



Compete.

Council on
Competitiveness

U.S. Energy & Manufacturing Competitiveness Partnership



Meeting the grand challenges—
and even grander opportunities—
of the 21st century demands
an innovation-driven economy
powered by a secure, sustainable,
affordable energy portfolio
and a robust, agile, advanced
manufacturing sector.

**America's ability to compete
in and lead the global
economy through this era
of transformation hinges on
bold, collaborative policy
solutions, leveraging America's
total innovation ecosystem—
industry, academia, labor and
the national laboratories—
at the heart of the nation's
productivity and prosperity.**

U.S. Energy and Manufacturing Competitiveness Partnership

The Council on Competitiveness will launch its new, 3-year, flagship U.S. Energy and Manufacturing Competitiveness Partnership (EMCP) in Spring 2014. The EMCP will unite America's leaders across industry, academia, labor and the national laboratories to develop a public-private action agenda to secure our nation's energy portfolio and invigorate an advanced national manufacturing sector for decades to come.

Goals

- Identify sectors critical to the economy and national security, and conduct deep-dive assessments of each sector's long-term energy and manufacturing competitiveness.
- Ahead of the 2016 election, deliver to national, regional, state and local leaders a realistic and comprehensive policy roadmap that will energize a vibrant, diversified, and technologically advanced energy portfolio and manufacturing value chain, resulting in American economic and job growth.

Setting the Stage

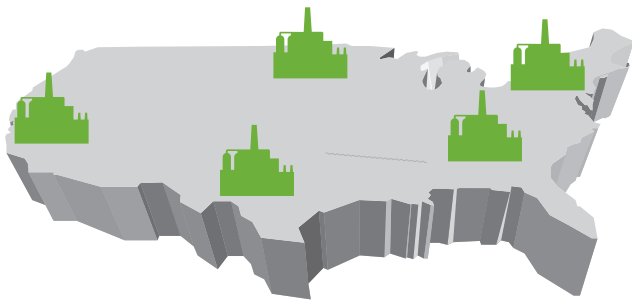
The Council has established its track record as a leading voice on American and global industrial competitiveness through nearly 30 years of path-breaking research, engagement and advocacy—culminating during the past decade in a series of critical initiatives, including the U.S. Manufacturing Competitiveness Initiative (USMCI) and the American Energy and Manufacturing Competitiveness (AEMC) Partnership. In particular, the Council's recommendations from *Make: An American Manufacturing Movement* resound in Washington, D.C. and outside the beltway.

The Council is proud to trace key accomplishments in manufacturing policy and innovation, including the reauthorized America COMPETES Act and the recently launched National Network for Manufacturing Innovation hubs in Youngstown, OH; Raleigh, NC; and Chicago, IL back to its groundbreaking work.

The Council's portfolio of initiatives and influence in the energy sector has never been more relevant than it is today. Building upon the Energy Sustainability, Innovation and Security (ESIS) Initiative, which delivered a 100-Day Energy Action Plan to the incoming administration ahead of the 2008 election, the Council continues to drive conversations across the country and at the federal level. Today, the Council is facilitating tangible outcomes in the areas of energy innovation, technology and productivity through the AEMC Partnership. This 3-year, joint effort with the U.S. Department of Energy leverages public-private partnerships to enhance America's competitiveness in manufacturing advanced energy technologies and to strengthen the foundations of America's manufacturing sector through increased energy productivity.

These two areas of our nation's economic and social fabric—manufacturing and energy—are inextricably woven together. America's ability to compete in the global economy, to rebuild the middle class, and to steward its natural resources and environment demands coordinated, thoughtful policy solutions, leveraging America's innovation ecosystem, workforce, technology, and business and policy-making communities.

37% of multi-nationals with annual sales above \$1 Billion have indicated a willingness to shift manufacturing facilities from **China to the United States**



Energy abundance and productivity is a key driver of this tectonic shift in the manufacturing landscape

Why the Council on Competitiveness?

