

Compete.

Leveraging Energy Abundance to Enhance U.S. Manufacturing

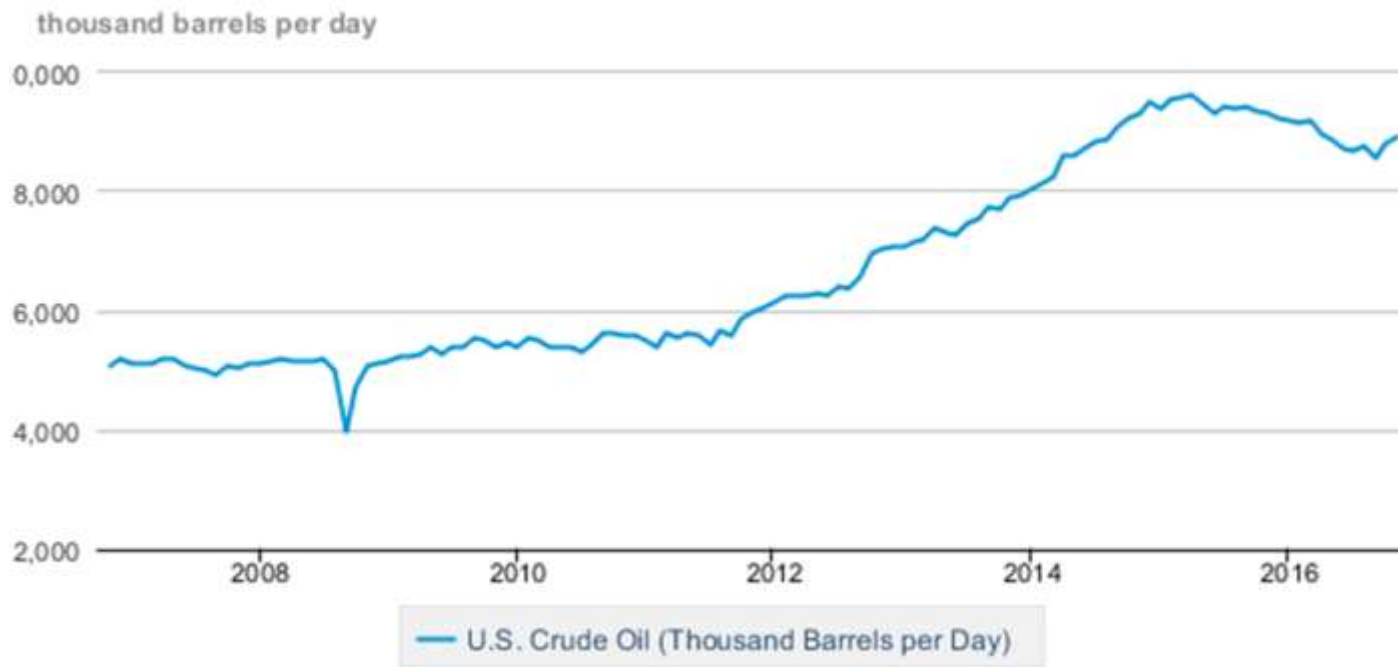
William Bates
Executive Vice President
U.S. Council on Competitiveness

