

Massachusetts Regional Competitiveness Councils

Survey Data for

Northeast, Southeast, and Cape & Island Regions

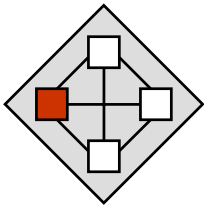
**Institute for Strategy and Competitiveness
Harvard Business School**

**Prepared for the
RCC Meetings
September 30, 2003**

This presentation draws on ideas from Professor Porter's articles and books, in particular, The Competitive Advantage of Nations (The Free Press, 1990), "The Microeconomic Foundations of Economic Development," in The Global Competitiveness Report 2001, (World Economic Forum, 2001), "Clusters and the New Competitive Agenda for Companies and Governments" in On Competition (Harvard Business School Press, 1998), and the *Clusters of Innovation Initiative*, a joint effort of the Council on Competitiveness, Monitor Group, and Professor Porter. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means - electronic, mechanical, photocopying, recording, or otherwise - without the permission of Michael E. Porter.

Additional information may be found at the website of the Institute for Strategy and Competitiveness, www.isc.hbs.edu

Northeast Region



Regional Comparisons

Availability of Inputs

Strongly
Disagree
1

2

3

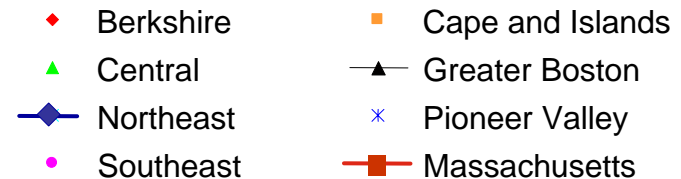
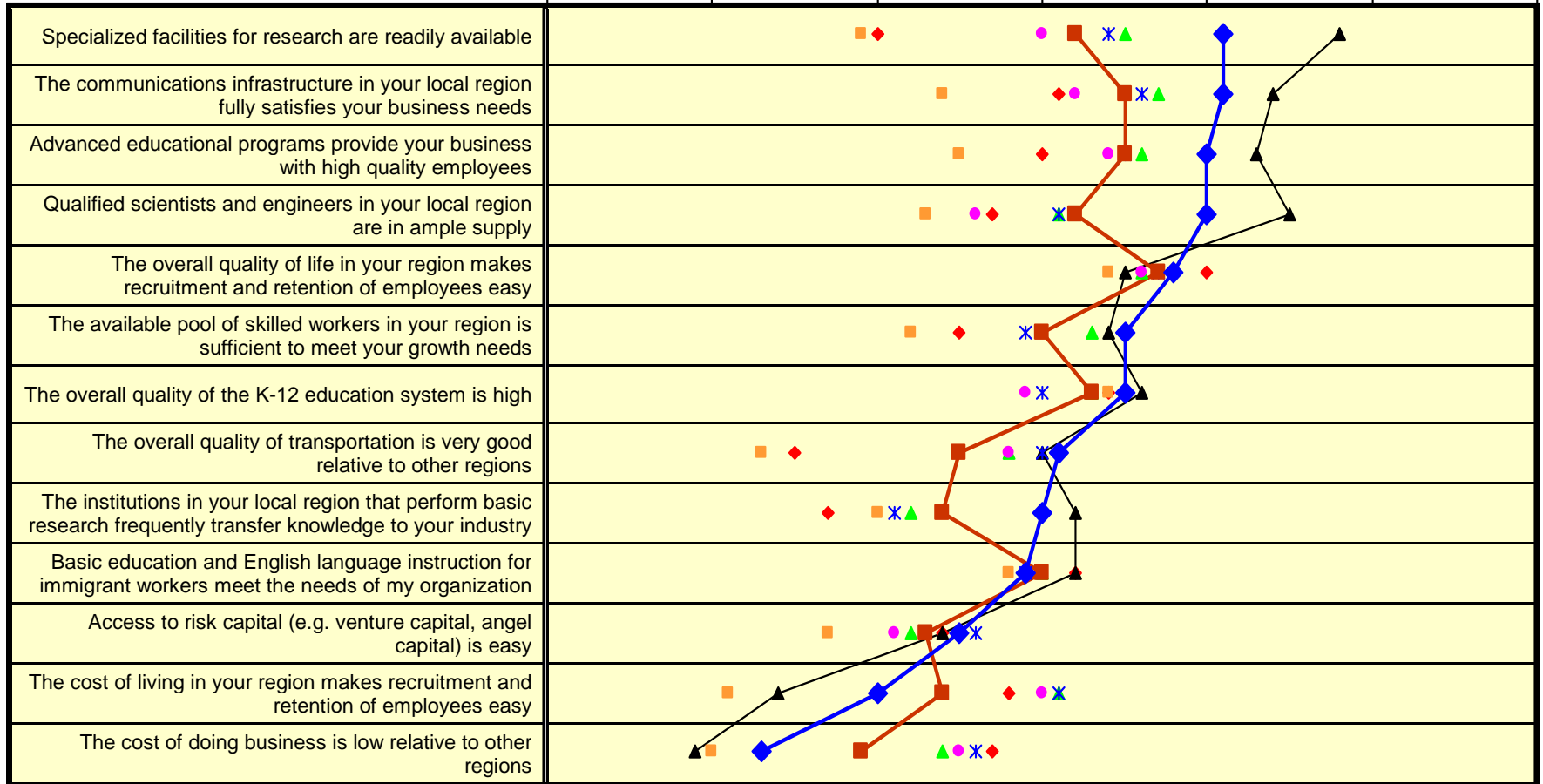
4

5

6

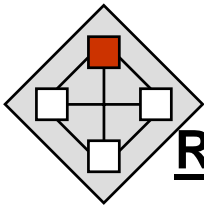
Strongly
Agree
7

Mean Agreement



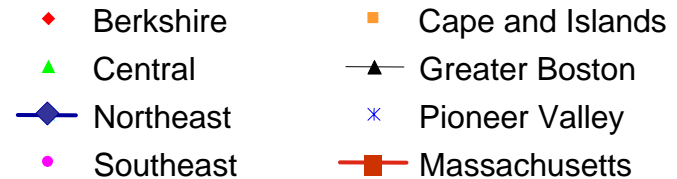
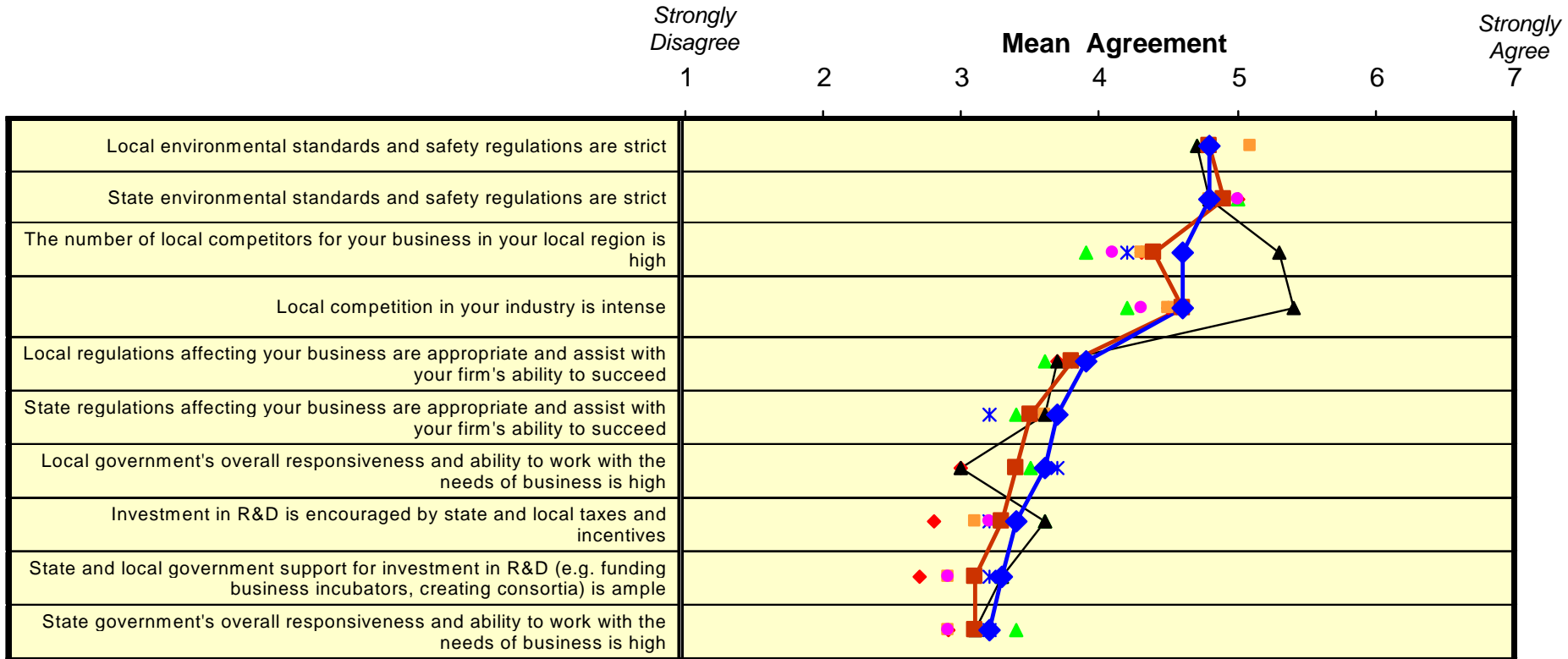
Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles - RB6



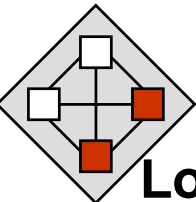
Regional Comparisons

Rules and Incentives Governing Investment and Competition



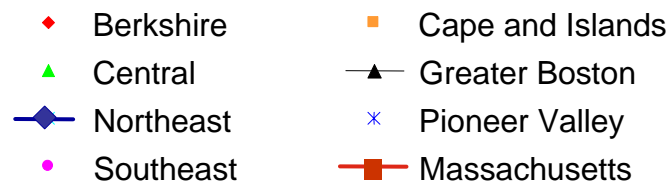
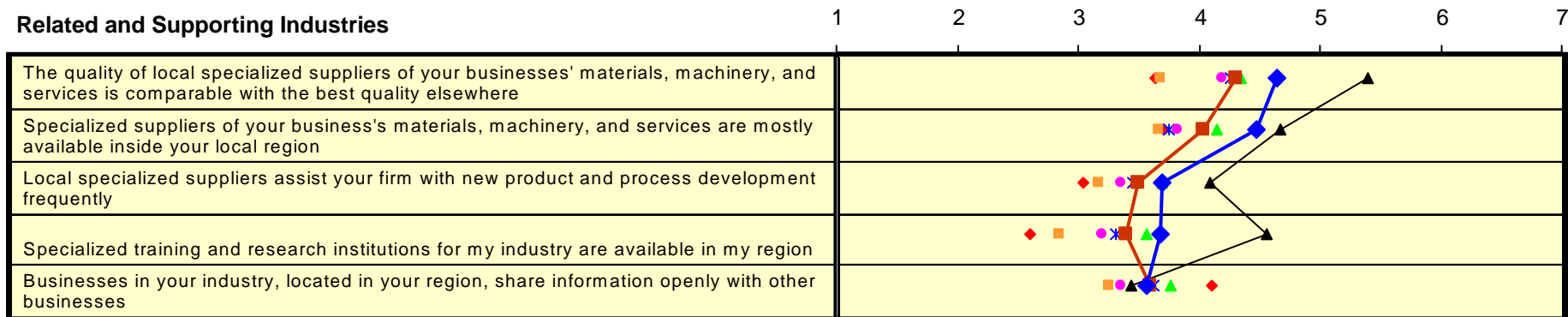
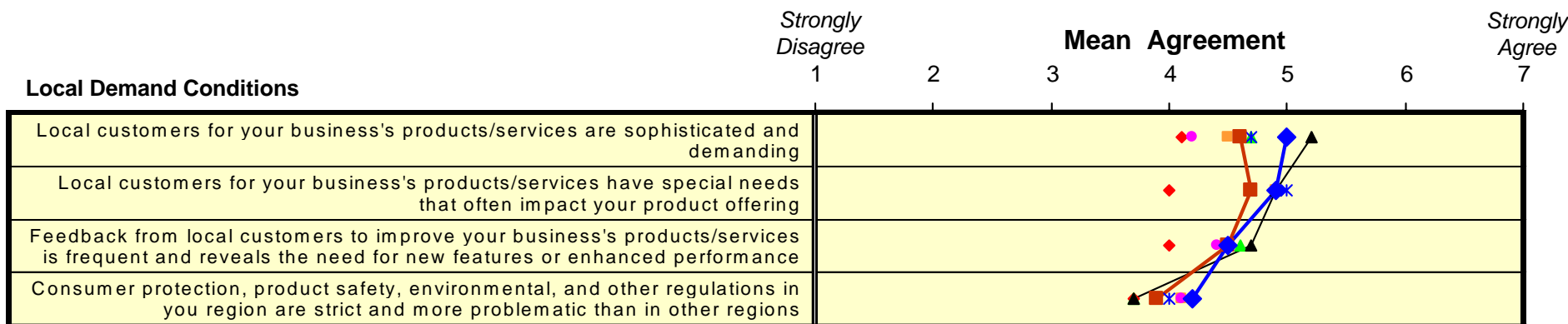
Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles – RB6



Regional Comparisons

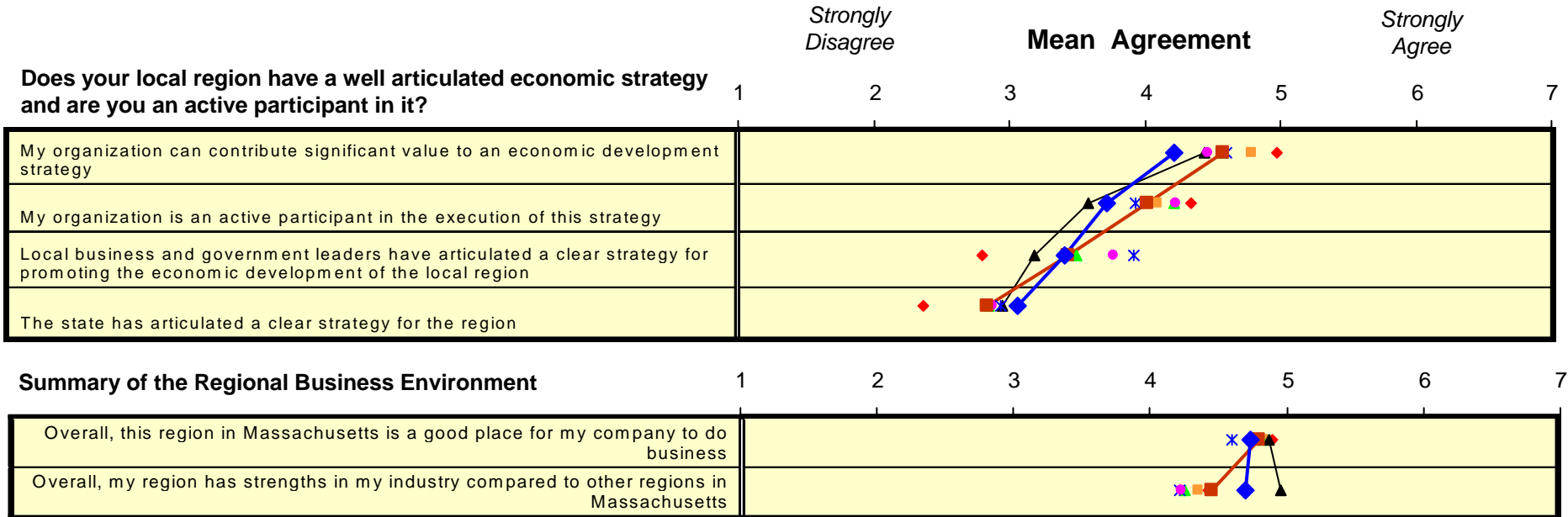
Local Demand Conditions & Related and Supporting Industries



