

AEROSPACE & DEFENSE INDUSTRY OVERVIEW



Assets and Resources in Washington DC,
Northern Virginia, and Suburban Maryland

GREATER WASHINGTON
INITIATIVE

Economic Development



GREATER WASHINGTON, DC: A LEADING AEROSPACE CENTER

The Greater Washington region, including Washington, DC, Northern Virginia, and Suburban Maryland, has one of the top aerospace clusters in the world. A distinctive combination of companies, government agencies, military installations, academic institutions, and associations call the region home.

Location is key: Over 800 aerospace companies in Greater Washington benefit from close proximity to the Pentagon, 11 military installations, and 10 federal agencies engaged in aerospace and defense work.

Defense presence: Forty-three of Defense News' top 100 international defense companies have operations in Greater Washington, including Lockheed Martin, Orbital Sciences and ARINC.

TOP 5 AEROSPACE EMPLOYERS

Company	Local Employment
Lockheed Martin	22,600
Northrop Grumman	20,340
SAIC	15,870
General Dynamics	7,400
BAE Systems	6,400

Source: *Washington Post* 200, 2007; *Washington Business Journal Book of Lists*, 2007; zapdata.com, 2007.

Talent & Human Capital

Aerospace and tech talent: Greater Washington has nearly 138,000 workers in aerospace-related occupations and ranks 1st per capita among major U.S. metros (2,994 workers per 100,000 residents).

Private sector expertise: Greater Washington has 56 aerospace-related companies which have 100 employees or more. Collectively, these companies employ approximately 45,600 people at over 100 locations in the region.

Home to aerospace engineers: Approximately 3,700 aerospace engineers work in Greater Washington, a human capital total that is second only to the Los Angeles metro area.

Most educated: Nearly 46% of Greater Washington's residents (25 or older) have at least a Bachelor's degree, up from 42.5% in 2000. The percentage of residents with a graduate degree has also increased from 19% in 2000 to 21.4%.

Brain Gain: Greater Washington ranks first among major metropolitan areas for attracting and retaining recent university graduates — performing 60% better than the national average.

GREATER WASHINGTON AEROSPACE

COMPANIES

- 1 Aerojet (C1)
- 2 AgustaWestland USA (C2)
- 3 Airpax SCS (A2)
- 4 Argon ST Inc. (C2)
- 5 ARINC (B3, D3)
- 6 Aurora Flight Sciences Corp. (C1)
- 7 BAE Systems Inc. (B2, B3, C1, C2, D3)
- 8 Battlespace Inc. (B2)
- 9 The Boeing Co. (B2, B3, C2, D4)
- 10 Booz Allen Hamilton (B3, C2, D1)
- 11 BSI Management Systems (C2)
- 12 Dimensions International Inc. (C2)
- 13 DRS Technologies (B2)
- 14 DynCorp International (D4)
- 15 EADS North America (A2)
- 16 Eagan McAllister Assoc. Inc. (D3)
- 17 Eagle Systems Inc. (D3)
- 18 Earth Satellite Corp. (B2)
- 19 Eaton Corp. (B2)
- 20 EDS Corp. (C2)
- 21 Exostar LLC (C2)
- 22 GE Aviation Systems (B2)
- 23 General Dynamics Corp. (B2, B3, D1, D3)
- 24 Gilat Network Systems (C2)
- 25 GMV Space Systems Inc. (B2)
- 26 Honeywell Technology Solutions (B3, D2)
- 27 Hughes Network Systems (B2)
- 28 Inphonic Inc. (B3)
- 29 Integral Systems Inc. (B3)
- 30 Intelsat (C2)
- 31 ITT Systems & Sciences (B2)
- 32 J.F. Taylor Inc. (D4)
- 33 Jackson and Tull (B3)
- 34 JDSU (B2)
- 35 L-3 Communications (B3, C2)
- 36 Landmark Aviation (B1)
- 37 Lockheed Martin Corp. (A2, B2, B3, C1, C2, D1)
- 38 ManTech International Corp. (C2, D3)
- 39 National Technologies Assoc. Inc. (D3)
- 40 Northrop Grumman Corp. (B2, B3, C2, D3)
- 41 Orbital Sciences Corp. (B1, B3)
- 42 Raytheon (B2, B3, C2)

