



Governor's Economic Competitiveness Subcabinet

The mission of the subcabinet is to advise the Governor on, and identify and recommend policies, regulations, strategies, and actions that strengthen Maryland's economic competitiveness and growth on an ongoing basis; review proposed policies and procedures by executive departments and agencies impacting economic development and workforce development; coordinate the implementation of executive directives and legislation that support business and talent development in the state; track the progress of the cross-agency implementation of the Economic Strategic Plan approved by the Maryland Economic Development Commission; track the progress of the cross-agency implementation of the economic goals under the Moore-Miller Administration's Maryland State Plan; and on a biannual basis, develop and publish a consolidated economic competitiveness plan that incorporates strategies and action plans from every executive department and agency represented on the Subcabinet.

Members

Agriculture (AG)
Budget and Management (DBM)

Commerce

Education

Environment (MDE)

General Services

Governor's Office of Small, Minority, and Women's Affairs (GOSBA)

Higher Education Commission (MHEC)

Housing & Community Development (DHCD)

Labor

Maryland Clean Energy Center

Maryland Economic Development Corporation

Maryland Technology Development Corporation

Natural Resources (DNR)

Planning (MDP)

State (SoS)

Transportation

University System of Maryland (USM)

Secretary Kevin Atticks (Steve Connelly)
Acting Secretary Marc Nicole (Richard Auxier)
Secretary Harry Coker, Chair, (Jerel Registre)
State Superintendent of Schools Carey Wright (Lisa Sparr & Alex Reese)
Secretary Serena McIlwain (Scott Goldman)
Secretary Atif Chaudhry (Daniel Chase)
Secretary Y. Maria Martinez, (Eduardo Hayden)
Secretary Sanjay Rai
Secretary Jake Day (Rosa Cruz)
Secretary Portia Wu (Ashley Sharp)
Executive Director Katherine Magruder (Mary Sirios & Pamela Powers)
Executive Director Tom Sadowski
CEO Troy LeMaile-Stovall
Secretary Josh Kurtz (David Goshorn)
Secretary Rebecca Flora (Darius White)
Secretary Susan Lee (Alexandria Liu)
Acting Secretary Samantha J. Biddle (Joe McAndrew & David Zaidan)
Chancellor Dr. Jay Perman (Diane Walters)

October 20, 2025
401 E. Pratt Street, 17th Floor Conference Room, Baltimore Maryland 21202
1:00 – 3:00pm
Minutes

Attendance

Subcabinet:

- Harry Coker, Secretary (Chair), Commerce
- Kevin Atticks, Agriculture
- Samantha J. Biddle (Joe McAndrew)
- Rebecca Flora, Planning (MDP)
- Marc Nicole (Richard Auxier), Budget and Management
- Josh Kurtz, Natural Resources (DNR)
- Susan Lee (Alexandria Liu), State (SoS)
- Y. Maria Martinez, (Eduardo Hayden), (GOSBA)
- Katherine Magruder, Maryland Clean Energy Center
- Serena McIlwain, MDE
- Sanjay Rai (Natasha Cornell), MHEC
- Tom Sadowski, MEDCO
- Portia Wu, Labor

Guests:

- Michael Lore
- Ashley Sharp
- Cassie Shirk

Commerce:

- Ricardo Benn
- Afiya Bey
- Cori Duggins
- John Gilstrap
- Mary Hanley
- Jayson Knott
- Jerel Registre
- Stephen Rice
- Judy L. Smith

I. Meeting Called to Order

The meeting was called to order at 1:03 p.m. by Secretary Harry Coker.

II. September 22, 2025 Meeting Minutes Approval

Upon a motion duly made and seconded, the meeting minutes from September 22, 2025 were approved.

III. Action Item Review and Status

Ms. Afiya Bey reviewed the status of action items from the September 22, 2025 meeting.

IV. Discussion – Chair's Report

Secretary Coker reported on the following topics:

- Following the September meeting, the moonshot definition and information document was shared with the Subcabinet for review and feedback. Commerce is continuing to update the list of potential Moonshots and actively engage the Subcabinet on this initiative.
- The second phase of Strategic Planning, which will cover 2027 to 2029, is currently underway, along with the Strategic Agenda. The FY26 Implementation Plan is expected to be finalized by October 31, 2025.
- The Loaned Executive Program pilot is a requirement of the same Executive Order that established the Subcabinet. Position descriptions have been developed, and are nearing the onboarding phase for participants.
- The Department of Commerce will lead the trade mission to Canada, scheduled for November. The mission aims to renew two MOUs, fostering expanded collaboration between Maryland and Canada, a key trading partner and tourism market. Additionally, Commerce is planning a trip to the Middle East.
- County visits across the state continue and officials from Caroline and Kent counties have been invited to the November GECS meeting to share their challenges with the Subcabinet. The objective is to foster collaboration in addressing issues and engage with economic development authorities.
- Commerce is developing an integrated energy plan in conjunction with energy partners. Secretary Coker will be meeting with Maryland Energy Administration Director Paul G. Pinsky.
- As of October 15, 2025, Commerce's pipeline of active attraction, expansion and FDI opportunities is summarized as follows:
 - 44 total opportunities, each representing at least 50 new and/or at-risk jobs
 - 20 attractions, 14 expansions and 10 foreign direct investments
 - 10,152 potential new jobs and 1,526 potential at-risk jobs
 - \$15.5 billion in potential new capital expenditure
 - 9 new opportunities were added to the pipeline in September 2025
 - 5 attraction, 2 expansions and 2 foreign direct investments

- 1,453 potential new jobs and 500 at-risk jobs
- \$3.84 million in potential new capital expenditure.