February 9, 2017

Oil



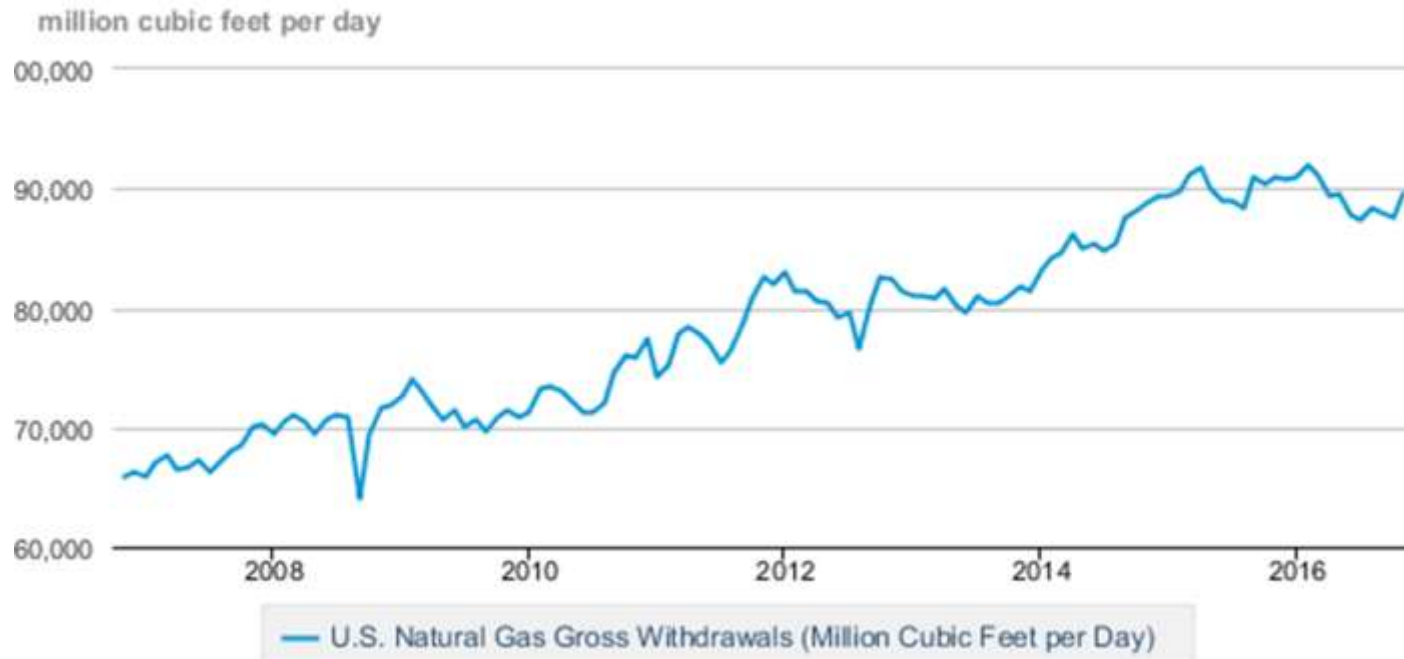
U.S. crude oil production



Source: U.S. Energy Information Administration

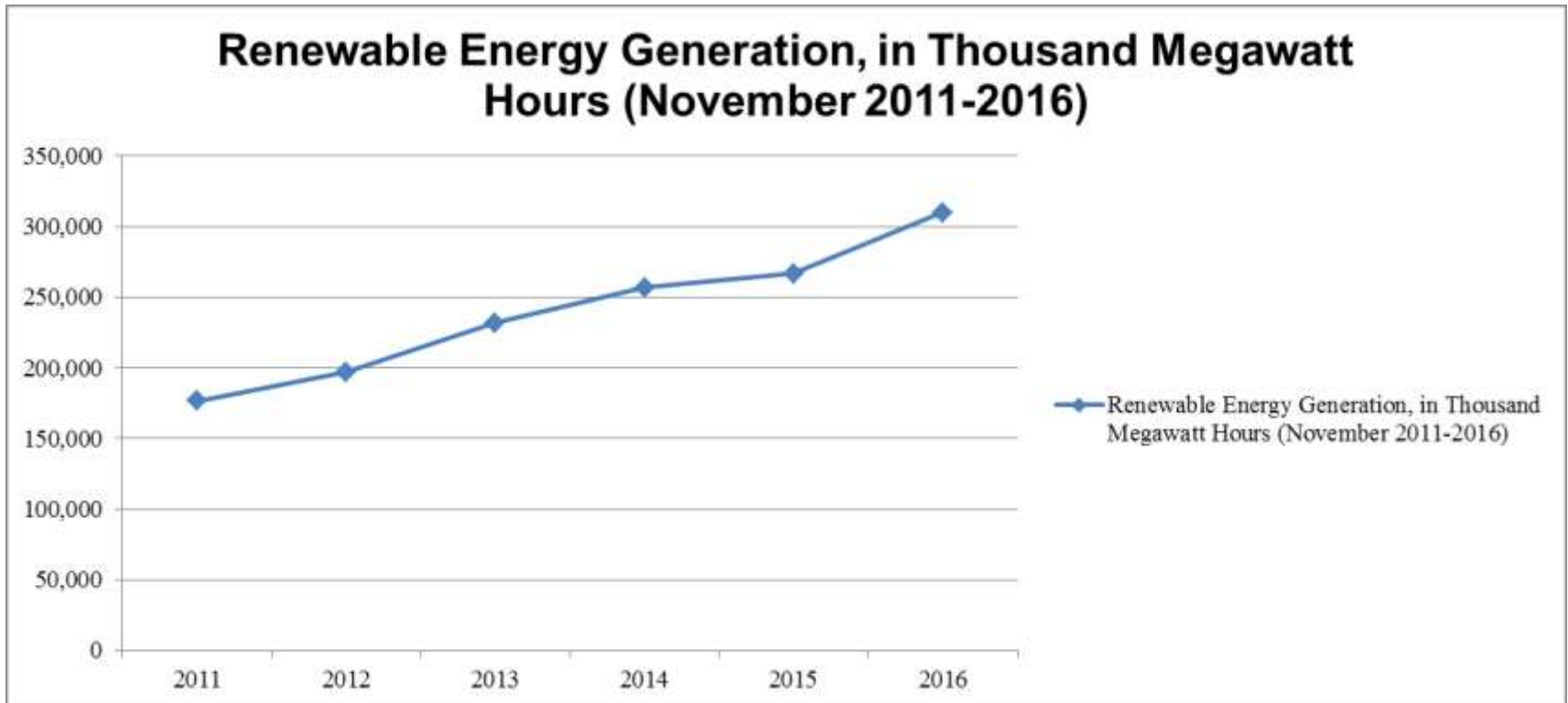
Natural Gas

U.S. natural gas production (gross withdrawals)

