



Ohio



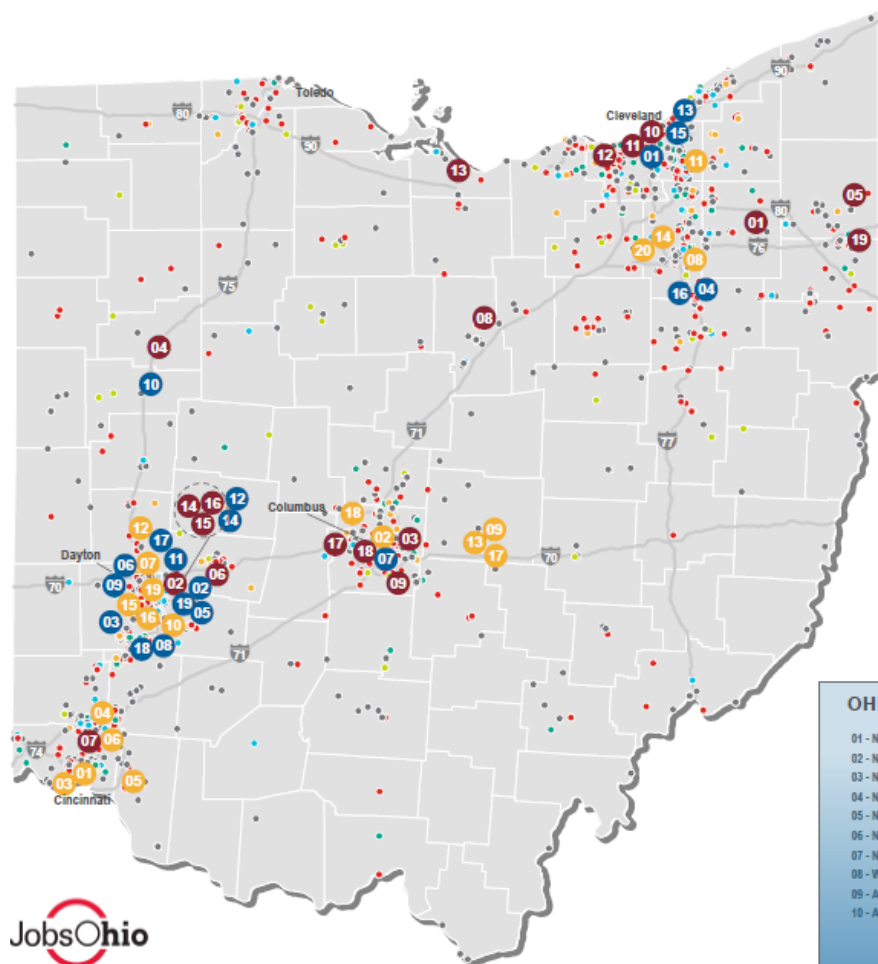
Defense & Aerospace 2030

*The Governor's Comprehensive Strategy
For
Growth in Aviation, Aerospace & Defense*

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Ohio's World-Leading Aerospace Industry

OHIO DEFENSE MANUFACTURING CONTRACTORS AND ASSETS



INDUSTRY SECTOR

- Advanced Manufacturing
- Aerospace & Aviation
- Automotive
- Healthcare
- I.T. & Services
- Other

MAJOR MILITARY FACILITIES

- 01 - Camp James A. Garfield (JMTG)
- 02 - Wright-Patterson AFB
- 03 - Defense Supply Center Columbus
- 04 - Joint Systems Manufacturing Center
- 05 - Youngstown Air Reserve Station
- 06 - Springfield Air National Guard Base
- 07 - Blue Ash Air National Guard Station
- 08 - Mansfield Air National Guard Base
- 09 - Rickenbacker Air National Guard Base
- 10 - U.S. Coast Guard 9th District HQ
- 11 - DFAS Cleveland

FEDERAL AEROSPACE RESEARCH FACILITIES

- 12 - NASA Glenn Research Center
- 13 - NASA Plum Brook
- 14 - Air Force Research Laboratory
- 15 - Naval Aerospace Medical Research Lab
- 16 - U.S. Air Force School of Aerospace Medicine
- 17 - Battelle (Columbus)
- 18 - Battelle (West Jefferson)
- 19 - America Makes

