



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)	Secretary Jake Weissmann (Richard Auxier)
Commerce	Secretary Harry Coker, Chair (Judy L. Smith)
Education	State Superintendent of Schools Carey Wright (Phil Lasser & Alex Reese)
Maryland Energy Administration (MEA)	Director Kelly Speakes-Backman (Jenn Aiosa)
Environment (MDE)	Secretary Serena McIlwain (Scott Goldman)
General Services	Secretary Atif Chaudhry (Daniel Chase)
Department of Social and Economic Mobility (DoSEM)	Secretary Walter Simmons
Higher Education Commission (MHEC)	Acting Secretary Elena Quiroz-Livanis
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)
Transportation	Secretary Kathryn Thomson (Joe McAndrew & David Zaidan)
University System of Maryland (USM)	Chancellor Dr. Jay Perman (Diane Walters)

July 16, 2026
401 E. Pratt Street, Baltimore MD 21202
1:00 – 3:00 p.m.
Minutes

Attendance

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

Subcabinet:

- Harry Coker, Chair, Commerce
- Kevin Atticks (Steve Connelly), Agriculture
- Rebecca Flora (Darius White), Planning
- Josh Kurtz (Julia Soloman), DNR
- Katherine Magruder, MCEC
- Susan Lee (Michael Lore), State
- Troy LeMaile-Stovall
- Elena Quiroz-Livanis, MHEC
- Serena McIlwain (Suzanne Dorsey), MDE
- Jay Perman (Michelle Masucci), USM
- Kathryn Thomson (Joe McAndrew), MDOT
- Tom Sadowski, MEDCO
- Kelly Speakes-Backman (Ian Ullman), MEA
- Jake Weissmann (Zaynah Rose), DBM
- Carey Wright (Phil Lasser), Education
- Portia Wu, Labor

Guests:

- Julia Chadwick
- Matthew Cimino
- Michele Masucci
- Timothy Murphy
- Mindy Lehman
- Jonathan Sachs
- Karen King-Sheridan
- Donald Smith
- Vijay Ramasamy

Commerce:

- Jenn Aiosa
- Ricardo Benn
- Afiya Bey
- April Doss
- John Gilstrap
- Mary Hanley
- Mayank Kapur
- Tamar Osterman
- Stephen Rice
- Judy Smith

I. Meeting Called to Order

The meeting was called to order at 1:01 p.m. by Secretary Coker.

II. Quorum Confirmation and Conflict of Interest

Following a quorum confirmation, the conflict of interest statement was read. No conflicts of interest were acknowledged.

III. June 18, 2026 Meeting Minutes Approval

Upon a motion duly made and seconded, the meeting minutes from June 18, 2026 were approved.

IV. Action Item Review and Status

Ms. Afiya Bey reviewed the status of action items from the June 18, 2026 meeting.

V. Discussion – Chair’s Report

Secretary Coker reported on the following topics:

- In direct response to feedback from the County Tours, the GECS is establishing a Rural Communities Task Force, as previously shared. A draft charter has been created and is currently being socialized with stakeholders. Further details will be provided once this process is complete.
- Commerce has completed the ROI analysis for its 30 programs as presented at the May GECS meeting. Labor presented their ROI analysis at the June GECS and Commerce is still working with DHCD to schedule their ROI analysis presentation.
- To advance international relations, Commerce supported key meetings with major global delegations. These high-level engagements included discussions with EU and Canadian Ambassadors, and Deputy Assistant Secretary Mitchell of the U.S. International Trade Administration.
 - Commerce led a delegation of 15 Maryland life sciences companies to the BIO International Convention in San Diego from June 22-25, 2026. Maryland will host the 2026 Quantum World Congress (QWC) from September 23-25 at The Hotel at the University of Maryland and across the College Park campus. The recruitment efforts align with previous trade missions to Canada, Japan, and South Korea, as well as ongoing diplomatic talks with the UAE, Qatar, and Nordic countries.
 - In Dublin, discussions explored establishing a Maryland soft-landing desk, co-organizing a transatlantic innovation roundtable and conducting industry site visits to promote Maryland for international scaling, with follow-ups planned for the fall.
- As of July 6, 2026, Commerce’s pipeline of active attraction, expansion and FDI opportunities is summarized as follows:

