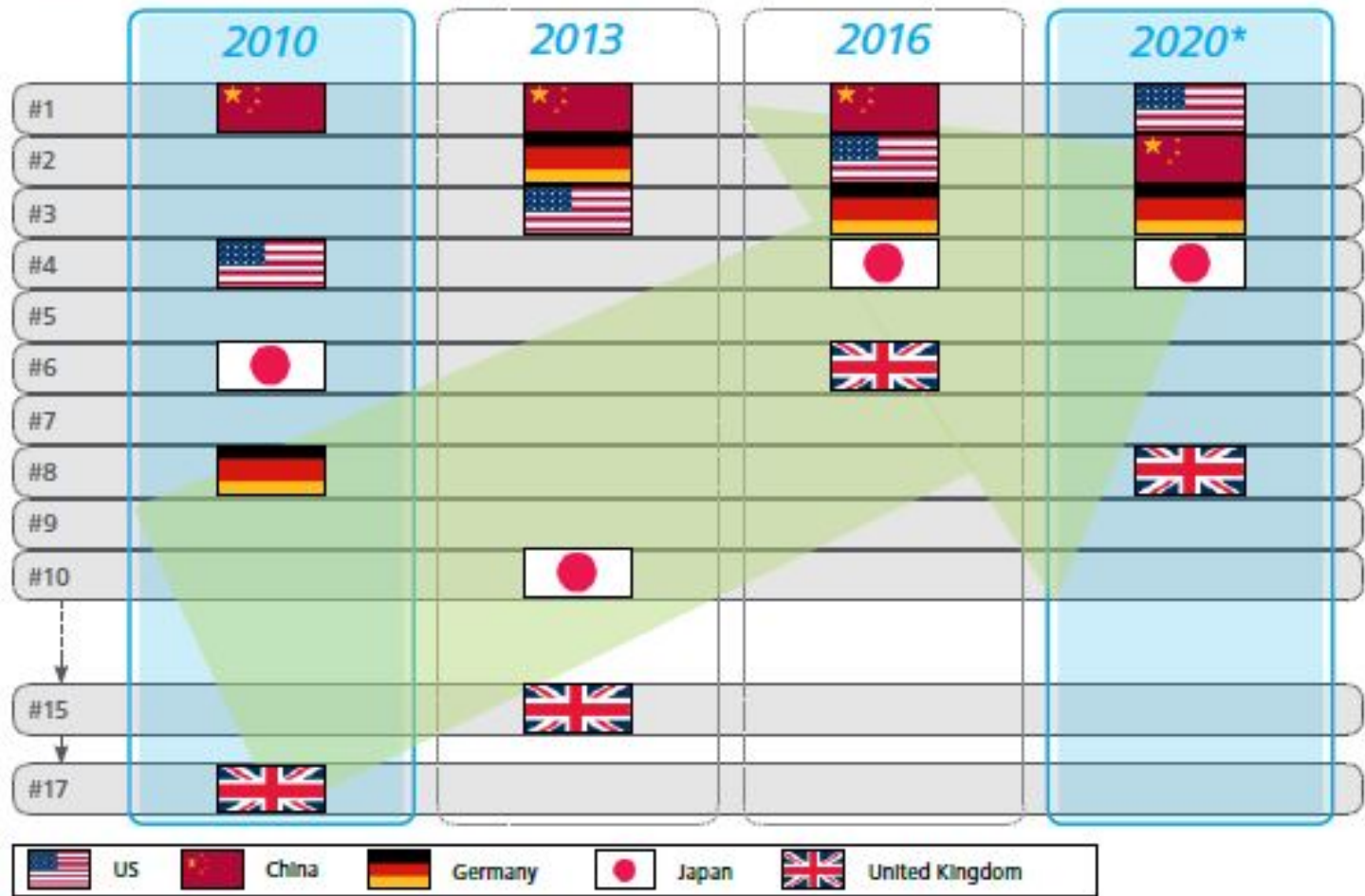
RETURNING U.S. MANUFACTURING

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 Statistics; and U.S. Economic Census.

Note: The index covers four direct costs only: wages, productivity growth, energy costs, 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.

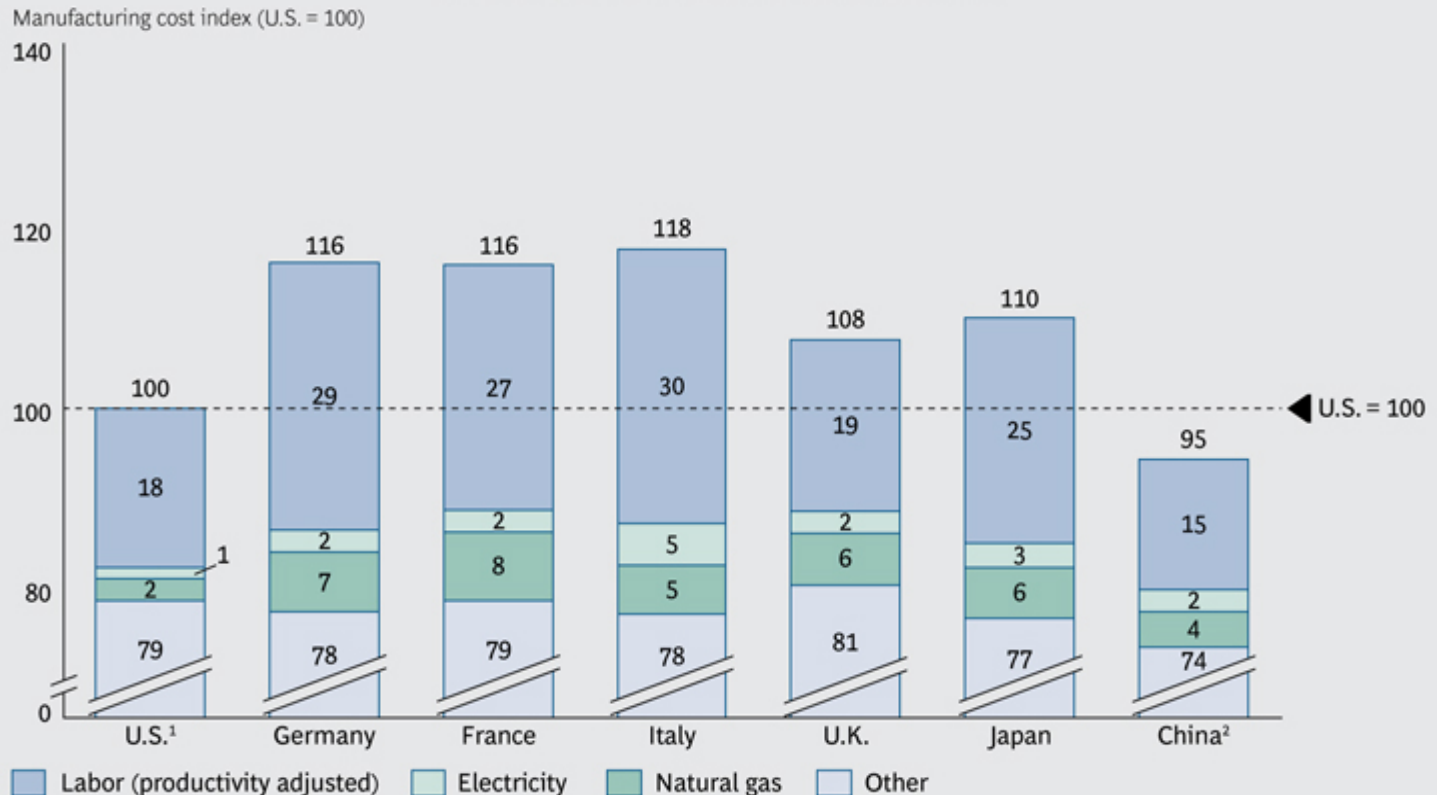
¹Productivity-adjusted.



