



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)

Secretary Kevin Atticks (Steve Connelly & Martin Proulx)

Budget and Management (DBM)

Acting Secretary Jake Weissmann (Richard Auxier)

Commerce

Secretary Harry Coker, Chair, (Judy L. Smith)

Education

State Superintendent of Schools Carey Wright (Lisa Sparr & Alex Reese)

Environment (MDE)

Secretary Serena McIlwain (Scott Goldman)

General Services

Secretary Atif Chaudhry (Daniel Chase)

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

Secretary Y. Maria Martinez, (Eduardo Hayden)

Higher Education Commission (MHEC)

Secretary Sanjay Rai

Housing & Community Development (DHCD)

Secretary Jake Day (Brad Fallon)

Labor

Secretary Portia Wu (Ashley Sharp)

Maryland Clean Energy Center

Executive Director Katherine Magruder (Mary Sirios & Pamela Powers)

Maryland Economic Development Corporation

Executive Director Tom Sadowski

Maryland Technology Development Corporation

CEO Troy LeMaile-Stovall

Natural Resources (DNR)

Secretary Josh Kurtz (David Goshorn)

Planning (MDP)

Secretary Rebecca Flora (Darius White)

State (SoS)

Secretary Susan Lee (Alexandria Liu & Michael Lore)

Transportation

Acting Secretary Samantha J. Biddle (Joe McAndrew & David Zaidan)

University System of Maryland (USM)

Chancellor Dr. Jay Perman (Diane Walters)

December 8, 2025
5508 Arapahoe Drive
Forest Heights, Maryland 20745
1:00 – 3:00pm
Minutes

Attendance

Note: Names in parentheses denote designees or alternates for members of the Subcabinet.

Subcabinet:

- Harry Coker (Judy L. Smith), Chair, Commerce
- Kevin Atticks (Martin Proulx), Agriculture
- Samantha J. Biddle (David Zaidan), Transportation
- Atif Chaudhry (Daniel Chase)
- Rebecca Flora, Planning
- Y. Maria Martinez, OSBA
- Katherine Magruder, Maryland Clean Energy Center
- Serena McIlwain, MDE
- Jay Perman, USM
- Sanjay Rai, MHEC
- Troy LeMaile-Stovall (Mindy Lehman), TEDCO
- Tom Sadowski, MEDCO
- Jake Weissmann (Richard Auxier), Budget and Management
- Portia Wu (Ashley Sharp), Labor

Guests:

- Tracy M. Benjamin
- Julia Chadwick
- Latoya Chism
- Laurel Cratsley
- Landon Fahrig
- Clate Jackson
- Troy Barrington Lilly
- Lucas Lin
- Tiffany Majors
- Michelle Masucci
- Mary Pulcinella
- Ebony Stocks
- Darius White

Commerce:

- Afiya Bey
- Delterese George
- John Gilstrap
- Mary Hanley
- Jayson Knott
- Tamar Osterman

- Ryan Powell
- Stephen Rice
- Judy L. Smith

I. Meeting Called to Order

The meeting was called to order at 1:02 p.m. by Department of Commerce Chief Strategy Officer, Judy L. Smith. Ms. Smith shared that she would be standing in for Secretary Coker who is currently engaged in a trade mission to the Middle East.

Ms. Smith stated that the Subcabinet meeting was being convened in Forest Heights, Maryland, located within Prince George's County. Secretary Coker previously mentioned taking the GECS on the road to better engage with local leaders and business partners. Ms. Smith expressed gratitude to the town of Forest Heights for hosting the event and extended an invitation to Mayor Troy Barrington Lilly to address the group. Mayor Lilly welcomed the Subcabinet to Forest Heights, characterizing it as a border community adjacent to Washington, D.C., which is experiencing substantial development and is demonstrably aligned with Governor Moore's priorities.

II. November 17, 2025 Meeting Minutes Approval

Upon a motion duly made and seconded, the meeting minutes from November 17, 2025 were approved.

III. Action Item Review and Status

Ms. Afiya Bey reviewed the status of action items from the November 17, 2025 meeting.