TOP DEFENSE CONTRACTOR LOCATIONS

- 01 - General Electric Company
- 02 - GE Rolls-Royce Fighter Engine
- 03 - CFM International, Inc.
- 04 - Battelle Memorial Institute
- 05 - Northrop Grumman Corporation
- 06 - L3Harris Technologies
- 07 - The Wornick Company
- 08 - The Boeing Company
- 09 - GE Aviation Systems
- 10 - Veyance Technologies
- 11 - Lockheed Martin Corporation
- 12 - Goodrich Corporation
- 13 - HDT Expeditionary Systems
- 14 - Integrated Procurement Technologies
- 15 - Raytheon Company
- 16 - General Dynamics Land Systems
- 17 - DRS Advanced ISR
- 18 - Safran Electrical & Power
- 19 - Parker Hannifin
- 20 - Eaton Corp.
- 21 - Howmet Aerospace
- 22 - Collins Aerospace

CONTRACT TOTALS*

- 291,830 CONTRACTS
- 185,250 SMB CONTRACTS
- 3,280 TOTAL COMPANIES

*FISCAL YEAR 2018 - H1 2020

OHIO/NATIONAL AVIATION HERITAGE ASSETS

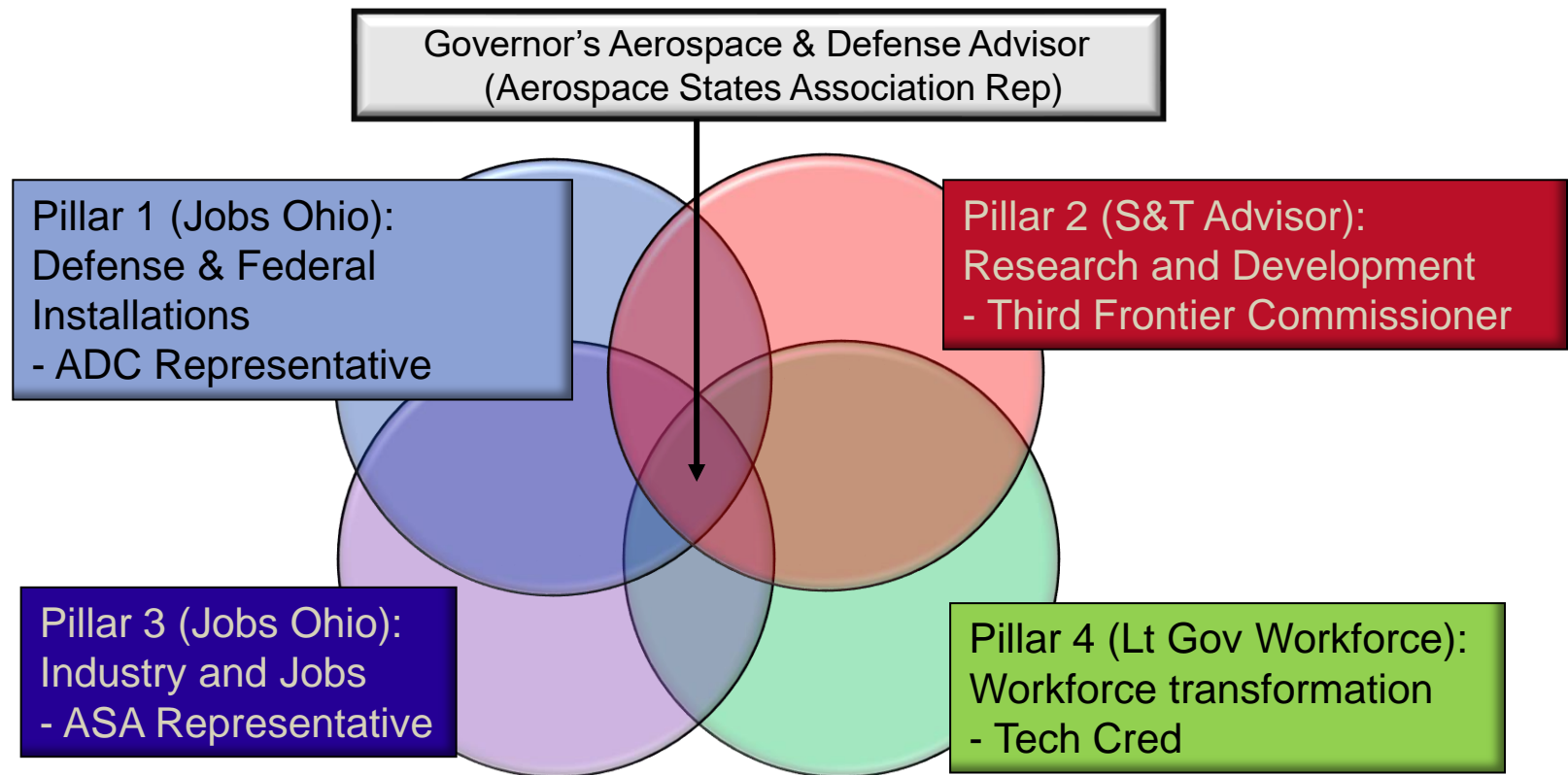
- 01 - NASA Glenn Visitor Center (Great Lakes Science Center)
- 02 - National Aviation Hall of Fame
- 03 - National Aviation Heritage Area
- 04 - National Inventors Hall of Fame (HQ)
- 05 - National Museum of the U.S. Air Force
- 06 - National Park Service - Dayton Aviation Heritage NHP
- 07 - National Veterans Memorial and Museum
- 08 - Wright Brothers National Museum (Carillon Historical Park)
- 09 - Air Camp
- 10 - Armstrong Air and Space Museum
- 11 - Boonshoft Museum of Discovery
- 12 - Champaign Aviation Museum
- 13 - Crawford Auto-Aviation Museum (Western Reserve Historical Society)
- 14 - Grimes Flying Lab - Historic Grimes Field
- 15 - International Women's Air and Space Museum
- 16 - Maps Air Museum
- 17 - WACO Air Museum
- 18 - Wright B Flyer
- 19 - Wright State Special Collections and Archives