US as Low Cost?

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

Average projected manufacturing cost structures of the major exporting nations relative to the U.S., 2015



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.

¹U.S. figures represent costs in a set of select lower-cost states specified in previous publications.

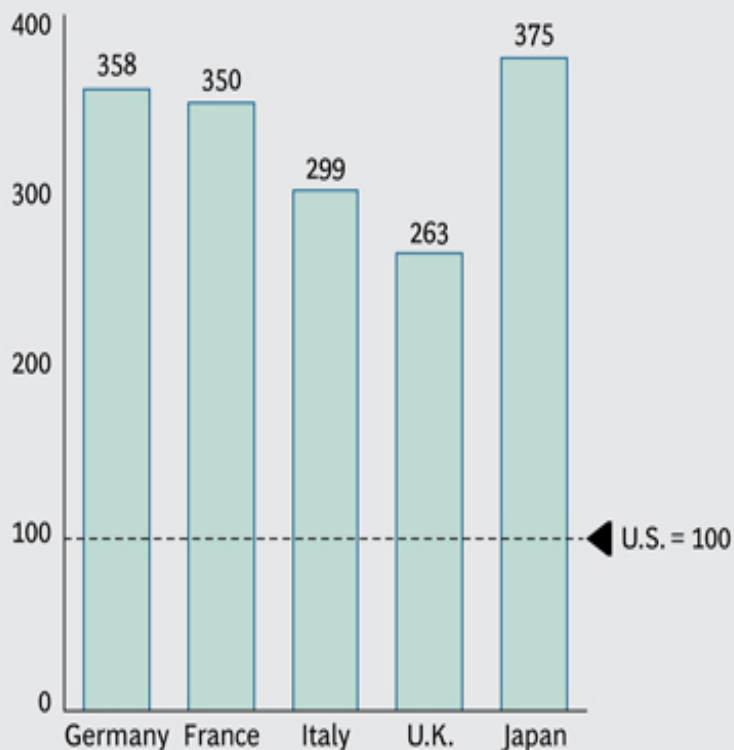
²Chinese figures represent the Yangtze River Delta region.

Abundant Natural Gas

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

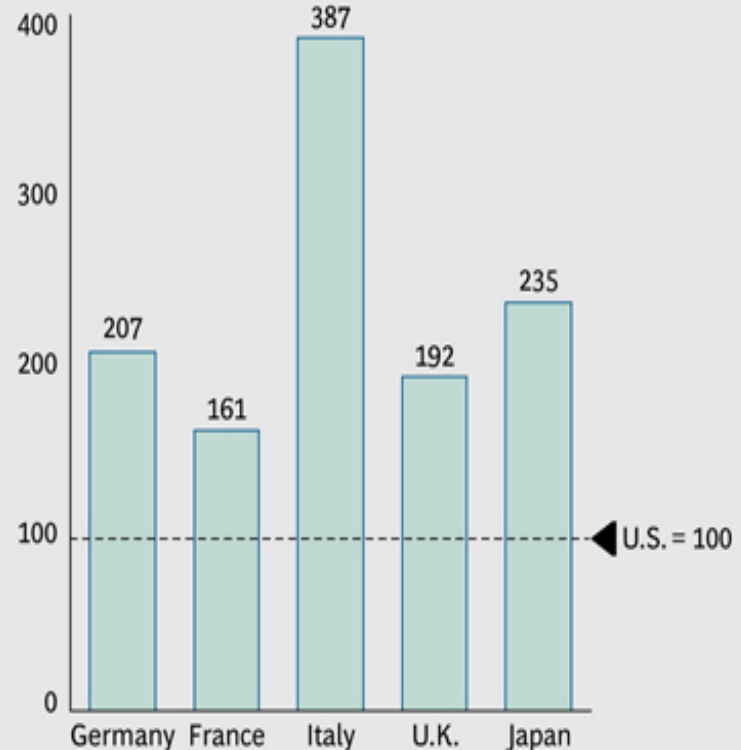
Natural gas prices in other major manufacturing economies are around 2.6 to 3.8 times higher than in the U.S....

