

APPENDIX A – Work Group SWOTs

SWOT Analysis

WORK GROUP: Adirondack

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Article XIV- The forever wild clause • Adirondack Park being split in 3 ESD Regions • APA • Natural beauty and open space • Quality of life • Excellent Schools • Four-season outdoor recreational opportunities poised to leverage private investment • Lakes, Rivers and Streams • Infrastructure and amenities that create a quality destination also create a great place to live which, in turn, attracts new full-time residents and the businesses necessary to support them • Full range of outdoor recreation • Proximity to major markets – a days drive • Vast open spaces • largest dark sky in the northeast 	<ul style="list-style-type: none"> • Article XIV- The forever wild clause • Adirondack Park being split in 3 ESD Regions • APA • Lack of Affordable Broadband • Transportation Costs • Lack of lodging and/or lack of up-to-date lodging • Lack of visitor-oriented businesses • Lack of Basic Services • Lack of infrastructure – water, sewer, economical power • Lack of understanding that tourism improves the quality of life for residents and has a multiplier effect, which is key to economy diversification • Visual appeal of many communities could be improved • Current NYS economic development programs are not geared toward the rural economies • Inconsistent and inadequate cell 	<ul style="list-style-type: none"> • Article XIV- The forever wild clause • Adirondack Park being split in 3 ESD Regions • APA • Bio Fuel industry • Tourism as a driver of economic development and community revitalization • ‘Live where you play’ potential • Youth population that is currently leaving could be convinced to stay • Fully utilize the Recreational potential of the Park (Public and Private) - Rec Plan • Capitalize on Canadian trade • Capitalize on proximity to Fort Drum • Tourism is deemed compatible with the Adirondacks • Expand Regional Packaging • Better Branding of the Region 	<ul style="list-style-type: none"> • Article XIV- The forever wild clause • Adirondack Park being split in 3 ESD Regions • APA • Fuel Prices • Loss of Workforce • Global competition • Fuel dependency – marine gas, heating, region is a driving destination • Inability of Policy and Governance to keep pace with a changing world • Loss of Critical mass • Perception of extreme weather • Loss of youth/Aging population • Perception of distance and isolation • Regional fragmentation • Aging Infrastructure – Water, sewer, roads and bridges • Overenthusiastic enforcement of

<p>U.S.</p> <ul style="list-style-type: none"> • Olympic Facilities - ORDA • Public access to millions of acres of protected land • A variety of fish and wildlife available for viewing, hunting and fishing • Historic places and landmark sites that are key to American history • Family-friendly environment • Communities have varied personalities • Abundance of Forest Products and minerals • Safe small Towns and Villages • Abundance of Water • Age/Experience of Population 	<p>phone coverage</p> <ul style="list-style-type: none"> • Excess of Public vs. Private employment • Lack of transportation options - air, train; lack of rental vehicles • Lack of access to investment capital • Workforce challenges (Lack of non-retired residents – Plus: Need improved job training • College students have to return to school while the tourist season is still in full swing • Lack of affordable housing • Quality of housing stock • Seasonal mind-set of commercial enterprises • Negativity • Inability of the APA to react to changes in needs 	<ul style="list-style-type: none"> • Take better advantage of the colleges in the area • Increase the time second homeowners spend in the Park • Sustainable economies lead to sustainable communities • Make State Travel Corridors (Scenic Byways/Bike Path) more compatible with the advertised uses • Create more multiuser Recreational opportunities • Work at Home Jobs • Capitalize on regional historic sites, culture, and our heritage to attract visitors • Better integrate education with employer needs • Expand shoulder seasons • Creation of region-wide bicycle friendly routes (both on and off road) • Enhance Global recognition • Abundance of Water • Age/Experience of Population 	<p>regulations (snowmobiling, hunting, road blocks) is a deterrent to travelers</p> <ul style="list-style-type: none"> • Spread of invasive species has the potential to greatly impact tourism by limiting places people can visit or destroying natural resources that support tourism • Percent of Public vs. Private employment • Demonstrated inability to rapidly transition our economy • Loss of Forest Products Industry • Changing Paper Industry • Age/Experience of Population
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[NEED CANADIAN CLUSTERS SWOT]

SWOT Analysis Community Development Work Group

REGIONAL STRENGTHS:

➤ **Strong Communities**

- North Country cities, towns and villages are friendly, intact and healthy, with a strong sense of community.
- Vibrant communities are key assets in economic development and as such, assisting community development efforts should be an important and vital component of the North Country Regional Strategic Plan.
- Our communities have latent energy and enthusiasm; residents will support good leadership with a clear, realistic vision, particularly if that vision has been vetted and endorsed on a regional level.

REGIONAL WEAKNESSES:

- ##### ➤ **Quality of Life Deficits:** We need appealing communities to encourage people to want to live and work in the North Country. Perceived deficits in the quality of life in our communities include:
- North Country communities have lower tax bases than many other communities in New York State
 - Lack of walkable, exercise-friendly areas with sidewalks and crosswalks
 - More activity needed; our communities, and particularly our downtowns, need to have a “buzz” about them. We need a focus on arts, sports, festivals and the like to encourage people to gather and enjoy themselves throughout the region and within every city, town, village and hamlet.
 - Poor customer service
 - Remoteness limits opportunities for investment that require transportation and creativity often found in urban areas
 - We are not prepared to compete in the global economy
 - Insufficient social opportunity/networking infrastructure,

- Some North Country communities lack a “sense of place”; an appreciation of the assets of the region and what makes life here special that is conveyed by the visual environment.
- The need to repair and replace significant portions of infrastructure in the majority of North Country communities; current conditions reduce opportunities for residential and business development.
- There are numerous "legacy sites" of former industrial and community activities that need restoration. These sites may have incentives for redevelopment, and if improved can have transformational impacts of regional significance.

➤ **Demographic Challenges**

- Aging population, outflow of youth
- Loss of local wealth from out-migration of population at all age brackets
- Dealing with the aging population will strain already inadequate county budgets
- Lack of under-50 potential business owners and leaders; little opportunity to reach existing potential owners/leaders.
- An agri-rural region - the population is scattered over a wide area, so "concentrated" areas of development often aren't practical. Issues of scale can challenge/constrain new business starts and local endeavors.

