Compete Connect

May 2026 Edition

From the CEO's Desk

Deborah L. Wince-Smith
President and CEO
Council on Competitiveness

Dear Council on Competitiveness Community,

As we move into summer, having paid our respects to America's military personnel who made the ultimate sacrifice to ensure our freedoms, we continue to build momentum toward our country's 250th birthday and our own 40th anniversary celebration this December. Please make sure to save the dates for this special edition of the National Competitiveness Forum: December 16-17 at the Willard InterContinental Hotel – and to consider a significant sponsorship for this seminal event.

In this pivotal year, the Council's agenda — and the urgency of our mission — is heating up, with significant opportunities for the Council community to engage in the critical work of our 40-year-old mission to drive the nation's productivity and economic growth, while advancing the global success of goods and services made and created in the United States, and increasing the living standards for every American.

Earlier this month, we convened a summer meeting of our Board, Executive Committee, and National Commissioners. I want to thank Gallup Chairman Jim Clifton for hosting us in the historic Gallup headquarters for an outstanding day of discussion. Our purpose was two-fold – to review and fine-tune a special, 40th anniversary "competitiveness landscape report" documenting how America and

Americans are doing; and to develop a range of potentially transformative policy recommendations stemming from the findings of the data-driven report.

- Jim Clifton provided a provocative and eye-opening assessment of U.S. employment and unemployment – arguing traditional data sources greatly underestimate U.S. unemployment. (See this month's "Council Insight.")
- Council EVP, COO, and Board Secretary Chad Evans walked the leadership group through a conversation around this piece. We will have more to come, as we advance to a final iteration.
- Prof. Ram Charan offered a novel overview of global competitiveness, framed by the significant China challenge.

And I had the opportunity to shepherd the second half of the meeting, focusing our members' attention on a series of potential "10X" policy recommendations to address many of the macro challenges exposed in the report. One of these recommendations is a call for a new set of "Advanced Innovation and Manufacturing (AIM) Zones." We envision AIM Zones as geographically anchored, sector-specific ecosystems designed to scale at speed the research, technology, and innovation of critical technologies to production and the marketplace.

Turning from our significant meeting in DC, I am proud to report our series of "**Competitiveness Conversations Across America**" continues to shine a light on the regional innovation ecosystems powering the next economy.

- My latest **Forbes.com article** highlights a range of best and next practices – uncovered in our March Competitiveness Conversation – bubbling to the surface in the Maryland innovation ecosystem.
- In April, I co-hosted with the University of Nebraska System President Jeffrey Gold, the next edition of our "Competitiveness Conversations Across America." This Conversation focused on Nebraska's key role in the nation's fast-growing bioeconomy. Key speakers for this meaningful dialogue included: Nebraska Lieutenant Governor Joe Kelly; U.S. Department of Agriculture Under Secretary and Chief Scientist Scott Hutchins; Gen. (Ret.) Anthony J. Cotton, former Commander of U.S. Strategic Command; Primient and Sustainea CEOs, Jim Stutelberg and Gustavo Sergi; and many more – all exploring the strategic actions needed to strengthen U.S. competitiveness in this critical domain.

The Competitiveness Conversations next head to San Diego. On July 21, I will co-host this 13th edition with UC San Diego Chancellor Pradeep K. Khosla, focusing on "Building the Next Economy's Innovation." (Register for the San Diego Conversation **here**.)

- The San Diego program will explore the technologies and capabilities shaping the next economy — including AI, transformative computing, quantum, biotechnology, the future of healthcare, advanced energy, autonomous systems, and national security innovation.
- We are honored to feature a range of the region's and nation's key leaders at the heart of these innovation drivers, including: Todd Gloria, Mayor of San Diego; Mark Cafferty, President and CEO of San Diego Regional Economic Development Corporation; Mehmood Khan, CEO of Hevolution and Council Chair Emeritus; Laurie Locascio, CEO of ANSI; Kimberly Budil, Lawrence Livermore National Laboratory Director; UC San Diego leaders Corinne Peek-Asa, Vice Chancellor for Research and Innovation, Al Pisano, Professor and

Dean of Jacobs School of Engineering, Paul Roben, Associate Vice Chancellor for Innovation & Technology Commercialization; and many others.

- In conjunction with the Conversation, the Council, IFF, ANSI and others will convene a special workshop focused on crafting a policy toolkit for U.S. policymakers – to help them navigate the path to developing the regulatory and standards frameworks to support and advance emerging, transformative technologies.