IV. Discussion – Chair's Report

Ms. Smith reported on the following topics:

- Commerce is currently in Phase II of strategic planning. The Request for Proposal (RFP) for the Strategic Plan was released on Thursday, November 13, 2025. A pre-proposal meeting was held, and proposals are expected in early January 2026, after which a contract will be awarded to begin implementation planning for FY27 through FY29. Commerce will continue to update the Subcabinet on progress.
- The Loaned Executive Program, a component of the Executive Order that established the Governor's Economic Competitiveness Subcabinet (GECS), is moving forward. Deloitte is interested in providing two Loaned Executives and these individuals will focus on assisting with the Commerce Organizational Construct Pilot. An MOU is currently being finalized.
- Secretary Coker is undertaking trade missions. Last month, the Secretary led a three-day trade mission to Canada, starting in Quebec and ending in Ontario. In Quebec, there was an opportunity to align on key areas of mutual interest in Tourism; and specifically around the Lighthouse Sectors of technology and the life sciences. The Secretary is currently undertaking his mission to the Middle East. The focus for those efforts also includes the Lighthouse Sectors with a specific focus on infrastructure development and increased trade and investment.

- Secretary Coker has been continuing County Tours throughout the state. Recent visits included Howard County, emphasizing continued close alignment, and Montgomery County, where the focus remains to further engage the business community.
- An update was provided on a connection Commerce facilitated between Paul Jones Lumber and Maryland Department of Transportation (MDOT). Approximately two months ago, MDOT coordinated a meeting with the company and the General Contractor for the Key Bridge construction. The decision regarding the company's participation in the project is now under their purview.

V. Closed Deals - Pipeline Update

Deputy Secretary Stephen Rice provided an update on the pipeline and closed deals since the last meeting. The major projects pipeline only incorporates projects that involve fifty or more jobs; smaller projects are not reflected in this information.

As of November 12, 2025, Commerce's pipeline of active attraction, expansion and FDI opportunities is summarized as follows:

- 45 total opportunities, each representing at least 50 new and/or at-risk jobs
 - 19 attractions, 16 expansions and 10 foreign direct investments
 - 10,388 potential new jobs and 1,501 potential at-risk jobs
 - \$15.8 billion in potential new capital expenditure
- 4 new opportunities were added to the pipeline in October 2025
 - 3 attractions, 1 expansion and 0 foreign direct investments
 - 470 potential new jobs and x at-risk jobs
 - \$41.7 million in potential new capital expenditure
- 1 opportunity was closed/won in October 2025

In response to Ms. Ashley Sharp's inquiry regarding data segmentation, Mr. Jayson Knott clarified that the pipeline data can be disaggregated.

- **Action:** Ashley Sharp will send the Department of Labor's desired data segmentation list to Commerce through Ms. Afiya Bey.

VI. Discussion – Prince George's County: Challenges and Themes

Prince George's county representatives joined the meeting to discuss their specific challenges. The objective is to provide an opportunity for the Subcabinet to hear directly from county representatives regarding their key challenges and areas of concern.

Tracy M. Benjamin, Esq., Deputy Chief Administrative Officer for Economic Development highlighted several significant assets that position Prince George's County for economic success:

- Strategic Location: A primary advantage cited was "location, location, location."

- The county benefits from robust infrastructure and ease of access.
- The county possesses a well-developed transportation network.
- Successful mixed-use development and a high capacity to attract tourism.

Despite the County's advantages, Ms. Benjamin posed the question: "Why do we lack retail attraction?" The root cause was identified as the complex, unpredictable development permitting process, leading to significant negative outcomes:

- Permitting Process Issues:
 - The process was described as feeling "less like a roadmap and more like a maze."
 - This complexity leads to developers becoming frustrated and choosing to pursue projects in other jurisdictions.
- Regulatory Uncertainty:
 - The sheer volume of regulations results in confusion and makes interpretation difficult.
 - Unpredictable timelines are stifling innovation.
- Economic Consequences:
 - Regulatory difficulties are a primary reason developers choose to go to other jurisdictions.
 - This ultimately results in a reduced supply of new development and retail options.

Ms. Benjamin proposed the following solutions:

- Develop and share a clear Game Plan: The County must create and communicate a single, unified "game plan" or roadmap for development.
- Emphasis on the critical need for all stakeholders to work together as a team to achieve success.
- Invest in Resources:
 - Staffing: Invest in staffing and resources to better manage processes.
 - Funding: Ensure adequate funding and utilize third-party assistance when necessary.
- Accountability: Embrace accountability throughout the process.

Ms. Benjamin is planning a meeting to formalize the communication of the County's unified strategy. Ms. Smith asked for the date and if the Department of Commerce should attend. Ms. Benjamin responded that the date is not yet set but will be communicated once it is finalized.

VII. Energy Update

Ryan Powell, PhD, Energy Program Manager at the Department of Commerce, presented an analysis showing Maryland's electricity supply vs. peak demand. The system's capacity must stay below the peak load, a problem magnified by the rapid growth of data centers driving demand. This struggle to meet peak load may cause significant issues, despite sufficient overall power supply outside of peak periods.