➤ **Affordable/ Adequate Housing Deficits**

- Much of the existing housing stock was constructed before 1939 and have outlived their economic lives. These houses need to be upgraded. Many buildings (houses included) are older, and require aggressive maintenance and higher energy costs; these are extra expenses that could be used/invested elsewhere.
- In some communities, there is a need for affordable/workforce housing, both rental, owner occupied, homeless and newly constructed or renovated existing homes, located near the workplace.
- Conditions of older homes result in energy inefficiency.
- With regional and national trends of aging populations, the need for affordable housing for seniors is evident.
- In some communities, there is a need for higher-end housing, especially new construction, condominium/townhouse and other low-maintenance housing options for professionals and retirees.
- New construction can be financially disadvantageous due to the differential between construction cost and market value of existing housing stock, and the smaller scale for development.
- Housing demand in some areas (e.g., Fort Drum) presents opportunity for development projects integrated into existing communities. As an example, the most recent market analysis shows that an additional 1,035 housing units are required to meet the need for multi-family rental housing at Fort Drum. Approximately 3,000 members of the 10th Mountain Division will be making their way back to the North Country over the next several months as they return to Fort Drum from year long deployments to Afghanistan. Groups of soldiers deploy together and return together.

➤ **Negative North Country Regional Self-Perception and Attitudes**

- Pessimism/lack of entrepreneurial spirit (feeling of hopelessness in depressed communities)
- Low and moderate income levels leads to "subsistence" survival attitudes about innovation
- Lack of understanding of global economy/ longing for "good old days"; reliance on old ways of thinking about developing economic well-being (e.g., dreaming about 4-lane highways as a panacea or mega-industry locating here)
- Fear of zoning/regulation as discouragement to business; therefore difficult to achieve the aesthetic necessary for a tourism economy and hamlet/downtown revitalization
- Lack of coordinated community visioning and local planning
- Fear that improving property will raise property taxes
- Turf" battles rather than regional cooperation on the local and county level.
- Misunderstanding who "low income" housing programs can serve. [North Country Communities are typically non-MSAs and therefore use State-wide non metropolitan median income (SWMI) when calculating eligibility income. For example a 2011 program requiring 60% AMI uses 60% of **\$56,100** (SWMI) which equals \$33,600 for a family of four. 80% of SWMI is \$44,900 for a family of four. That is workforce housing.]

➤ **Image/Aesthetic/Impressions of Depressed Community as Undesirable**

- Prevalence of vacant and blighted properties
- Prevalence of lower quality and unmaintained housing
- Distance to destinations, Sense of isolation, etc.

SWOT Analysis Infrastructure Work Group

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Rte 81 and 87 Interstates (N-S) • DANC Telecom Middle Mile Network • Ease of Mobility • Highway System Reliability • Solid Connectivity Between Rural Communities • Strong Engineering Knowledge and Abundance of Young Graduates • Knowledge of Our Asset Conditions. Makes for Good Decision Making and Priority Setting • Location – North Country is Gateway to U.S. for Canada-based Companies • Natural Resources • Assessed Values are Low in Area • Building costs for infrastructure are lower in this region. • Access to CSX Mainline • Natural Gas Access • Low Cost Workforce Quality of Life • Carthage to Newton Falls Railroad 	<ul style="list-style-type: none"> • Lack East-West Corridor • Lack of Adequate Last Mile Coverage • Air Service is Thin in Area • Lack of Widespread Public Transportation • Loss of Heavy Rail Assets • Failing Infrastructure Continues to be an Issue and will Eventually Degrade Mobility and Reduce Reliability • Lack of financial capital • Harsh winters make it difficult to move freight • Low population makes profitable business difficult • Interstate Access • Interconnectivity of Multi-Purpose Municipal / Trail System • Lack of Cooperation from CSX • Aging Water Systems • Railroad Needs Repair • Poor Broadband Coverage • Transportation • Elements of weather • Short Agriculture season • High utility costs • Lack of business to stimulate new business • Minimum business services (i.e. 	<ul style="list-style-type: none"> • Development of East-West Corridor • Expanded Broadband Connectivity • Enhanced Local Programs Funding for Community Infrastructure Improvements • Funding to Provide for Improved Bike/Ped Opportunities • Infusion of Transportation Projects Helps to Provide Economic Jumpstarts • Lower municipal power costs could attract businesses • Enlarge runway in Massena airport for jet traffic to entice Canadian traffic • Port of Ogdensburg • Shared Port of Entry in Massena • Access to Canadian Market • Potential for Low Cost Municipal/ Electric AMP • Widespread Community Support for I-98 Construction • Large Industrial Park in the Adirondacks • Technology Transfer • Tourist opportunities • Scenic Vistas to lure people • Good Ag characteristics (other 	<ul style="list-style-type: none"> • Availability of Funds • Smart Growth Act • Lack of Private Investment & Funding • Reduced Funding for Transportation Infrastructure • Aging Infrastructure • Non-Redundant Bridge/Highway Network – Long Detours • Economic Prosperity in an On-Time Delivery Marketplace Depends on Sound Infrastructure • Geographic isolation • Lack of government and private investment. • Lack of healthy local economy; dependence on dwindling public employment • EAS Subsidies • CSX restarted use of main line • Parochialism • Mohawk demonstrating at Seaway International Bridge • NYS Land Reclamation Policies • Over Regulation • Recession • Higher corporate taxes • Higher utility costs • More regulations • Downturn of Economy

<ul style="list-style-type: none"> • Fort Drum • St. Lawrence Seaway • Fiber optic Backbone (DANC) • Sports Infrastructure Lake Placid • Geography • Higher ED • Room for expansion • Lifestyle of North Country • Good candidates for employment • A Governor who is willing to let the people make decisions on how to improve the economy • Volunteers • Intellectual Resources • Heritage/Legacy • Prox to Mega Cities • Prox to Canada • Year Round Destination Resort • Recreation and Sports Industry • Competition Facilities and US Olympic Training Center 	<p>freight carriers, next day services, etc.)</p> <ul style="list-style-type: none"> • Regulations • Perceived distance away • Unemployment • Real Estate Values 	<p>than short Ag season)</p> <ul style="list-style-type: none"> • Infrastructure easily improved with funding • The ability to create suitable infrastructure and sites to attract new business • Less Regulations • Small Business • Eco Travel • Shared Events • Development of Resort Lodging Projects • Year round activities 	<ul style="list-style-type: none"> • Gas Pricing • Land Values • Youth Resources • Second Homes displacing families • Outpricing • Main St. Rental pricing • Affordable housing
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SWOT Analysis Small Business Work Group