Natural gas prices (indexed, U.S. = 100)



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

Industrial electricity prices, 2012 (indexed, U.S. = 100)















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

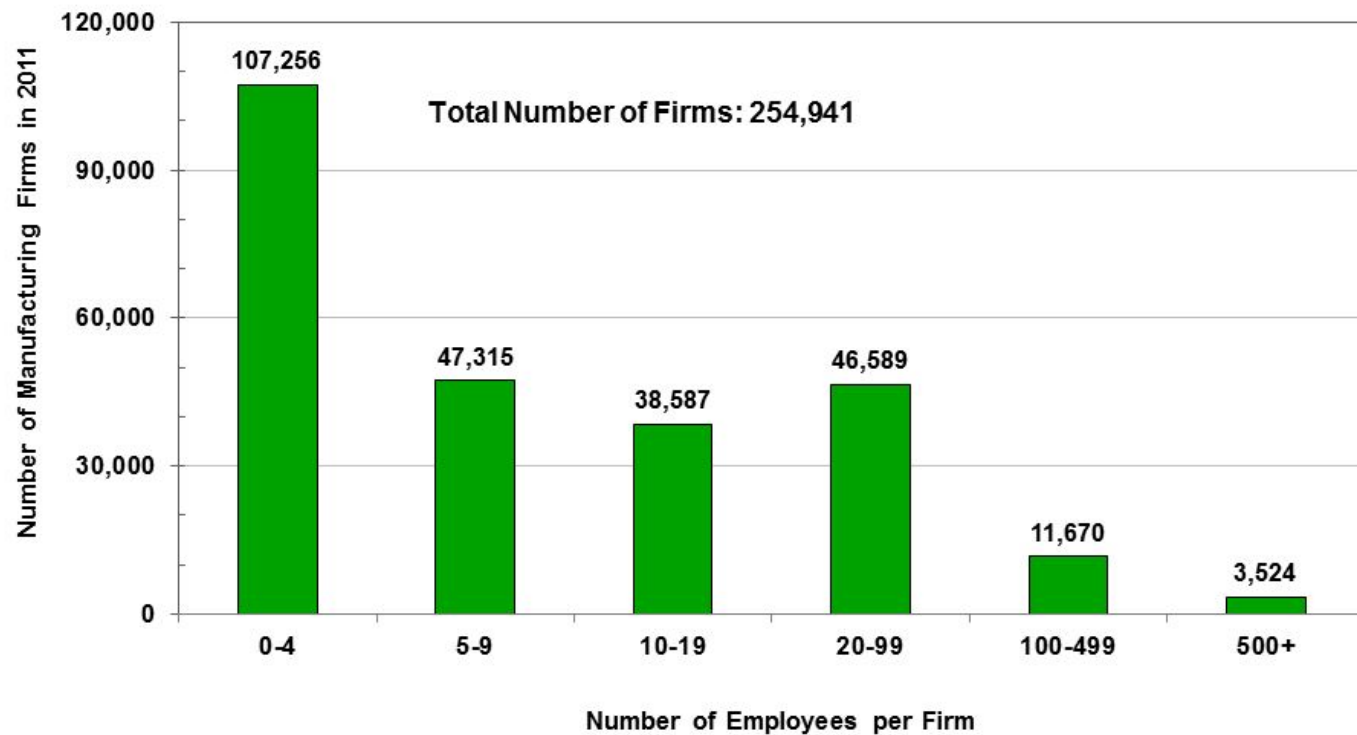
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Manufacturing Firms by Number of Employees

(Updated April 2014)