If you are interested in learning more about the San Diego Competitiveness Conversation and/or this special workshop, please contact Chad Evans at **cevans@compete.org**.

A final note as we turn to June: in less than two weeks, our Technology Leadership and Strategy Initiative (TLSI) will convene in Fort Worth. Lockheed Martin Vice President – and TLSI co-chair – Tahllee Bayrnard will host TLSI Dialogue 32 at the company's F-35 production facility. The co-chairs – including Sally Morton, EVP, Arizona State University and Patricia Falcone, Deputy Director, Lawrence Livermore National Laboratory – will guide participants in a robust discussion around the Council's competitiveness landscape report and charting a new agenda for the initiative. TLSI participants will also tour one of the world's most sophisticated manufacturing facilities.

As always, we welcome our members' support of and engagement in our ambitious action agenda. And please be in touch with me should you have any questions or suggestions to amplify the Council's impact in our 40th anniversary year.

Sincerely,

Deborah L. Wince-Smith
President & CEO
Council on Competitiveness

Council News

MARK YOUR CALENDARS! Join the Council on Competitiveness December 16–17, 2026, at the Willard InterContinental in Washington, D.C., as we celebrate the Council's 40th Anniversary and convene the 2026 National Competitiveness Forum. The event will also unveil a bold set of transformative policy recommendations designed to strengthen U.S. innovation, productivity, security, and prosperity in the decades ahead. More details and registration coming soon.

Join Us in San Diego for the 13th Edition of the "Competitiveness Conversations Across America"

On July 21, 2026, the Council on Competitiveness convenes some of the nation's most consequential leaders — from the lab to the boardroom, from campus to to the corridors of government — for **"A Competitiveness Conversation: San Diego."**

Selection of confirmed speakers. Photos courtesy of speakers' respective organizations.

The agenda is ambitious by design: transformative computing and AI. Next-generation fusion and advanced energy. Biotech, biomanufacturing, and synthetic biology. Sensors reshaping healthcare. Advanced microelectronics. Autonomous systems redefining defense, security, and space. San Diego sits at the crossroads of all of it — and this Conversation will show why.

UC San Diego Chancellor Pradeep K. Khosla and Council President & CEO Deborah L. Wince-Smith will host a full day of candid, forward-looking dialogue on what it takes to build thriving regional innovation ecosystems — and what the rest of America can learn from San Diego's playbook.

The speaker lineup is growing daily — visit the **event page** for the latest agenda, confirmed speakers, and full bios.

Don't just watch the next economy take shape. Be in the room where it's mapped.

Register for the San Diego Conversation here.

Recap: Council 2026 Summer Meeting — A Call to Action for U.S. Competitiveness

Photo credit: Council on Competitiveness
Pictured: Mr. Chad Evans, Executive Vice President, Chief Operating Officer, and Board Secretary , Council on Competitiveness; Hon. Deborah L. Wince-Smith, President and CEO, Council on Competitiveness; Mr. Erik Fyrwald, CEO, IFF, Chair, Council on Competitiveness; Mr. Sundar Raman, CEO, Fabric & Home Care and P&G Ventures, The Procter & Gamble Company, Business Vice Chair, Council on Competitiveness; Ms. Joan Gabel, Chancellor, University of Pittsburgh, Academic Vice Chair, Council on Competitiveness; Mr. Charles "Chad" Holliday, Jr., Chair Emeritus, Council on Competitiveness, and Chair, Global Federation of Competitiveness Councils (GFCC); Mr. Jim Clifton, Chairman, Gallup

On May 8, the Council on Competitiveness convened its Board, Executive Committee, and National Commission at Gallup Headquarters in Washington, D.C., for a pivotal session in the development of its 40th Anniversary Competitiveness Landscape — a major report nearing its final form that will be released soon. The day centered on stress-testing and refining the report's core findings: that the United States, while still the world's dominant economy, faces an accelerating competitive challenge across manufacturing, R&D investment, energy, workforce, and emerging technology.

Photo credit: Council on Competitiveness

These findings are not merely diagnostic. They are driving a fundamental rethinking among Council leadership about what scale of response the moment actually demands — and the answer is not incremental. The landscape report is substantiating a growing consensus that the United States needs a series of bold, transformative "10X" policy recommendations to restore and extend American competitiveness. The most developed of these is the concept of Advanced Innovation and Manufacturing (AIM) Zones — geographically anchored ecosystems that would integrate research institutions, manufacturing capacity, energy infrastructure, and workforce pipelines under a streamlined regulatory environment. Each zone would focus on a critical technology sector such as quantum, biomanufacturing, advanced nuclear, or semiconductors. The goal is to close the gap between American innovation and American production — designing, building, and scaling in the same place, under a governance structure built to last.