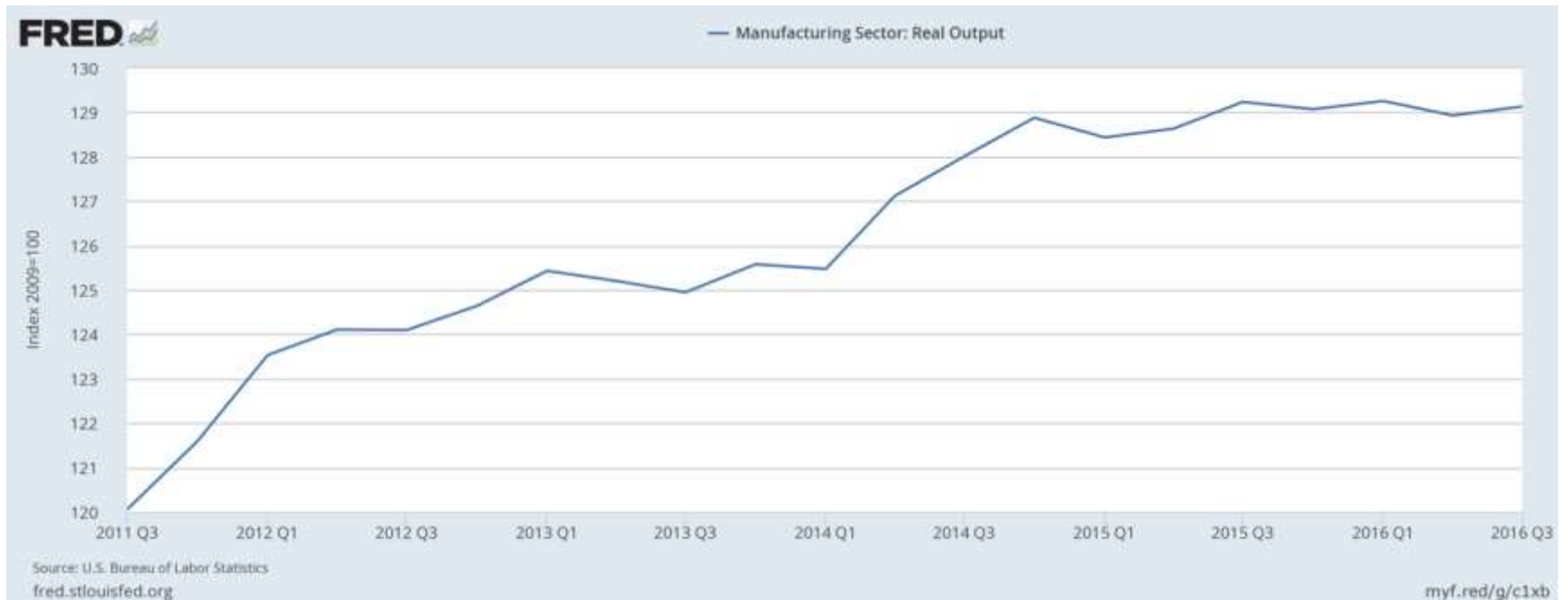


Source: U.S. Energy Information Administration

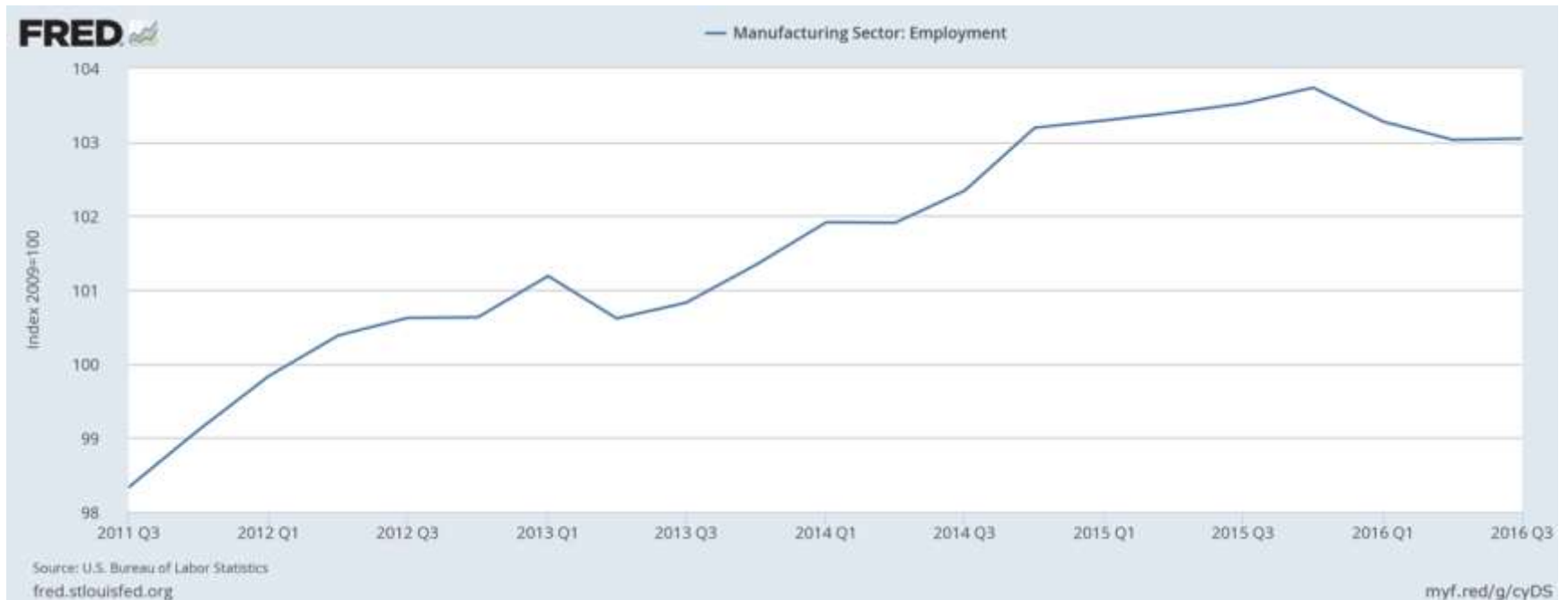
Renewables



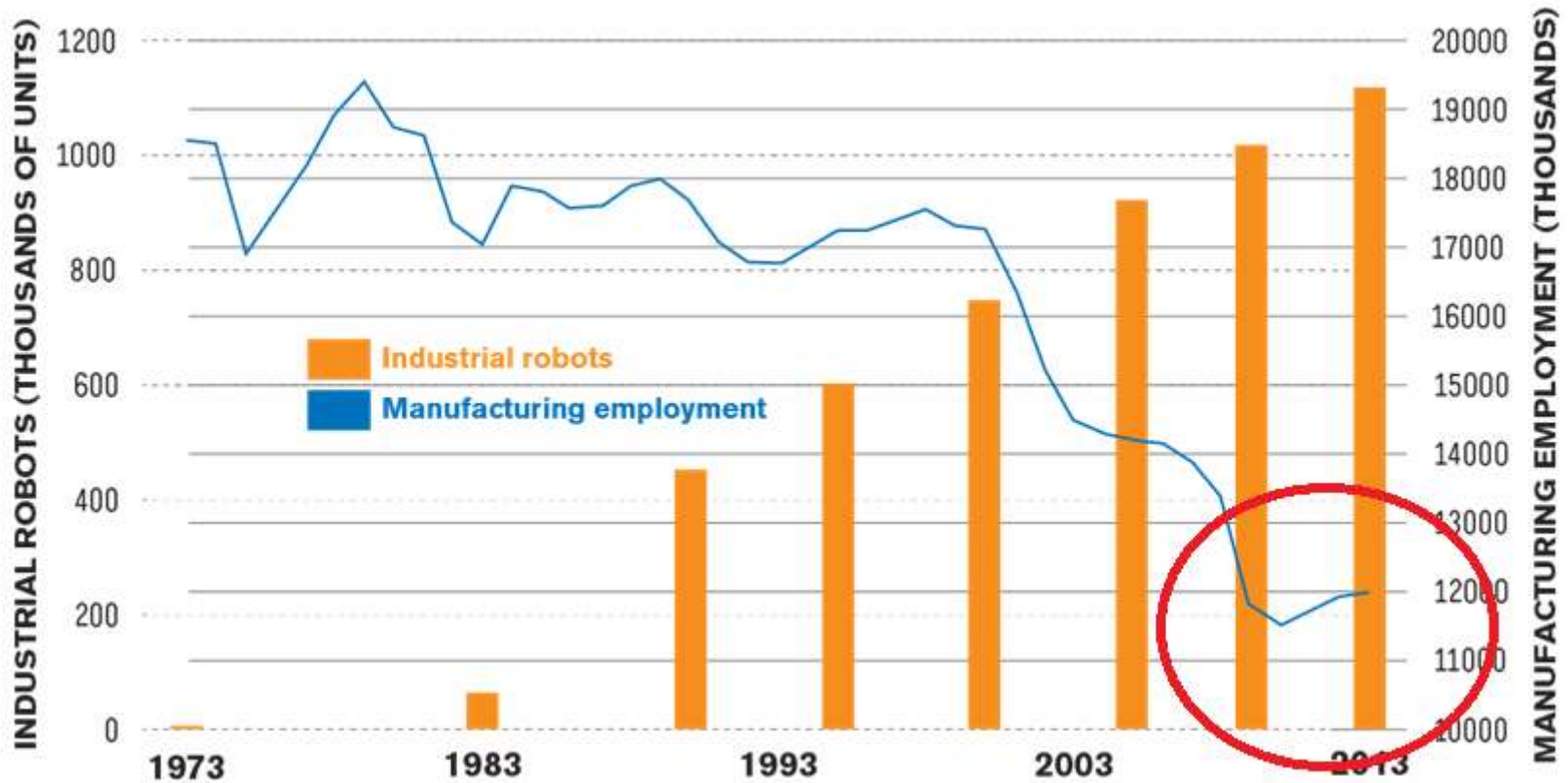
Manufacturing Output



Manufacturing Employment



Managing Expectations



Is Perception Becoming Reality?

2016 Global Manufacturing Competitiveness Index

U.S. MANUFACTURING COMPETITIVENESS RISING, SET TO TAKE #1 SPOT FROM CHINA BY 2020

INDEX RANKINGS BY COUNTRY

2016 (Current)		
Rank	Country	Index score (100=High) (10 = Low)
