

CENTERSTATE NEW YORK EXPORT PLAN

METRO EXPORT INITIATIVE





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BROOKINGS-ROCKEFELLER PROJECT
ON STATE AND METROPOLITAN INNOVATION



CENTERSTATE REGIONAL EXPORTS

CenterState New York is a 12-county region consisting of Cayuga, Cortland, Herkimer, Jefferson, Lewis, Madison, Oneida, Onondaga, Oswego, St. Lawrence, Seneca, and Tompkins counties in the Central and Northern area of New York State. The region combines the Syracuse, Ithaca, and Utica-Rome Metropolitan Statistical Areas.

Established through the merger of the Greater Syracuse Chamber of Commerce and the Metropolitan Development Association of Syracuse and Central New York, CenterState Corporation for Economic Opportunity (CenterState CEO) was formed in April, 2010 to promote regionalism and to encourage partners to collectively pursue a coordinated, effective, and globally competitive economic development agenda. Working across the entire 12-county region, CenterState CEO has had success building collaborations, developing a regional identity, proactively pursuing business development and attraction, and implementing programs to support entrepreneurship and workforce development.

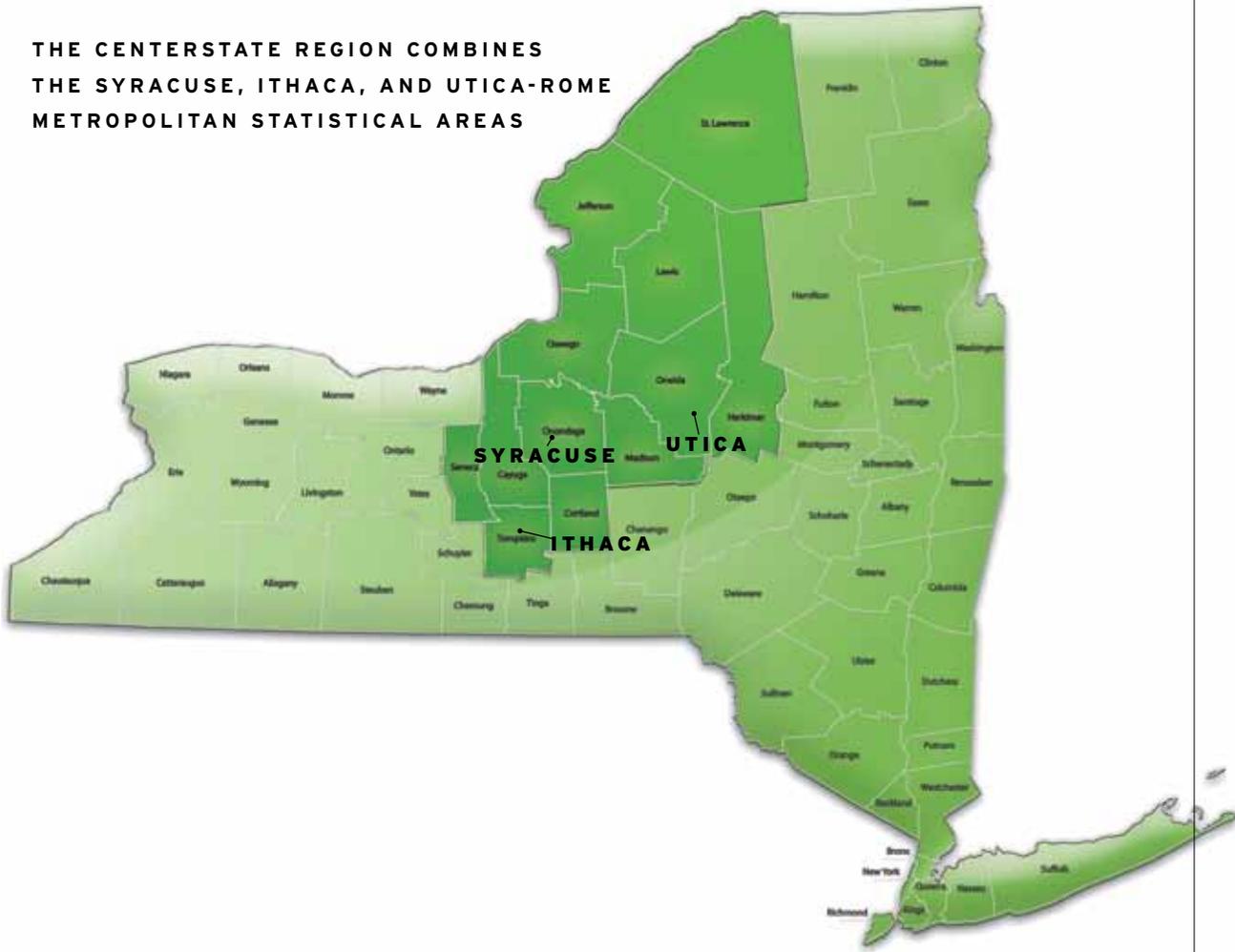
However, CenterState CEO has not been focused on promoting and stimulating the growth of a potential transformational business practice: increasing the region's exporting activity. This reflects larger sentiments throughout the region where some export promotion activities have occurred, such as the establishment of the Central New York International Business Alliance in 2002. Yet there has not been region-wide momentum to fully embrace exporting