At the intersection of industry, academia, labor, and the nation's pre-eminent national laboratories, the non-partisan Council on Competitiveness is distinctively and strategically poised to deliver both high-impact policy recommendations and on-the-ground solutions. The Council has a strong track record for leveraging its own intellectual capital and its membership's expertise and position to translate ideas into action.

The American Energy and Manufacturing Competitiveness Partnership

The AEMC Partnership, a 3-year commitment between the Council and the Department of Energy Office of Energy Efficiency and Renewable Energy, works to accelerate a movement to increase U.S. competitiveness in the production of clean energy products, and to increase U.S. manufacturing competitiveness across the board through greater energy productivity; and, commit to concrete actions to spark continued innovation and industrial transformation needed for economic growth and job creation.

The American Energy and Manufacturing Competitiveness Summit

The Council will build upon the success of the landmark 2013 Inaugural AEMC Summit, which convened more than 600 leaders from industry, academia, the national laboratories, and government to address crucial energy and manufacturing challenges and opportunities affecting U.S. prosperity, sustainability, and security. With Summits planned for September 17, 2014 and 2015 (Date TBD), the AEMC Summit will continue to be the premier platform for the national energy and manufacturing dialogue, and will build a critical mass of decision-makers to take concrete action in this space.

Regional Dialogue Series

The AEMC Partnership will build upon its successful tour of the Nation's innovation ecosystem in 2014 and continue to host regional dialogues designed to elucidate concrete ideas and build support for partnerships and other concrete activities to strengthen the U.S. energy and manufacturing innovation ecosystem.

Public Private Partnership Leadership

Working with partners across the private sector, the Department of Energy, and the rest of the Federal government, the AEMC Partnership will provide the umbrella and the infrastructure for the instantiation of high-impact public-private partnerships designed to accelerate and scale manufacturing capabilities in the United States.

Sectoral Studies

Leveraging its core work streams in energy and manufacturing, the Council will conduct a series of deep-dive, sector-specific investigations of the forces shaping and impacting energy and manufacturing competitiveness, including technology innovation, talent, advanced and digital manufacturing, supply chain and infrastructure, finance and fiscal policy, and public-private partnerships. Executed in three progressive phases, the deliverables of the EMCP are designed to illuminate policy pathways that will serve as a platform for legislative action and government policy for years to come.

Discover

Time-frame: Summer 2014 through Winter 2014/ Spring 2015

Format: Virtual conferences

Over an approximately 9-month period, the Council will conduct a series of C-suite virtual conferences and customized outreach activities, each focused on different critical manufacturing sectors, to map out a high-level analysis of the strengths, weaknesses, opportunities and threats to each sector and develop primary research questions and areas for further investigation.

Dive

Time-frame: Spring 2015 through Fall 2016

Format: Regional/Sectoral Dialogue Series

Drawing on the outcomes and recommendations of the Discover phase, the Council will launch a series of regional and sector-specific dialogues over a 15 to 18 month period. Hosted around the nation by co-chairs of the EMCP Steering Committee Sector Groups, these dialogues will build a deep well of knowledge and uncover critical areas for policy interventions and partnerships to buttress each sector.

Although competing nations are closing the gap, the United States still accounts for a full

ONE THIRD

of the world's research and development dollars



A natural gas and oil boom could deliver

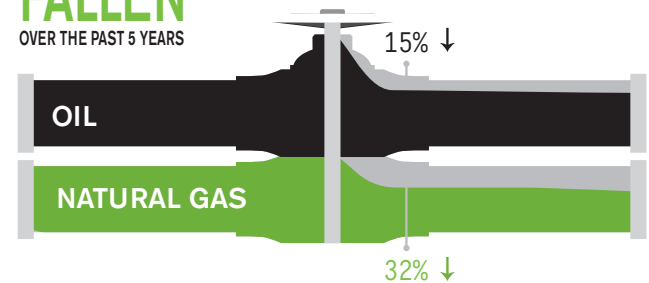
100 YEARS

of low cost energy to American producers and lure new manufacturing investment from overseas to fuel increased economic growth and turbo-charge a manufacturing renaissance