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Closeness to Canada • Quality of Life • Natural Resources • Lower Taxes • Ready, reliable workforce • Variety of ED agencies with a track record of informal collaboration. • Lower labor costs • Several institutions of higher education, provide resources, training opportunities and most skilled workforce – as well as the capacity to “incubate” new ideas. • Entrepreneurial Spirit. • Most small towns have distinguishable centers of commerce that unify and connects members of the community. 	<ul style="list-style-type: none"> • Broadband: Inadequate technology infrastructure – need for improved Internet communications throughout the North Country. • Weather (could also be a strength!) • High cost of utilities • Lack of rail service • Inability to get permits and licenses in a timely manner • Few high-paying, quality jobs • Poorly educated, low-skilled workers, • Loss of former economic engines; Shuttered factories; Abandoned farms and mines • Closed stores on Main Street • Infrastructure – lack of water, sanitary sewer, and natural gas. • Lack of access to capital (or knowledge of how to access sources of capital) • Few networks to support entrepreneurs and entrepreneurial development strategies - Limited opportunities for mentoring and networking with other entrepreneurs • Aging populations 	<ul style="list-style-type: none"> • Develop more/better tourism infrastructure • Develop local incentives to lure businesses to the North Country • Develop more manageable regulations • Changing the way our government works and deliver results • Regional collaboration on a shared economic agenda ensures our region’s long-term sustainable economic prosperity • Town, Village. County and State coordination of zoning, building, etc. permits. • One key driver of rural economies in the coming year will be an increased emphasis on things “local.” This includes the burgeoning local foods movement as well as efforts to better facilitate neighborhood and local shopping. • Develop financial tools that make sense to North Country businesses, particularly seasonal businesses than 	<ul style="list-style-type: none"> • Recession • Higher taxes • More regulations • Out-migration of the “best and brightest” • Need to streamline process for obtaining NYS licensing and permits. Currently it can take up to six months to receive liquor licenses causing great hardship on the new business. • Costs of doing business are very reliant on old forms of energy that can spike at any time and are most likely to increase significantly in the future. • Canadian opportunities are tempered by border security issues, changing exchange rates and the trend of major retailers like Target and Wal-Mart opening more stores in Canada, giving shoppers fewer reasons to come over.

- A culture of dependency
- Low population size and density, limited local demand – economies of scale hard to achieve
- Remoteness from markets & infrastructure limits economic opportunities, poor connections to global, regional market.
- Existing businesses closing due to lack of succession/transition plans. Among the most critical challenges facing small business development in the region is our perception that the North Country's business community most probably reflects the general population of the region, which is older and aging much faster than other areas of the state and nation
- Small towns themselves are rarely involved in the recruitment of new residents

need to manage uneven cash flows – perhaps through short-, medium-term lines of credit, payment plans that take into account seasonal nature of businesses, etc.

SWOT Analysis
Strategic Clusters Work Group - Advanced Materials Work

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Engineering School – Nationally Recognized – Clarkson University • Technical School – SUNY Canton – Development of Technicians for Industry • Alumni – North Country has dedicated Alumni at Clarkson University • Fortune 500 Companies in the North Country • Concentration of Capabilities that complement each other • Ability to share information across the region • Cold Climate – has the ability to draw power intensive users to the region 	<ul style="list-style-type: none"> • Broad Territory • Sparse Population • Some skill sets not addressed • Vocational Schools have moved away from hard trades <ul style="list-style-type: none"> ○ Machinists ○ Air Conditioning ○ Tooling • Transportation - Large geographic area 	<ul style="list-style-type: none"> • Power - NYPA and RVRDA (River Valley Redevelopment Authority) • Fresh water in abundance • Property – Land is abundant, low cost high quality • Housing – Low cost of ownership in the North Country • Region – Stable climate, no Hurricanes, earthquakes, tornados • Lake Placid Olympic Training Facilities 	<ul style="list-style-type: none"> • Declining Manufacturing Base in the North Country • Aging Population • Skill Trades <ul style="list-style-type: none"> ○ Skilled labor in the region are all older, lack of younger population to back fill these jobs upon retirement • Community Colleges and Boces are moving away from training “Skill” jobs, Trades; Machinist and Tool Makers, Plumbers, Air Conditioning, etc.

<ul style="list-style-type: none"> • Small Municipal Offices across the St. Lawrence Seaway could utilize water temperature of river for cooling in the summer, heating in the winter • Clarkson/Manufacturing partnership to assess automation/robotic opportunities to address H&S or productivity/growth opportunities • Clarkson/Manufacturing partnership to encourage and grow Co-op/Internship programs to foster student development, support manufacturing needs and aid in retention • Clarkson University has 15 Startup companies going • United Materials – Steve Rohring has a Wind Turbine project that is Shovel Ready to go into Massena, NY • Data Center - Project funded by NYSERDA, AMD in concert with University of Illinois, University of Texas, Austin. The project will be located in Potsdam. <p>Clarkson University, Payton Hall Incubator – funded by the NY State</p>			
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<p>(\$2.1 to 2.4 MM) Incubator is completely refurbished building re-opened on 7/1/2011 offering 13,000+ square feet in office space and 4 wet labs. Peyton Hall is the only incubator located in the North Country and serves geography roughly the size of the state of Connecticut.</p>			
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SWOT Analysis