Secretary Wu requested that the list of pipeline wins be shared.

- **Action:** Secretary Coker will arrange a meeting with Secretary Wu to explore how to best engage and collaborate with the Department of Labor concerning new employment opportunities generated by the pipeline.

V. Discussion – Economic Development Messaging

Ms. Judy L. Smith highlighted that feedback from various stakeholders and partners on a range of topics is being compiled. Currently, the focus is on developing targeted messages around these topics beginning with two initial areas: extended sales tax and foreign investment.

Extended Sales Tax

Ms. Smith explained that information regarding the extended sales tax is not effectively reaching essential outlets, indicating a disconnect between the available information and its intended audience so Commerce has asked the Chamber of Commerce to solicit input from their stakeholders and partners on additional needs associated with the extended sales tax. Mr. Richard Auxier of the Department of Budget and Management added that the legislature extended the sales tax to include data and IT services at a 3% rate, with some specific exemptions. Otherwise, this is simply the existing sales tax.

Foreign Investment

Deputy Secretary Ricardo Benn highlighted ongoing efforts to address Foreign Direct Investment (FDI) and enhance communication with stakeholders. He noted that current indicators, such as the double-digit decline in FDI reported by the Bureau of Economic Analysis, reflect a lagging trend and are below traditional levels. Beyond FDI, the Deputy Secretary also mentioned a significant drop in international visitor arrivals and tourism numbers from key markets. This decline is potentially linked to certain policies or proposed policies that may be impacting the message sent to international visitors.

The current focus is on developing messaging strategies that highlight Maryland's key markets, emphasizing their talent pools and specific strengths. Messaging is being expanded to include industry-recognized credentials, efficient site-ready permitting process, and alignment with lighthouse sectors. This is an ongoing effort, but analysis of macroeconomic data is guiding us in showcasing Maryland's key attributes and supporting the broader FDI narrative.

- Secretary Coker confirmed Commerce's commitment to transparency in its plans and to providing ongoing updates to the Subcabinet.

VI. Discussion – Biannual Report Update

Ms. Mary Hanley provided an update on the Biannual Consolidated Economic Competitiveness Plan. The plan has evolved through one-on-one and group meetings with Biannual Plan POCs, incorporating their feedback. The revised strategy emphasizes and leads with Maryland's strengths, such as its national leadership in research and development, proximity to federal institutions, and exceptional quality of life and resources.

The plan's updated goals, initially more Commerce-specific, now address how various economic development authorities and jurisdictions will collaborate to implement and track these objectives. The assessment of the plan will center on achieving these overarching goals, each supported by specific actions.

Next steps:

- Lead agencies for each goal are currently being determined.
- The assigned lead agency will provide a progress update at the next GECS meeting.

VII. Streamlining COMAR Update

Ms. Judy L. Smith shared that Commerce has received feedback that businesses find the Maryland regulatory environment highly complex and difficult to navigate. Maryland needs to find solutions that promote ease of navigation, and promote harmonization.

Deputy Secretary Michael Lore of the Office of the Secretary of State outlined the Department of State's initiatives to enhance COMAR navigation. COMAR is now machine-readable, with automated compliance and analysis tailored for regulatory operations. These improvements increase transparency, harmonization, and automation. The ultimate objective is to integrate all regulatory and statutory code into a machine-readable format, allowing a large language model (LLM) to translate public searches into plain language explanations.

Participants were excited by the updates. Secretary Flora inquired about incentives for local system use, and Deputy Secretary Lore confirmed, stating Baltimore City would present updates at the next permitting council meeting.

VIII. Good of the Order

- Katherine Magruder, Executive Director of the Maryland Clean Energy Center, thanked Secretary Coker for attending the Maryland Clean Energy Summit and will follow up with outcomes from the event.

- Secretary Portia Wu highlighted the impacts caused by the federal shutdown, noting the impact of high energy bills and financial hardship on individuals. She encouraged sharing any pertinent information, as the Department of Labor is observing significant struggles. Additionally, she sought volunteers to assist with loan processing and proof of hardship requests.
- MEDCO Executive Director Tom Sadowski reported on developer discussions regarding data center projects. He noted potential misunderstandings and energy concerns, which could impede projects. Mr. Sadowski stressed the need to resolve these issues to facilitate projects and boost competitiveness.
 - Discussion ensued regarding how to enable the development of data centers recognizing it as a significant economic opportunity for the state. It was noted that technology advances more rapidly than the current regulatory environment and a concerted effort is needed to send a clear message to developers.
 - Mr. Jayson Knott noted that data centers comprise a large portion of the pipeline. He stressed dispelling myths about data center noise and water use, acknowledging power as a key challenge Commerce is addressing. He also suggested reviewing the Maryland Tech Council's data center report and their recent summit.

■ **Actions:**

- Secretary Coker asked for the Maryland Tech Council Report to be shared with the Subcabinet after the meeting.
- Commerce will present its long-term energy plan at a future GECS meeting, and will consider inviting the Maryland Tech Council to present as well.

IX. Summary of Key Decisions and Actions

Ms. Smith highlighted several follow-up actions resulting from the meeting.

Action items for follow-up:

- Secretary Coker will arrange a meeting with Secretary Wu to explore how to best engage and collaborate with the Department of Labor concerning new employment opportunities generated by the pipeline.
- Commerce will distribute the Maryland Tech Council report to the Subcabinet.
- Commerce will present its short-and long-term Energy Plan at an upcoming GECS meeting and consider whether the Maryland Tech Council should also present.

X. Adjournment

Upon a motion duly made and seconded, the meeting was adjourned at 2:24 p.m.