- o 39 total opportunities, each representing at least 50 new and/or at-risk jobs
- o 14 attractions, 21 expansions and 4 foreign direct investments
- o 9,878 potential new jobs and 1,749 potential at-risk jobs
- o \$33.6 billion in potential new capital expenditure
- o 6 new opportunities were added to the pipeline in June 2026
 - 2 attraction, 4 expansions and 0 foreign direct investments
 - 908 potential new jobs and 23 at-risk jobs
 - \$558 million in potential new capital expenditure
- o 2 new opportunities were closed/won in June 2026
 - McCormick
 - New pilot manufacturing plant in Aberdeen
 - 225 new employees, \$243 million capex
 - Holly Poultry
 - New poultry processing and distribution facility
 - 140 new jobs, \$2.3 million capex

VI. Discussion – Baltimore County: Challenges and Themes

In support of the state’s aim to build a collaborative economic development ecosystem for growth, Baltimore County was invited to present the challenges and opportunities within the county. Mr. Jonathan Sachs, Director, Department of Economic and Workforce Development, shared the following:

Executive Overview & Governance

- **Governance Model:** The Baltimore County governance structure integrates Economic and Workforce Development operations. It features a County Executive and a 9-member council across single-member districts.
- **Economic Position:** As the second largest local jurisdiction by GRP and Income Tax contribution, and #3 by population in Maryland, the County maintains a highly diversified economy.
- **Current Climate:** Discussion noted that Maryland was recently ranked as having the second-worst business climate in the U.S. Baltimore County is a state economic leader.

SWOT & Strategic Analysis

- **Strengths:** Strategic location (multimodal transport links: road, rail, sea, air), educational infrastructure (four 4-year universities and CCBC), major local enterprises (e.g., McCormick, Stanley Black & Decker, Amazon), and six target industries (Healthcare, Defense, Logistics, Tech, Manufacturing, Financial Services).
- **Weaknesses:** Land use challenges, the need for a comprehensive 10-year zoning rewrite, and a lack of a strategic view beyond single-district decision-making. Infrastructure requires critical transit upgrades—exacerbated by Key Bridge collapse traffic on I-695. A severe

housing shortage limits tax base growth, while negative public perceptions regarding crime and unhoused populations create challenges.

- **Opportunities:** Expanding targeted industries, enhancing private sector engagement, leveraging Tradepoint Atlantic, and acting on Advisory Board recommendations (e.g., establishing a private-sector-led Business Development and Retention Corporation, expanding incentives for vacant office space and housing, and supporting higher education reform).
- **Threats:** Persistent infrastructure delays tied to the Key Bridge and widespread anti-growth sentiment (NIMBYism).

Key Areas for State Assistance

- **State Resource Support:** Baltimore County lacks a robust business pipeline and equivalent attraction resources. Securing state assistance for lead generation and business attraction represents a pivotal growth opportunity.

Action Items:

- Commerce to identify localized, actionable measures they can implement to bolster regional competitiveness.
- Commerce to initiate assistance with Baltimore County with economic development initiatives, business attraction, and pipeline expansion efforts.
- Commerce will share Mr. Sachs' presentation with the Subcabinet.

VII. Biannual Plan Update

Ms. Mary Hanley provided an update on the Maryland Biannual Integrated Economic Development Plan, including a proposed structural framework, outline for the public-facing strategy document, and a status update on implementation planning. Successful implementation relies on continuous communication, cross-agency integration, and iterative feedback to ensure all state agencies remain aligned and collaborative. The execution strategy is phased:

- Short-Term: Focus on establishing foundational anchors.
- Medium-Term: Focus on scaling initiatives.
- Long-Term: Focus on achieving broader economic transformation.

Secretary Coker highlighted that while current efforts have largely focused on three key sectors, the overall plan encompasses six designated lighthouse sectors. Ms. Hanley confirmed that the plan is to finalize and complete the Integrated Economic Development Plan by November.

VIII. Department of the Environment Update

Secretary McIlwain, Department of the Environment, presented a progress overview of the Online Permitting and Electronic Payment at the Department of the Environment (MDE).

MDE mapped workflows to identify delay sources and moved to a data-driven model, balancing environmental protection, customer service, and economic growth and now tracks core metrics, including permit turnaround times, staff utilization, unit productivity, and legislative reforms.