- 43 Rolls-Royce North America (C2)
- 44 SAIC (B2, B3, C2, D3)
- 45 SGT Inc. (B3)
- 46 Si International (B2)
- 47 Signature Flight Support (B1, B3, C2)
- 48 Spirent Communications (B2)
- 49 Swales Aerospace (B3)
- 50 System Planning Corp. (B2)
- 51 TCOM (B2)
- 52 Telenor Satellite Services Inc. (B2)
- 53 Thales North America Inc. (B2, C2)
- 54 VSE Corp. (C2)
- 55 URS Corp., EG&G Division (B2)
- 56 Worldspace (B2)

MILITARY INSTALLATIONS

- 57 Andrews Air Force Base (C3)
- 58 Annapolis U.S. Naval Academy (B3)
- 59 Bolling Air Force Base (C2)
- 60 Fort Belvoir (C2)
- 61 Fort Detrick (A2)
- 62 Fort McNair (C2)
- 63 Fort Meade (B3)
- 64 Fort Myer (B2)
- 65 Naval Air Station Patuxent River (D3)
- 66 Quantico Marine Corps Base (C2)
- 67 Naval Station Washington (C2)

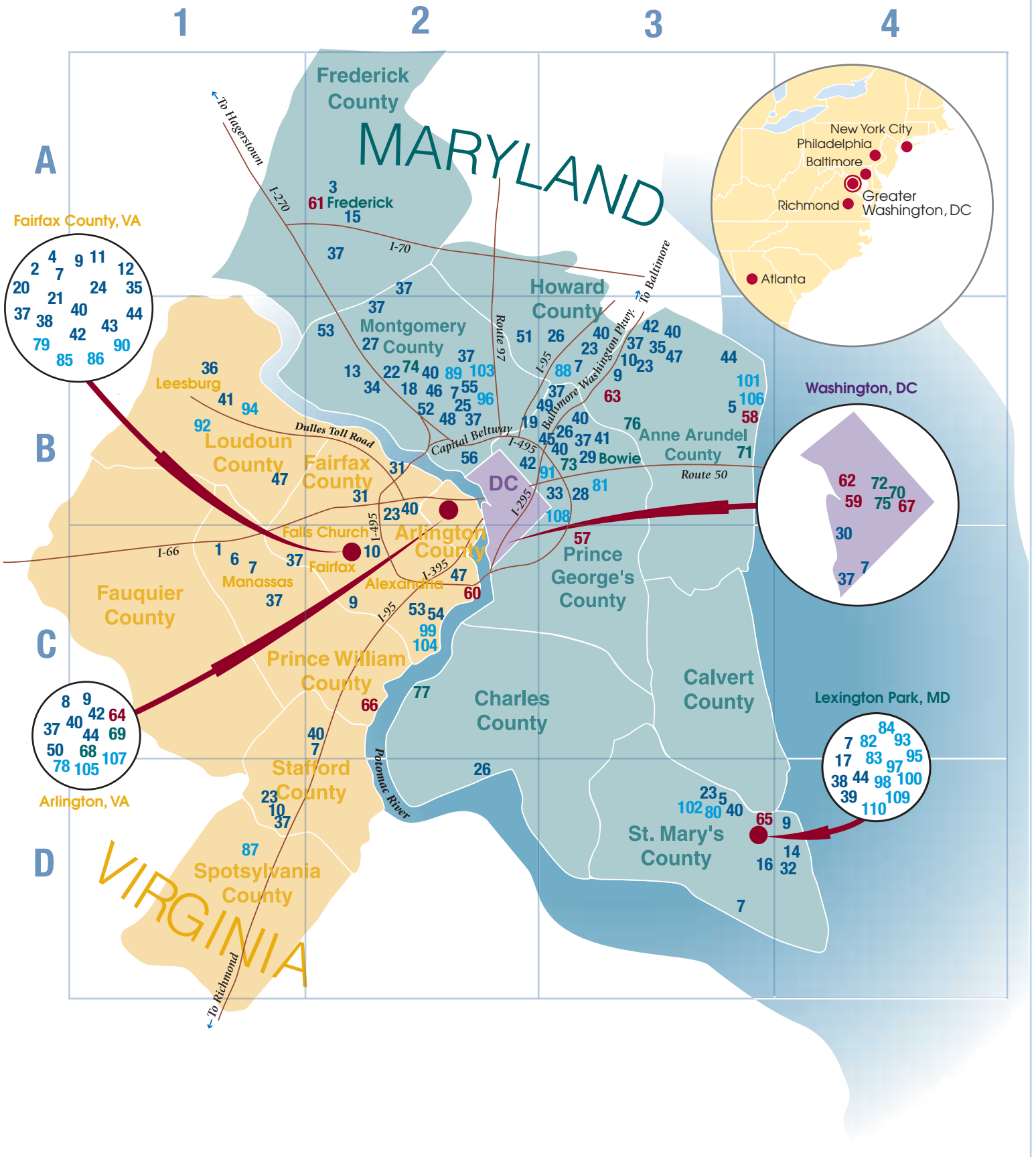
GOVERNMENT AGENCIES

- 68 Defense Advanced Research Projects Agency (DARPA) (B2)
- 69 Department of Defense (DoD)/ Pentagon (B2)
- 70 Federal Aviation Administration (FAA) (C2)
- 71 Joint Spectrum Center (B3)
- 72 National Aeronautics and Space Administration (NASA) (C2)
- 73 NASA Goddard Space Flight Center (B3)
- 74 National Institute of Standards and Technology (NIST) (B2)
- 75 National Oceanic and Atmospheric Administration (NOAA) (C2)
- 76 National Security Agency (NSA) (B3)
- 77 National Surface Warfare Center (C2)

R&D FACILITIES

- 78 The Aerospace Corp. (B2)