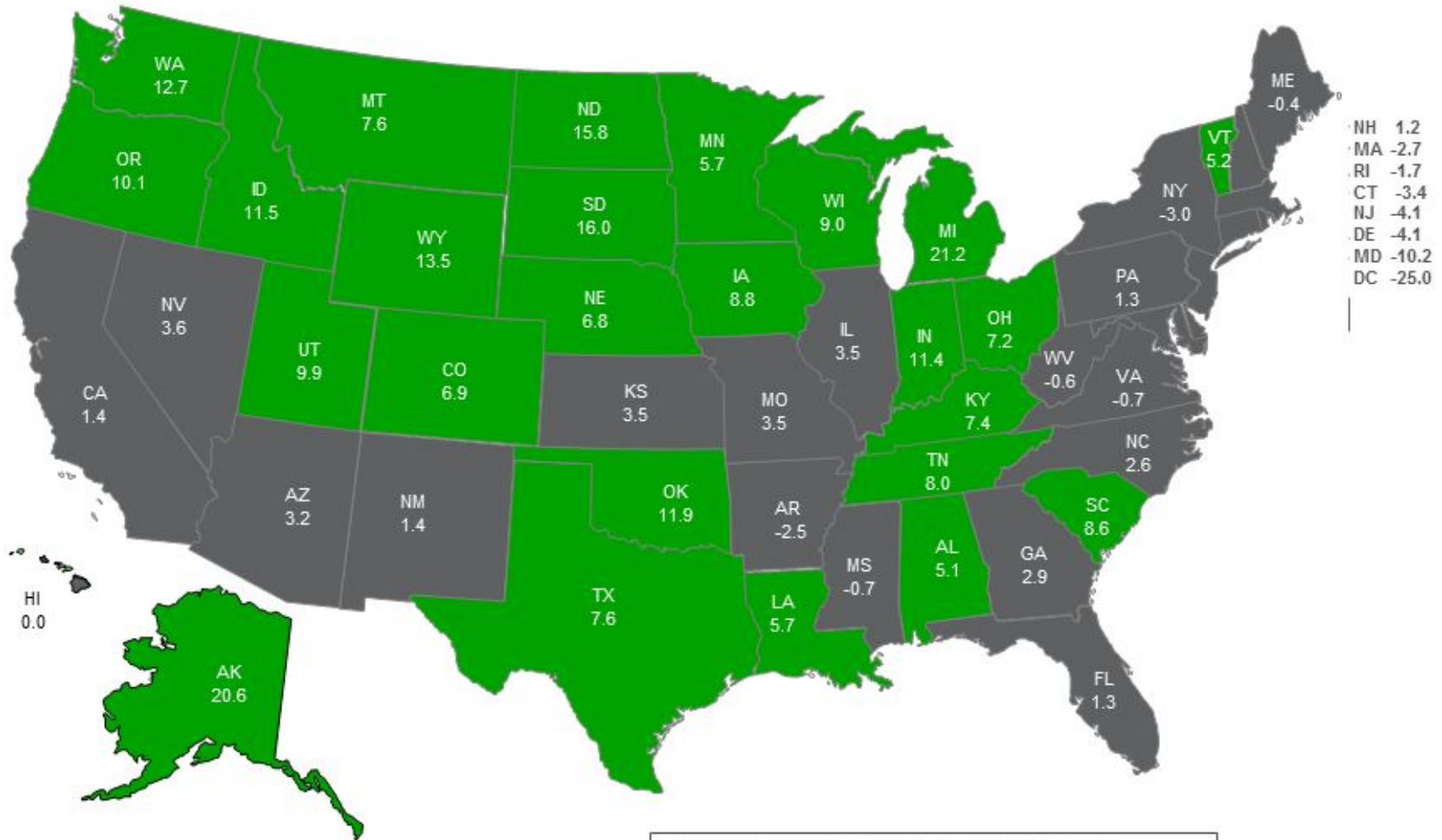
Source(s): U.S. Census Bureau and MAPI



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

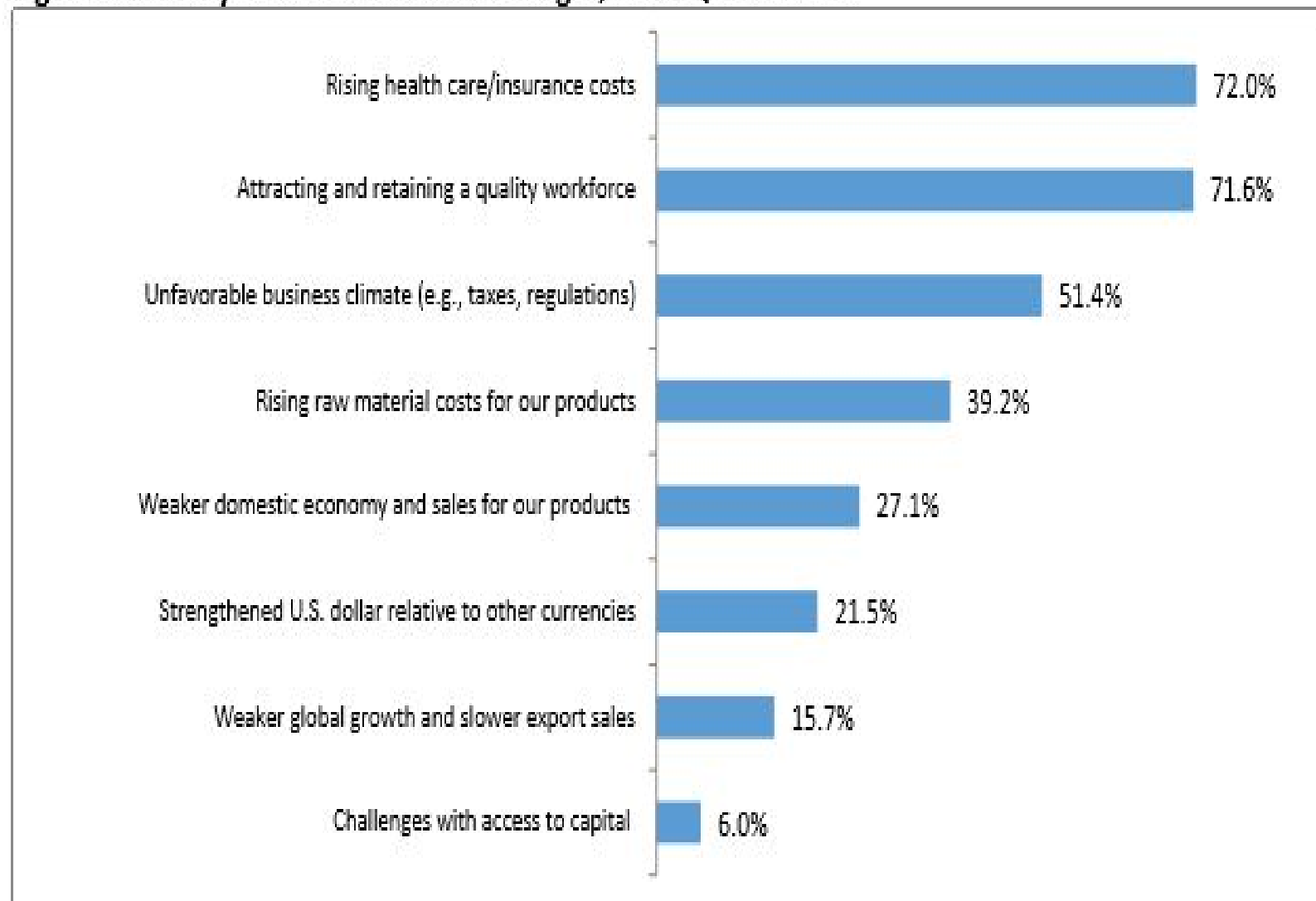
NAM MANUFACTURERS' OUTLOOK SURVEY

THIRD QUARTER 2017

September 29, 2017