- 2026 Milestones:
 - 25% Reduction in permit turnaround times (achieved in 2025).
 - Environmental Service Center launched May 2026, putting ~50% of permit types live.
 - Digital Adoption: Processed 400+ electronic permits and collected \$200K+ online.
- Platform Modernization: Replacing paper systems with a single platform featuring online applications, payments, and status dashboards to streamline workflows.
- Next Steps
 - Expansion of Digital Access: Transition the remaining permit categories online and scale self-service functionalities within the Environmental Service Center.
 - Refinement and Advancement: Utilize pilot data to establish reduced turnaround targets and progress permit modernization initiatives.

The department is now effectively evaluating critical performance metrics. Further updates will follow as these initiatives progress.

IX. University System of Maryland Research Initiatives

Michele Masucci, Vice Chancellor for Research and Economic Development, University System of Maryland (USM), provided an update on USM research initiatives as discussed as an action item from the June meeting.

- Strategic Drivers: USM research serves as an economic engine by advancing externally sponsored research, fostering discovery, driving intellectual property, and supporting workforce and regional growth. Major flagships include "Quantum at Maryland".
- Institutional Recognition & Excellence: USM holds 3 R1 research designations and 7 Community Engagement Classified campuses. Flagships UMB and UMD rank #14 nationally for total R&D funds and #15 for federal funding. Faculty include members across the National Academies and National Academy of Inventors.
- Economic & Tech Transfer Impact:
 - Jobs & Startups: Research parks employ 9,000 people; 125 new startups developed with USM venture support in FY 2025.
 - Intellectual Property Metrics (FY 2024): 301 invention disclosures, 108 issued US patents, 39 executed licenses/options, and \$8.3M+ in gross license income. USM ranks 11th among U.S. public universities for issued patents.

Action item:

- Secretary Coker will reach out to USM and IHC regarding the second lighthouse sector.

X. CLOSED SESSION INFORMATION (§ 3-306)(c)(2) or § 3-104

- Time of closed session: 2:50 p.m. to 3:03 p.m. ET
- Place: 401 E. Pratt Street Baltimore, MD 21202, 17th Floor Conference Room
- Purpose(s): The meeting was closed under the provisions of procurement exception under General Provisions Article Section 3-305(b)(14) and the investment of public funds exception under Section 3-305(b)(5).

Persons attending closed session:

Subcabinet:

- Secretary Weissmann (Richard Auxier)
- Secretary Coker
- Secretary Flora (Darius White)
- CEO LeMaile-Stovall
- Acting Secretary Quiroz-Livanis
- Director Magruder
- Secretary McIlwain
- Secretary Chancellor Perman
- Executive Director Sadowski
- Secretary Simmons
- Director Speakes-Backman (Jenn Aiosa)
- Director Sadowski
- Secretary Thomson (David Zaidain)
- Secretary Wu

State of Maryland:

- Ricardo Benn
- Afiya Bey
- Julia Chadwick
- Steve Connelly
- Matthew Cimino
- Cori Duggins
- April Doss
- John Gilstrap
- Mary Hanley
- Mayank Kapur
- Karen King-Sheridan
- Michael Lore
- Michelle Masucci
- Timothy Murphy
- Tamar Osterman

- Vijay Ramasamy
- Donald Smith
- Judy Smith
- Stephen Rice

Topics discussed:

- Commerce Legislative Priorities

Action taken:

- No actions were taken.

XI. Good of the Order

There were no “Good of the Order” comments made.

XII. Summary of Key Decisions and Actions

Ms. Smith outlined the following follow-up actions resulting from the meeting:

- Commerce will distribute the presentation slides from today's meeting.
- Commerce will identify support mechanisms to assist in attracting businesses to the Baltimore region and follow up with Mr. Sachs regarding assistance with business development.
- MHEC will work to further refine their new program approval process to ensure academic quality and align educational offerings with the lighthouse sectors and the state workforce needs. Secretary Coker will work with USM and IHC for a greater focus on the second lighthouse where computational biology resides.
- The Subcabinet will collaborate on legislative proposals (e.g., two-way sharing of legislative proposal information).

XIII. Adjournment

Upon a motion duly made and seconded, the meeting was adjourned at 3:06 p.m.