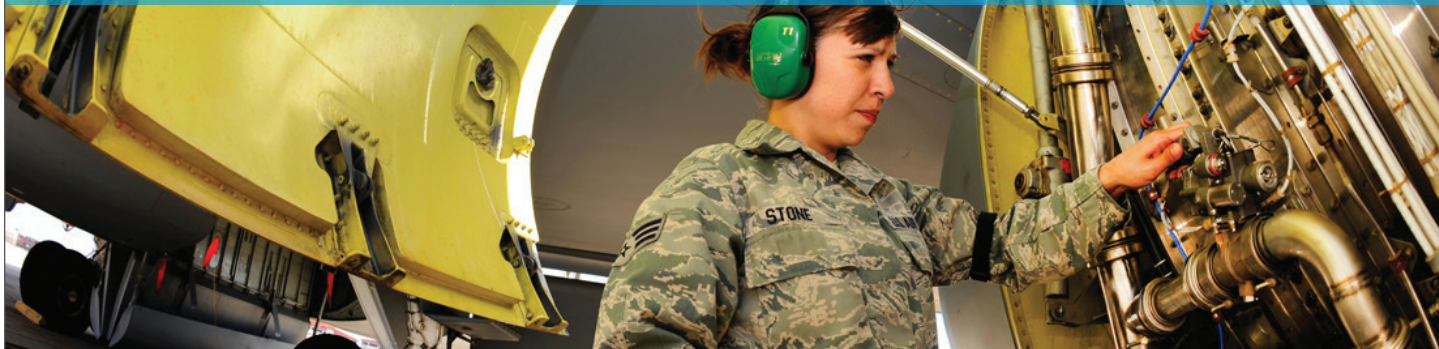


DEFENSE AND SECURITY

INDUSTRY OVERVIEW



Tampa Bay has one of the largest veteran workforces in the nation, and our business community takes pride in our military workforce of roughly 92,000.

Tampa Bay is home to MacDill Air Force Base and two, four-star Combatant Commands: U.S. Central Command (USCENTCOM) and U.S. Special Operations Command (USSOCOM). Thirty-eight additional mission partners operate from MacDill AFB, in addition to specialized security and intelligence firms.

Locally, a \$14 billion military industry has developed around areas such as cybersecurity and IT, intelligence and analysis, training and simulation, and advanced manufacturing. Defense-focused education programs ensure the students of today are trained for the jobs of tomorrow. Each May, we host the Special Operations Forces Industry Conference (SOFIC), a three-day event presented by the Special Operations Research, Development and Acquisition Center (SORDAC) and the National Defense Industrial Association (NDIA) that identifies the top priorities and business opportunities available through USSOCOM acquisition programs.

Between these multiple assets and our enviable quality of life, why would you want to be anywhere but Tampa and Hillsborough County?

“The Tampa Bay region has an amazing labor pool. From experienced veterans that recently retired from MacDill Air Force Base to new graduates who are fresh out of one of the area’s 80 institutions of higher learning, there’s no shortage of talent. On top of that, Tampa Bay is an entrepreneur’s dream: the economic climate is ideal, and the community is extremely business friendly.”

- GREGORY J. CELESTAN,
CHAIRMAN AND CEO, CELESTAR CORPORATION, AND RETIRED LIEUTENANT COLONEL OF THE UNITED STATES ARMY

TAMPA BAY’S LEADING DEFENSE AND SECURITY COMPANIES

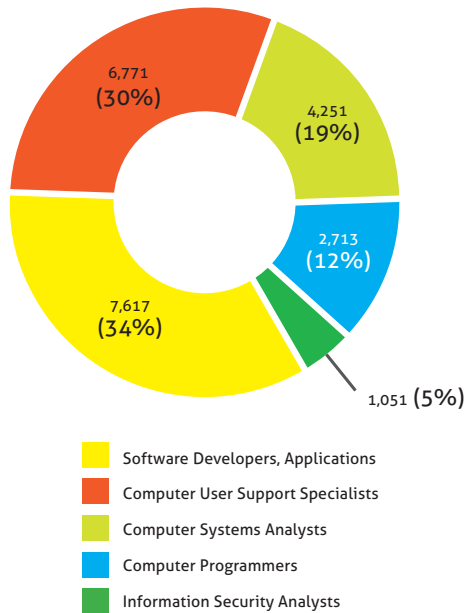


Aero Simulation
Arma Global Corporation
CAE
Camber
Celestar Corporation
CLI Solutions