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

Figure 4: Primary Current Business Challenges, Third Quarter 2017



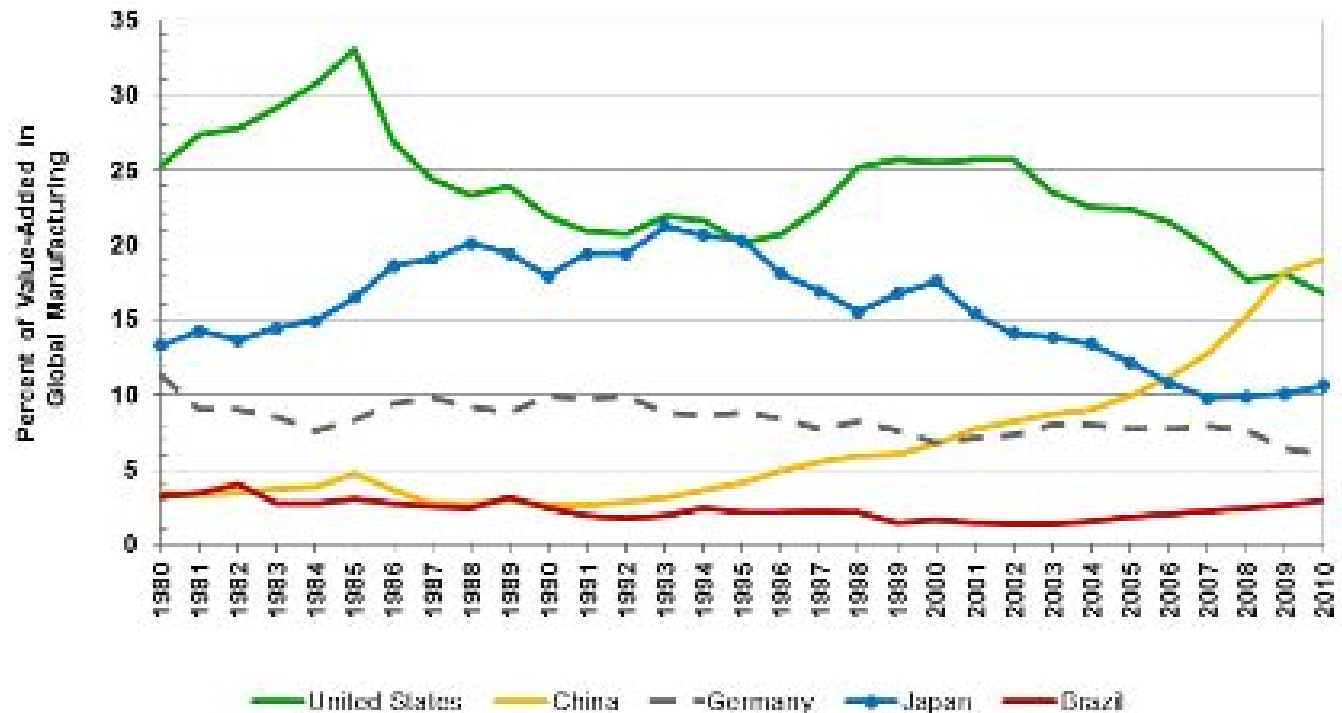
Note: Respondents were able to check more than one response; therefore, responses exceed 100 percent.