Key points:

- We have an impending peak power issue.
- Power prices have increased and will continue to increase sharply if this is not addressed.
- According to PJM, we may have rolling blackouts as soon as next summer (2026).
- Every 10% increase in electricity price costs Marylanders \$770M per year.
- Prices may increase by 60% by 2035. This represents an added cost to the economy of \$4.6B per year.

Dr. Powell stressed the need for clear, time-bound actions and a unified, "whole of government response" to address rising energy costs. The Department of Commerce's role will be to collaborate with the Maryland Energy Administration and the Maryland Clean Energy Center, which are currently leading the majority of this work. Initial progress was shown for a series of proposed solutions spanning the short, mid, and long term.

Key types of solutions include:

- Accelerating deployment of new power generation.
- Increasing energy efficiency.
- Demand shifting, especially during grid emergencies.

Executive Director Katherine Magruder commended the clear explanation of a complex issue. She highlighted the potential for future demand increases driven by data centers and asked if demand response could be included in the chart. Dr. Powell affirmed, agreeing that it is a necessary tool.

- **Action:** Ryan Powell will add demand response to future presentation charts.
- **Action:** Members of the Subcabinet interested in supporting the State's integrated energy plan should contact Ryan Powell.

VIII. Permitting Pilot Projects Update

Secretary Flora of the Department of Planning provided an update on the Maryland Coordinated Permitting Review Council. The Council established a Working Group whose purpose is to coordinate interagency plan review and permitting of covered (pilot) projects through a Working Group of permitting leads from each state agency represented on the Council.

The Council's six pilot projects are:

1. Pimlico Redevelopment, Baltimore City
2. SBY Market Center, Salisbury-Wicomico County
3. Loch Raven Overlook, Baltimore County
4. Quantum Frederick, Frederick County
5. Phase I at Bainbridge, Port Deposit-Cecil County
6. Burnt Hill Farm, Montgomery County

The Council is currently in an ongoing discovery phase for the Pilot Program and has established a technology design task force, which is collaborating with the Department of Information Technology (DoIT) to develop a dashboard prototype. This prototype will comprise two primary components: a map displaying detailed permit information and Key Performance Indicators (KPIs). While the initial objective was to launch the dashboard by December, it is anticipated that deployment will be deferred until January. The Council's ongoing discovery phase is incorporating lessons learned into a multi-phased, long-term solution.

IX. Discussion – Biannual Report and Surveys Update

Ms. Mary Hanley provided an update regarding the Biannual Consolidated Economic Competitiveness Plan including the updated language for each goal and their themes. Each goal will have an agency lead and a development team to flesh out action plans for each goal with the aim of presenting the updated action plan in February 2026.

Goal 1: Cultivate a business-friendly environment in partnership with local economic development authorities that fosters and rewards innovation and entrepreneurship

Goal 2: Harness the economic engine of Maryland's research and development institutions to drive knowledge creation and bring next-generation solutions to market

Goal 3: Nurture Maryland's talent pipeline to meet businesses' workforce needs and help them compete and thrive in the global economy through strategic coordination and equitable access

Goal 4: Support in the climate-resilient critical infrastructure necessary to maintain high quality-of-life standards for all Marylanders

Goal 5: Strengthen Maryland's collaborative, integrated economic development system

A survey will be sent to the Subcabinet to ensure Secretary-level feedback is included and incorporated into the plan. Executive Director Magruder requested that the survey include the Goal Leads next to each goal. Subcabinet members also recommended monitoring Goals 2 and 5 due to their partial overlap.

Action: Mary Hanley will add Goal Leads to each goal on the presentation and survey.

X. Good of the Order

- Mr. Martin Proulx from the Department of Agriculture reported a slight program adjustment, expanding their monthly program to incorporate marketing within

agricultural development. This new initiative, launching in January, will assist businesses with navigation. The team is excited about the launch with more details to follow.

- Ms. Smith expressed gratitude to the Mayor and community of Forest Heights for hosting the meeting, and to the Prince George's County representatives for their participation. She also welcomed the Subcabinet to provide feedback regarding the experience of holding meetings in the field.

XI. Summary of Key Decisions and Actions

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

- Ashley Sharp (Labor) will send data segmentation requests for the pipeline charts to Afiya Bey.
- Ryan Powell is tasked with adding demand response to the presentation chart.
- Subcabinet members should respond by December 24, 2025 to the Biannual Plan survey, which will be distributed by Mary Hanley and will include a list of Points of Contact (POCs) for each goal.

XII. Adjournment

Upon a motion duly made and seconded, the meeting was adjourned at 2:38 p.m.