Source: Professor Michael E. Porter and Monitor Company Group

Regional Comparisons

Regional Strategy & Summary of the Regional Business Environment

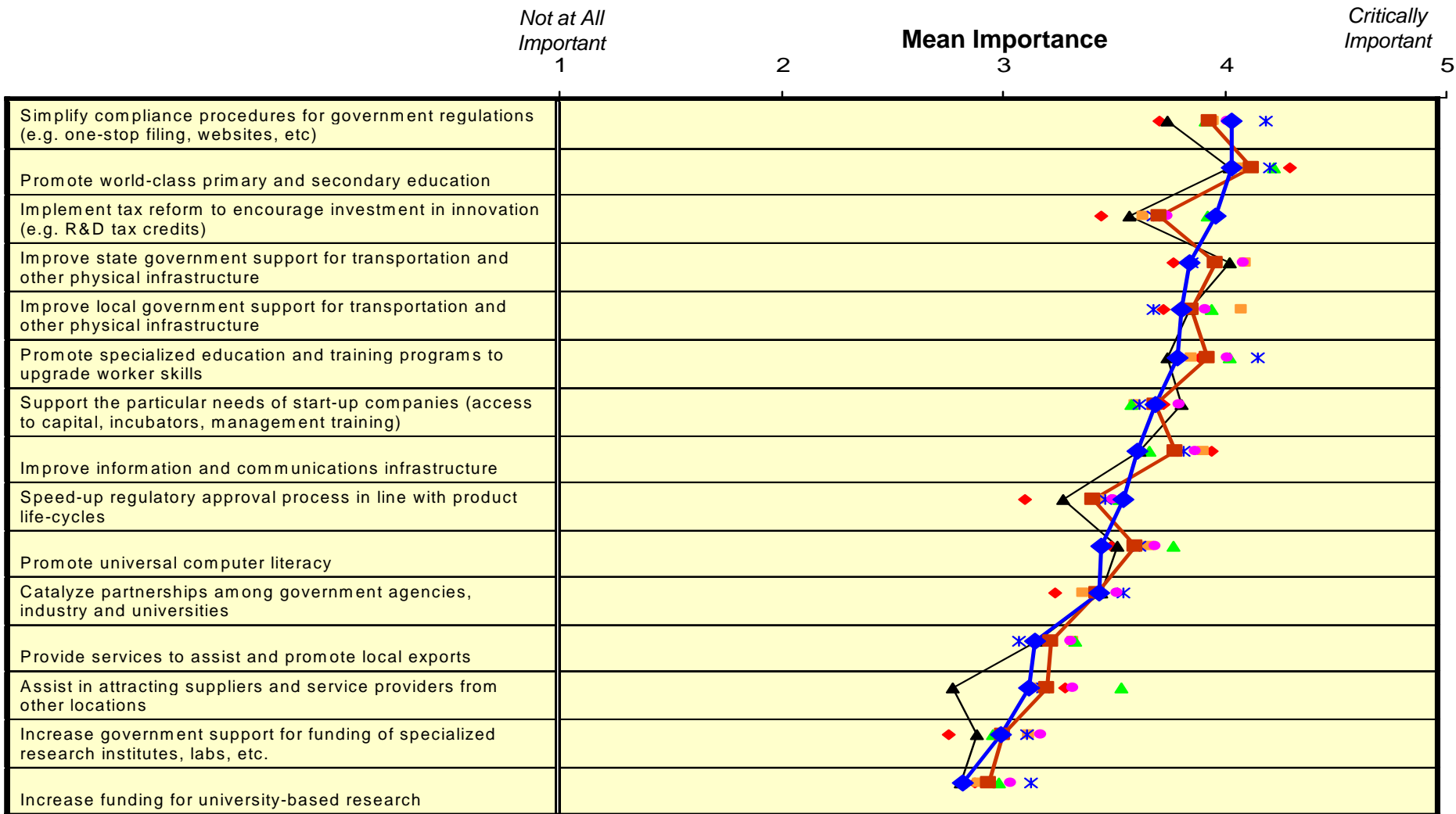


- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- ◆ Northeast
- × Pioneer Valley
- Southeast
- Massachusetts



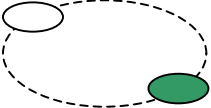
Regional Comparisons

Priorities for Government



- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group



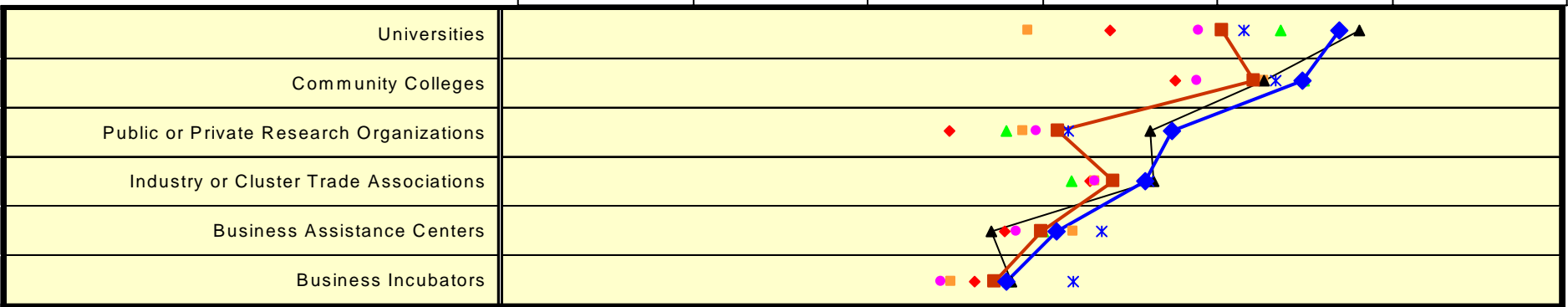
Regional Comparisons

Institutions & Education

How satisfied are you with the impact of the following institutions, in your region, on your company?

Strongly Disagree Mean Agreement Strongly Agree

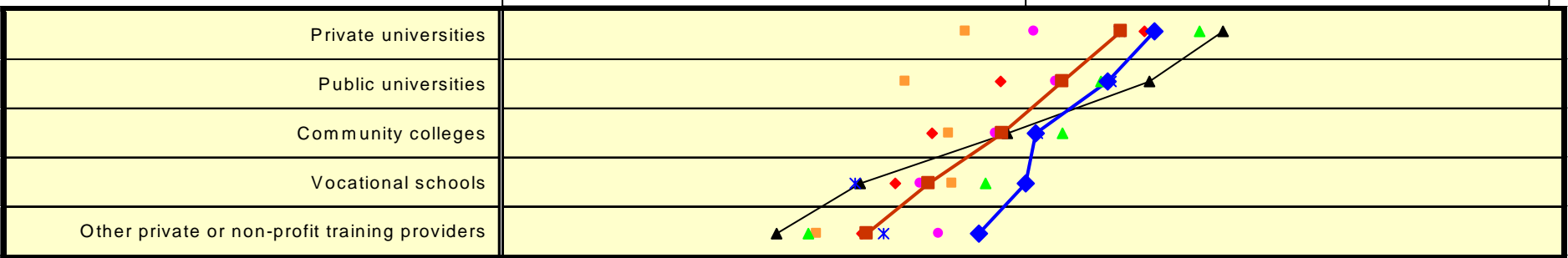
1 2 3 4 5 6 7



How would you best describe the quality of new workers from these sources?

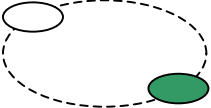
Inadequate Mean Rating Superior

3 2 1



- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group



Regional Comparisons

Institutions & Education (Cont.)

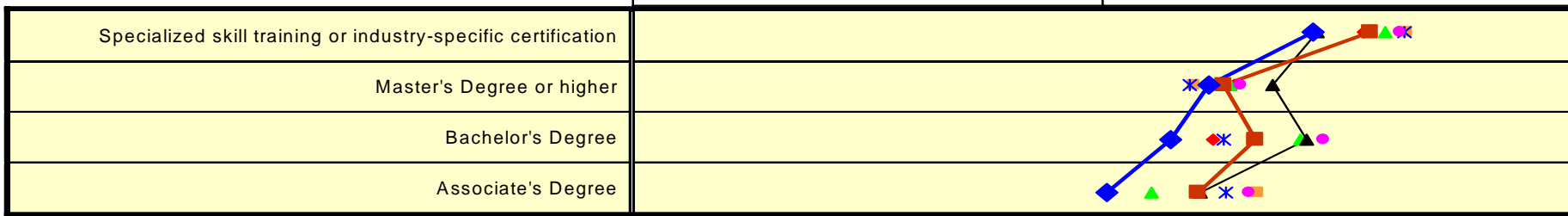
Over the next five years, I expect the needs of my organization, with respect to the following levels of education and/or training, to:

Decrease
3

Mean Expectation

2

Increase
1



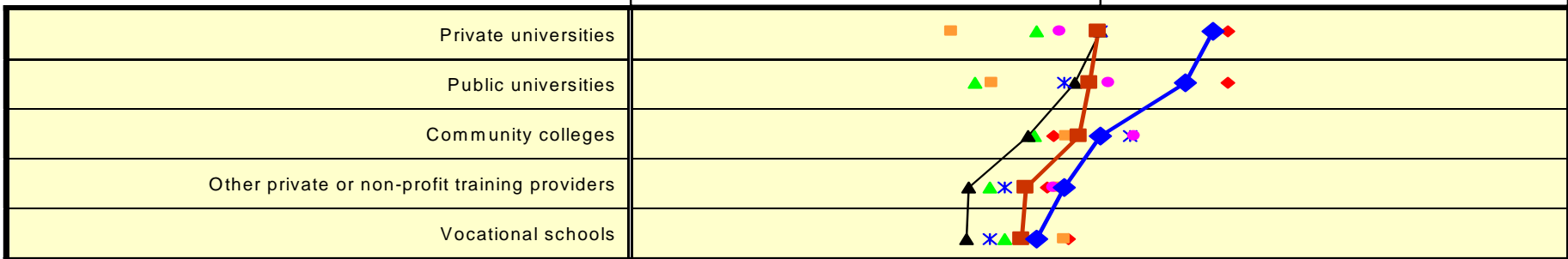
If your organization met or worked with any of these entities on workforce issues, to what extent did your contact meet your expectations?

Did not Meet my Expectations
3

Mean Rating

2

Exceeded my Expectations
1



- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- ◆ Northeast
- × Pioneer Valley
- Southeast
- Massachusetts

Regional Comparisons

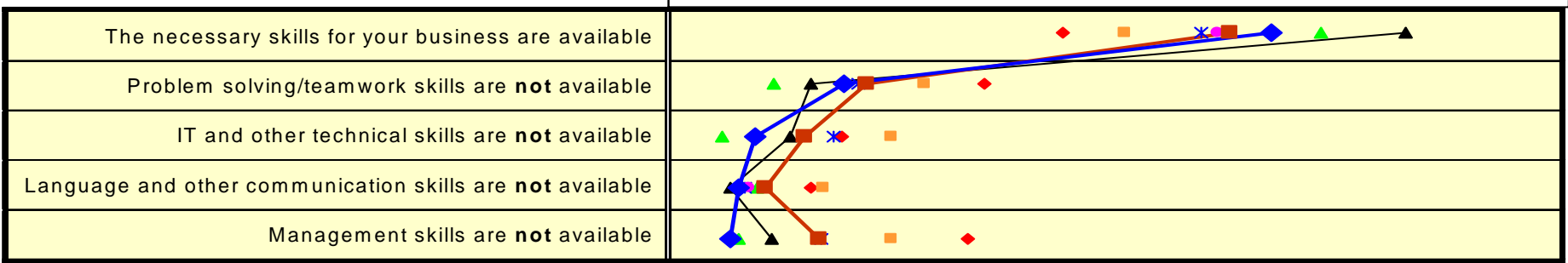
Employee Skills

Overall, are employees with the necessary skills for your business available in the region?

0%

Percent of Respondents

100%



- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- Southeast
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts
- Cape and Islands

Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles – RB6

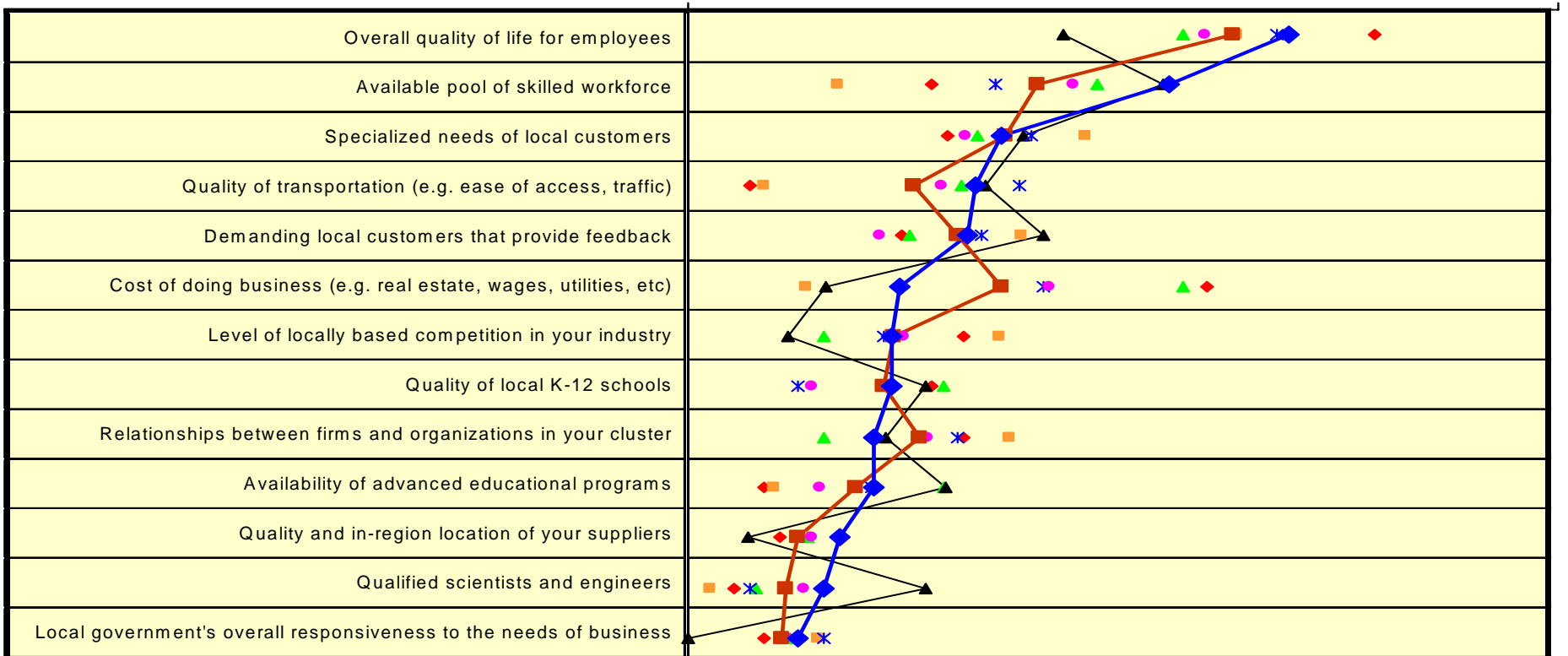
Regional Comparisons

Positive Impact on the Local Business Environment

Percent of Respondents which Ranked Characteristic Among the Top Five Most Positive

0%

100%



- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles – RB6

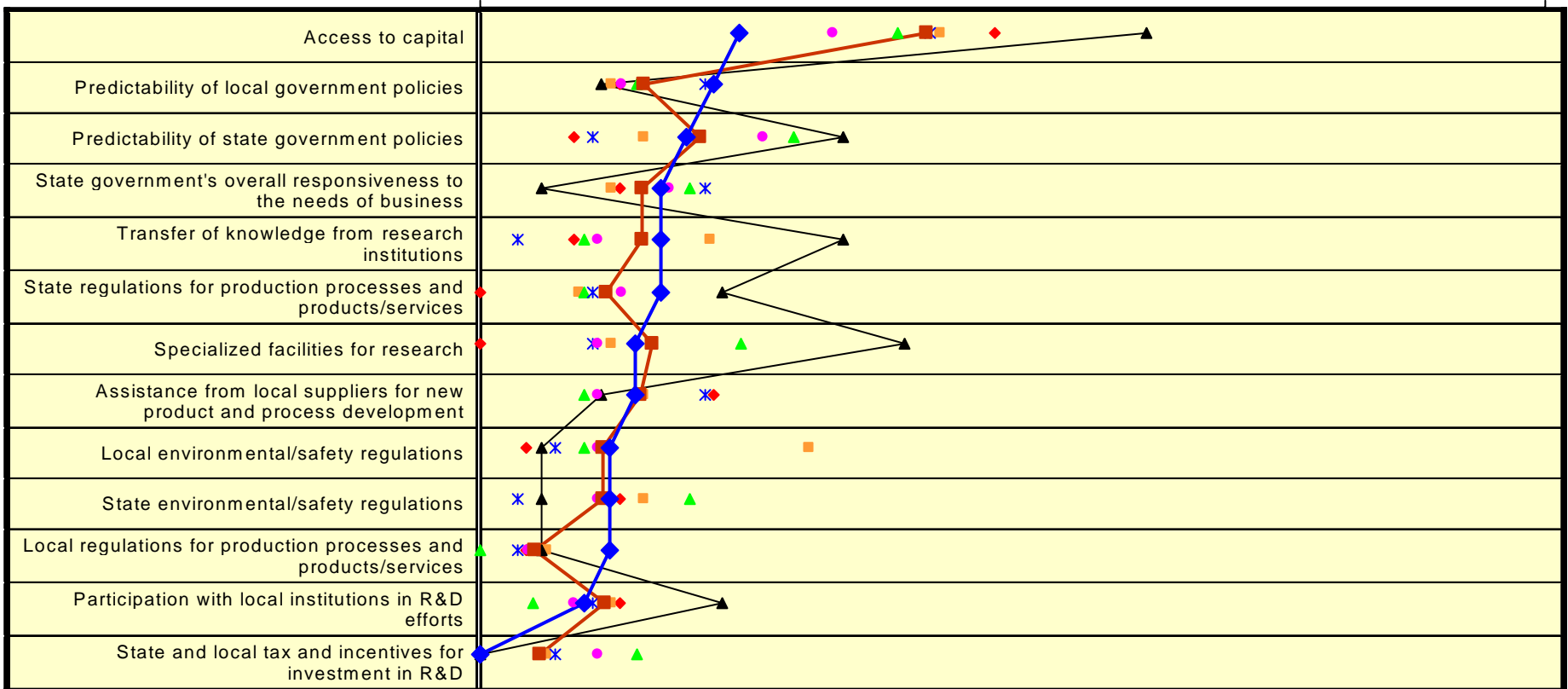
Regional Comparisons

Positive Impact on the Local Business Environment (Cont.)