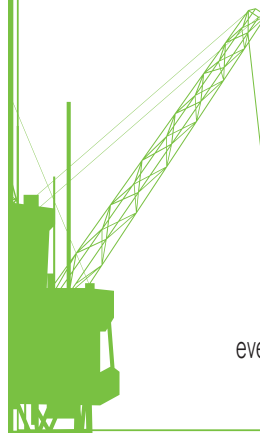
U.S. ENERGY IMPORTS HAVE
FALLEN

OVER THE PAST 5 YEARS



MANUFACTURING
HAS THE **HIGHEST**
MULTIPLIER EFFECT
OF ANY SECTOR

Manufacturing is poised for resurgence—and every dollar of final manufacturing sales supports \$1.48 in output across the wider economy.



Deliver

Time-Frame: Summer 2016 through Winter 2016
Format: National Energy & Manufacturing Summit and release of the 100-Day Action Plan

The Council, with the full backing of the EMCP Steering Committee, will refine and deliver the results of each sectoral study into distinct policy roadmaps, identifying both the unique competitiveness dynamics of each sector, as well as universal, cross-cutting challenges and opportunities impacting all sectors of the economy. The Council and Steering Committee will continue to deliver on the agenda outlined in the Action Plan through strategic engagements with the White House, Congressional leadership, and key figure across State and Federal governments.

The Global Manufacturing Competitiveness Index

An important, recurring Council product for more than 4 years, the Global Manufacturing Competitiveness Index is the gold-standard in private-sector focused tools offering substantive commentary and in-depth analysis on national and international manufacturing competitiveness indicators and drivers. Created in partnership with Deloitte Touch Tohmatsu Limited (Deloitte), the Manufacturing Competitiveness Index examines the highly complex forces driving the future of manufacturing and many of the structural changes reshaping the global economy.

Leadership

C-Suite Level Steering Committee

A C-suite Steering Committee will lead the EMCP, pose the critical questions driving the work, provide direction and develop the public-private action agenda for the initiative. Co-Chairs Mayo Shattuck, III, Executive Chairman, Exelon Corporation; Jeffrey Fettig, Chairman and CEO, Whirlpool Corporation; William Powers, President, University of Texas at Austin; and Dr. William Goldstein, Director, Lawrence Livermore National Laboratory, will lead the Steering Committee.

Steering Committee members may also chair Sector Groups, providing leadership opportunities to members and guiding the Council's implementation of the Steering Committee's recommendations. Sector Groups could focus on a range of critical, high-value manufacturing areas, including agriculture, aerospace and defense, automotive, pharmaceuticals, IT, supply chain, chemicals, oil and gas, utilities, and heavy manufacturing and tools industries, to name a few.

Executive Advisory Committee

A diverse and expert Executive Advisory Committee will help shape the substantive aspects of the EMCP, as well as provide ongoing counsel and support to the Steering Committee and the Council on Competitiveness. Steering Committee members will have the opportunity to designate a "delegate" to represent them on an Executive Advisory Committee. Both the Council and Steering Committee members will also be able to nominate additional experts to serve on the Executive Advisory Committee of the EMCP.

U.S. Energy and Manufacturing Competitiveness Partnership Steering Committee

COUNCIL LEADERSHIP

Mr. Samuel R. Allen
Chairman and CEO
Deere & Company

Dr. Michael Crow
President
Arizona State University

Mr. William P. Hite
General President
United Association of Plumbers and Pipefitters

Mr. Charles O. Holliday, Jr.
Chairman Emeritus
Council on Competitiveness

Mr. Michael R. Splinter
Executive Chairman
Applied Materials, Inc.