Strategic Clusters Work Group - Aerospace and Transportation

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Location - The North Country region is the gateway to the U.S. for Canadian based companies • Natural Resources - The North Country has abundant natural resources that can support growth in the industry • Supply Chain - Both Plattsburgh and Watertown have good North-South transportation infrastructure • Cost of Living - Housing is much less expensive than in metro regions, an advantage when trying to recruit highly skilled personnel 	<ul style="list-style-type: none"> • Communication Infrastructure – in many areas broadband is either not available at all or is available only at a high cost. Cell phone reception is bad only a few miles from the population centers. • Difficulty in finding and keeping engineers and degreed crafts people. • The small population has inherent disadvantages that must be overcome for companies to be successful and profitable. • The region must find a way to keep more young people in school so they will have the skills needed to be employed and advance in the industry 	<ul style="list-style-type: none"> • Buses and trains, especially those powered by alternative fuels, will be increasingly important modes of travel in the future. Transportation manufacturers in the region are well positioned to take advantage of this trend • The high price of fuel presents many challenges but, it also creates opportunities for some business sectors • Military - The North Country Region is the only one in New York with a Military base. • The North Country's proximity to Canada, and the region's 	<ul style="list-style-type: none"> • Bordering Canada can make the region vulnerable to any change in regulations or procedures that could jeopardize the flow of goods and people. • *EAS (Essential Air Service) – all of the communities in the region are served by EAS supported air carriers • * Upstate/Downstate • Workers' compensation system is difficult to negotiate and inequitable to employers. • Out-migration – young people are leaving the northern states – a trend that has been growing over the past two decades. <p>(* See Appendix II for more details)</p>
<ul style="list-style-type: none"> • Educational System - The North Country has a variety of secondary and post-secondary educational institutions that provide workforce development services and continuing education opportunities for Transportation industry. 	<ul style="list-style-type: none"> • Another disadvantage of having a small population base is that the number of suppliers is smaller, and getting supplies from other regions is more costly 	<p>historical economic relationship with Quebec and Ontario, give the region a strategic advantage for attracting new investment by Canadian companies</p> <ul style="list-style-type: none"> • *Expansion of culture and the arts. • *Closeness to Aerospace cluster 	

<ul style="list-style-type: none"> • Border Crossing - Two of the six major northern border crossings provide access to the communities of Plattsburgh and Watertown. • Traffic - A related advantage is the lack of traffic congestion in the region. • Good Labor Relations - employers and employees of Transportation Industry facilities both enjoy a good working relationship that allows creative solutions, productivity, and cooperative efforts. 		<p>in Canada</p> <ul style="list-style-type: none"> • The former Air Force Base has 12 million square feet of concrete ramp space that can be used by Cargo, MRO, Testing, Research, and other Aerospace related companies • The value of the dollar relative to the Canadian dollar and the Euro make investment in the region more desirable. • Both Watertown and Plattsburgh airports have excess space and underutilized facilities that could be used by companies for their operations 	
<ul style="list-style-type: none"> • Taxes - Assessed values in the North Country are much lower than the metro areas in New York State, making the region more affordable for businesses and employees. • Location of Choice for Families - . Employees tend to stay with an employer for many years, providing stability and valuable skills developed over time to the companies. 		<ul style="list-style-type: none"> • Many companies who have opted to do off-shoring are not experiencing the cost savings expected from moving production overseas. The North Country is well positioned to benefit from on-shoring and re-shoring trends. 	

SWOT Analysis

Strategic Clusters Work Group - Agriculture

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Dairy infrastructure – NNY has a strong dairy infrastructure with a great dairy supply chain • Apple infrastructure – excess to market nation and worldwide. • Maple infrastructure and forest to support a locally “special product” • Livestock infrastructure; Good area for grass based livestock agriculture ; Growing demand for local meat; Animal waste for biogas production • Good Markets and demand for product 	<ul style="list-style-type: none"> • Low land prices therefore farmland could be bought and used for other purposes • May be hard to get to highways for delivery (mountains in the middle) • Low availability of refrigerated warehousing • Few central distribution points – especially for direct market • Need for reliable workers that will do repetitive jobs • Limited USDA slaughterhouse facilities • Limited availability of certified commercial kitchens for value added production • Minimum \$10,000 dollar sales for Ag Use Value assessment may be too high (ex Amish) 	<ul style="list-style-type: none"> • Make H2A program that works for dairy industry labor needs • Need NYS Farm Guest worker program to provide legal reliable workforce • Energy (see Appendix III for more detail) • Opportunity to lease to hunting groups – improve relations with neighbors • Increasing interest in new and beginning farms or enterprises • Upgrade farm facilities to increase milk production and quality – and cow comfort • Install tile drainage to increase feed quality and quantity through timely practices 	<ul style="list-style-type: none"> • Labor (see Appendix III for more details) • Shortage of milk – need 15% increase over next 5 years but currently growing at 2% • Milk price is based on world economy causing extreme volatility • Some foreign products that come to US are adulterated and receive bad press that impacts our product marketing • Government regulations • Third party audits from large stores are requiring audits of food sourcing back down to every farm
<ul style="list-style-type: none"> • Affordable land – large quantity of prime agricultural land is still available for relatively low prices as compared to other areas of NYS and the nation • Available high quality abundant water resource • Great diversity of production and 	<ul style="list-style-type: none"> • Financial support for ag research in NNY and NYS is sporadic and reduced • Broad band not available in many rural areas, farms need access too. • Weight limited bridges/roads and width of bridges • New farmers need education and 	<ul style="list-style-type: none"> • National Animal Identity Program to increase consumer confidence and reduce negative impact of problems • Get in front of agricultural issues that are going to impact public opinion • Marketing for agriculture • Finance high tunnels 	<ul style="list-style-type: none"> • Agencies change level of enforcement of existing regulations over time, i.e. wetland regulation enforcement by USDA, without educating new generations of farm owners • Lack of agency staffing to assist with regulation compliance • Some government funds go to

<p>production capacity</p> <ul style="list-style-type: none"> • Good research and educational outreach • NYS Dept of Ag and Markets certified Agricultural District program is strong • Jefferson County's Agricultural Development Corporation and Agricultural Coordinator position 	<p>business planning assistance – they make a lot of mistakes</p> <ul style="list-style-type: none"> • Need better positive marketing of ag products and the industry to public • Cost of doing business in NY – taxes, unemployment insurance, regulations 	<p>greenhouses, drainage and irrigation</p> <ul style="list-style-type: none"> • Agriculture economic development similar to Jefferson County Ag Development Corporation for other counties. Increase IDA focus on agriculture • Conservation Reserve funding is available to set aside stream bank land and plant to trees. • Availability of land and new enterprises 	<p>projects that it should not go to (manure pit and farmer goes out next year) (rewarding farmers with “bad” practices)</p> <ul style="list-style-type: none"> • Growing consumption of processed foods – diets are changing • Bad public relations from bad agricultural issues • Infighting within agriculture • Aging agricultural population – need to develop interest and education for next generation of farmers • Reducing or reduced funding for agriculture groups
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SWOT Analysis Strategic Clusters Work - Arts & Culture