Source: USASPENDING.gov

The Ohio *Aerospace and Defense Pillars*

- Preserve, Protect, Defend and Expand the **Federal Aerospace and Defense Installations**
- Increase the Research Portfolio and State-wide Synergies of **Ohio's National-Level Laboratories:**
- Work with **JobsOhio** to:
 - Preserve & Expand **Ohio's Aerospace and Defense Industry**
 - Aggressively Attract Jobs, Mission, and Companies to Ohio
- Maintain and Grow the **Workforce** (Govt. and Comm.)
 - University-Educated
 - Craftsman-trained
 - STEM/STEAM Preparation

Governor's Aerospace and Defense Pillars



Ohio Space Commercialization Strategy

Ohio International Aerospace Strategy (JO - OAI)

The Strategy – *ONE VOICE*

1) **Rapidly Expand Knowledge of Ohio's Attributes**

- a) Educate Internal (to Ohio) on Aerospace and Defense
 - Fight the *"I didn't know you did that here!"* paradigm
 - Increase Advocacy Pool – everyone is an advocate
- b) Raise the External Profile of Ohio
 - Inject Ohio into the Boardrooms of the World

2) **Aggressively Seek New Mission and Industry**

- Preservation and Growth of AFMC and NASA Locations
- New Mission = Community, Resources and Workforce
- New Industry = Ecosystem Attraction
 - Identify Industry problems and Ohio's solution...
..... before the board knows there is a problem
 - Engagement responsive to an RFI is too late
- Invest and develop Key Technological Thrusts

3) **Develop Advantageous Alliances**

- Identify Mission Partners and Federal Agencies
- Inextricably Link Mission, Agency and Location

The Value Proposition = Economic Impact

The Governor's Vision: Ohio led this nation into the Air and Space Age in 20th Century...A new generation of Ohioans will lead this nation into the Aerospace Age of the 21st Century!

Ohio is a *World-Recognized Leader* in the Aerospace and Defense Industry:

- **Home to Irreplaceable Aerospace and Defense Installations**

 - Wright-Patterson AFB** 33,000+ and \$16 Billion impact

 - Home to USAF Research and Development & Air and Space Intelligence Ctr

 - HQ Largest aircraft holding company in the world

 - NASA Glenn** World-unique Test and Research Facilities – Space Vacuum

 - Defense Supply Center Columbus**

 - >40% of the entire Defense budget goes through Columbus

 - 5th Largest National Guard in the Nation – 2nd Largest Air Guard**

- **The Aerospace R&D capital of the Nation** – Four “National-level” Laboratories