Percent of Respondents which Ranked Characteristic Among the Top Five Most Positive

0%

40%

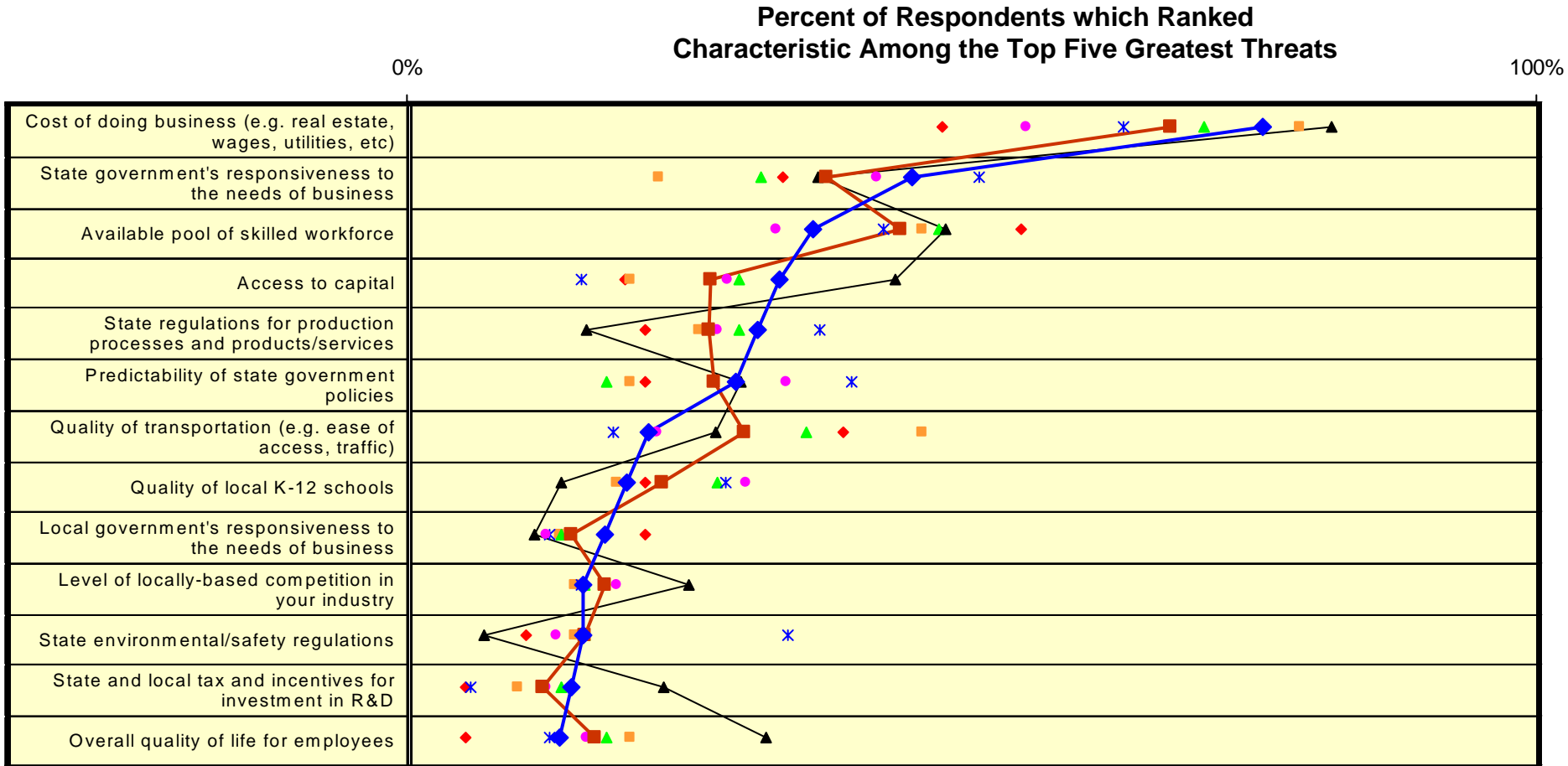


- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- ◆ Northeast
- × Pioneer Valley
- Southeast
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

Regional Comparisons

Future Threats in the Local Business Environment



- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- ◆ Northeast
- × Pioneer Valley
- Southeast
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

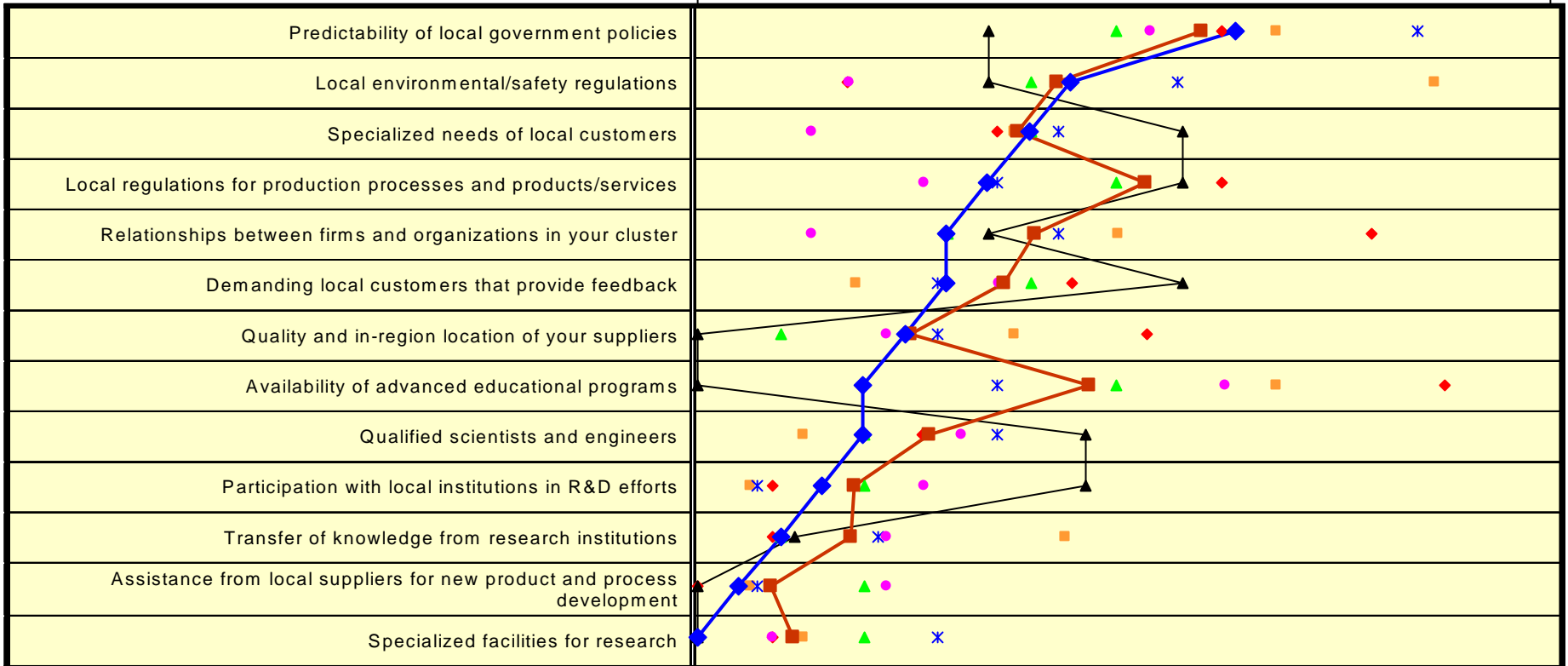
Regional Comparisons

Future Threats in the Local Business Environment (Cont.)

Percent of Respondents which Ranked Characteristic Among the Top Five Greatest Threats

0%

20%



- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

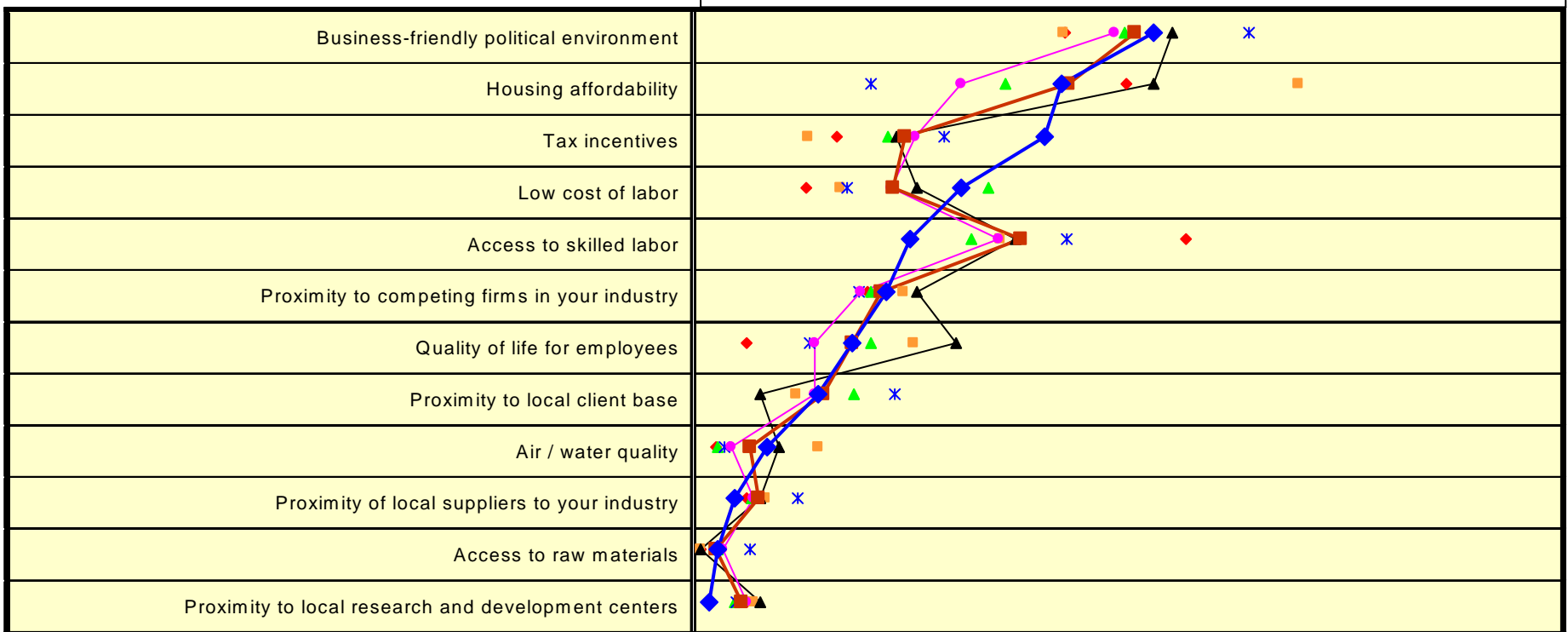
Regional Comparisons

Barriers to Expansion in the Next Five Years

Percent of Respondents which Ranked Characteristic Among the Top Three Greatest Barriers to Expansion

0%

100%

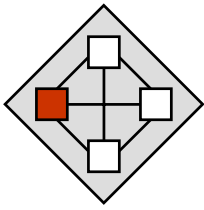


- ◆ Berkshire
- ▲ Central
- ◆ Northeast
- Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Southeast Region