as a critical component of future growth.

Starting in the mid-1970s and continuing through the early 1990s, the CenterState region was hit by several disruptive economic forces. The globalization of the economy brought about foreign low-cost competition that offered competitive products at cheaper costs. Manufacturers began expanding and relocating out of the traditional manufacturing regions of the Northeast and Midwest toward cheaper more business-friendly environments in the South and Southwest regions of the country. Mergers and acquisitions of local firms impacted the CenterState region with the removal of local corporate decisionmaking for large firms.

As difficult as many of these changes were for the region, a central storyline of transition to the next economy began to emerge. This transition has been primarily based on the region's considerable knowledge assets, including research and development activities that were retained after major manufacturers moved production elsewhere, creating strong R&D capacity; significant colleges, universities, and research centers that attract 130,000 students to the

**THE CENTERSTATE REGION COMBINES
THE SYRACUSE, ITHACA, AND UTICA-ROME
METROPOLITAN STATISTICAL AREAS**



area; and deep talent pools in technical occupations such as engineers and scientists. Though manufacturing as a general economic activity has declined in the region, many of its core economic strengths—such as cleantech, digital and electronic devices, and biosciences—have retained strong advanced manufacturing components.

However, the region still faces considerable barriers that have hindered the mobilization of these assets to transform the region into a globally competitive 21st century economy. Net job growth has stalled over the past decade, with a handful of the region’s mature industry sectors losing jobs; the region’s average wages in 2009 were 20 percent less than the national average; high concentrations of poverty persist in the region’s urban cores and rural areas; and the region’s emerging businesses have been stymied by low venture investment. In light of these significant entrenched challenges, the CenterState region must pursue new strategies and initiatives throughout its regional economic development efforts.

One of these new initiatives must involve improving the region’s connections to, and competitiveness in,

the global economy. The 12-county CenterState region relies on exports for 9.2 percent (\$6.6 billion) of its economic output, placing the region below the U.S. average of 10.7 percent.¹ At the same time, domestic consumption in the United States has slowed due to the effects of the global recession, while the markets with the strongest prospects for new and future growth are outside of the United States—in areas such as Asia, the Middle East, and South America.

The CenterState region must place increased focus on these and other global markets if it is to grow and sustain its regional economy. Although the CenterState region, based partly on its diversity of industry concentrations, was not as significantly impacted by the recession as others, improved access to foreign growth markets presents a potentially significant way to address some of the region’s entrenched challenges: stagnant wage growth, loss of manufacturing jobs, and overall sluggish net job growth.

FOOTNOTES

1. Emilia Istrate and Nicholas Marchio, 2012, “Export Nation,” Brookings.

MARKET ASSESSMENT

CenterState CEO staff and other members of the Metropolitan Export Initiative advisory team conducted a detailed market assessment of the 12-county CenterState region at the beginning of the export planning process to inform and guide the region's export strategy. The market assessment included a total of 21 one-on-one interviews with medium and large businesses and regional export service providers, a region-wide survey of 144 businesses and service providers, and an analysis of detailed export data provided by the Brookings Institution and the U.S. Chamber of Commerce.

Though interviews and surveys included participants from across the 12-county CenterState region, export data was analyzed only for the Syracuse, NY metropolitan area. Greater Syracuse represents 45 percent of the CenterState region's population, 45 percent of employment, 52 percent of gross metropolitan product (GMP), and 50 percent of total exports. Our research suggests the CenterState region is home to businesses that are, on average, less sophisticated about exporting compared to firms in other mid- to large-sized U.S. metropolitan areas. However, given the strength of the region's knowledge-based assets, there remains significant potential on which the region can build to fuel future export growth.