The Council is actively developing this and other recommendations and determining how best to deploy the landscape report for maximum impact, with concrete announcements targeted for its 40th Anniversary National Competitiveness Forum in December 2026.

Council President and CEO Focuses May Forbes.com Article on Maryland's Transformation Story

What does it take to build the United States' next great innovation ecosystem?

In her latest **Forbes.com article**, Deborah L. Wince-Smith reflects on the Maryland edition of the "Competitiveness Conversations Across America" to highlight an emerging answer: align universities, federal laboratories, industry, venture capital, infrastructure, workforce development, and public policy around AI, quantum, and biotechnology — then move with speed, focus, and purpose.

Wince-Smith details key factors driving Maryland's next-generation model for "place-making innovation" — elevating the state as a major innovation hub in AI, quantum, and biotechnology.

Key insights she identifies include:

- Research strength must translate into commercialization and scale.
- Smart standards and regulation accelerate innovation.
- AI and quantum are driving a surge in demand for talent.
- The regions that best integrate technology, manufacturing, infrastructure, and workforce development will shape the next economy.

Read the full Forbes.com article here: "**Transforming Computing, Transforming Maryland — A New Approach To Place-Making Innovation**"

Council Community News

Council Chair Erik Fyrwald Lands the Cover of Chemical Week for His Strategic Leadership of IFF

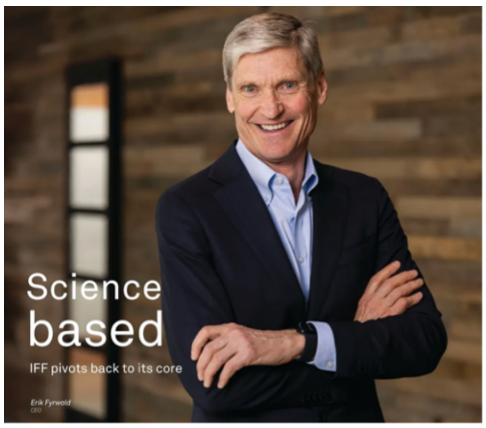


Photo credit: Chemical Week *by S&P Global*

Council Chair and IFF CEO Erik Fyrwald takes the cover of the May 11-18, 2026, issue of Chemical Week by S&P Global. The story offers a compelling look at how Fyrwald has repositioned IFF around a sharper strategic core — with biosciences, naturals, and deep customer partnerships driving the company's direction after a period of significant transformation. The piece digs into how IFF is navigating the intersection of sustainability, innovation, and commercial discipline, and what Fyrwald sees as the defining opportunities in the specialty ingredients market in the years ahead. Anyone tracking where the chemistry and life sciences industries are heading will find this worth their time. **Read the article here**.

Council National Commissioner Kimberly Budil Calls for Sustained U.S. Investment in Fusion

Photo credit: Lawrence Livermore National Laboratory

In an interview with *The Innovator*, Lawrence Livermore National Laboratory (LLNL) Director Kim Budil offers a candid assessment of fusion energy's prospects, opportunities, and risks. While she expects several fusion companies to demonstrate energy breakeven within the next decade, she sees commercial energy generation as closer to 2040 than 2030. She highlights AI as a gamechanger for plasma control and design iteration, and flags LLNL's growing partnerships with private fusion companies as a key avenue for accelerating progress. On competition, she notes China is making massive investments across all fusion approaches, underscoring the urgency of sustained U.S. public investment. **Read the full interview**.

The United States Bets Big on Quantum Computing

The Department of Commerce announced $2 billion in CHIPS Act incentives for nine quantum-computing companies, with the federal government taking a minority equity stake in each recipient. Among the recipients, Quantinuum, led by Council Executive Committee Member Rajeeb Hazra, and Infleqtion — a quantum computing company spun out of the University of Colorado Boulder, led by Council Executive Committee Member Justin Schwartz — will each receive $100 million to advance their quantum computing capabilities. The largest share, $1 billion, goes to IBM to establish a new quantum foundry subsidiary for quantum-grade superconducting wafers. **Read more**.