- 79 Center for Remote Sensing Inc. (C2)
- 80 Chesapeake Technology International Corp. (D3)
- 81 Conwall Division (B3)
- 82 Crashworthy Escape Systems Branch (D3)
- 83 DCS Corp. (D3)
- 84 Dynamics Research Corp. (D3)
- 85 George Mason University, Center for Air Transportation Systems Research (C2)
- 86 Innovative Solution International Inc. (C2)
- 87 JET Technologies Inc. (D1)
- 88 Johns Hopkins University Applied Physics Lab (JHU/APL) (B3)
- 89 Materials Science and Engineering Laboratory (B2)
- 90 MITRE Center for Advanced Aviation System Development (C2)
- 91 Motorola CGISS (B3)
- 92 National Transportation Safety Board Training Center (B1)
- 93 Naval Air Systems Command (NAVAIR) Patuxent River, MD (D3)
- 94 New Generation Motors Corp. (B1)
- 95 Northrop Grumman Corp. Decision Support & Technology IPT (D3)
- 96 Planetary Systems Corp. (B2)
- 97 Platform Systems Inc. (D3)
- 98 Sabre Systems Inc. (D3)
- 99 SASI (C2)
- 100 Sierra Management & Technologies Inc. (D3)
- 101 Sonex Research Inc. (B3)
- 102 Southern Maryland Higher Education Center (D3)
- 103 Southwest Research Institute, MD (B2)
- 104 Southwest Research Institute, VA (C2)
- 105 Systems Integration Technology & Evaluation (B2)
- 106 Technology Assessment & Transfer Inc. (B3)
- 107 Unisphere (B2)
- 108 University of Maryland College Park (B3)
- 109 Veridian Engineering (D3)
- 110 Wyle Laboratories (D3)