KEY FINDINGS:

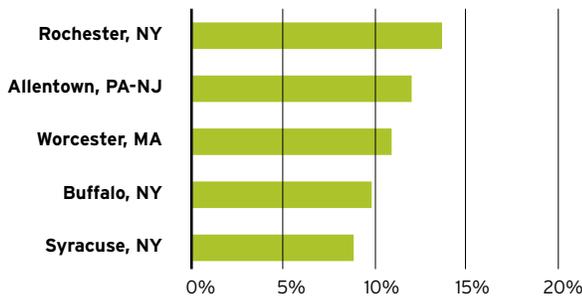
➤ **Greater Syracuse's export economy and growth lags most other large metropolitan export markets.** Compared to the nation's top 100 metropolitan areas, exports grew relatively slowly in the Greater Syracuse region between 2003 and 2010 (Greater Syracuse ranks 64th in the country with an export growth rate of 32.3 percent). The export of goods represents 60 percent of the region's total exports while services comprise the remaining 40 percent. Between 2003 and 2010, export job growth was also comparatively slow. Greater Syracuse ranked 65th in export job creation among the 100 largest metropolitan areas in the nation, growing export jobs by 16.5 percent. Export related jobs in the region are heavily concentrated in the services producing industries, which represent 64 percent of total regional export employment.

➤ **Greater Syracuse boasts a diverse set of export industries that collectively drive the region's trade.** The region is not overly dependent

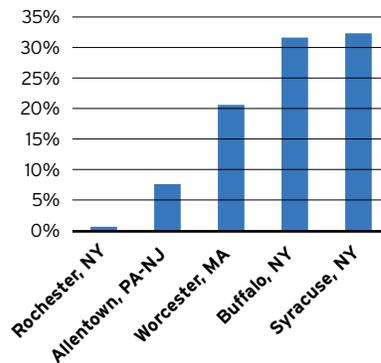
on one industry to drive its exports. Rather, export growth has been spread across a number of industries that are closely related to the region's competitive growth clusters. These include: Machinery Manufacturing; Computer and Electronic Product Manufacturing; Telecommunications; Intellectual Property Royalties; Tourism; Chemical Manufacturing; Transportation Equipment Manufacturing; Primary Metal Manufacturing; Education; and Financial Services.

➤ **Service Exports represent a significant growth opportunity for the region.** Nationally, the export of services has continued to steadily rise over the past 10 years. In Syracuse, services exports grew 60 percent between 2003 and 2010, accounting for an outsized share of the metropolitan area's total export growth. Furthermore, increases in service exports directly create more jobs for our region than the same increase in goods exports, on average. The strong growth and job-creation effects of

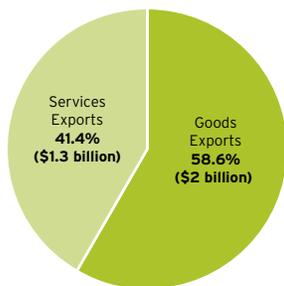
EXPORTS AS A SHARE OF OUTPUT, 2010



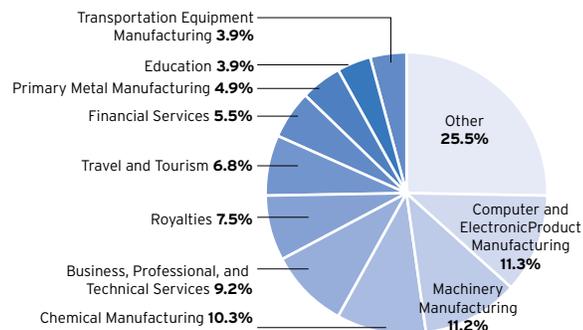
REAL EXPORT GROWTH, 2003 TO 2010



GOODS AND SERVICES EXPORTS, 2010



INDUSTRY SHARE OF TOTAL EXPORTS IN 2010





services export growth is tied to the region's strong service providers found in the education, health care, and tourism fields. The region's proximity to Canada further enhances this opportunity, offering relatively easy entry to a broader market for this emerging component of exports.

► **The CenterState region does not have a strong export-oriented culture.** In fact, many local businesses lack basic market knowledge and business acumen regarding the opportunities in selling a good or service overseas. Astoundingly, 40 percent of respondents to the CenterState export survey indicated that they did not export because they are more focused on domestic markets or they think their good or service could not be sold in foreign markets. This is partially attributed to a lack of knowledge of the best growth opportunity markets for their product or service and a relative unease with cultural and language barriers within target export markets.