Eli Lilly Advances U.S. Manufacturing and Next-Generation Medicine

Photo credit: Eli Lilly

Eli Lilly Chair and CEO and Council National Commissioner David Ricks is leading the company on two landmark fronts. Lilly has announced a $4.5 billion investment in its Lebanon, Indiana, facility — part of a $50 billion expansion of U.S. production — and has opened its first genetic medicines facility, just ahead of the company's 150th anniversary. When the Lebanon facility opens in 2027, it will rank as the largest active pharmaceutical ingredient facility in U.S. history. Read more **here**.

Nebraska Medicine and UNMC Respond to Hantavirus Outbreak

Photo credit: University of Nebraska

When federal partners needed a trusted institution to receive and monitor U.S. citizens evacuated from a cruise ship following an outbreak of Andes virus — a rare, person-to-person transmissible strain of hantavirus — they called on Nebraska Medicine and the University of Nebraska Medical Center, led by Council member Dr. Jeffrey Gold, President of the University of Nebraska System. The Nebraska team activated the National Quarantine Unit at the Davis Global Center — the only federally-funded quarantine unit in the United States — drawing on the same expertise that guided Nebraska Medicine through the 2014 Ebola outbreak and the earliest COVID-19 cases. Coincidentally, the Council held its latest bioeconomy initiative working session at the National Quarantine Unit late last month – prior to the hantavirus outbreak. Read more **here** about this university's distinctive role in biocontainment.

University of Oklahoma Launches Project 200, Its Largest Research Investment Ever

Photo credit: University of Oklahoma

The University of Oklahoma launched Project 200, hiring 200 new researchers to drive impact across health, extreme weather, national security and defense, and secure and resilient energy. Matt Hulver, OU's Vice President for Research and Partnerships and a member of the Council's Technology Leadership and Strategy Initiative, said the initiative will "translate discovery into real-world solutions — advancing breakthroughs that improve lives,

strengthen communities and fuel economic growth." **Learn more about the initiative**.

Pitt Opens Landmark Quantum Research Facility

Photo credit: University of Pittsburgh

The University of Pittsburgh has officially opened the Western Pennsylvania Quantum Information Core (WPQIC) on May 4, backed by $11.6 million from Pitt's Strategic Advancement Fund. The facility brings together physicists, engineers, chemists, and computing researchers with access to specialized equipment for cutting-edge quantum research and is open to regional academic partners and industry collaborators. University of Pittsburgh Chancellor and Council Academic Vice Chair Joan Gabel remarks, "We understand the vital role of quantum science within so much of the research and technology that Pitt creates. Quantum technology is at the top of our priorities, and our investment in this amazing facility makes that clear." **Read more**.

$470 Million Investment Accelerates UT San Antonio's Rise as a Research University

The University of Texas System Board of Regents has authorized approximately $470 million in capital investments in the University of Texas at San Antonio, spanning its academic and health campuses. The funding will support major priorities in research, innovation, infrastructure, technology, and patient care, positioning the institution for continued national ascent. UTSA President and Council Executive Committee Member Taylor Eighmy calls the investment transformative, noting that UTSA is already one of the nation's fastest-rising public research institutions. **Read more**.

NSF Awards $45 Million to ASCEND Engine in Colorado and Wyoming

The National Science Foundation has awarded up to $45 million over three years to the NSF ASCEND Engine to develop technologies protecting communities from wildfires, drought, and extreme weather across the Colorado-Wyoming I-25 Innovation Corridor. Council Member Mike Freeman, who leads ASCEND, calls the award "a vote of confidence in our region's ability to lead the nation in environmental intelligence and resilience." **Read more**.

Photo credit: NSF ASCEND Engine

Jonathan Alger Transitions to a New Role to Advance the Role of Universities in the United States

American University President Jonathan Alger has accepted a joint appointment with the American Council on Education (ACE) and the American Association of Colleges and Universities (AAC&U) as the inaugural America 250 Fellow — a new national fellowship advancing the role of colleges and universities in strengthening democratic institutions, civic learning, and informed citizenship. **Read the full announcement**.

Photo credit: American University

Research Confirms Standards Drive Innovation

The American National Standards Institute (ANSI), which is led by Executive Committee Member Laurie Locascio, commissioned a new study that finds that standards meaningfully contribute to innovation in sectors central to U.S. competitiveness, including autonomous driving and advanced manufacturing. Researchers from BRELA Research and Northwestern University conducted the study, which linked nearly 10,000 standards documents with patent citations to trace how standards connect to new inventions. The findings reinforce the case for treating standardization as a core part of innovation policy. Read the release **here** and full study **here**.