Regional Comparisons

Availability of Inputs



Strongly Disagree
1

2

3

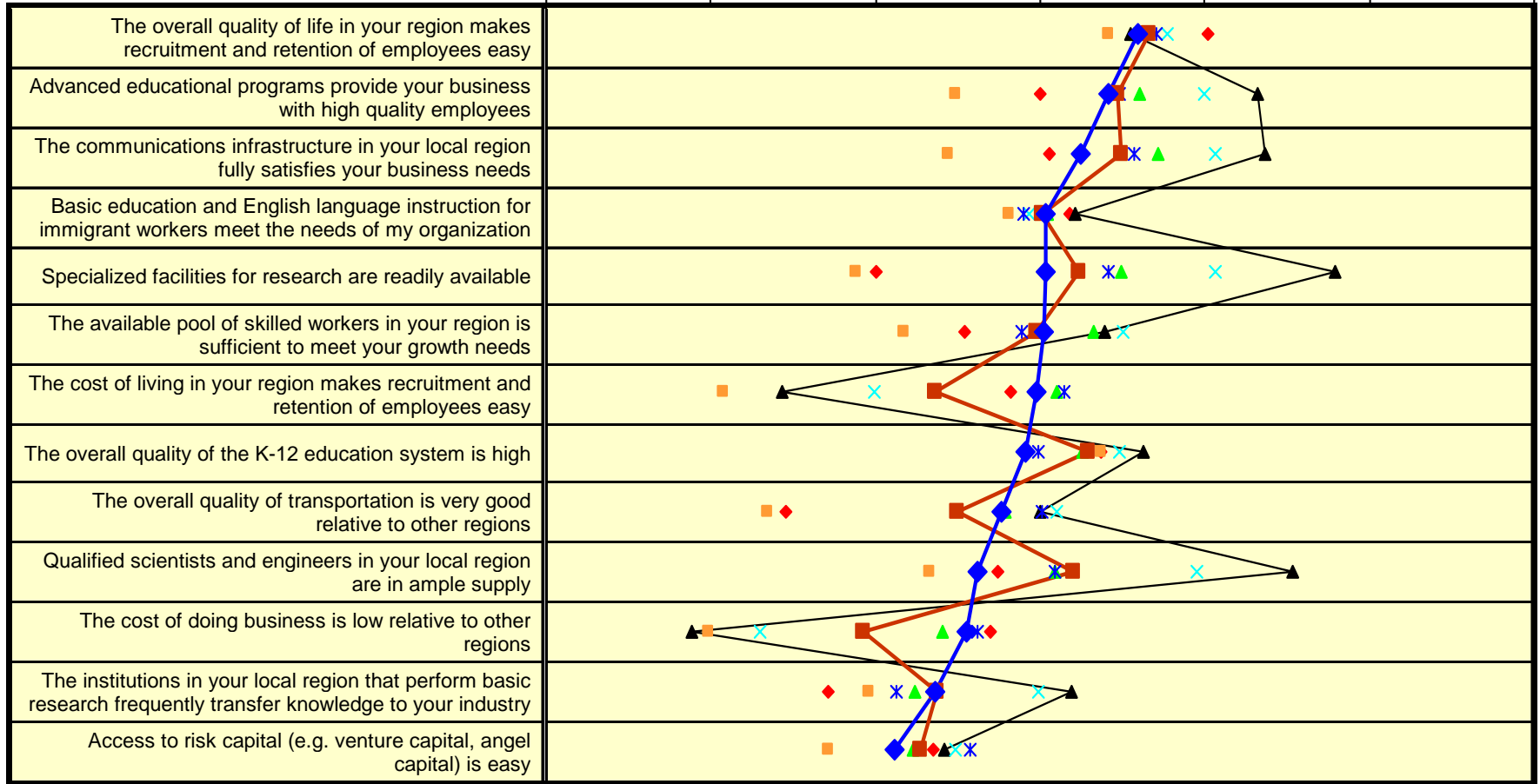
Mean Agreement

4

5

6

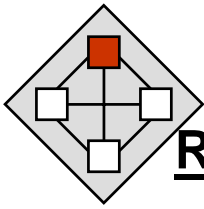
Strongly Agree
7



- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

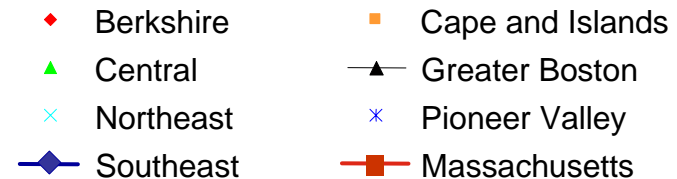
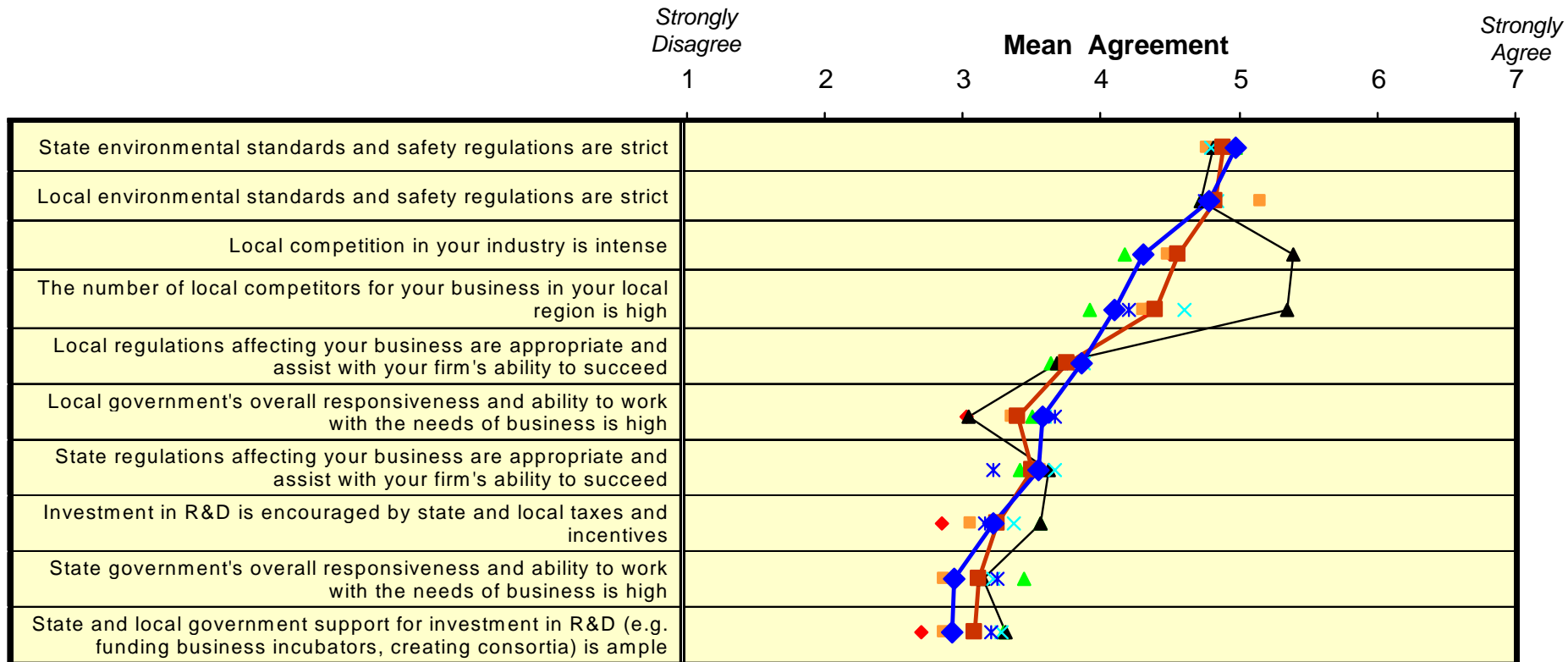
Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles - RB6



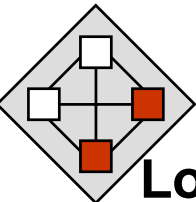
Regional Comparisons

Rules and Incentives Governing Investment and Competition



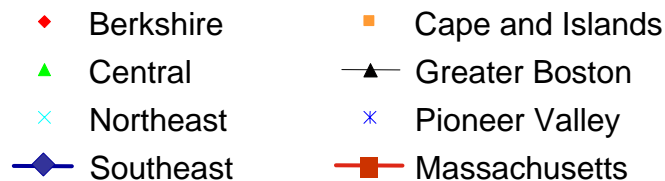
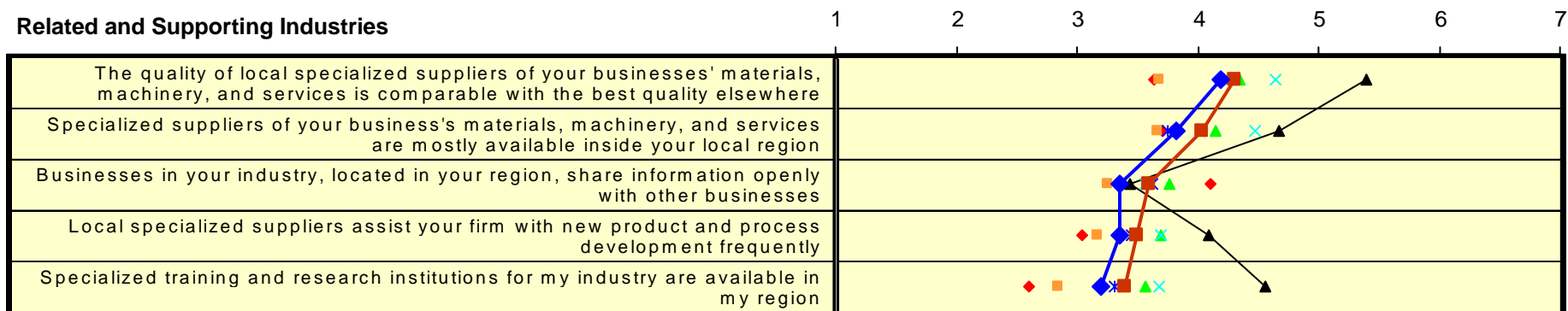
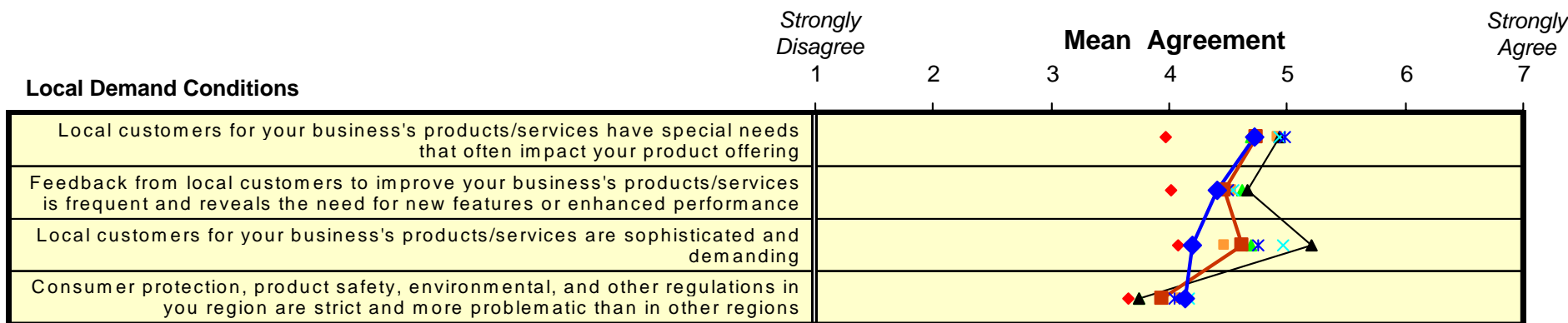
Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles - RB6



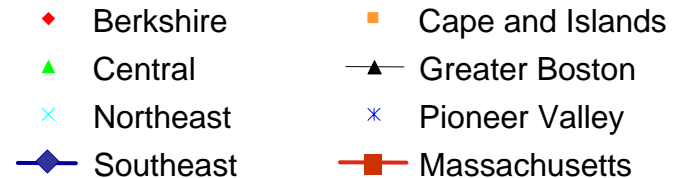
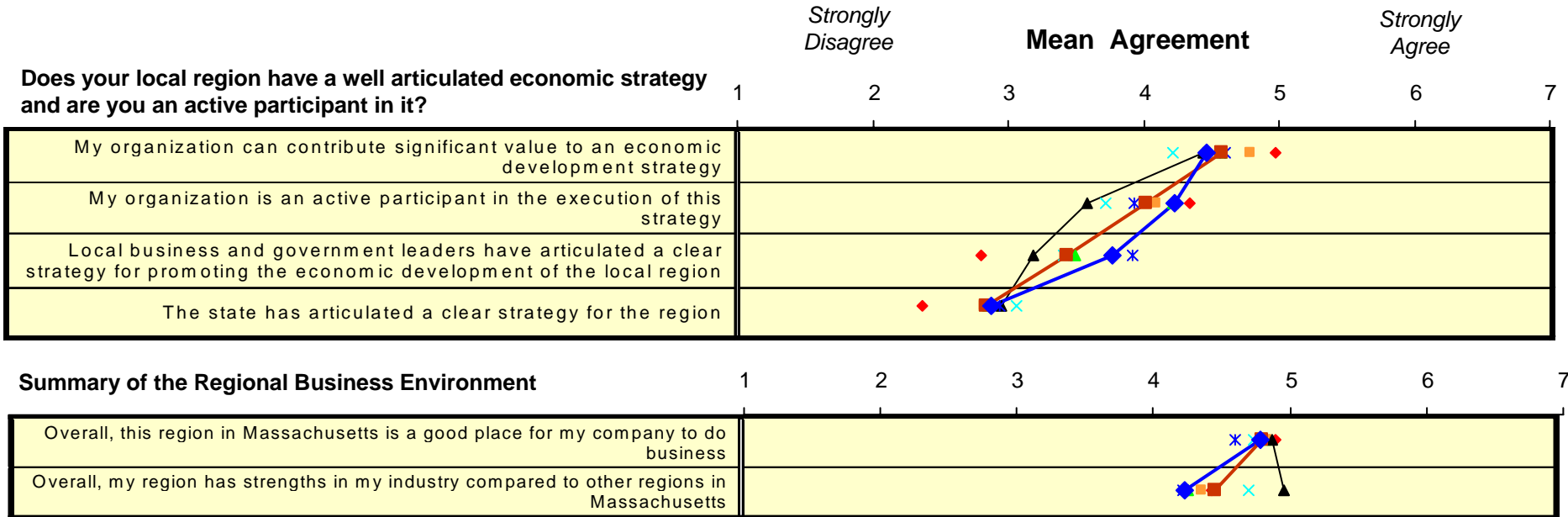
Regional Comparisons

Local Demand Conditions & Related and Supporting Industries



Regional Comparisons

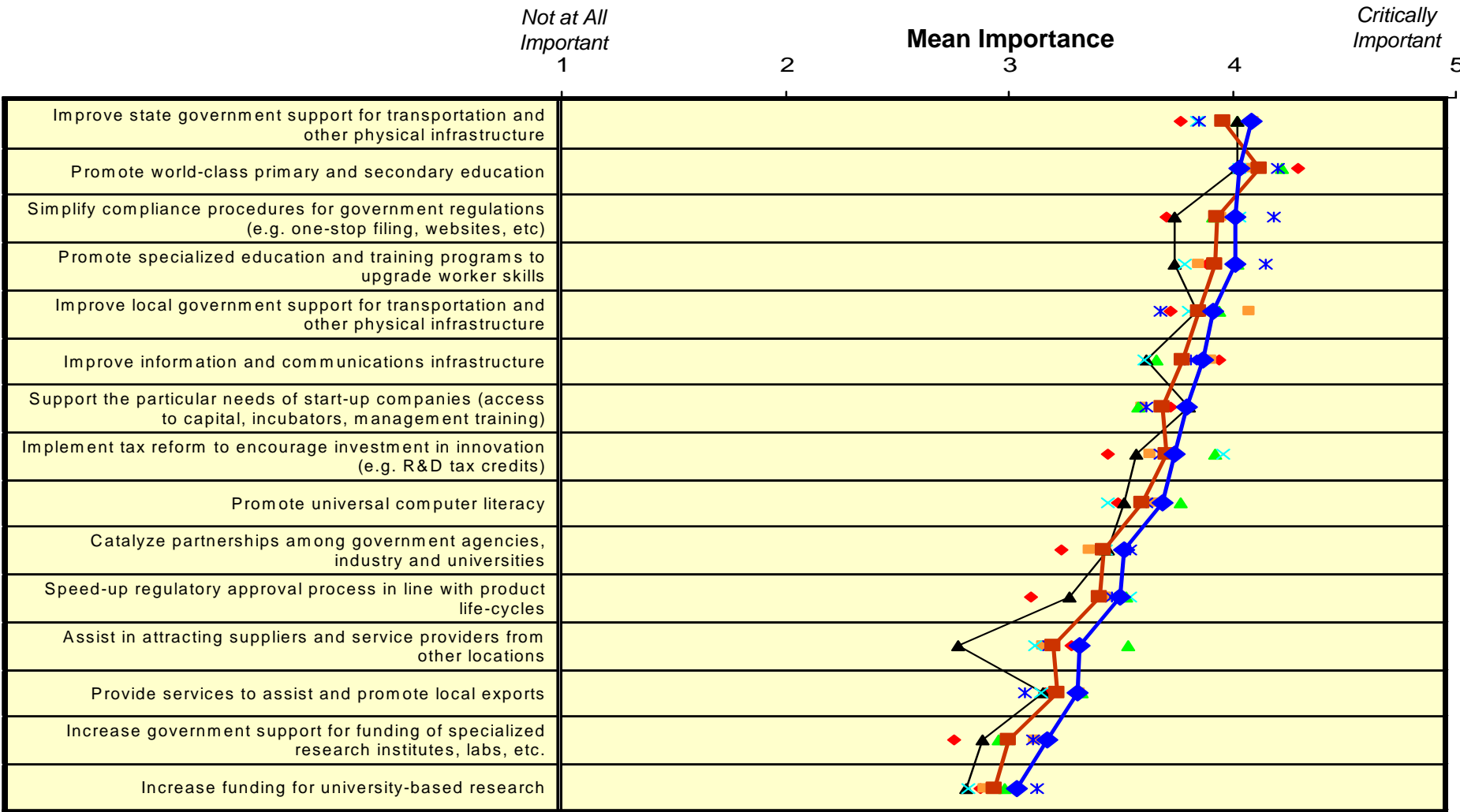
Regional Strategy & Summary of the Regional Business Environment





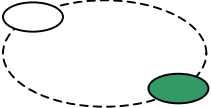
Regional Comparisons

Priorities for Government



- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- × Northeast
- × Pioneer Valley
- ◆ Southeast
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group



Regional Comparisons

Institutions & Education

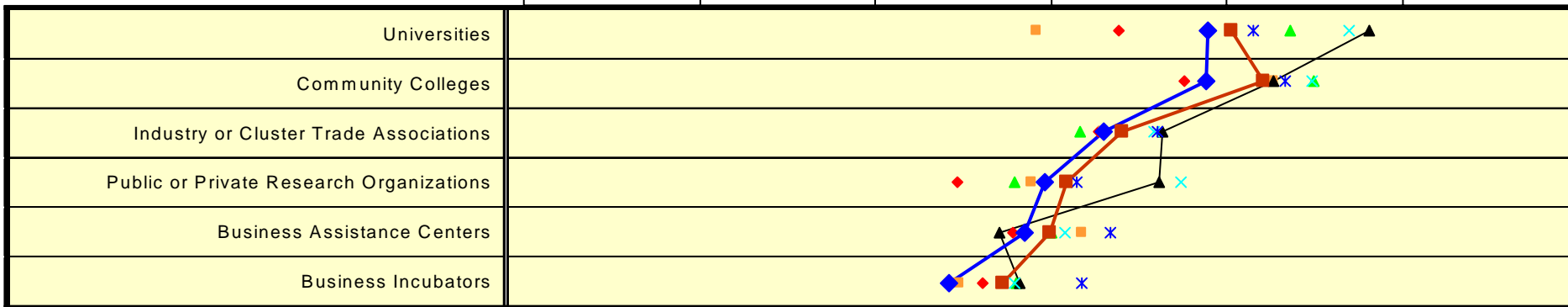
How satisfied are you with the impact of the following institutions, in your region, on your company?

Strongly Disagree

Mean Agreement

Strongly Agree

1 2 3 4 5 6 7



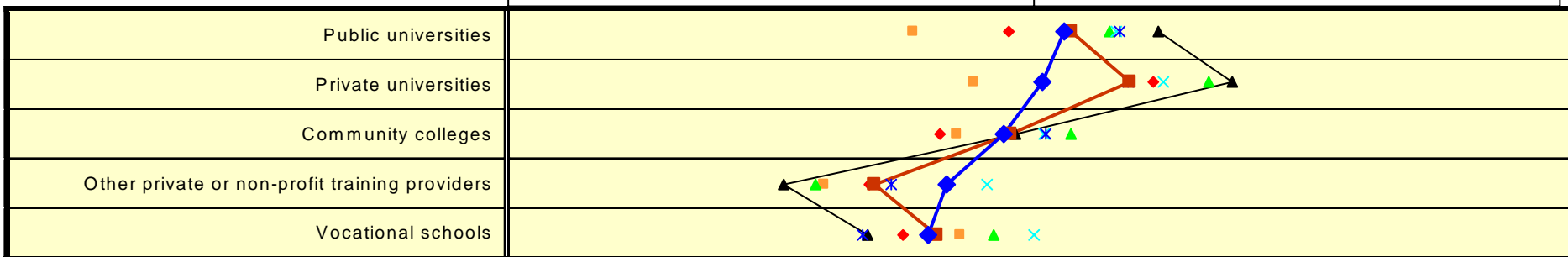
How would you best describe the quality of new workers from these sources?