► **Further compounding this export awareness gap, local businesses face a number of real and perceived obstacles that impact their exporting decisions:**

- Knowledge of foreign markets
- Transportation costs
- U.S. Export Control Laws, regulatory compliance, licensing, inspections, tariffs
- Global sale contracts, contract negotiations
- Protection of intellectual property rights
- Foreign import control laws, regulatory compliance, inspections, tariffs
- Foreign government regulations / policies
- Global advertising, marketing, distribution
- Language and cultural barriers
- Customs clearance
- Exchange rate fluctuations
- Export financing

Many of these barriers appear to be the result of a lack of awareness or detailed knowledge about the opportunities associated with exporting to global markets, a general fear of exports or dealing with the perceived risks, and a lack of familiarity with the exporting process in general.

► **The region's export service system is fragmented.** Extensive local export expertise is available through the region's system of export service providers. However, only 19 of 144 respondents reported having received local export services during the last 10 years. Though many businesses that have used existing export assistance services rank them highly, there is not a designated lead for export service provision in the region. Furthermore, there is not a clear delineation of roles and responsibilities between local public / private export service providers, state service providers, and federal assistance experts, making the region's export resources difficult to tap.





EXPORT PLAN

GOAL

Aligned with the administration's National Export Initiative, the CenterState region seeks to double exports over the next five years.

OBJECTIVES

The CenterState Metropolitan Export Initiative (MEI) team has identified four primary objectives to guide its work:

- 1 Create quality and highly productive jobs through increased export activity
- 2 Improve regional competitiveness in the global marketplace
- 3 Ensure long-term economic sustainability and growth
- 4 Attract and retain world-class talent and new wealth to the region

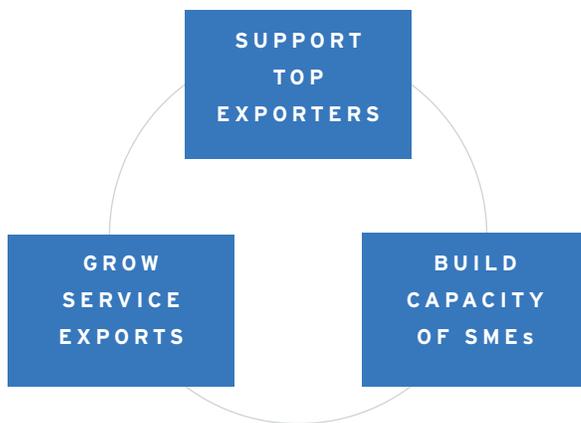


THREE CORE STRATEGIES

In light of research and analysis conducted by the MEI team, CenterState will implement the following short and long term strategies to begin pursuit of these objectives to grow the region's competitiveness in the global marketplace



These strategies are all based on several critical industry sectors that have been identified to be at the heart of the region's economy. These sectors represent a cross-section of both traditional and new economy industries and include, but are not limited to: research and engineering services; biosciences; hospitals and health services; software and internet services; private higher education; cleantech; precision metalworking; metals production and manufacturing; and digital and electronic devices. Components of many of these industry sectors, such as machinery manufacturing, computer and electronic product manufacturing, education, and financial services, have also been identified as some of the region's top exporting sectors.



STRATEGY 1: INCREASE EXPORT ACTIVITIES OF THE REGION'S TOP EXPORTERS

OPPORTUNITY:

Although the CenterState region is generally considered a relatively unsophisticated exporting region, there is a core group of strong exporters that rely on overseas transactions for a significant part of their business. Most of these strong exporters, which are within industries related to the region's core economic strengths mentioned above, could benefit from targeted interventions that are above and beyond what is commonly provided by the region's export assistance programs. A specific menu of actions must be developed for the unique needs of strong, existing exporters.

TACTICAL PRIORITIES:

- 1 **Establish the CenterState Export Council, a regional council of executives from the region's top exporters.** The council can act as the advisory body to the entire MEI effort, but can also share best practices, country-specific expertise, and inform region-wide advocacy efforts.
- 2 **Target companies demonstrating high potential to export products to additional markets for one-on-one outreach.** Identify companies in the region's targeted industry concentrations, and also high-growth export industries, and provide them with a compelling story about new export opportunities and the services that are available to support them.