Key National Workshop on U.S. Biomanufacturing Features Council Member Mark Warner

Photo credit: Andlinger Center for Energy and the Environment/Princeton University

The Andlinger Center for Energy and Environment at Princeton University convened researchers, industry leaders, and federal partners for its 2026 Biomanufacturing Workshop "Energy, Environment, and Emerging Industries," focused on building a data-driven strategy for the future of industrial biotech in America. Council Member Mark Warner of Liberation Bioindustries delivered a morning keynote, joining a broad coalition of stakeholders working to map out the future of U.S. biomanufacturing across feedstock, process technology, and renewable power. **Read more**.

AIAA Inducts Steve Walker as Honorary Fellow

Photo credit: Lockheed Martin

The American Institute of Aeronautics and Astronautics (AIAA) has inducted Steve Walker – Council Distinguished Fellow and former TLSI Co-Chair – into its Honorary Fellow Class of 2026. AIAA has recognized Dr. Walker for advancing high-speed aeronautics and propulsion research and technology, leading at the highest levels of the Defense Department, and accelerating the transition of breakthrough capabilities from lab to field. **Read more about this honor**.

Additionally, Dr. Dana “Keoki” Jackson, Senior Vice President, General Manager of MITRE National Security, The MITRE Corporation, and former TLSI Co-Chair, is now AIAA Foundation President for the 2026-2028 terms. Read a Q&A with Keoki **here**.

The University of California Board of Regents Names a New Lawrence Berkeley National Laboratory Director

Photo credit: Lawrence Berkeley National Laboratory

The University of California Board of Regents named Katherine Yelick as the next Director of Lawrence Berkeley National Laboratory, effective July 1, succeeding long-standing Director and Council National Commissioner Mike Witherell. A leading computer scientist with deep expertise in AI and high-performance computing, Yelick said Berkeley Lab is "uniquely positioned to lead" at a moment when advances in AI and data science are transforming how science is done. The Council congratulates Dr. Yelick and thanks Dr. Witherell for his outstanding leadership and service. Read more **here**.

ARCS Foundation Bestows the 2026 Eagle Award to the Hon. Deborah L. Wince-Smith

Photo credit: Elli Nesbitt

The ARCS Foundation Metro Washington Chapter has honored Wince-Smith with its prestigious Eagle Award. The Chapter recognized Wince-Smith for her extraordinary leadership advancing American science, research, engineering, and technology. In accepting the award, Wince-Smith shared with the audience: "We do not inherit the future; we build it." Read the full story **here**.

Planning Is Underway for 2026 STS *forum*

Council on Competitiveness Executive Vice President, Chief Operating Officer, and Board Secretary Chad Evans participated in a mid-May planning session hosted by IBM Chief Innovation Officer Emeritus Bernard Meyerson to advance buildout of the 2026 Science and Technology in Society (STS) *forum*. The discussion brought together leaders to identify actionable strategies to strengthen public trust in science and technology amid rapid advances in AI, biotechnology, advanced computing, and other emerging technologies.

Competitiveness News

The National Science Board Releases 2026 Science and Engineering Indicators: *The State of U.S. Science & Engineering*

Photo credit: National Science Board

The National Science Board has published *The State of U.S. Science and Engineering*, its biennial assessment of the U.S. science and engineering enterprise. The report highlights U.S. strengths and competitive pressures. The report's key takeaway is: while the United States remains a leader in highly cited research, venture capital-backed innovation, and knowledge-intensive services, China has surpassed the United States for the first time as the world's largest performer of research and development. Additionally, the U.S. STEM workforce — representing 26 percent of the total domestic workforce — continues to grow, though K-12 student performance in math and

science has declined from pre-pandemic levels. **Check out the report here**.

NSF Launches $1.5 Billion X-Labs Initiative

Photo credit: National Science Foundation

The National Science Foundation has announced a $1.5 billion initiative over the next decade to fund independent, milestone-driven research teams pursuing breakthrough science outside of traditional academic and industry institutions. Known as NSF X-Labs, the initiative will back interdisciplinary teams of researchers, engineers, and entrepreneurs tackling specific scientific challenges. The first round of funding targets two areas: next-generation scientific instrumentation for sensing and imaging, and quantum systems interconnects and integrated photonics. **Read more**.