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

Industry Lead

Mr. Jeffrey M. Fettig
Chairman and CEO
Whirlpool Corporation

University Lead

Mr. William C. Powers, Jr.
President
The University of Texas at Austin

National Laboratories Lead

Dr. William Goldstein
Director
Lawrence Livermore National Laboratory

Mr. J. David Armstrong, Jr.
President
Broward College

Dr. Dan E. Arvizu
Director
National Renewable Energy Laboratory

Mr. Neil Z. Auerbach
Founder and Managing Partner
Hudson Clean Energy Partners

Mr. Thomas R. Baruch
Partner
Formation 8 Partners

Mr. George Blankenship
SVP & President, Lincoln Electric North America
The Lincoln Electric Company

Mr. William H. Bohnett
President
Whitecap Investments LLC

Mr. Terry Boston
President and Chief Executive Officer
PJM Interconnection

Dr. Richard H. Brodhead
President
Duke University

Dr. Curtis R. Carlson
President and CEO
SRI International

Dr. James Clements
President
Clemson University

Mr. Daniel DiMicco
Chairman and CEO
Nucor Corporation

Mr. Jeff M. Fettig
Chairman, President and CEO
Whirlpool Corporation

Dr. Alice P. Gast
President
Lehigh University

Mr. Craig A. Giffi
Vice Chairman, Leader U.S. Consumer & Industrial
Products
Deloitte Services LP

Dr. Paul J. Hommert
President and Laboratory Director
Sandia National Laboratories

Dr. Eric D. Isaacs
Director
Argonne National Laboratory

Dr. Shirley Ann Jackson
President
Rensselaer Polytechnic Institute

Dr. Linda P.B. Katehi
Chancellor
University of California, Davis

Dr. Steven Knapp
President
The George Washington University

Dr. Thomas E. Mason
Laboratory Director
Oak Ridge National Laboratory

Mr. Sean McGarvey
President
Building and Construction Trades Department
AFL-CIO

Mr. John E. McGlade
Chairman, President and CEO
Air Products and Chemicals, Inc.

Mr. Keith D. Nosbusch
Chairman and CEO
Rockwell Automation, Inc.

Dr. Harris Pastides
President
University of South Carolina

Dr. G. P. "Bud" Peterson
President
Georgia Institute of Technology

Mr. James M. Phillips
Chairman and CEO
NanoMech, Inc.

Mr. Nicholas T. Pinchuk
Chairman and Chief Executive Officer
Snap-on Incorporated

Dr. Lou Anna K. Simon
President
Michigan State University

Mr. Jack Stack
Founder, President and CEO
SRC Holdings Corporation

Dr. Charles W. Steger
President
Virginia Polytechnic Institute and State University

Dr. Teresa Sullivan
President
University of Virginia

Dr. Kim A. Wilcox
Chancellor
University of California, Riverside

Mr. Keith E. Williams
President & Chief Executive Officer and Trustee
Underwriters Laboratories Inc.

Dr. W. Randolph Woodson
Chancellor
North Carolina State University

Mr. Paul A. Yarossi
President
HNTB Holdings Ltd.



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For more information about the EMCP and other Council programs, please contact:

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About the Council on Competitiveness

WHO WE ARE

The Council's mission is to set an action agenda to drive U.S. competitiveness, productivity and leadership in world markets to raise the standard of living of all Americans.

The Council on Competitiveness is the only group of corporate CEOs, university presidents and labor leaders committed to ensuring the future prosperity of all Americans and enhanced U.S. competitiveness in the global economy through the creation of high-value economic activity in the United States.

Council on Competitiveness

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HOW WE OPERATE

The key to U.S. prosperity in a global economy is to develop the most innovative workforce, educational system and businesses that will maintain the United States' position as the global economic leader.

The Council achieves its mission by:

- Identifying and understanding emerging challenges to competitiveness
- Generating new policy ideas and concepts to shape the competitiveness debate
- Forging public and private partnerships to drive consensus
- Galvanizing stakeholders to translate policy into action and change