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • The North Country has a wide range of talented artists involved in a wide variety of media. • Internationally known talent live here and/or come to the area for events. • Uniqueness of Native American and Amish communities contribute to the broad spectrum of the arts • Interest in culture seems to have grown over the last 50 years. • There are strong networks and organizations that involve some of the artists. • Spirit of collaboration among the various arts organizations 	<ul style="list-style-type: none"> • Lack of funding for general operating support. • Other funding, including state and local grants, difficult to apply for, usually limited by area, and not a large dollar value if available at all. • Lack of major corporation sponsorship. • Lack of Political support and encouragement of the arts. • Lack of understanding in general of how the arts can be a viable and important part of economic development • Distances to events and cost of travel as well as lack of public transportation 	<ul style="list-style-type: none"> • Inspiration from the natural beauty and materials of the North Country – promote the pristine rural setting. • Cost of living, market the region to other artists – much less expensive to live in the North Country than the areas in and around cities. • Launch regional arts festivals during summer • Growth at Fort Drum • Group marketing and sharing of resources. • Associated Colleges of the St. Lawrence Valley (ACSLV) – could potentially be tapped to provide shared resources. 	<ul style="list-style-type: none"> • Lack of Jobs • Population is small • Decreased Support • Lack of financial support • Aging population • Winter (approximately 2/3 of our weather) • Budget cuts • Lack of staff • Government officials forget about the North Country.
<ul style="list-style-type: none"> • Arts education – in addition to the Crane School, there are a number of other organizations and individuals that offer a variety of classes, workshops, and courses. • Educational Institutions – 	<ul style="list-style-type: none"> • North Country has historically been forgotten by New York State – the State doesn't know we exist. • North Country weather - especially winter. • Efforts to network and collaborate 	<ul style="list-style-type: none"> • Plans for the re-development of Clarkson University's Snell Hall (downtown) as an arts center. • Develop more opportunities, strategies, and programs to reach specific populations • Proximity to Canada, New York 	

<p>universities and colleges serve as “art” anchors for the various communities.</p> <ul style="list-style-type: none"> • Other Supporting Organizations – Chambers of Commerce and others • Strong arts information and resources – newsletters, North Country Public Radio, Art Council directory • Passionate volunteers who are dedicated to enriching the lives of the residents and visitors. • History – local and global; preserving history & heritage, sharing, educating 	<p>not organized or formalized – makes it hard to find out what events are taking place.</p> <ul style="list-style-type: none"> • Lack of facilities • Lack of markets and opportunities to sell artwork • Not enough young people (under 30) participating in organizations • Arts education in K-12 does not generally include instruction in dance and theatre • Lack of diversity – arts other than “Adirondack” • Perception of the North Country by those other than local residents and businesses. • Lack of voice to promote the arts 	<p>City, Rochester, Buffalo – easy access to museums, theaters, etc – cross border /statewide collaboration</p> <ul style="list-style-type: none"> • Educational Institutions – universities and colleges • Internet – promoting our area and connecting the arts 	
<ul style="list-style-type: none"> • Proximity to Canada, New York City, Rochester, Buffalo – easy access to museums, theaters, etc. 			

SWOT Analysis

Strategic Clusters Work Group - Biotechnology

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Highly-skilled workforce • Collaborative, non-competitive environment among local firms • Existing and developing relationships between local firms and local and regional research and educational institutions such as Trudeau Institute, North Country Community College, PSUC, Paul Smiths, and SUNY Albany • Presence of Trudeau Institute as an academic-based anchor • Existing critical mass of biomedical companies • Non-controversial industry • Clean, low impact industry compatible with the sensitive ecosystem of the Adirondacks 	<ul style="list-style-type: none"> • Many companies are located in small or aging facilities • Little access to private capital for expansion • The industry is relatively unknown in the region 	<ul style="list-style-type: none"> • The region offers lower cost of living • The region offers low land costs compared to the urban/suburban centers in the country • Other than commercial space, the region already provides adequate infrastructure for the industry • Community support for the industry among those who know it exists • The North Country is a marquee location • Large number of experienced local angel investors amongst the large summer community. • Collaborative State and Local Government • Additional college and university partnerships 	<ul style="list-style-type: none"> • Relative geographic isolation • Lack of private investment • Inflexible public investment • Lack of existing leasable commercial space in some areas of the region • Health of the regional economy and dependence on dwindling public employment • National and global competition • Changes and uncertainty in NIH and NSF funding • The industry and its companies are relatively unknown in and outside the region • Lack of marketing the region as a biomedical cluster • Fragmented local government
<ul style="list-style-type: none"> • Produce high technology products and services – model for future jobs and motivation for rural area families and children to have exposure too 		<ul style="list-style-type: none"> • Harrietstown and Trudeau Science Parks • Biomedical is a growing industry • Quality public schools with high per capita spending 	

<ul style="list-style-type: none">• Low-employee turnover• Existing specialized equipment and expertise• High wages• Existing culture of entrepreneurship – multiple start-ups• Many companies were stable or growing during the recession – tools vs. risky drug discovery and development• Existing companies are focused in more stable subsector of applied research and development		<ul style="list-style-type: none">• Existing synergy between companies• Potential for collaboration and attraction of early stage Montreal based companies - wishing to grow to mid-stage tools and services based companies.• Rouses Point Pfizer pharmaceutical manufacturing complex*• Chazy Pfizer Research Facility*	
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SWOT Analysis