- ③ **In partnership with the CNY International Business Alliance (CNY IBA) establish the Regional Export Council, a council of executives from the region's top exporters.** The council can act as the advisory body to the entire MEI effort, but can also share best practices, country-specific expertise, and inform region-wide advocacy efforts.
- ④ **Enhance provision of export services in high-growth target countries overseas.** In partnership with Empire State Development, optimize existing overseas services in a handful of target countries to provide comprehensive licensing, translation, deal-making, and support services to top exporters looking to enter new markets. Countries which were already identified by the region's top exporting firms should be the first targets for this strategy. These include emerging markets, like Africa, Brazil, China, and India, and established markets, such as countries in the European Union—specifically the United Kingdom, Finland, Germany, and France—as well as easy-to-enter markets such as Canada, for future export growth. The STEP grant, secured by New York State's Empire State Development Corporation, presents an initial opportunity to provide enhanced overseas services for business in ten varied sectors to enter China and South Korea.
- ⑤ **Pursue an advocacy strategy designed to alleviate regulatory barriers.** One of the key findings of our survey of local companies was that more CenterState firms identified U.S. controls and regulations as a bigger barrier to exporting than foreign importing laws and regulations. Businesses called for a streamlining of U.S. export regulations, and consolidating the responsibility for enforcing these regulations in a single agency.

**STRATEGY 2:
BUILD EXPORT CAPACITY OF
SMALL AND MEDIUM SIZED
ENTERPRISES**

Though small and medium sized businesses often lead future growth and job creation, many find it particularly challenging to engage in exporting activities. As mentioned earlier, recent research has shown significant perceived and real barriers to entry for SMEs.

OPPORTUNITY:

To maximize the export growth potential of the region's critical industry clusters, small and medium-sized businesses operating in these clusters must increase their exporting activities. Many of the companies that are currently exporting are primarily doing so reactively (the overseas company found them) or because of relationship based opportunities (fueled direct sales contact in the country or prior relationship with the country). The CenterState region is home to a set of highly experienced exporters and these larger firms have expressed a willingness to share insights and experiences (as well as possible business contacts) with non competing local firms.

TACTICAL PRIORITIES:

- ① **Streamline export assistance services -**
Partner with the Central New York International Business Alliance to establish and fund a single one-stop export assistance coordinating program. This program will provide outreach to SMEs and guide them through the system of local, state, and federal service providers. This coordinating program should manage and track companies as they enter the export service system and move through the pathway to more advanced services (such as the U.S. Commercial Service's Gold Key program, Empire State's export missions, or Ex-Im Bank loan guarantees). Guidance, insight, and curriculum development will be provided by the Regional Export Council.



FOOTNOTES

2. New York State Department of Labor

3. Analysis of CenterState Export Survey

② **Build export awareness through traditional marketing and word of mouth campaigns** - Use CenterState CEO as the primary marketing and PR arm for promoting export growth and the utilization of export assistance programs. The coordinating organization will:

- ▶ Develop a list of SMEs operating in a strong export growth cluster that will be targeted for increased awareness through one-on-one meetings by professional CenterState export staff or a regional export service provider (MACNY, US Department of Commerce, Empire State Development).
- ▶ Partner with regional and local chambers of commerce and business groups in newsletters and e-blasts.
- ▶ Establish a series of export-oriented articles in local newspapers and business journals.

③ **Create an export tag-a-long program to link strong exporters with growing SMEs** - Primarily to benefit small and medium-sized enterprises, this program would provide an incentive - possibly a state tax credit - to larger, more experienced businesses that assist smaller businesses with exporting. Assistance will be provided by bringing products and SME leaders overseas on sales trips, mentoring smaller companies, and providing limited staff expertise. The creation of this state tax credit will be included in the region's export policy agenda to be developed and endorsed by the Regional Export Council.

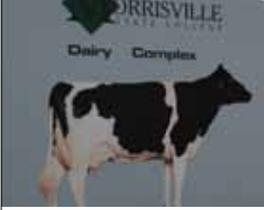
STRATEGY 3: EXPAND EXPORTS OF THE REGION'S KEY SERVICE PROVIDERS

Six of the region's top ten employers are service providers in the education and medical sectors, and roughly 70 percent of all regional employment is in private service related activities.² In addition to a general lack of knowledge about exporting activities, many service firms appear more hesitant based on education and knowledge factors (lack of knowledge about a foreign market, lack of cultural / language experience, fear of intellectual property theft) than firms producing a good.³

OPPORTUNITY:

There remains significant opportunity to transition the region's anchor service employers to focus growth strategies on foreign markets and reach a critical mass of service exporters. Given the region's geographic proximity and the relative ease of market entry, some service providers have already made initial inroads in targeting Canada as a market critical for new growth. Three particular opportunities are presented in education, health care and medical services, and tourism:

- ① **Education** - The CenterState region is home to 35 colleges and universities with more than 130,000 college students. An increasing number of these students are being recruited from abroad and, given the downward trends in the number of annual Northeast regional high school graduates, colleges and universities will be looking to attract even more foreign students. Many institutions, such as Cornell University, Syracuse University, and Colgate University have international reputations. These students often come from families of business and government elites in other countries, and offer an opportunity to generate greater revenues since international students often pay full tuition. Perhaps more importantly, it is a chance to build relationships and familiarity with the CenterState region as these students return to their home countries upon graduation.



- ② **Health Care and Medical Services** - Because of the region's close proximity to the Canadian border, and Canada's long lead times for some health care services, CenterState's hospitals and specialty medical practices can seek to build both official relationships with Canada's eastern provinces to provide services (as Syracuse's St. Joseph's Hospital Health Center has done) and informal patient relationships via direct or internet marketing to attract more private pay patients from Canada. Because of the international diversity of Syracuse's physician practices, and its reputation for high quality, low cost health care for certain procedures, the region may have a unique opportunity to service foreign markets.
- ③ **Tourism** - The relative value of the dollar over the past two decades has limited travel by foreign tourists, primarily Canadian tourists. However, with the reversal of the exchange rate, and the higher price structure found in Canada, Canadian tourists and shoppers have increased visitation to the U.S. Greater promotional activities and coordinated sales of hotels, cultural events, and shopping could significantly increase tourism and retail trade sectors in the CenterState region. Many foreign visitors already visit New York State to see attractions in New York City and Niagara Falls, and could be encouraged to stop in the famous Finger Lakes and Thousand Islands tourist attractions.



TACTICAL PRIORITIES:

- ① **Establish an Education and Health Care working group as part of the regional export council** - The working group should take charge of the effort to develop an international marketing and recruitment program for education and health care providers. The goal of the working group would be to encourage leaders from the region's leading education and health care institutions to be more intentional about attracting patients and students from overseas. Leaders should also be included in the Regional Export Council.
- ② **Target Canada for initial marketing efforts**
 - **Establish an international marketing and recruitment program for the region's colleges, universities and health care services** - Create an international marketing campaign for any local college, university, and health care provider that wants to participate in the program. The campaign should be initially targeted to Canada with the intent of extending it to other foreign markets, such as the BRICs, that demonstrate high potential for education services exports.
 - **Establish an international destination marketing program targeting Ottawa, Montreal, and Toronto** - The International Trade Administration estimates that 6.7 million additional people will visit the U.S. from Canada from 2010 to 2016.⁴ The region's geographic proximity to Canada and growing tourism assets should be capitalized upon through the creation of targeted destination marketing programs to large Canadian metro areas.
- ③ **Enhance regional services for foreign language speakers to utilize local health care and education assets** - In a similar fashion to providing better export services on the ground in target markets, services must be enhanced throughout the region to assist foreign language speakers with transportation, short and long term housing, visa, and other related issues for foreign visitors.

FOOTNOTES

4. Julie Heizer, Deputy Director, Office of Travel and Tourism Industries, International Trade Administration. Presentation to Marketing Outlook Forum: Fort Worth.

ROLES AND RESPONSIBILITIES

Using the combined expertise, existing export assistance programs, and in-kind support from the MEI Project Steering Committee, CenterState CEO and the CNY IBA will lead implementation of the Metropolitan Export Plan. Project implementation will cost an estimated \$150,000 annually, which will be funded through member dues, fees for service, and other partnership opportunities with both public and private local and national supporters. To assist in implementation, the following groups will be established:

REGIONAL EXPORT COUNCIL

A regional council of export-oriented business owners, VP and C-level executives, export service providers, and members of the Central New York IBA, will be formed for the purpose of providing a common forum for the region's strong exporters to discuss and collectively tackle significant export obstacles. The Regional Export Council will carry on the role of the Central New York International Business Alliance by providing guidance and curriculum development support for the streamlined export assistance services.