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

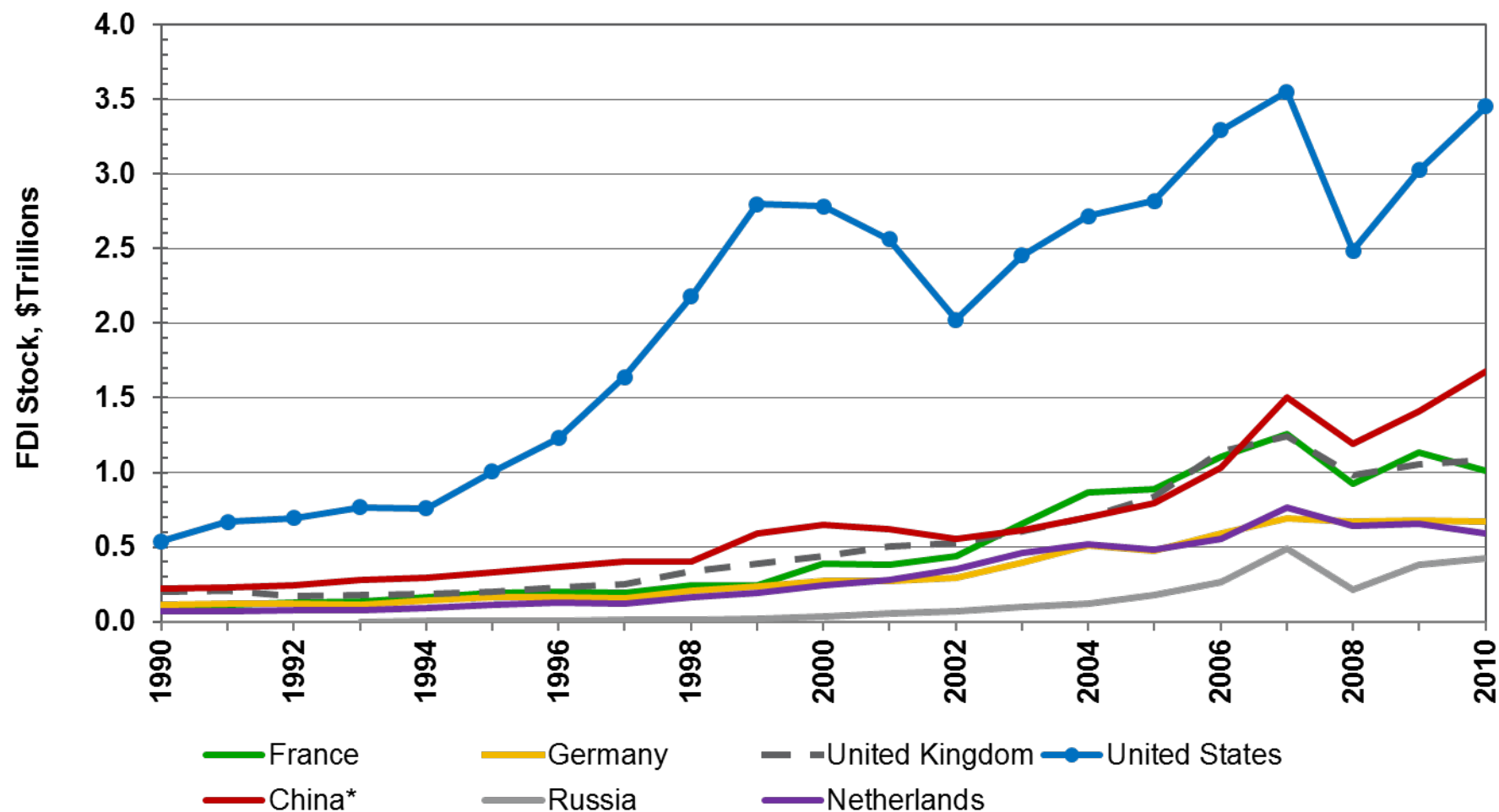


Source(s): World Bank, WDI and GDP databases and MAPI

MAPI



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

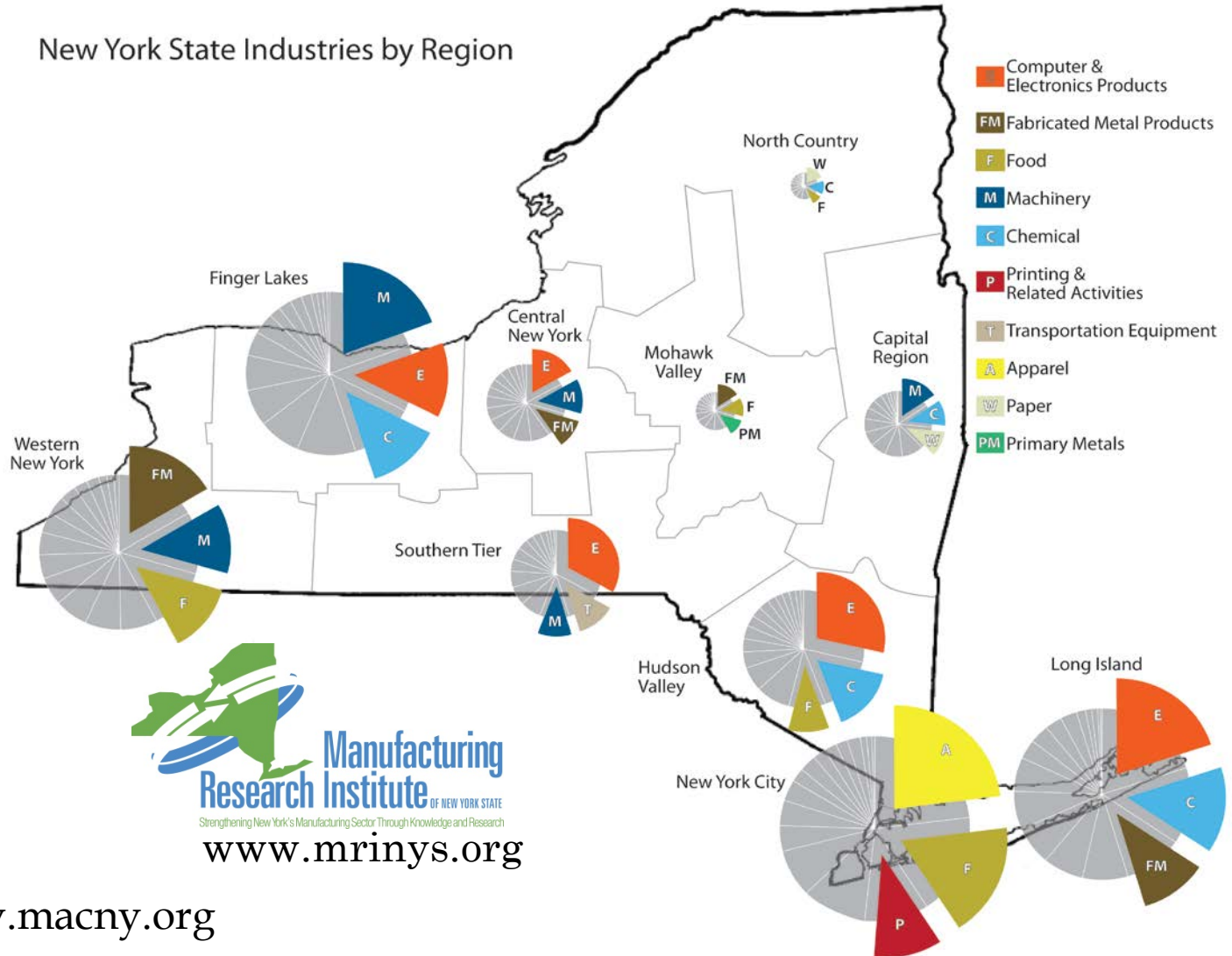


* Includes Hong Kong

Source(s): UNCTAD World Investment Report

New York Manufacturing

New York State Industries by Region

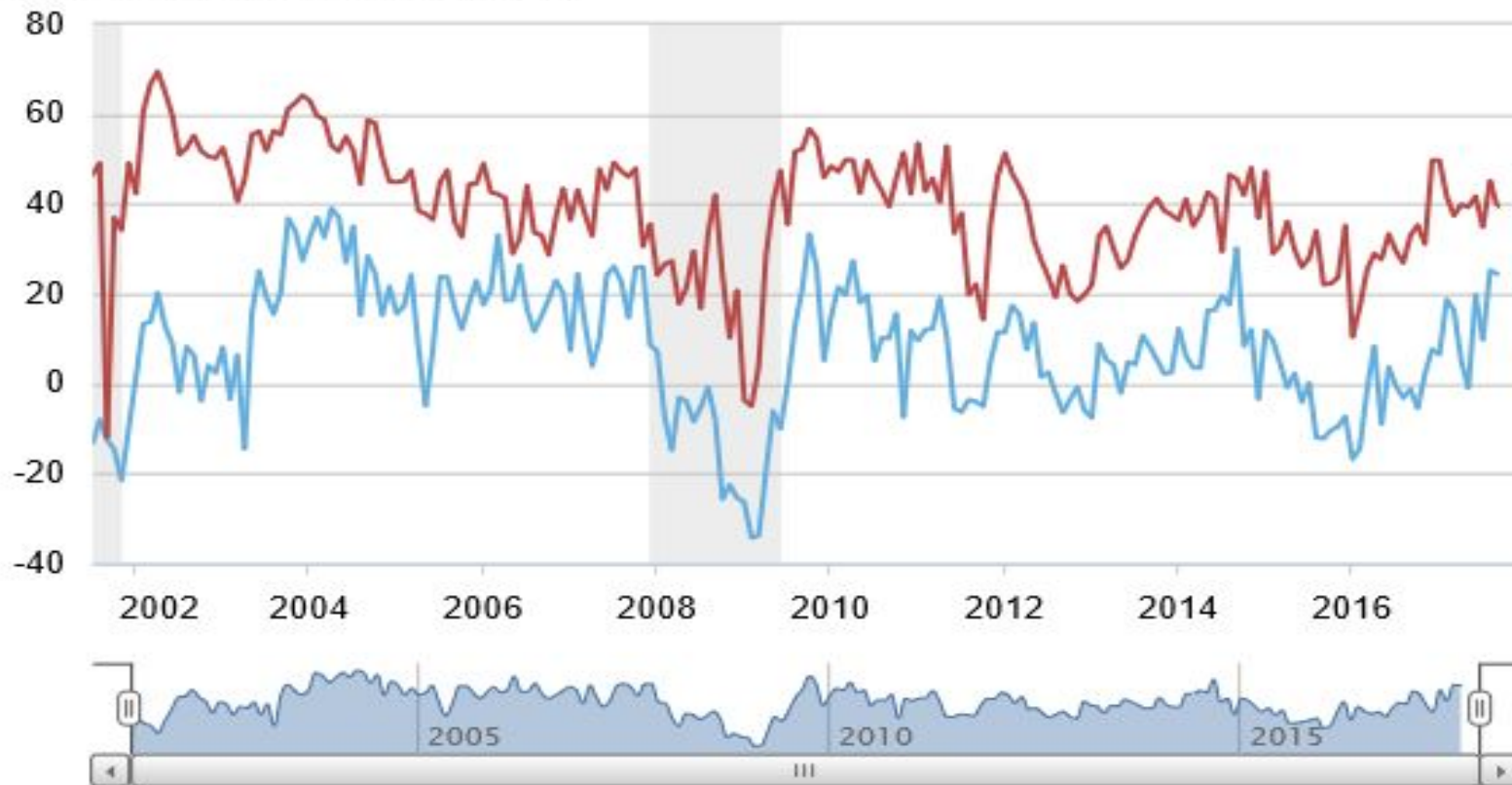


General Business Conditions



— Current — Expected — U.S. recession

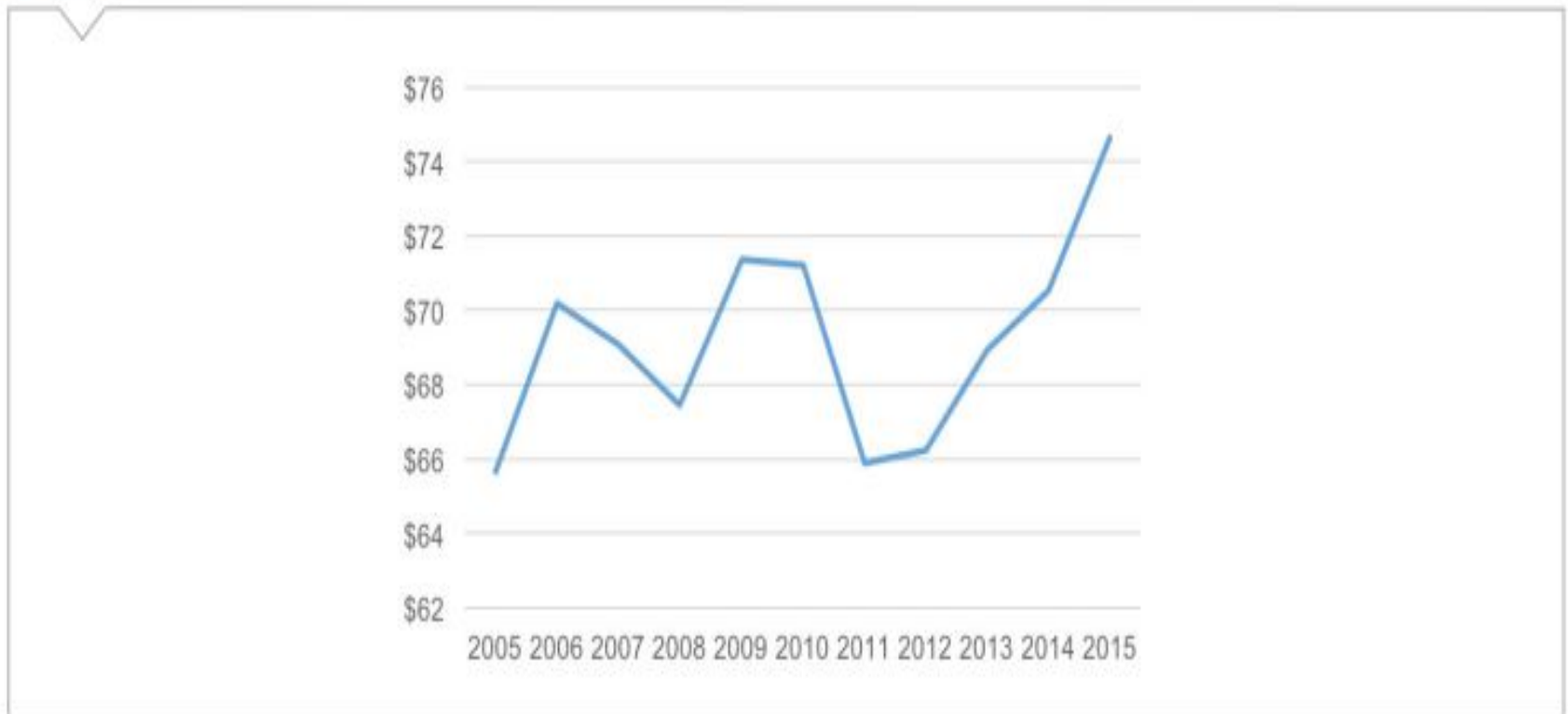
Diffusion index, seasonally adjusted





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



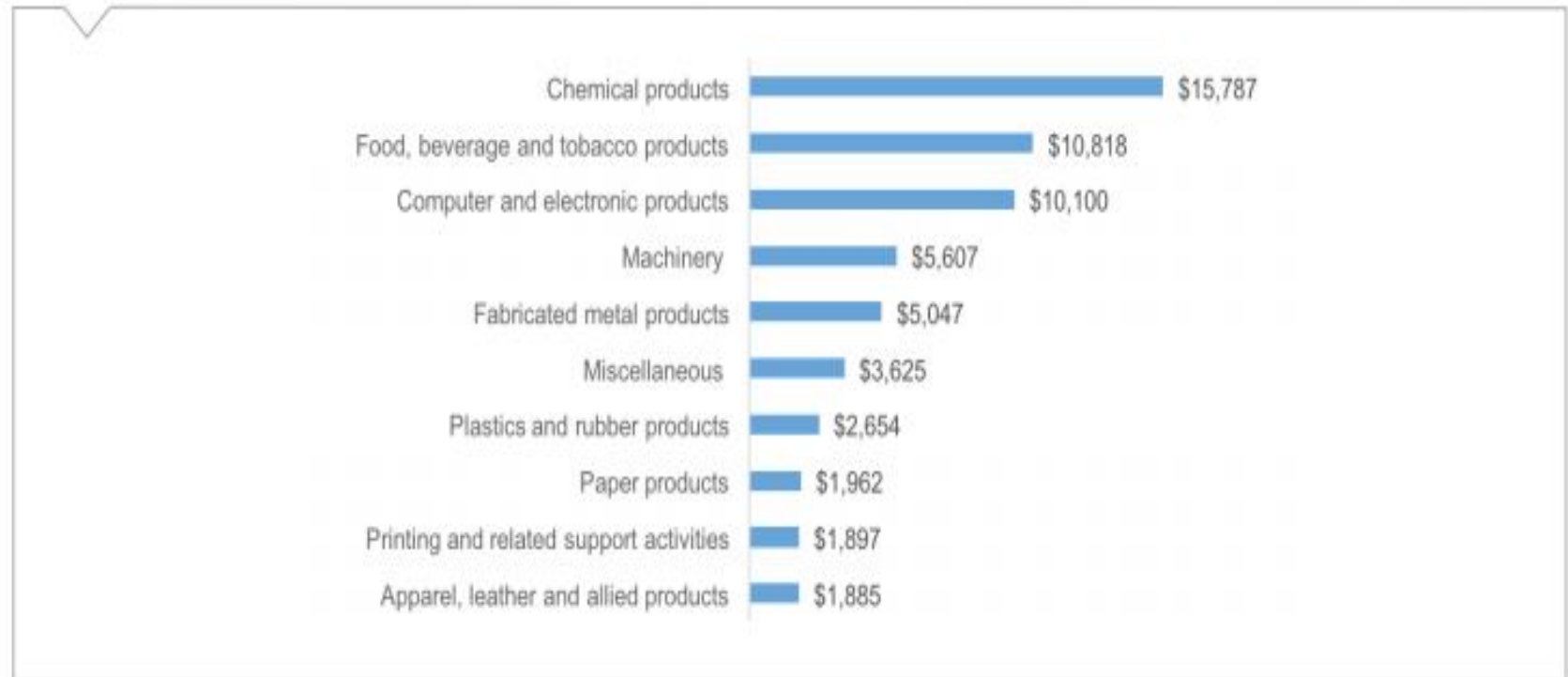
NAM Manufacturing Facts, April 2017





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



Revised March 2017

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



| Metro Area | Employment* | | Change: | |
|---|-------------|------------|------------|---------|
| | 2000 | 2010 | Net | Percent |
| <i>New York State</i> | 752,300 | 457,800 | -294,500 | -39.1% |