1	China	100.0
2	United States	99.5
3	Germany	93.9
4	Japan	80.4
5	South Korea	76.7
6	United Kingdom	75.8
7	Taiwan	72.9
8	Mexico	69.5
9	Canada	68.7
10	Singapore	68.4

2020 (Projected)			
Rank	2016 vs. 2020	Country	Index score (100=High) (10=Low)
1	(▲ +1)	United States	100.0
2	(▼ -1)	China	93.5
3	(↔)	Germany	90.8
4	(↔)	Japan	78.0
5	(▲ +6)	India	77.5
6	(▼ -1)	South Korea	77.0
7	(▲ +1)	Mexico	75.9
8	(▼ -2)	United Kingdom	73.8
9	(▼ -2)	Taiwan	72.1
10	(▼ -1)	Canada	68.1

Source: Deloitte and Council on Competitiveness

Around the Table (Advanced Materials)



Around the Table (Water & Manufacturing)



Taking It To the Hill (Biosciences)



Google image

Looking for Common Themes Across Sectors



- * *Energy Sector Study: May 30-31, 2017*
- * *Aerospace Sector Study*
- * *Pharmaceuticals & Healthcare Sector Study*

Focus

- Talent
- Sensors/Data Collection
- Data Management/AI
- Cyber Security
- PPPs
- Infrastructure
- Research





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