Strategic Clusters Work Group - Clean Energy

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • North Country is positioned as a result of our location, skills/ training programs, and from our established businesses that will provide opportunities for this skilled workforce • The North Country has accessible clean/renewable energy. Aside from solar, hydro and wind, we have a history of managing our forests and water • Forest Management is demonstrated by our ability, to bring back the Adirondack forest from obvious over foresting. 	<ul style="list-style-type: none"> • NYSERDA R&D needs significant expansion in the area of home insulation retrofits. • Grid constrain and pricing causing small hydro to shutdown 	<ul style="list-style-type: none"> • Conservation opportunity based on the 60% of our current homes being constructed in 1960 or before • Resolution of virtual net metering and community virtual net metering provides immediate benefit to Solar and Hydro, extension to Wind also has potential • Enabling SREC's use by investors versus others provides opportunity for large scale renewable energy projects 	<ul style="list-style-type: none"> • Current renewable energy support for Biomass Electric generation is insufficient, contracts are not reflective of real markets and one plant will shutdown in 2012 • Current constrained grid will curtail all energy projects that connect to the grid in the future
<ul style="list-style-type: none"> • There are new tools in place that enable the forester to assess the sustainable rate of tree harvesting from a given acre • The North Country has a number of existing / functioning / and capable businesses in all the areas addressed by clean energy. • No new technology is required to address opportunities in wind, 			

<p>solar, hydro, or biomass</p> <ul style="list-style-type: none">• North Country has education programs that are up and running. From photovoltaic (both residential and commercial), commercial wind, residential wind, hydro power, engineering and others			
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SWOT Analysis Strategic Clusters WG - Distribution

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • People / Employees -- There is a strong dedicated workforce in the North Country. • Lower Wage Scale – The wages in the area are less than they are in many regions in the state • Location to the Canadian border – We are positioned well for easy access for import and export of freight. • The crossing station at the RT 87 border exchange is laid out very well and is extremely efficient. • The North and South trucking routes are set up well for freight exchange. 	<ul style="list-style-type: none"> • The East / West corridor needs improvement to accommodate better freight flow. • It is difficult to recruit management level and IT employees to the region. • The Railroad Companies are delivering insufficient service and support to the region. • There is not enough LTL equipment and resources to supply the current demand of the region. • We have very poor winter conditions to move freight in a timely manner 	<ul style="list-style-type: none"> • There is an abundant amount of underutilized facilities in the region that can support distribution centers, industry and manufacturing processes. • There is a need to improve the east / west corridor from Watertown to Plattsburgh. The proposed covered highway system could be a large part of the solution. • There is an opportunity to take advantage of the Plattsburgh International Airport to establish a major hub for Fed Ex or UPS overnight service for the region. 	<ul style="list-style-type: none"> • There is a very negative impact on our cross border business, because of the weak US dollar. • The New York State economy continues to be less attractive to Canadian firms. • New York State is not a “Business Friendly” state. • There is overregulation by the federal government on imported and exported goods at our borders. Import products have 60 different agencies involved and export products have 11 different agencies involved.
<ul style="list-style-type: none"> • The region has good political support at the state and federal levels. • Our high population densities are within a two day travel time to the border. • College and universities are very strong in our region. 	<ul style="list-style-type: none"> • There is a very poor cell phone service network infrastructure to track and contact drivers in the region. • There are high power and utility rates in New York and the region with the exception of a few communities. 	<ul style="list-style-type: none"> • The region has an abundance of natural resources that could be utilized by developing new technologies to create future business opportunities. • We need to create new manufacturing jobs / businesses in the region to increase the 	<ul style="list-style-type: none"> • The federal governing agencies and policies for exports and imports can change with each new administration, which makes it very difficult to stay current with the regulations. • The Adirondack Park Agency regulations make it difficult to

<ul style="list-style-type: none"> • The Port of Montreal is much cheaper to enter than both the New Jersey and California ports. Port of Montreal does not have a harbor maintenance fee structure • Building costs for distribution centers in our region are cheaper per square foot. • Land costs in our region are cheaper than many areas throughout the state. • There is an abundant supply of distribution facilities to purchase or rent in our region. • The International Airport in Plattsburg will accommodate any size plane. 	<ul style="list-style-type: none"> • The Adirondack Park Agency has too many regulations on such a vast area of our region. • There seems to be inadequate state funded resources to continue to develop business in the region. 	<p>outbound freight for the region.</p> <ul style="list-style-type: none"> • There is a need to tap on the ecommerce opportunities in our region to increase potential outbound freight for the region. • We need to build on our overseas relationships to duplicate what we have established with our Canadian neighbor to take advantage of future opportunities to build a supporting distribution network for increased import activity in our region. 	<p>operate or expand operations in that area of our region.</p> <ul style="list-style-type: none"> • There continues to be a limited and decreasing amount of state funded resources to enhance business development in the region.
<ul style="list-style-type: none"> • The North Country quality of life can fit many people's lifestyles. • There is very cheap power available in the Plattsburgh, Massena and Rouses Point area. • There is currently not enough freight leaving the region to take advantage of the full load outbound trucking opportunities. The full load outbound pipeline can absorb a lot more freight utilizing its current equipment supply. 			

SWOT Analysis

Strategic Clusters Work Group - Fort Drum/Defense

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Single largest employer in Upstate New York • Military personnel and spouses enhance skilled workforce • Existing infrastructure in key infrastructure corridors • Cultural diversity • Four Seasons Training for soldiers • Limited encroachment around the post • Strong community support of the post including supporting future growth • Well established communication between the Fort and surrounding communities • Well establish health care and education systems that are effectively intertwined 	<ul style="list-style-type: none"> • One Company Town • Recurring deployment schedules • Highly variable housing vacancy rates • Rural nature of the area • Uneven economic impacts (gate vs. range vs. corridor communities) • Limited transit and transportation alternatives • Negative perceptions of livability from newly arriving military families • Regulatory restraints on adjacent State land • Limited infrastructure capacity in some surrounding communities 	<ul style="list-style-type: none"> • High retention rate of military retirees • Increases entrepreneurial business development activities • Military population provides critical mass for growth of education, health care, business development, recreation & tourism • Expansion and attraction of defense related businesses • Northeast regional training opportunity • Potential increase of the percentage of supply and service contracts awarded to business in the region • Potential for additional community growth and community wealth as a result of Fort Drum growth 	<ul style="list-style-type: none"> • Significant Defense Department cutbacks • Evolving defense strategies that could reduce the operational mission • Lack of State and local influence over Fort Drum's future • Changing public opinion on National Defense activities • Public resources limit community's ability to respond to Fort Drum's growth and needs - Housing, infrastructure, transit, commercial services • Potential of adding new services on post that negatively affect services off-post
<ul style="list-style-type: none"> • Enhanced quality of life to area residents • \$2 Billion economic output on the surrounding economy (\$1.5 billion in direct annual expenditure; of which \$1.2 billion is payroll) • State-of-the art training facility 		<ul style="list-style-type: none"> • Opportunity to further increase quality of life opportunities 	