HEALTH CARE AND EDUCATION WORKING GROUP

This is a group of the Regional Export Council focused solely on organizing efforts to increase export activities of the region's health care and educational assets. Efforts are already underway in the region to establish this group under a collective goal of pursuing new opportunities in Canada. These efforts are currently being led through a partnership between CenterState CEO, the Syracuse Convention and Visitors Bureau, and the Department of Commerce.



PERFORMANCE METRICS

CenterState CEO will manage an annual regional export survey to track export development and program usage progress. This localized data will be used in concert with quantitative analysis provided through the Brookings Export Nation reports and other data from ITA and the Census Bureau. Metrics that will be tracked in the survey include:

REGIONAL EXPORT INDICATORS:

- Total foreign sales
- Total foreign goods/services sold
- Output per export job
- Share of local businesses that export
- Export as percent of regional GMP/GDP
- Employees in export companies
- Total foreign students
- International visitation
- Cases and revenue from hospital procedures sold to foreign nationals

PROGRAM USAGE / PERFORMANCE INDICATORS:

- Number of companies in export development programs
- Increase in export activities of companies in export development programs



POLICY PRIORITIES

CenterState CEO, based on comments received from its members, companies which were interviewed and from its own experience, developed recommendations for federal and state policy makers that would support the goals of the National Export Initiative and the Metropolitan Export Initiative.



- ❶ **More Support on the Ground, Over There** - The federal government needs to shift its resources to provide more support for U.S. exporters in foreign markets.
- ❷ **Become an Effective Team Player** - In response to the active role that many foreign governments take in promoting exports for their companies, it is recommended that the U.S. take a larger presence in foreign trade shows, use procurement policies to help devise new products and services for exports, and to recommend and endorse the sales of these products overseas.
- ❸ **Reduce Export Regulatory Barriers** - Local businesses have cited U.S. export control policies and regulations to be a greater concern than foreign import policies and regulations. Well intentioned laws such as the Foreign Corrupt Practices Act, International Traffic in Arms Regulations, and Dual Use create a series of significant penalties for U.S. companies trying to do business abroad. Responsibility for the enforcement of these acts should be consolidated into a single government agency to make compliance easier.
- ❹ **Encourage Alignment Among Federal and State Governments, and with Local Support** - CenterState CEO believes that coordination of federal, state and local resources and efforts can improve the effectiveness of programs intended to support export businesses.
- ❺ **Improve the Quality and Consistency of Data** - Finding data on trade is difficult, and much of it is inconsistent as data is compared from different sources. Some standardization is required, and this role can be best played by the federal government to help localities and businesses learn more about trade opportunities.
- ❻ **Address Immigration and Visa Issues and International Tourism** - The United States has great resources in the number of immigrants, refugees and foreign students in the United States, many of which could be an asset to U.S. businesses seeking to sell into foreign markets. Visa issues need to be clarified to make it easier for companies to take advantage of these resources, and to allow the nation to better benefit from international tourism.

EXPORT PLAN DEVELOPMENT

The development of the Syracuse/CenterState export plan has been led by staff from the following regional organizations and businesses:

- CenterState CEO (Project Lead)
- Central New York Technology Development Organization (CNYTDO)
- City of Syracuse
- East Point Public Relations
- MACNY, the Manufacturers Association
- Mirador Consulting
- Mohawk Valley EDGE
- Mohawk Global Logistics
- New York State Empire State Development Corporation
- Onondaga Civic Development Corporation
- Onondaga County
- The Kiebach Center for International Business at the Whitman School of Management at Syracuse University
- U.S. Department of Commerce

Special thanks to some of the region's leading export business that helped to develop the plan:

- Anaren
- ConMed
- Inficon
- Welch Allyn

FOR MORE INFORMATION

David Mankiewicz

Senior VP Infrastructure and Urban Initiatives

CenterState CEO

dmankiewicz@centerstateceo.com



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Brookings also thanks the Metropolitan Leadership Council—a bipartisan network of individual, corporate, and philanthropic investors that provide it financial support but, more importantly, are true intellectual and strategic partners. While many of these leaders act globally, they retain a commitment to the vitality of their local and regional communities, a rare blend that makes their engagement even more valuable.