Inadequate

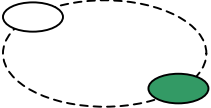
Mean Rating

Superior

3 2 1



- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts



Regional Comparisons

Institutions & Education (Cont.)

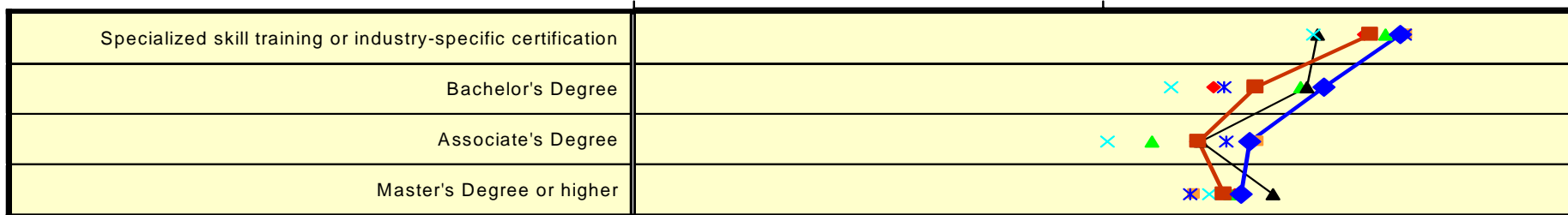
Over the next five years, I expect the needs of my organization, with respect to the following levels of education and/or training, to:

Decrease
3

Mean Expectation

2

Increase
1



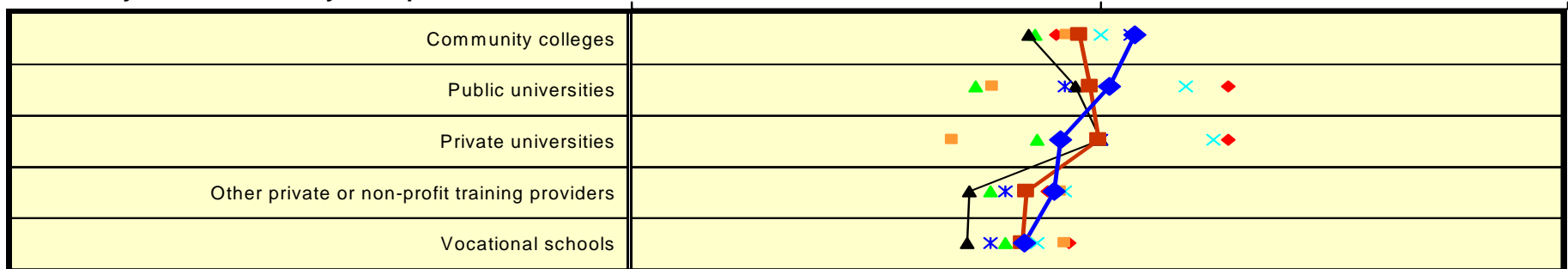
If your organization met or worked with any of these entities on workforce issues, to what extent did your contact meet your expectations?

Did not Meet my Expectations
3

Mean Rating

2

Exceeded my Expectations
1

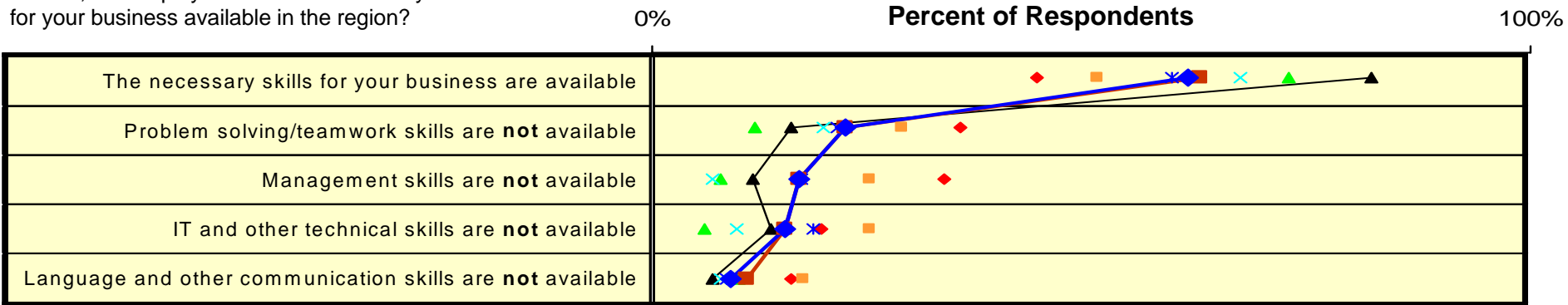


- ♦ Berkshire
- Cape and Islands
- ▲ Central
- Greater Boston
- × Northeast
- × Pioneer Valley
- ◆ Southeast
- Massachusetts

Regional Comparisons

Employee Skills

Overall, are employees with the necessary skills for your business available in the region?



- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

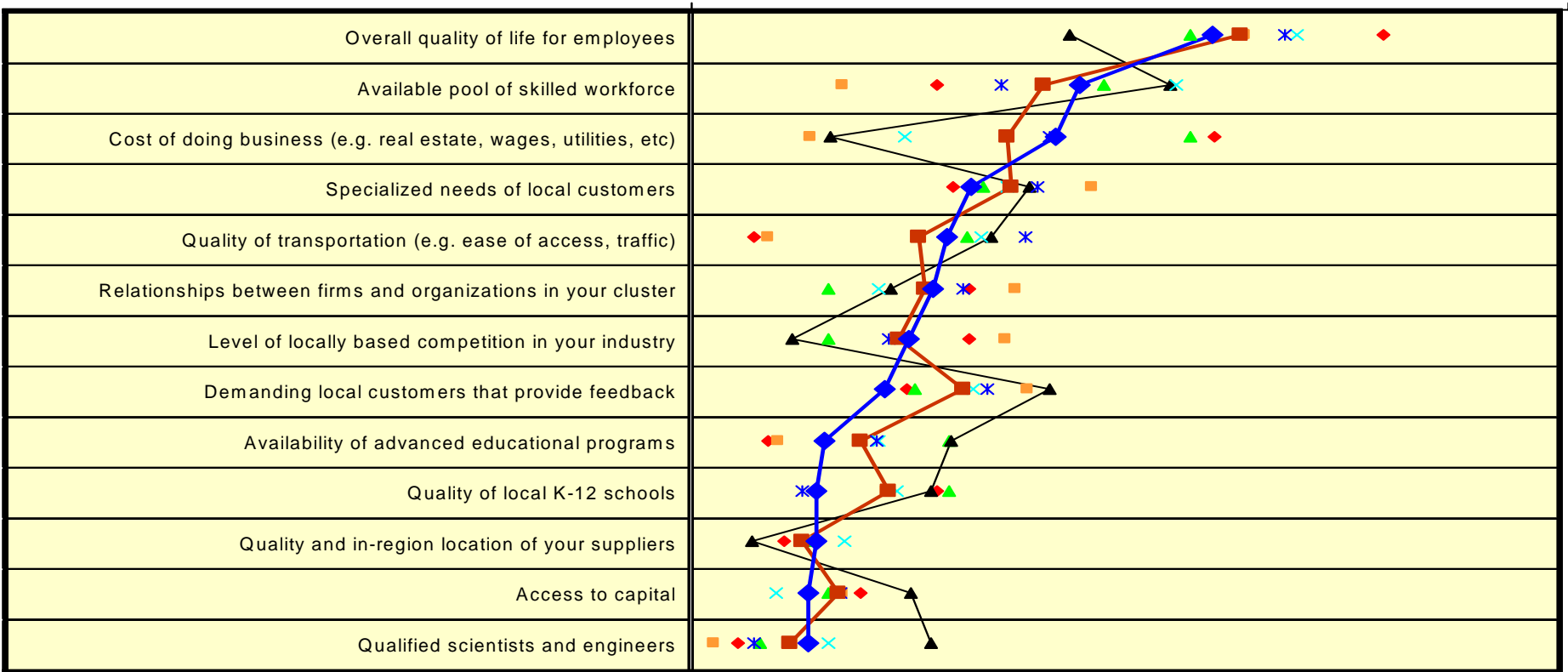
Regional Comparisons

Positive Impact on the Local Business Environment

Percent of Respondents which Ranked
Characteristic Among the Top Five Most Positive

0%

100%



- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- × Northeast
- × Pioneer Valley
- ◆ Southeast
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

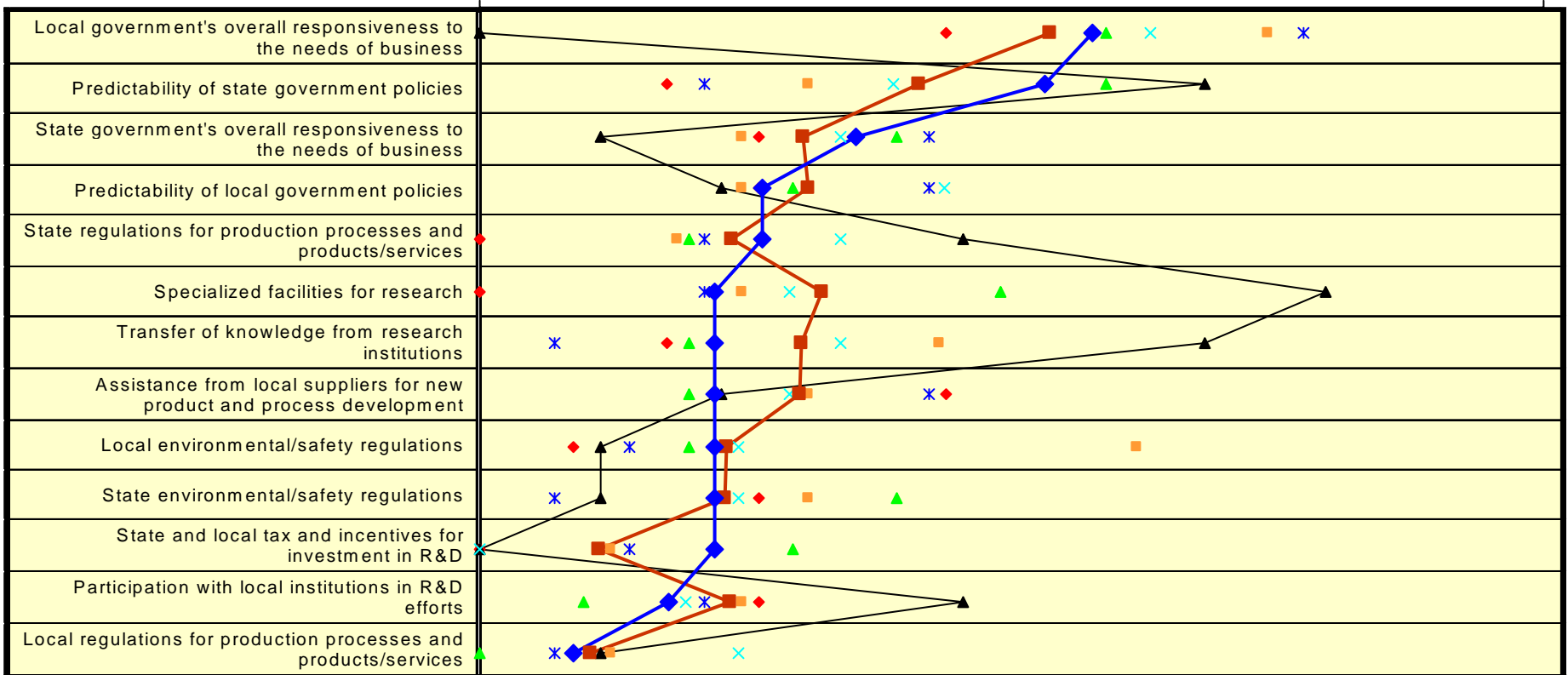
Regional Comparisons

Positive Impact on the Local Business Environment (Cont.)

Percent of Respondents which Ranked Characteristic Among the Top Five Most Positive

0%

20%



- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

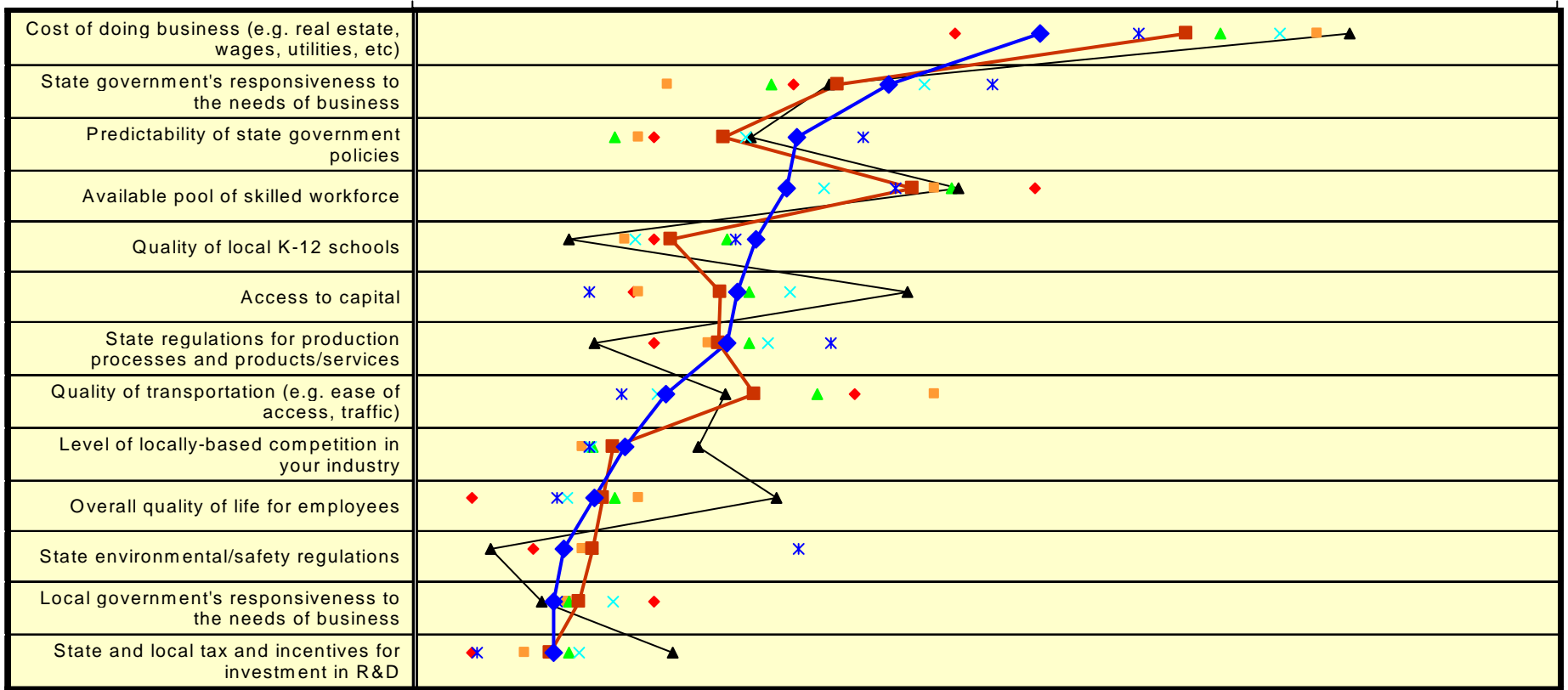
Regional Comparisons

Future Threats in the Local Business Environment

Percent of Respondents which Ranked Characteristic Among the Top Five Greatest Threats

0%

100%



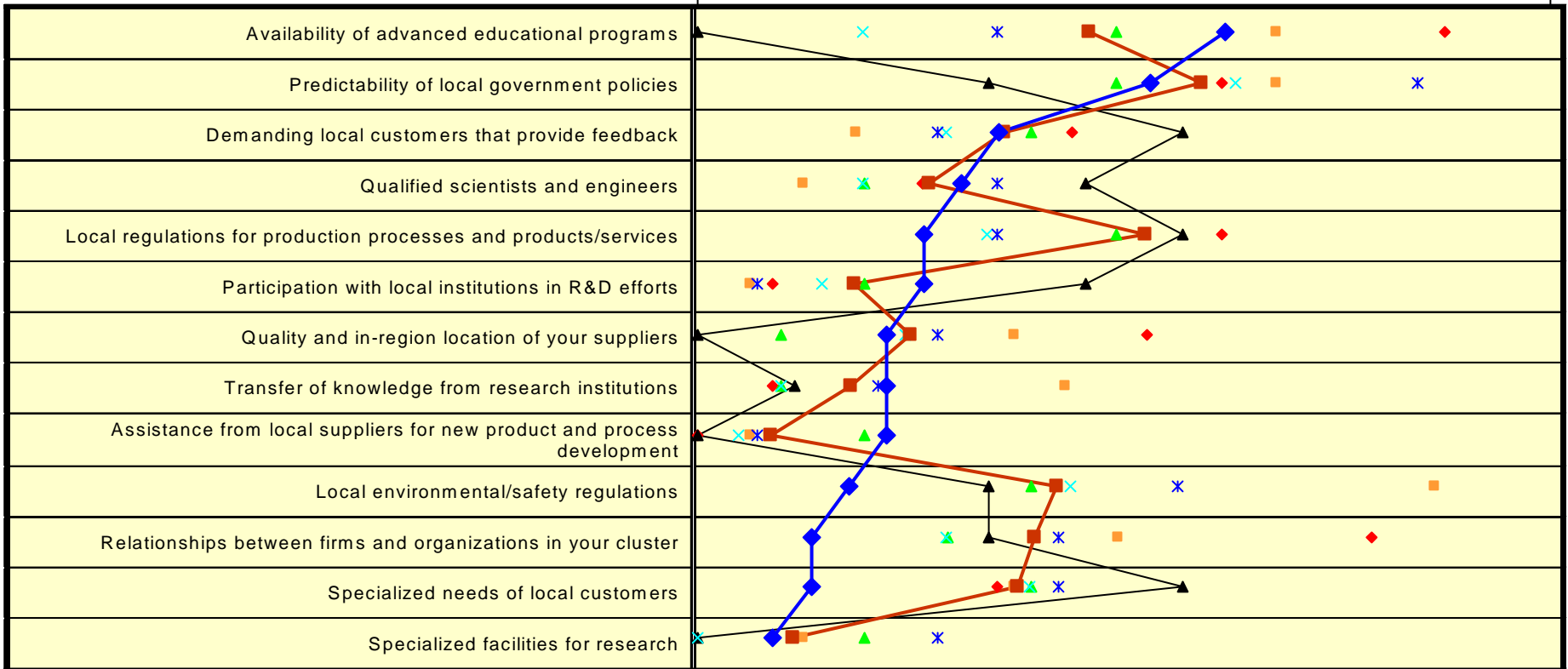
- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Regional Comparisons

Future Threats in the Local Business Environment (Cont.)