SWOT Analysis

Strategic Clusters Work Group - Higher Education

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • strong linkages w/ industry • ability to stimulate entrepreneurship • R&D capability / infrastructure • good integration across campuses; natural career ladders • spirit of cooperation among educational institutions • North Country institutions of higher education are efficient (“scrappy” and resilient because we have to be) • campuses/region is attractive to “outsiders” excellent quality of life • low cost of living • ready workforce / strong work ethic • good at articulating and promoting transfer (education pipeline) 	<ul style="list-style-type: none"> • We are isolated from the rest of the state. • The low population density can be a challenge to North Country institutions of higher education. • It is tough to sustain some academic programs because of the North Country’s low population density. • There are no Interstate highways that connect our institutions of higher education to each other (especially from east to west). • There is no community college in St. Lawrence County. • There is no medical school north of Syracuse. • There are no proprietary colleges that operate within the region. 	<ul style="list-style-type: none"> • There is immense human capital from military veterans, especially around Fort Drum. • Homeward Bound Adirondacks in Saranac Lake is a unique veteran reintegration program. There could be an opportunity for an “Academy” in partnership with the region’s institutions of higher education. • There is still more opportunity for Canadian education exchange (students, faculty, clinical sites) • There is an opportunity for partnerships with U. Albany and others in bio-medicine programs • There is an opportunity to partner with U. Albany and others in semiconductor manufacturing 	<ul style="list-style-type: none"> • Over-regulation • Shrinking public support for higher education
<ul style="list-style-type: none"> • good value of higher education in the North Country • high retention rates, students in the North Country are focused (fewer distractions) • physical geography lends itself to unique field experiences (e.g., lakes, Adirondacks, forests, recreation) • outstanding recreational 	<ul style="list-style-type: none"> • The largest industries in St. Lawrence County are Education and Health Care. • The lack of broadband Internet infrastructure inhibits the proliferation of distance education in the North Country. • There is a lack of opportunity for trailing spouses. • Diverse campus constituents are 	<ul style="list-style-type: none"> • Our nine institutions of higher education and two research institutes are situated in the largest park in the nation (6-million-acre Adirondack Park) – an opportunity to market to “outsiders.” • Our physical geography (Lake Ontario, Lake Champlain, St. Lawrence River) give us opportunities for unique academic 	<ul style="list-style-type: none"> •

<p>opportunities for students</p> <ul style="list-style-type: none"> • North Country colleges and universities offer a more personalized educational experience (largest of the nine is Potsdam w/ 4,400 students) • Our cultural uniqueness adds to the quality of life in the North Country institutions of higher education. • Diverse spectrum of programs offered at institutions across the NNY Region and signature academic programs* (*see Appendix IX for details) • Farming. 	<p>not always accepted by local community constituents.</p> <ul style="list-style-type: none"> • Traditional academic calendar is rigid and restrictive; sometimes inhibits creative scheduling. • Campus facilities are not always up-to-date or up-to-par. (Note: Some SUNY 4-year campuses have made tremendous strides in the last 9 years since the State has initiated a critical maintenance program.) 	<p>programs.</p> <ul style="list-style-type: none"> • Our region is rich in American history (esp. along the St. Lawrence River, Lake Champlain, and Ticonderoga). • There are young people who would love to work here if they could find jobs. • We have the opportunity to be a laboratory for sustainable practices (some best practices exist at SUNY Potsdam, Paul Smith's and Miner Institute). • The region's large agriculture industry could be an opportunity for new academic programs • There are more opportunities for adult ed. Programs. 	
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SWOT Analysis

Strategic Clusters Work Group - Wood and Paper

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Availability of hydroelectric power, cost advantage. • Stable workforce. • Availability of raw materials to forest products industries. • Strong affiliation and support from higher education. • Lower labor costs than other regions of the country. • Proximity to Canada. • Economic development agencies (IDA, ESD). • DW...proximity to major northeastern markets (Montreal, New York City, Boston, Philadelphia, Hartford). • Location, quality of life. 	<ul style="list-style-type: none"> • Remoteness. • Cost of energy. • Lack of rail service. • Cost structure compared to other parts of the country and foreign competitors, e.g. taxes. • Workforce technical skills, engineering, electrical, mechanical, etc. attracting and retaining. • Multiple and difficult to navigate layers of regulatory authority/agencies. • Multiple funding sources/agencies. • Workers comp costs. • Lack of cell phone service (consistent and full coverage). 	<ul style="list-style-type: none"> • Meshing environmental regulations with economic impact...balance. • Renewable energy development, specifically biomass. • Natural gas pipeline Plattsburgh to Ticonderoga (through Keeseville, Westport, Port Henry, Crown Point). • Feed-in tariff for biomass energy generation. • Perceived urgency on the part of the Cuomo administration to make change in the way our government works and delivers results (including regulatory reform). 	<ul style="list-style-type: none"> • Health care costs (a local, state and national issue). • A decreasing population, changing demographics. • Availability of wood harvesting community (loggers, haulers) to meet demands of existing forest products entities and increased demand from emerging biomass energy. • A paper industry specific, discipline and lack of leadership in maintaining pricing. • Cost of raw materials. • Rising, volatile, unstable cost of oil and fossil fuels for energy & transportation and lack of alternatives.
<ul style="list-style-type: none"> • The public easement ownerships, not over 1,000,00 acres in the region, can assure a raw material supply for future forest products industry 	<ul style="list-style-type: none"> • Aging and undependable power distribution infrastructure. • Energy portfolio alternatives • Lack of balanced voice to carbon neutrality discussions. DEC voice stronger than the voice of economics, jobs and sustainable forestry. 	<ul style="list-style-type: none"> • Streamlining of grant funding process and paperwork. • Timing for pushing infrastructure projects (Federal Gov't agenda to create jobs by building and rebuilding infrastructure). • Make certain that low-cost power is available to industry. 	<ul style="list-style-type: none"> • Lack of political will in NY to see economic development as a priority over the long-term. Commitment. • New businesses and industry competing with existing businesses and industry. Need to assure a level playing field.