Heartland BioWorks Tech Hub Breaks Ground in Indianapolis

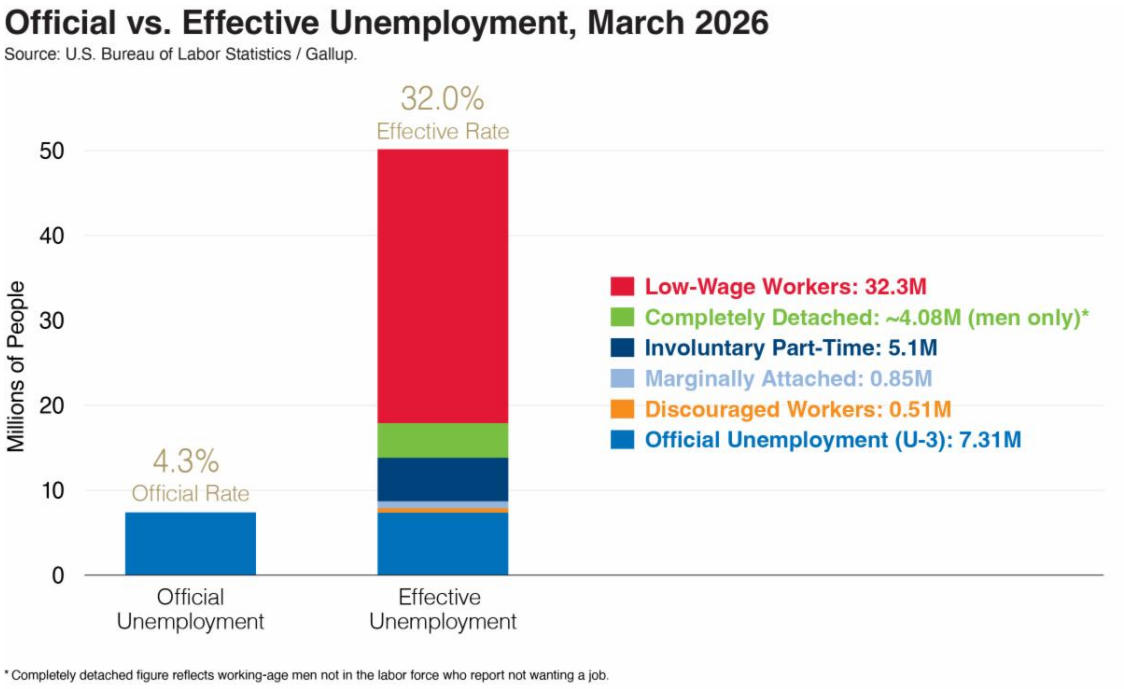
U.S. Senator Todd Young joined leaders from Indiana industry and academia to break ground on the $24.3 million Heartland BioWorks headquarters in downtown Indianapolis's 16 Tech Innovation District. Funded by $18.3 million from the CHIPS and Science Act and a $6 million investment from Eli Lilly and Company, the 20,000-square-foot biomanufacturing workforce training and innovation facility is expected to open in mid-2027. **Read more**.

France Bets €1 Billion on Quantum to Keep Pace with U.S. and China

French President Emmanuel Macron has announced €1 billion in new funding for quantum computing, calling on France and the European Union to accelerate investment in the face of intensifying competition from the United States and China. The commitment brings France's total public quantum investment to €3.3 billion since its national strategy launched in 2021. Macron also announced an additional €550 million in state funding for semiconductors as part of a European program. The announcement came just one day after the United States committed $2 billion under the CHIPS Act for quantum manufacturing. Read more on **Reuters**.

Council Insight

The Jobs Gap America Is Not Counting



During the Council's Summer 2026 Board, Executive Committee, and National Commission Meeting, Gallup Chairman and Council Executive Committee Member Jim Clifton opened the day with a challenge to the standard framing of U.S. economic health.

The 4.3 percent official unemployment rate reported that morning, he argued, excludes a vast number of Americans who are, effectively, unemployed: discouraged workers, those marginally attached to the labor force, involuntary part-time workers, working-aged men who have left the workforce entirely, and workers earning less than a livable wage.

Gallup's survey-based methodology, drawing on 60,000 interviews per month, points to a figure closer to 54 million Americans, or 32 percent of the workforce, not fully engaged in productive employment.

The gap between 4.3 percent and 32 percent reflects a structural challenge at the heart of U.S. competitiveness: a workforce in which tens of millions of people are sidelined, underemployed, or locked in low-wage work that fails to capture their full productive potential. At a moment when the United States is competing globally for economic leadership, those 54 million people are not just a social concern; they are a competitive liability the United States cannot afford.

New to Our Community

Dr. Irem Tumer
Vice President for Research and Innovation
Oregon State University

Dr. Tumer joins the Council's Technology Leadership & Strategy Initiative.

Photo credit: Oregon State University

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