Percent of Respondents which Ranked
Characteristic Among the Top Five Greatest Threats

0% 20%



- ◆ Berkshire
- Cape and Islands
- ▲ Central
- ▲ Greater Boston
- × Northeast
- × Pioneer Valley
- ◆ Southeast
- Massachusetts

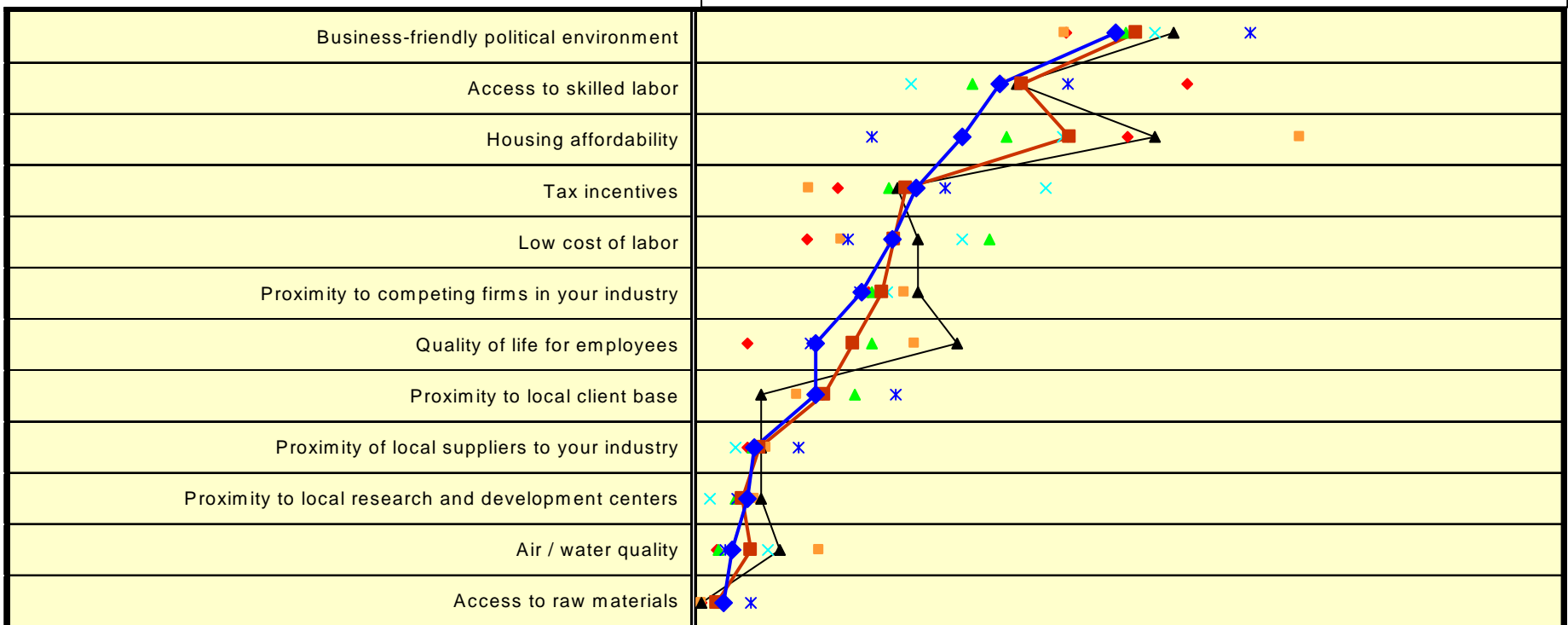
Regional Comparisons

Barriers to Expansion in the Next Five Years

Percent of Respondents which Ranked Characteristic Among the Top Three Greatest Barriers to Expansion

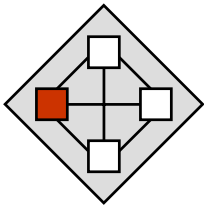
0%

100%



- ◆ Berkshire
- ▲ Central
- × Northeast
- ◆ Southeast
- Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Cape & Islands Region



Regional Comparisons

Availability of Inputs

Strongly
Disagree
1

2

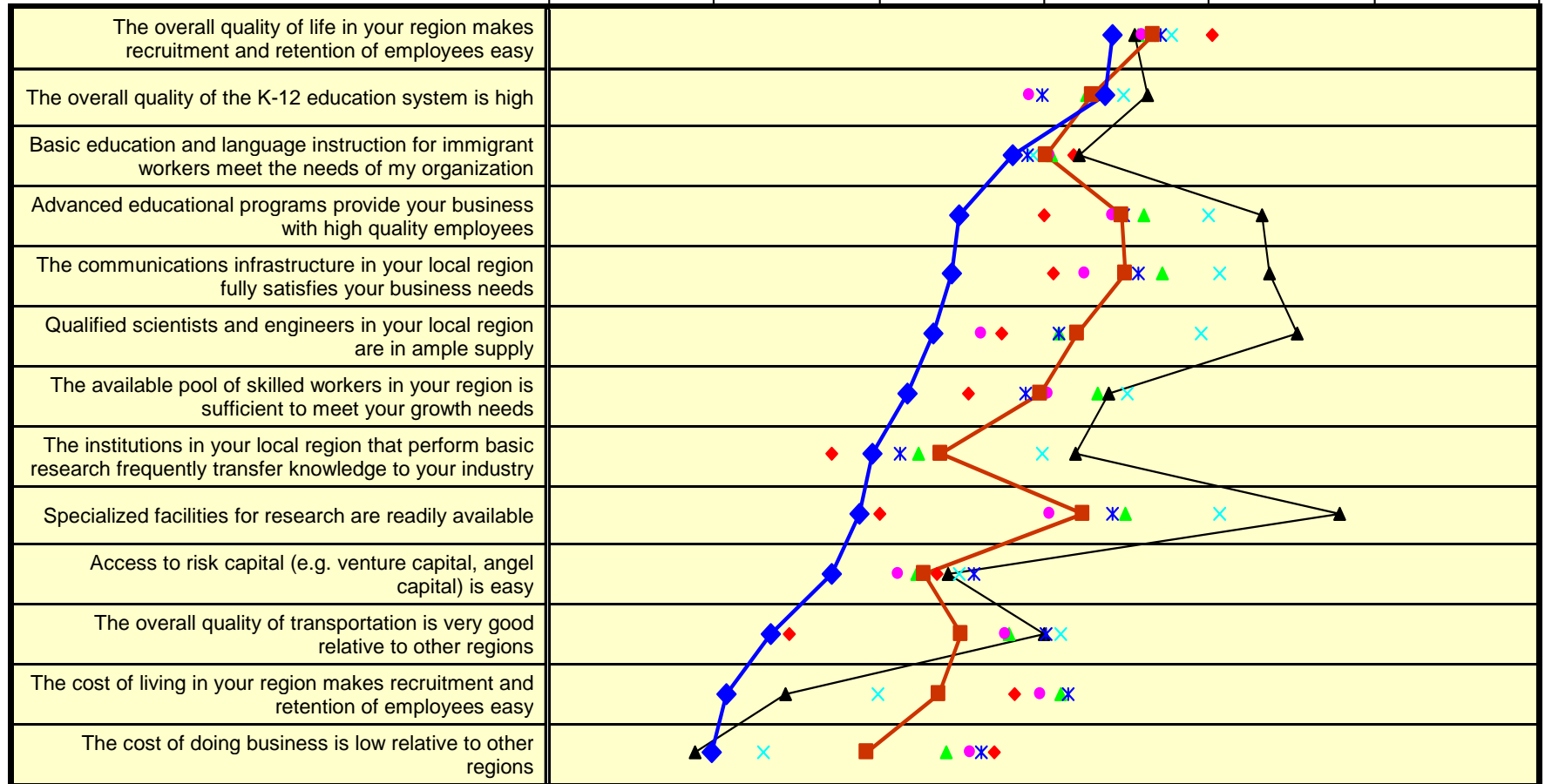
3

4

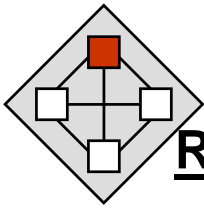
5

6

Strongly
Agree
7

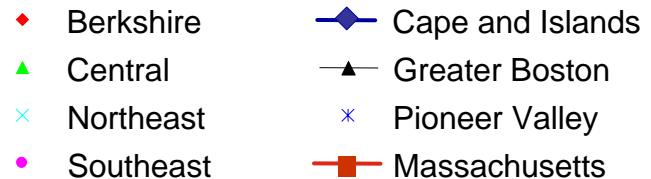
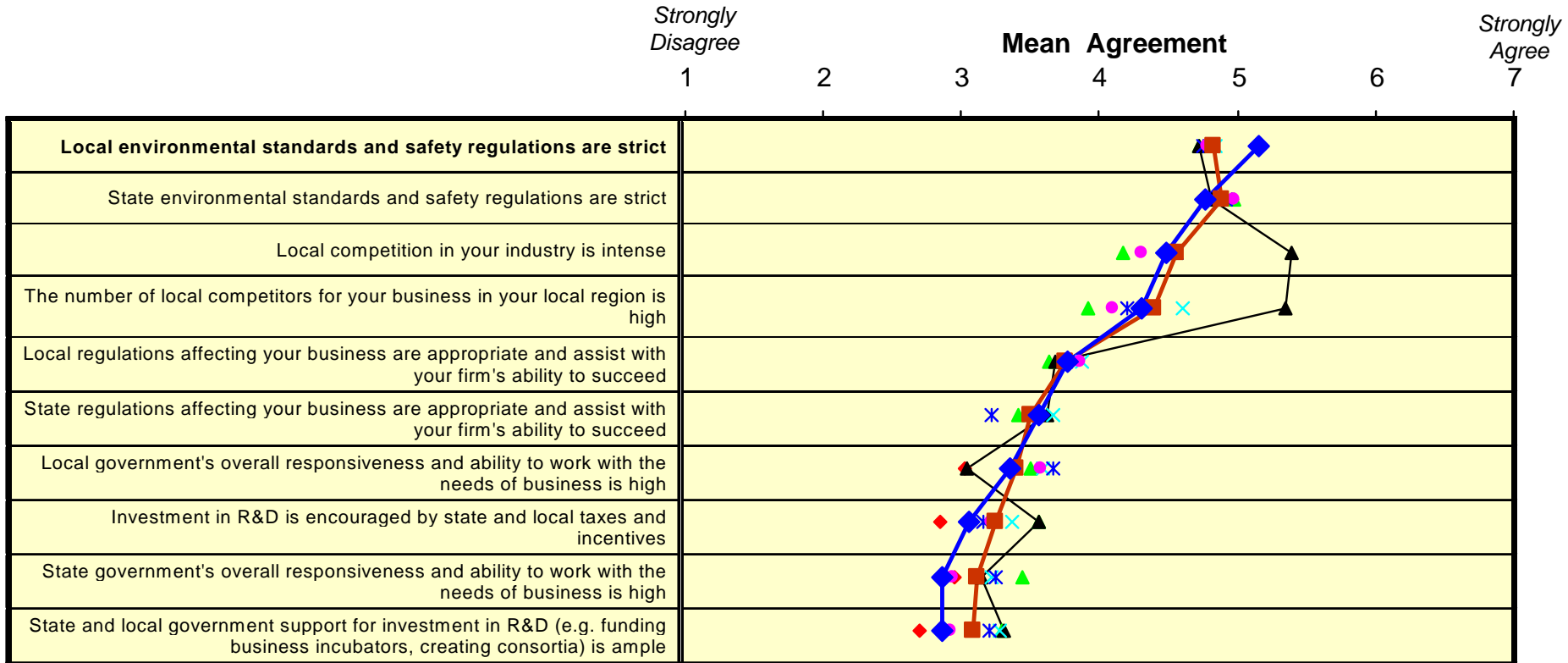


- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts



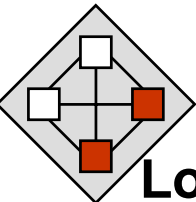
Regional Comparisons

Rules and Incentives Governing Investment and Competition



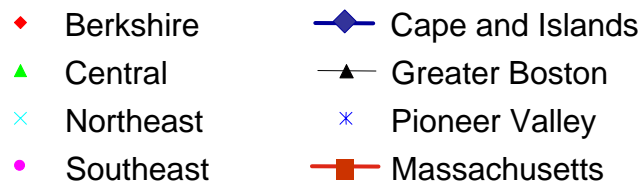
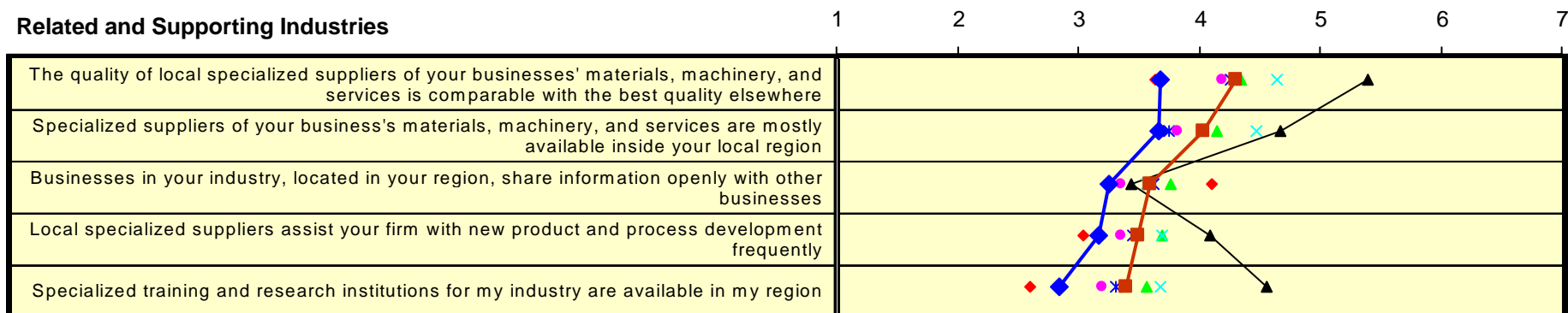
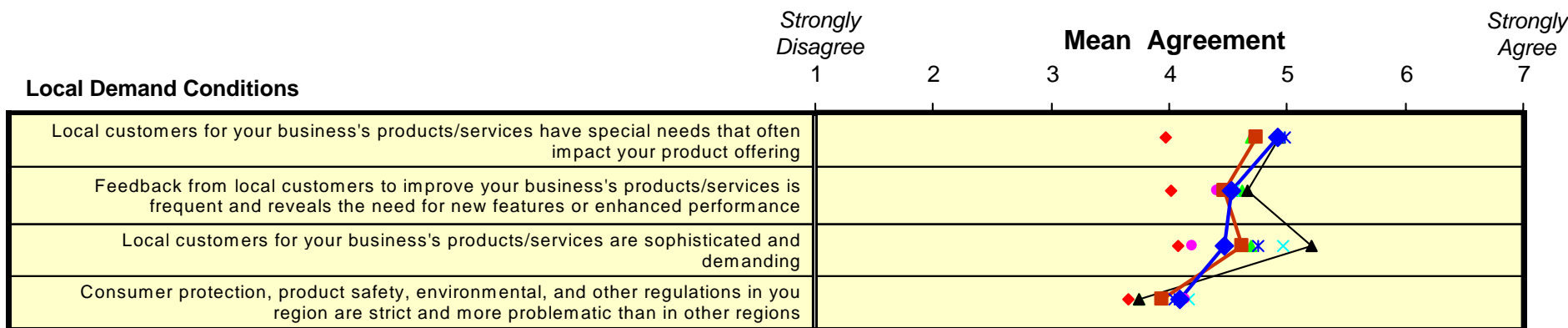
Source: Professor Michael E. Porter and Monitor Company Group