ABOUT THE BROOKINGS-ROCKEFELLER PROJECT ON STATE AND METROPOLITAN INNOVATION

States and metropolitan areas will be the hubs of policy innovation in the United States and the places that lay the groundwork for the next economy. The Brookings-Rockefeller Project on State and Metropolitan Innovation will present fiscally responsible ideas state leaders can use to create an economy that is driven by exports, powered by low carbon, fueled by innovation, rich with opportunity and led by metropolitan areas. Part of the Brookings-Rockefeller Project on State and Metropolitan Innovation, the Brookings Metropolitan Export Initiative (MEI) is a ground-up collaborative effort to help regional civic, business, and political leaders, with their states, create and implement customized Metropolitan Export Plans (MEPs), from which this summary export plan is drawn. These localized export plans will apply market intelligence to develop better targeted, integrated export-related services and strategies to help regions better connect their firms to global customers, as outlined by their individualized export goals.

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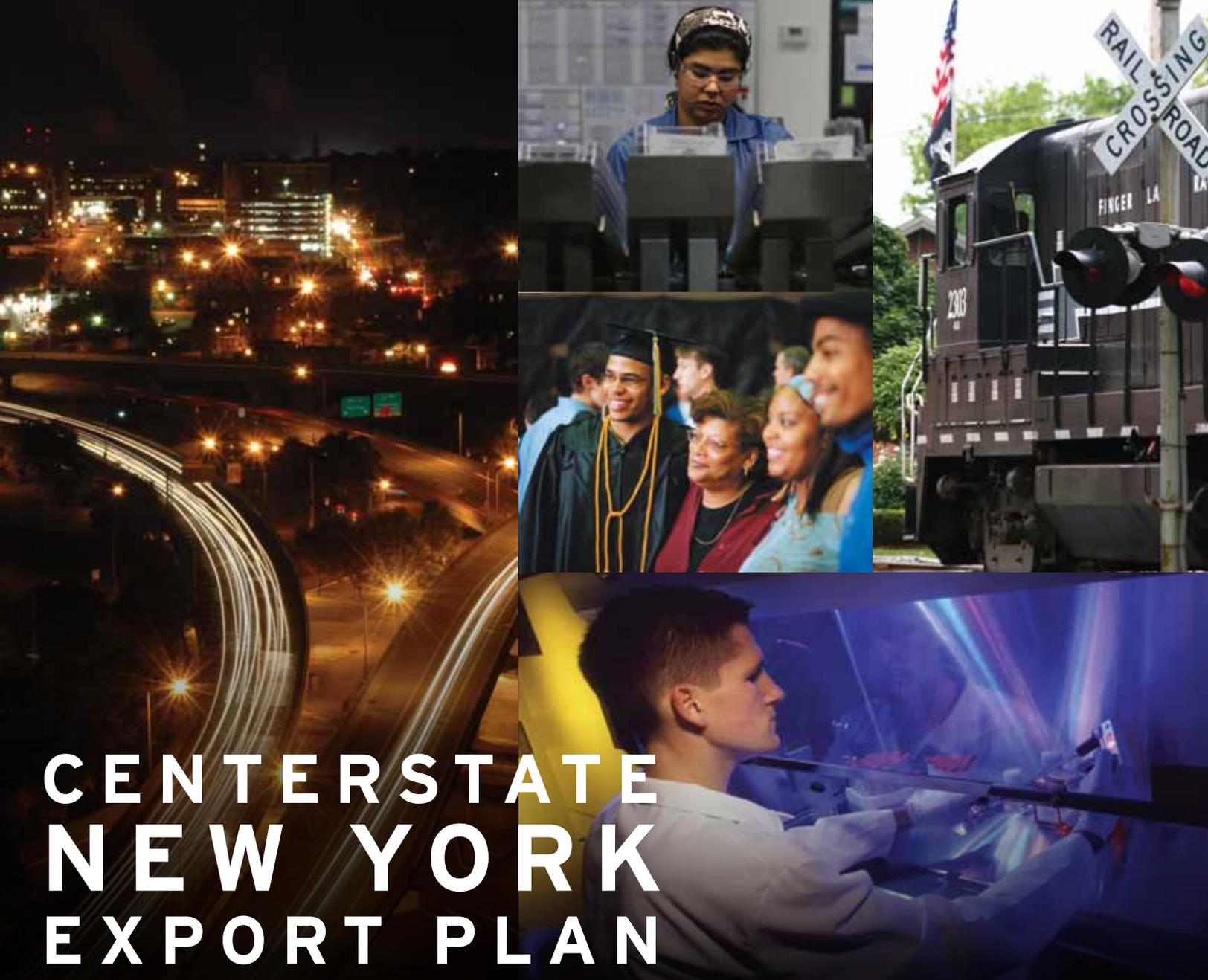
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