 - Air Force Research Lab / NASA Glenn / Battelle / EPA Lab

 - Underpinned by the Ohio Federal Research Network

 - The National Leader in Agricultural R&D through OSU

- **Preeminent in manufacturing and supply chain**

 - #1 Supplier to Boeing and to Airbus of 50 States

 - Primes – GE (largest aircraft engine manufacturer in world; General Dynamics –

 - Last Heavy armor plant in US, Boeing – Singular Guidance and Control MRO

Aerospace and Defense encompasses **110,900 Ohio jobs, 5.9% of Ohio economy and over \$39.9B in Economic Impact.**

Bottom Line: Ohio is self-attractive to industry

Pillar 4 Support to Military Families

On 21 December 2022, the Secretary of the Air Force approved Youngstown Air Reserve Station as the newest location for C-130J aircraft, replacing the current eight C-130Hs with eight C-130Js.

1. The 8 C-130J's represent a significant increase in capability over the much older aircraft, and indicate Youngstown Air Reserve Station support and strength in a cash-strapped Air Force budget.
2. Of particular note in the decision was the table below, scoring the competitive bases (and States). Note that Ohio maximized the scoring for Licensure Portability, under Support of Military Families. Ohio also scored highest in Education among the competitors. This is a major Air Force endorsement of Ohio's goal to be the most military friendly state, and to take concrete action to support military families.

Assessment		Dobbins, GA (94 AW)	Minn-St. Paul, MN (934 AW)	Peterson, CO (302 AW)	Youngstown, OH (910 AW)
Environmental	Encroachment				
	Air Quality				
Military Family Readiness	Healthcare	Available	Available	Available	Available
	Housing	Available	Available	Available	Available
Support of Military Families	Public Education	6 of 8	6 of 8	6 of 8	7 of 8
	Licensure Portability	0 of 9	0 of 9	9 of 9	9 of 9
One Time Aircraft Special Mission Modification Cost		Not Applicable	Not Applicable	\$5-7k per aircraft	\$5-7k per aircraft
One Time Costs (FSRM/MILCON)		\$730K	\$45.5M	\$10.5M	\$2.2M
FYDP Personnel Savings		(\$6M)	(\$6M)	(\$8M)	(\$8.5M)
FYDP Flying Hour/TDY Savings		\$0	\$0	\$0	(\$5M)
Total FYDP Cost		(\$5.27M)	\$39.5M	\$2.5M	(\$11.3M)

Recent Wins

The Governor's Vision: Ohio led this nation into the Air and Space Age in 20th Century...A new generation of Ohioans will lead this nation into the Aerospace Age of the 21st Century!

Ohio is a *World-Recognized Leader* in the Aerospace and Defense Industry:

- National Space Intelligence Agency – Wright-Patterson AFB (1)
- CyberSpace Warfare Wing – Mansfield Air National Guard Base (1,4)
- Airbus Voyager Nanoracks Commercial Space Station R&D (2, 3, 4)
- National Center for Advanced Air Mobility (1,2,3)
- Intell Corporation Production (3)
- Sierra Nevada Corporation MRO (1, 2, 3)
- C-130J recap at Youngstown ARB (1)
- KC-135 Fleet RTIC Mod Line at Rickenbacker ANGB (1, 3)

Bottom Line: Ohio is self-attractive to government and industrial Aerospace and Defense

The Governor's Call to Action

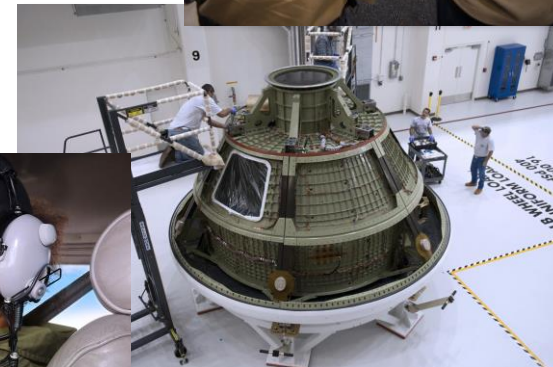
As Ohio, *and Ohioans*, led this nation into the Air Age of the early 20th Century and the Space Age of the later 20th Century...



And....



...So will Ohio, and a new generation of Ohioans, lead this nation into the Aerospace Age of the 21st Century!



Ohio

Thank you