| <i>United States</i> | 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.

Significant Industries, Southern Tier Region, 2015

| NAICS Industry Code | Industry Name | Job Count | | Net Change in Jobs, 2009-2014 | % Change in Jobs, 2009-2014 | Average Annual Wage, 2014 | Projected % Change in Jobs, 2012-2022 |
|---------------------|---|-----------|---------|-------------------------------|-----------------------------|---------------------------|---------------------------------------|
| | | 2009* | 2014* | | | | |
| | Total, all industries (all ownerships) | 266,000 | 260,200 | -5,800 | -2.2% | \$43,700 | 5.5% |
| 236 | Construction of buildings | 1,800 | 2,000 | 200 | 11.1% | \$42,700 | 11.3% |
| 311 | Food manufacturing | 2,500 | 3,400 | 900 | 36.0% | \$47,600 | 12.5% |
| 333 | Machinery manufacturing | 3,900 | 4,300 | 400 | 10.3% | \$60,500 | -3.3% |
| 334 | Computer and electronic product manufacturing | 12,300 | 8,400 | -3,900 | -31.7% | \$86,000 | -4.7% |
| 493 | Warehousing and storage | 400 | 1,000 | 600 | 150.0% | \$38,100 | 15.1% |
| 541 | Professional and technical services | 9,700 | 9,800 | 100 | 1.0% | \$71,700 | 11.7% |
| 551 | Management of companies and enterprises | 1,900 | 2,500 | 600 | 31.6% | \$117,700 | 15.8% |
| 611 | Educational services | 46,700 | 42,100 | -4,600 | -9.9% | \$48,700 | 6.0% |
| 621 | Ambulatory health care services | 8,600 | 8,600 | 0 | 0.0% | \$59,300 | 17.5% |
| 622 | Hospitals | 12,900 | 13,400 | 500 | 3.9% | \$49,200 | 4.2% |
| 623 | Nursing and residential care facilities | 12,100 | 11,600 | -500 | -4.1% | \$32,500 | 21.2% |

NA – Not Applicable

*Represents both private and public sector jobs

104 Years of Service



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

WHAT IS MACNY DOING ?

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

NEW INITIATIVES

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

WHAT CAN YOU DO?

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

104 Years of Service



THANK YOU

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