RCC Profiles – RB6



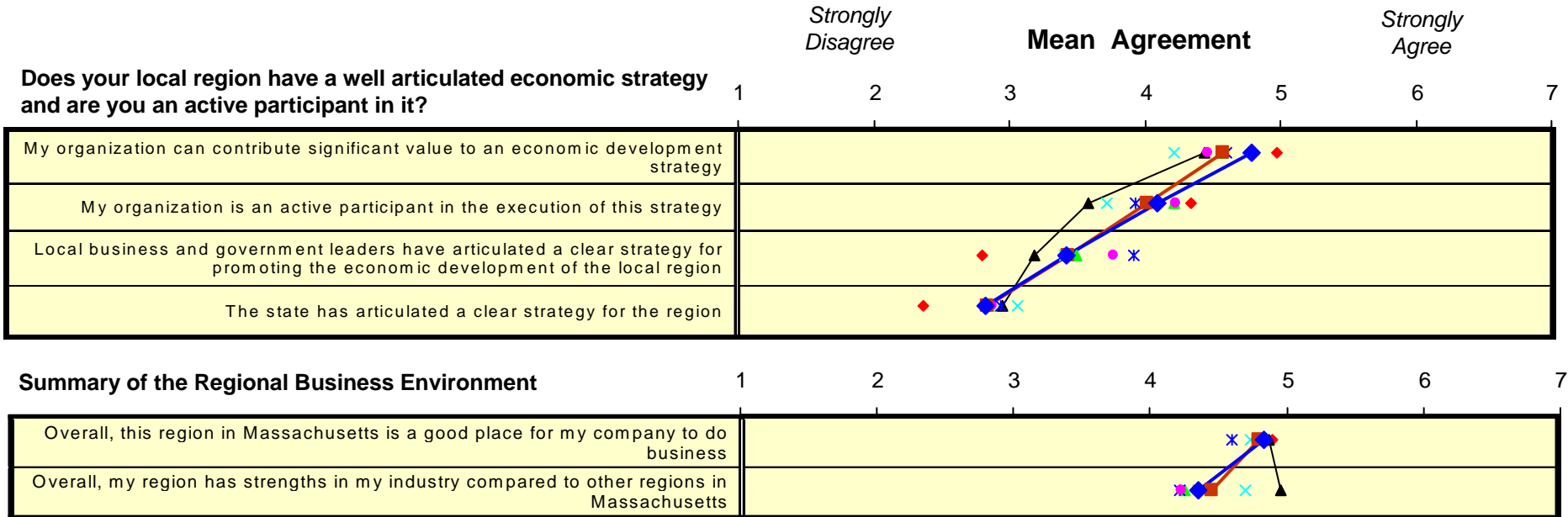
Regional Comparisons

Local Demand Conditions & Related and Supporting Industries



Regional Comparisons

Regional Strategy & Summary of the Regional Business Environment



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts



Regional Comparisons

Priorities for Government

Not at All
Important
1

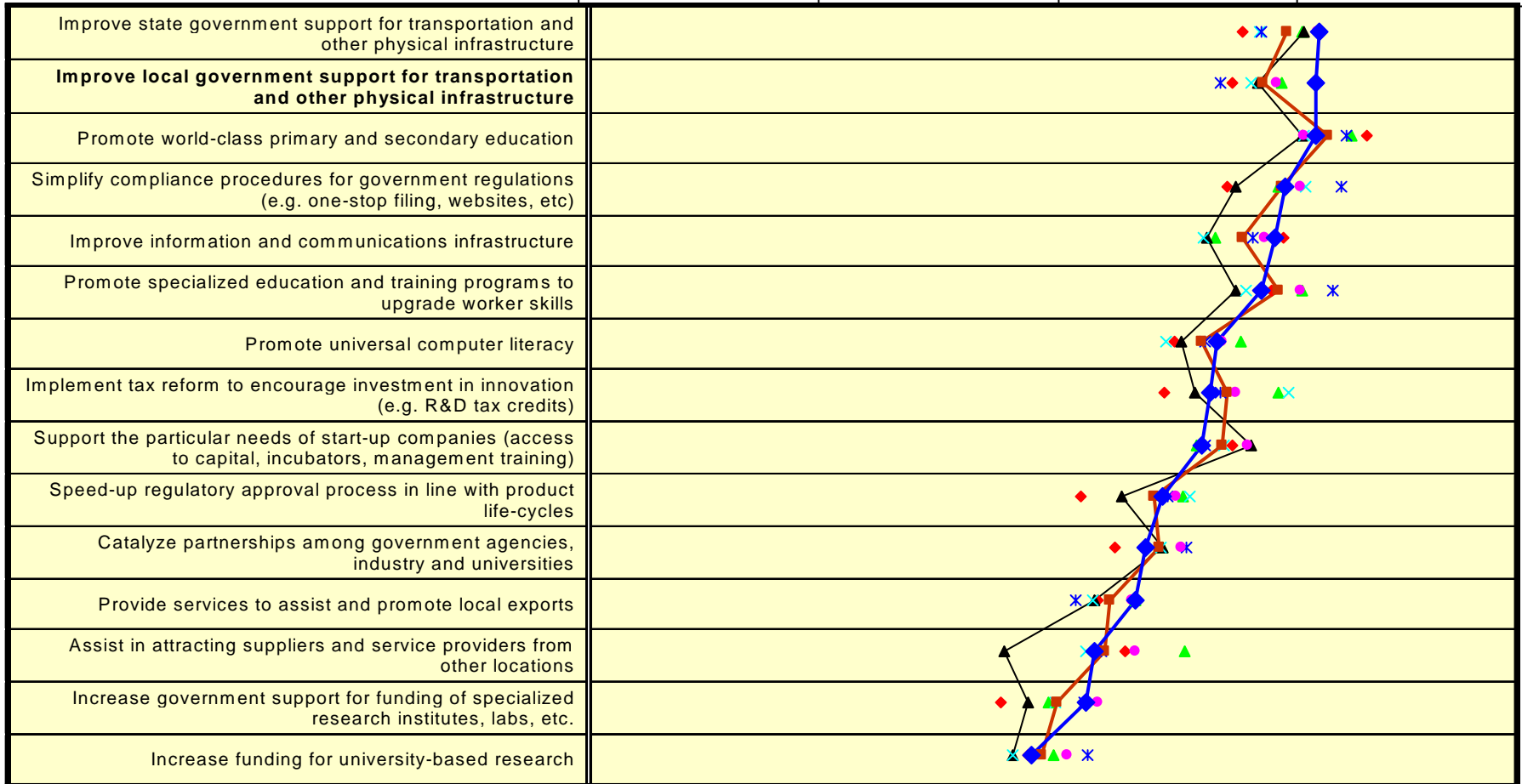
2

Mean Importance

3

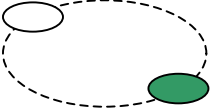
4

Critically
Important
5



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

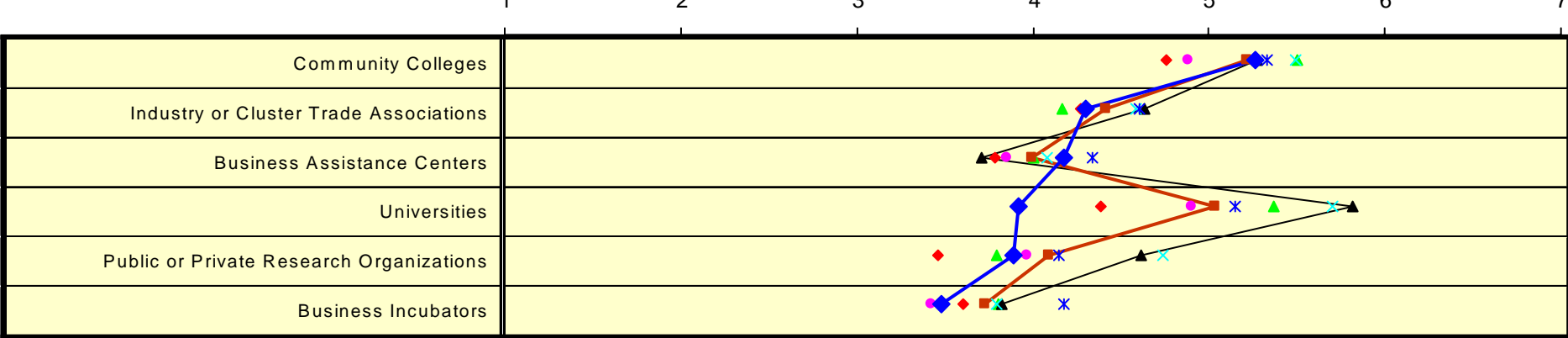
Source: Professor Michael E. Porter and Monitor Company Group



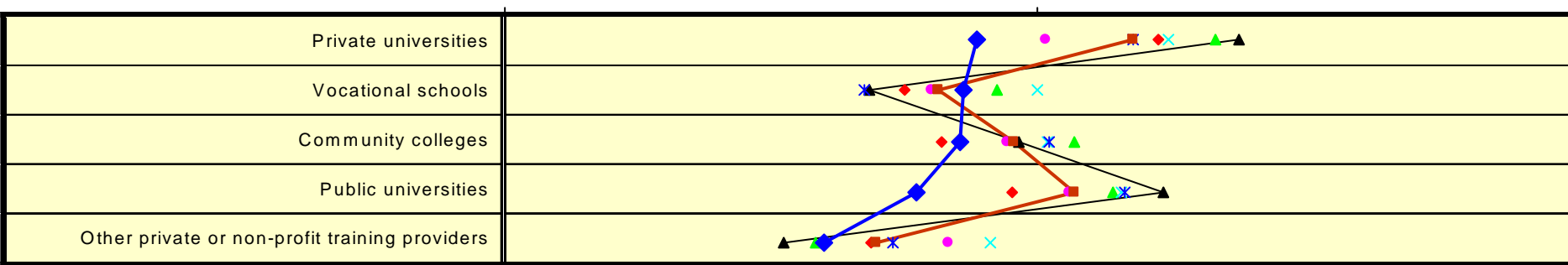
Regional Comparisons

Institutions & Education

How satisfied are you with the impact of the following institutions, in your region, on your company?

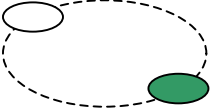


How would you best describe the quality of new workers from these sources?



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group



Regional Comparisons

Institutions & Education (Cont.)

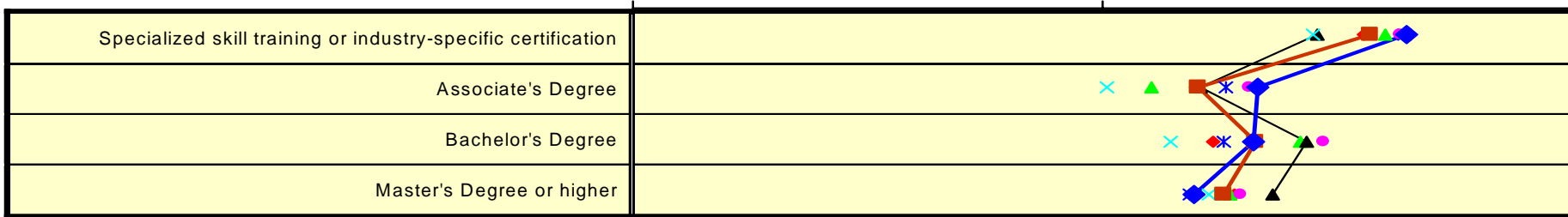
Over the next five years, I expect the needs of my organization, with respect to the following levels of education and/or training, to:

Decrease
3

Mean Expectation

2

Increase
1



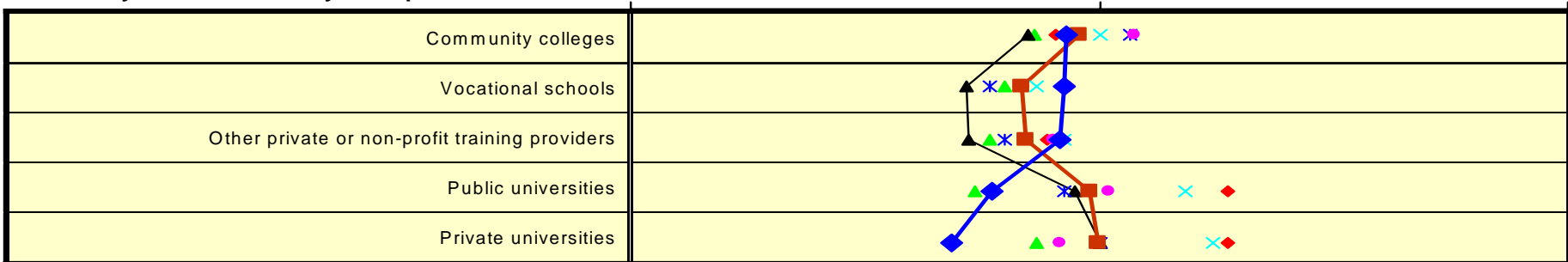
If your organization met or worked with any of these entities on workforce issues, to what extent did your contact meet your expectations?

Did not Meet my Expectations
3

Mean Rating

2

Exceeded my Expectations
1



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Regional Comparisons

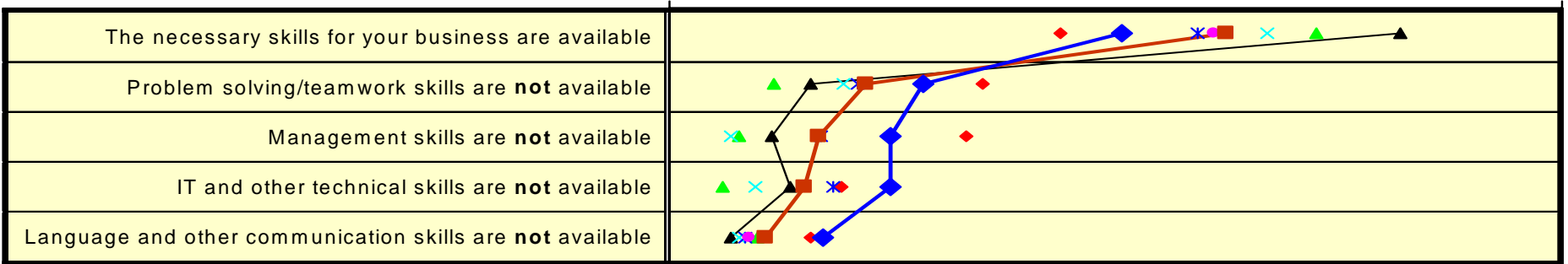
Employee Skills

Overall, are employees with the necessary skills for your business available in the region?