SPACE & DEFENSE RESOURCES



GREATER WASHINGTON'S "AEROSPACE-CRITICAL" HUMAN CAPITAL

Computer systems analysts	43,860
Computer software engineers, systems software	29,270
Computer software engineers, applications	29,200
Electronics engineers	6,680
Engineering managers	5,900
Electrical and electronic engineering technicians	4,710
Mechanical engineers	4,150
Electrical engineers	4,100
Aerospace engineers	3,650
Industrial engineers	2,390
Aircraft mechanics and service technicians	1,670
Electrical and electronic equipment assemblers	1,320
Mechanical drafters	630
Avionics technicians	270
Aerospace engineering technicians	130
Total	137,930

Source: Bureau of Labor Statistics, 2005.

Federal Spending

Federal impact: Overall federal spending in Greater Washington topped \$116.5 billion in 2006, increasing 47% since 2001. By 2012, federal spending in the region will reach \$130.4 billion — an increase of almost 12%.

Buying locally: Purchases of goods and services by the U.S. government in Greater Washington reached \$54.6 billion in 2006, more than doubling since 1999. By 2012, federal procurement in the region will increase by 12% to \$62.2 billion.

Leading in defense procurement: In 2006, Department of Defense procurement in the region surpassed \$31 billion, more than the total defense procurement in Texas (\$27 billion) and Florida (\$10.7 billion).

"Given the Greater Washington region's vibrant defense and aerospace industry, Thales North America headquarters enjoys the many benefits of being close to industry partners, government and customers."

Allan Cameron
CEO and Chairman, Thales North America

Aerospace Assets: R&D Facilities, Associations

Research support: Thirty-three area R&D facilities conduct aerospace-related research. Facilities range from the Johns Hopkins University Applied Physics Research lab in Howard County, MD to the National Transportation Safety Board Training Center in Loudoun County, VA.

Association connections: With more than 6,600 associations, Greater Washington is the association capital of the U.S. The top 5 aerospace associations based in the region have a combined corporate membership of approximately 14,200.

TOP 5 AEROSPACE ASSOCIATIONS

Association	Corporate Members
National Business Aviation Association	8,000
National Air Transportation Association	2,000
Armed Forces Communications and Electronics Association	1,560
Helicopter Association International	1,510
National Defense Industrial Association	1,100

"Lockheed Martin is proud to be headquartered in the Washington, DC area, offering us close proximity to our government customers and an exceptionally well-educated information technology, systems integration and engineering workforce."

Robert J. Stevens
Chairman, President and CEO, Lockheed Martin Corporation



“Aurora lives at the center of two worlds: aerospace and science. One thing they both have in common is Greater Washington.”

Dr. John Langford
President and CEO, Aurora Flight Sciences

GREATER WASHINGTON INITIATIVE: Helping Companies Make Informed Decisions

The Greater Washington Initiative (GWI) is a nonprofit economic development organization representing Washington, DC, Northern Virginia, and Suburban Maryland. GWI's complimentary, confidential services provide companies and site selection consultants with the information they need to make informed decisions about relocating or expanding into Greater Washington.

Contact our staff to receive customized information on:

- >> Setting up a business in Greater Washington;
- >> Industry clusters, office costs, labor rates, venture capital, regional taxes;
- >> Best practices on selling to the U.S. Government; and
- >> Connecting with key business and political leaders.

For statistics and information about the region,
visit www.greaterwashington.org.

GREATER WASHINGTON INITIATIVE

Economic Development

1725 I Street NW, Suite 200
Washington, DC 20006

T 202.857.5999
F 202.466.4980

www.greaterwashington.org

Toll free from within the
U.S. and Canada
800.555.6783

UK toll free 0500892691

an affiliate of