	<ul style="list-style-type: none"> • A steady declining harvest from state owned forest lands over the past decade that threatens the FSC SFI certification for public lands and adds additional pressure to private lands to supply existing demands 	<ul style="list-style-type: none"> • Focus equal attention to preserving jobs • Federal fuel and truck weight standards present a huge opportunity for his business which produces aluminum, a light weight alternative. • Chance to evaluate how funding is best spent...return on investment, e.g. east/west highway would be a very costly project. • Many towns and community groups recognize the value of the forest products industry and interdependency and support expanding the industry 	<p>(Incentives to attract new often results in a disadvantage for existing).</p> <ul style="list-style-type: none"> • Lack of access to investment capital. • The courage to be actionable/get things done. • The State continues to purchase fee simple land for the Adirondack Preserve, when an opportunity arises without any long term goal or plan, thus removing this land from any supply opportunities forever.
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SWOT Analysis Tourism Development Work Group

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Abundance of natural beauty and open space, including a critical mass of lakes, rivers, ponds and streams • Unparalleled four-season outdoor recreational opportunities poised to leverage private investment • Region is positioned well for tourism facility growth in comparison to other industries • Proven market demand exists for higher quality tourism products • Infrastructure and amenities that create a quality destination also create a great place to live which, in turn, attracts new full-time residents and the businesses necessary to support them • Fort Drum as a partner in providing a year-round visitor base and economic support of tourism infrastructure • Access to over 120 million potential customers from large wealth markets within a day's drive • Internationally known destination 	<ul style="list-style-type: none"> • Tourism not recognized as an economic driver and a community development/revitalization opportunity by economic development leadership • Lack of lodging and/or lack of up-to-date lodging • Lack of critical mass of pedestrian-friendly, attractive, visitor-oriented business districts • Lack of civic infrastructure hinders business development – water, sewer, power • Lack of understanding that tourism improves the quality of life for residents and has a multiplier effect, which is key to economy diversification • Visual appeal of many communities could be improved • Current NYS economic development programs are not geared toward the rural tourism reality nor are most available to tourism-related businesses • Decreasing public water access • Inconsistent Broadband capability and cell phone access across the region • Inconvenient access by water, air, 	<ul style="list-style-type: none"> • Activate tourism as a driver of economic development and community revitalization • Use tourism base to attract lifestyle entrepreneurs to funnel private investment into the region (live where you vacation) • Adapt tourism-specific investment tools to encourage private investment • Potential for linkage of existing water and land trails to connect communities and offer more recreational opportunities • Capitalize on Canadian visitors; tap Canadian market to extend pass-through trips to overnight stays • Tourism is an economic activity consistent with the mandates that govern public lands and managed open space • Meld growing natural interest in sustainability and green practices with existing natural resources to grow green tourism and geo-tourism 	<ul style="list-style-type: none"> • Global competition – level of amenities has risen, escalating travelers' expectations • Fuel dependency – marine gas, heating, region is a driving destination • Inability of federal and state governments to adapt programs to rural-scale development • Decaying main streets deter visitors from stopping • Perception of extreme weather • Variable Canadian dollar • Perception of distance and isolation • Regional fragmentation • Changing demographics in key markets (age, income, activity preference) • Canadian tourism businesses have more opportunities for government support • Increased difficulty with cross-border travel since 2001 • Overenthusiastic enforcement of regulations (snowmobiling,

<p>brands – Adirondacks, 1000 Islands, Lake Champlain, Tug Hill, St. Lawrence Seaway – with established reputation and proven aptitude for tourism business</p> <ul style="list-style-type: none"> • International visibility of the authenticity of our experiences and places • Vast open spaces offer solitude, silence and the largest dark sky in the northeast U.S. • International visibility of sporting competitions and training facilities • Public access to millions of acres of undeveloped and protected land • Communities have varied personalities • A variety of fish and wildlife available for viewing, hunting and fishing • Significant number of historic places and landmark sites that are key to American history • Family-friendly environment 	<p>train; lack of rental vehicles</p> <ul style="list-style-type: none"> • Lack of access to investment for seasonal businesses • Lack of marketing resources • Workforce challenges (untrained employees, poor customer service skills, lack of employees for hire due to school schedules) • Standard market data often omits tourism and vacation home impacts for business planning, limiting investment opportunities • Seasonal mind-set of commercial enterprises • Lack of solicitation of tourism businesses • Lack of regional marketing of our arts and culture opportunities to encourage intra-region travel 	<ul style="list-style-type: none"> • Develop creative intra-region touring opportunities that capitalize on agriculture and outdoor recreation and incorporate multiple existing and recognized pathways (roadways, blueways) to extend visitor stays • Anticipate changing demographics in key markets (age, income, activity preference) • Take better advantage of abundance of military and college/university visiting friends and relatives in the region • Increase vacation homeowner use/spending and use this group as a base to bolster shoulder seasons • Cross-development of tourism-agriculture-creative investments • Make roads and directional signage more visitor-friendly • Historic, 19th century Main Street architecture available for rehabilitation/revitalization • New/growing airport connections with inbound opportunities • Capitalize on regional historic sites and heritage to attract visitors through collaboration of heritage organizations 	<p>hunting, road blocks) is a deterrent to travelers</p> <ul style="list-style-type: none"> • Spread of invasive species has the potential to greatly impact tourism by limiting places people can visit or destroying natural resources that support tourism
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		<ul style="list-style-type: none">• Improve education necessary to support the tourism economy – create a culture and language of hospitality• Expand shoulder seasons• Creation of region-wide bicycle friendly routes to entice a growing market segment• Formalize a relationship between tourism and federal and state agencies with functions related to highways, border security, environmental regulations, safety, etc.	
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