0%

Percent of Respondents

100%



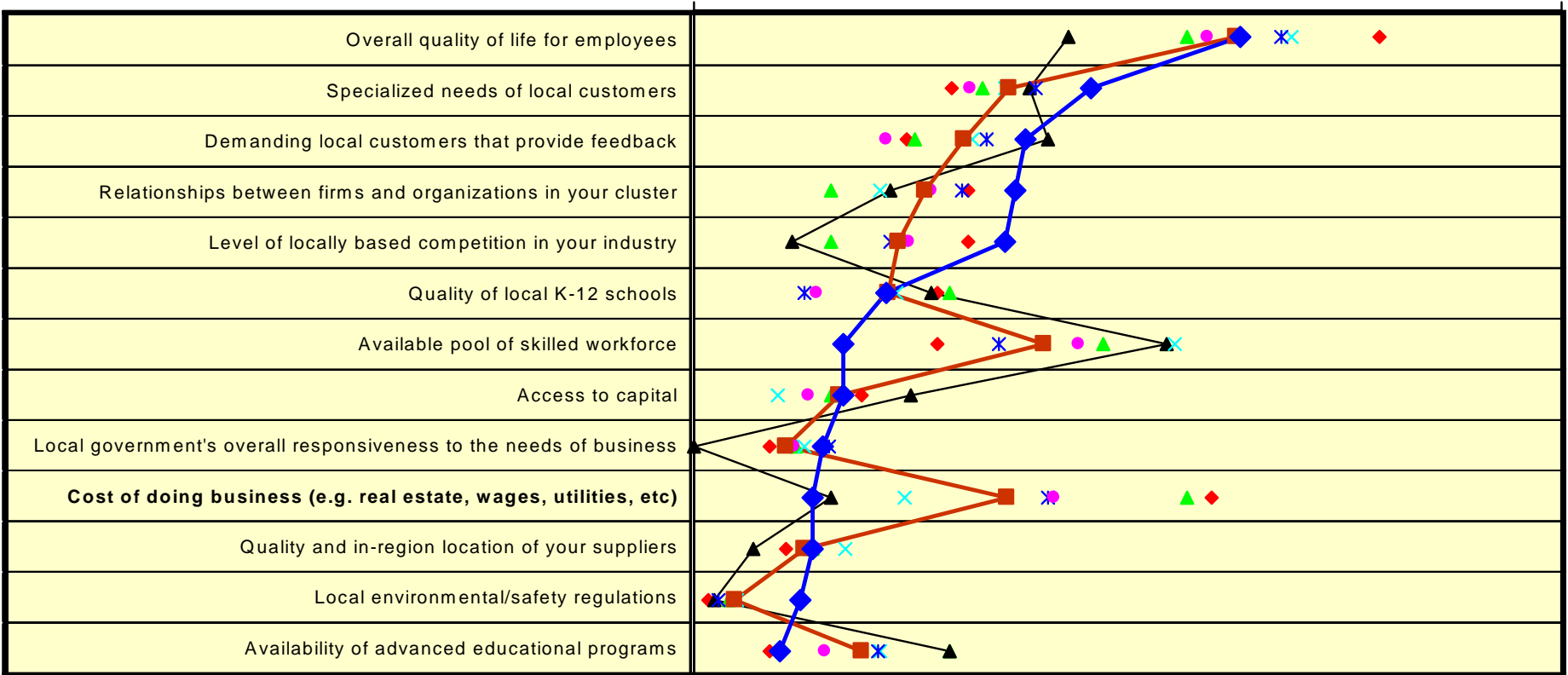
- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

Regional Comparisons

Positive Impact on the Local Business Environment

Percent of Respondents which Ranked Characteristic Among the Top Five Most Positive

0% 100%



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

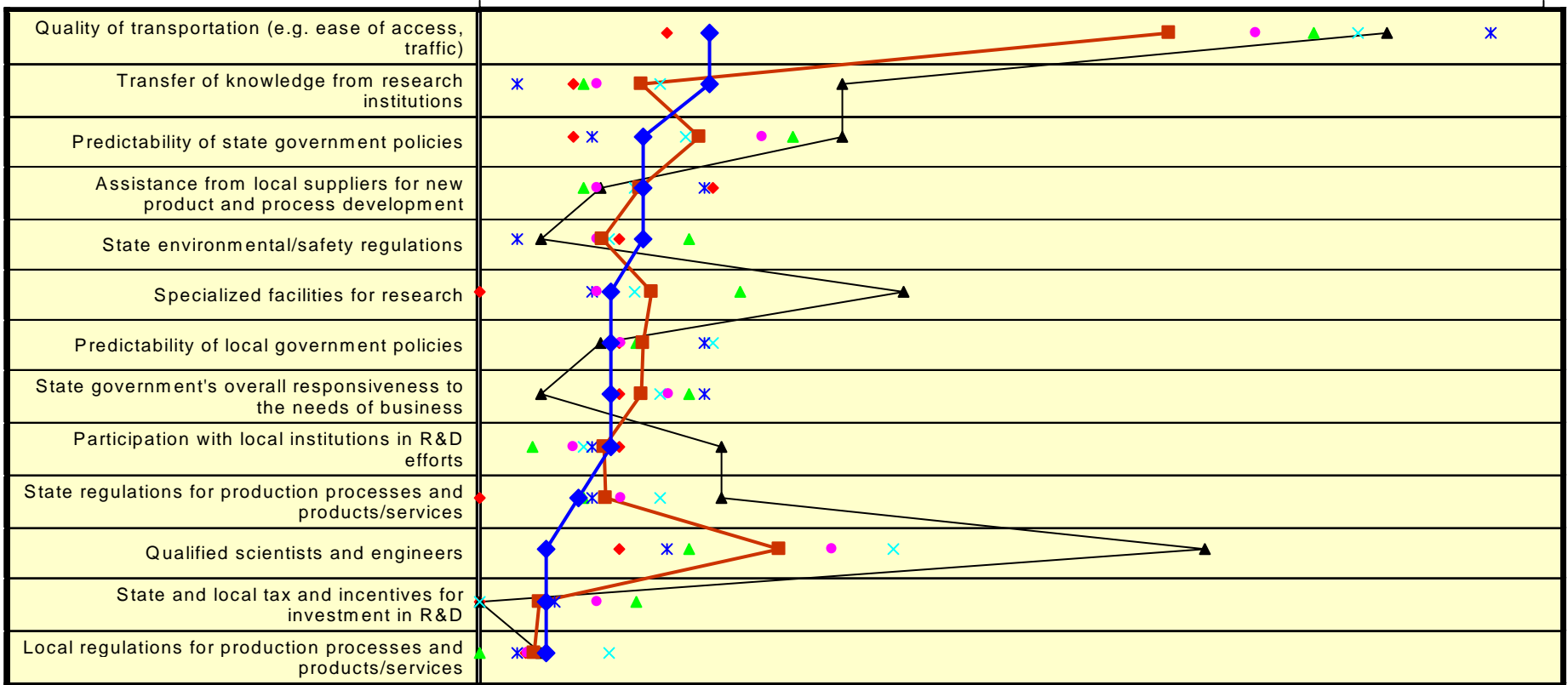
Regional Comparisons

Positive Impact on the Local Business Environment (Cont.)

Percent of Respondents which Ranked Characteristic Among the Top Five Most Positive

0%

40%



- ♦ Berkshire
- ◆ Cape and Islands
- ▲ Central
- ▲ Greater Boston
- × Northeast
- × Pioneer Valley
- Southeast
- Massachusetts

Source: Professor Michael E. Porter and Monitor Company Group

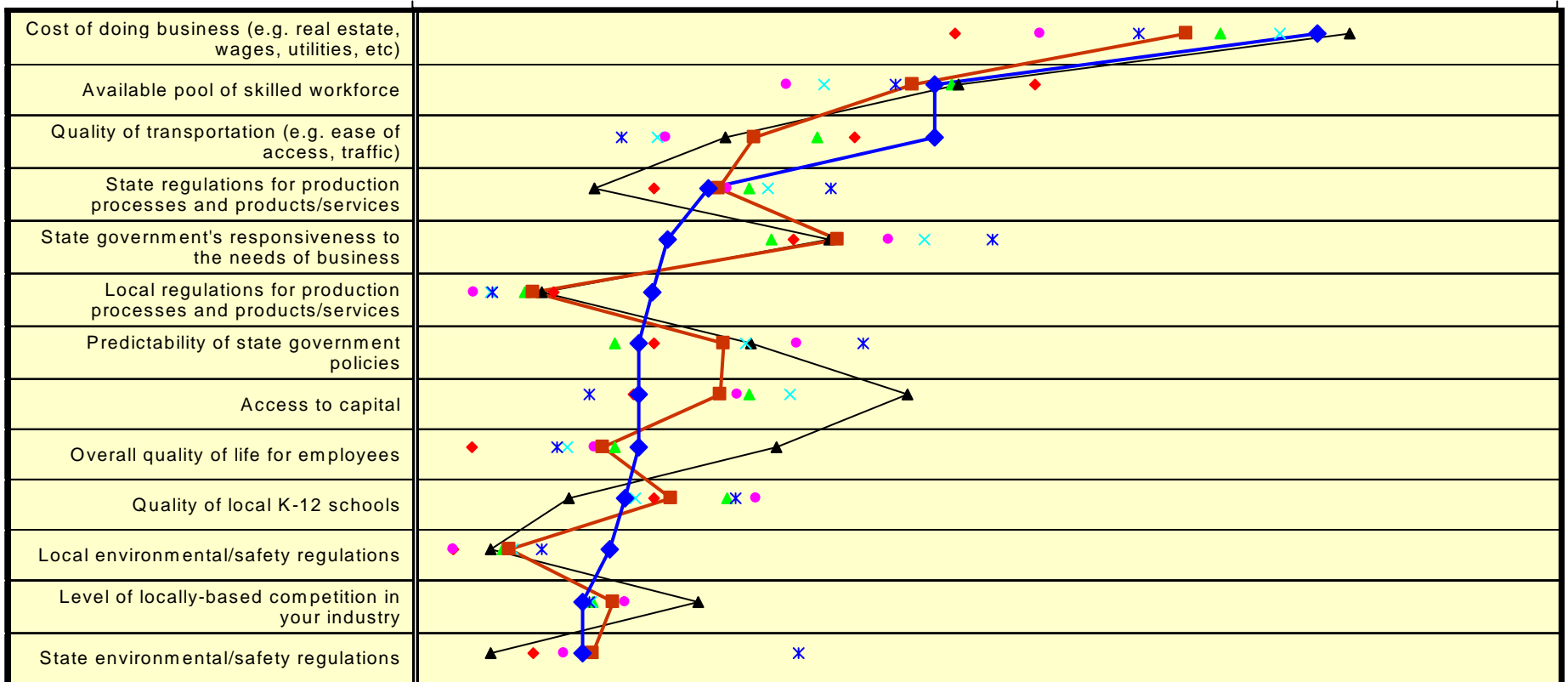
Regional Comparisons

Future Threats in the Local Business Environment

Percent of Respondents which Ranked Characteristic Among the Top Five Greatest Threats

0%

100%



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

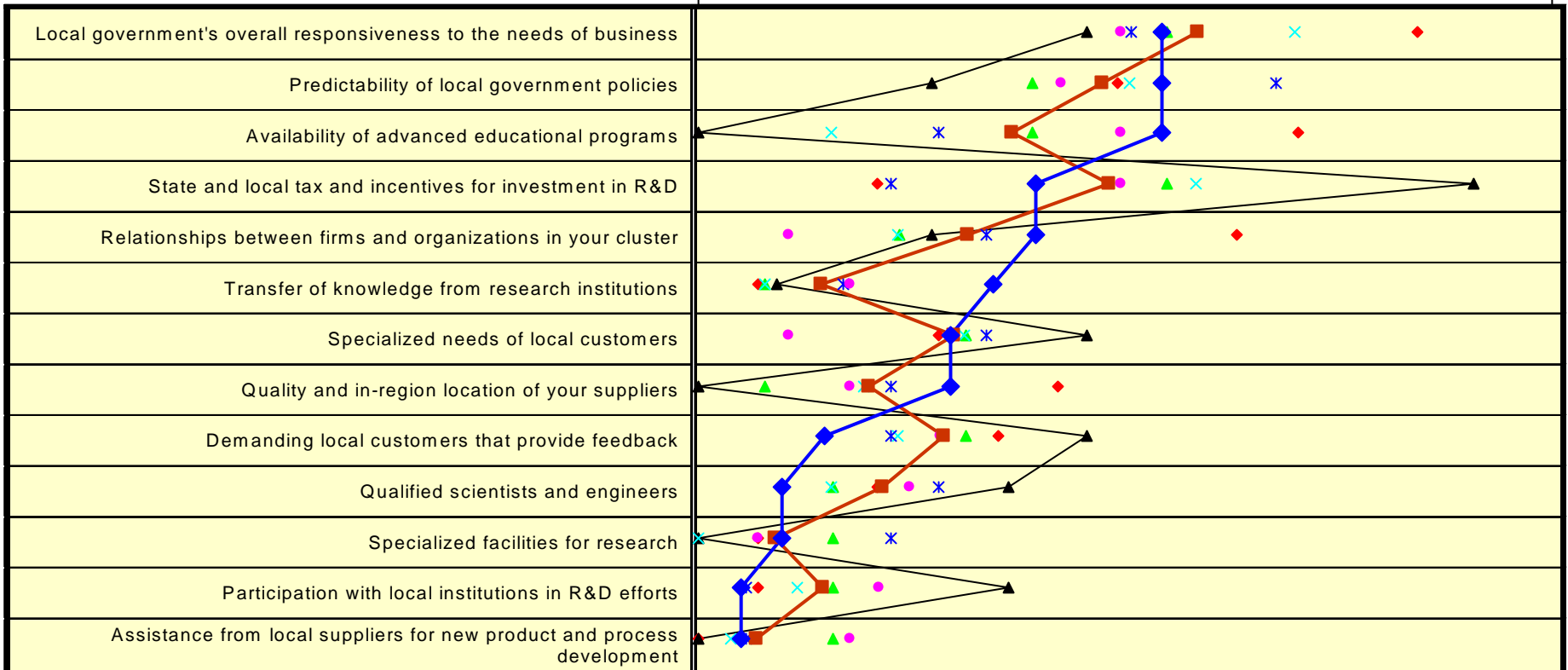
Regional Comparisons

Future Threats in the Local Business Environment (Cont.)

Percent of Respondents which Ranked Characteristic Among the Top Five Greatest Threats

0%

25%



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts

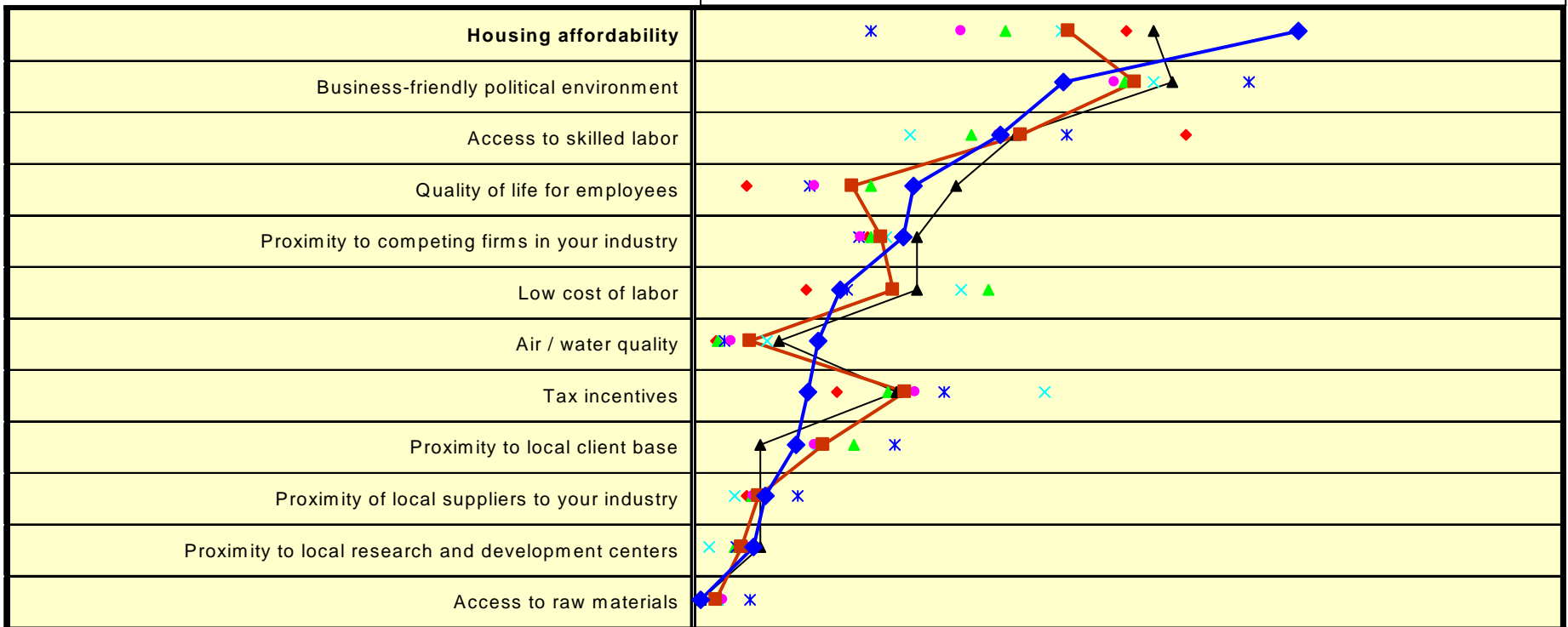
Regional Comparisons

Barriers to Expansion in the Next Five Years

Percent of Respondents which Ranked Characteristic Among the Top Three Greatest Barriers to Expansion

0%

100%



- ◆ Berkshire
- ▲ Central
- × Northeast
- Southeast
- ◆ Cape and Islands
- ▲ Greater Boston
- × Pioneer Valley
- Massachusetts