CWU Inc.
DRS Technologies
GE Aviation
General Dynamics
Harris Corporation
Honeywell

Jacobs Technology
L-3 Communications
Lockheed Martin
Northrop Grumman
Raytheon

DEFENSE & SECURITY INDUSTRY SECTORS TOTAL 2017 JOBS



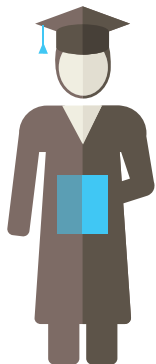
AVERAGE WAGE BY DEFENSE AND SECURITY SECTORS

NAICS CODE	SECTORS	AVERAGE WAGE TAMPA MSA	U.S.
336411	Aircraft Manufacturing	\$69,092	\$104,124
541512	Computer Systems Design Services	\$95,865	\$105,279
541511	Custom Computer Programming Services	\$84,320	\$109,680
334511	Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$87,168	\$112,137
541711	R&D in Physical, Engineering and Life Sciences	\$74,958	\$125,767
541513	Computer Facilities Management Services	\$85,427	\$89,038
237130	Power and Communications Line & Related Structures	\$50,643	\$71,165
336611	Ship Building and Repairing	\$55,319	\$70,853
336612	Boat Building	\$41,807	\$45,446
339113	Surgical Appliance and Supplies Manufacturing	\$47,665	\$75,606

Source: JobsEQ®, 2017 Q2.



TOTAL FLORIDA DEGREES AWARDED BY LEVEL



Bachelor's
104,805

Post Graduate
43,210

Source: National Center for Education Statistics (NCES), 2014-2015

TAMPA DEFENSE AND SECURITY DATA

\$67,008 **AVERAGE**
ANNUAL WAGES

38,041 **EMPLOYEES**

2,864 **COMPANIES**

Source: JobsEQ®, 2016

AVERAGE WAGE BY DEFENSE AND SECURITY OCCUPATION

SOC CODE	OCCUPATION	AVERAGE WAGE	
		TAMPA MSA	U.S.
15-1132	Software Developers, Applications	\$89,700	\$104,300
15-1131	Computer Programmers	\$79,100	\$85,200
15-1151	Computer User Support Specialists	\$47,200	\$53,100
15-1121	Computer Systems Analysts	\$83,500	\$91,600
15-1122	Information Security Analysts	\$84,900	\$96,000

Source: JobsEQ®, 2017 Q2.



RESOURCES



ARMED FORCES COMMUNICATIONS AND ELECTRONICS ASSOCIATION (AFCEA) TAMPA-ST. PETERSBURG PELICAN CHAPTER

www.afceatampa.org

An international organization, AFCEA is dedicated to increasing knowledge through the exploration of issues relevant to its members in IT, communications, and electronics for the defense, homeland security, and intelligence communities.



FLORIDA DEFENSE CONTRACTORS ASSOCIATION

www.fl-dc.com

Florida Defense Contractors

Association's goals are to make Florida

the premier state where defense contractors conduct business, create jobs, and expand operations, as well as to improve economic conditions for Florida's defense sector through legislative and regulatory changes.



NATIONAL DEFENSE INDUSTRIAL ASSOCIATION (NDIA) – GREATER TAMPA BAY CHAPTER

www.tampabayndia.org

The National Defense Industry

Association (NDIA) is America's leading defense industry association promoting national security. NDIA provides a legal and ethical forum for the exchange of information between industry and government on national security issues.



TAMPA BAY DEFENSE ALLIANCE (TBDA)

www.tampabaydefensealliance.com

Tampa Bay Defense Alliance (TBDA)

supports active and retired military

personnel and their families while building awareness of MacDill Air Force Base's impact on Tampa Bay. The organization strives to improve the quality of life, enhance the overall economic wellbeing, positively affect public policy, tackle obstacles, and solve problems facing the local defense community.



SOFWERX

www.sofwerx.org

Under an agreement with USSOCOM, the Doolittle Institute implement SOFWERX

as a public organization to assist with the collaboration, innovation, prototyping, and exploration with industry, labs, and academic partners. With two large facilities in Tampa, SOFWERX aims to help inject USSOCOM with new ideas on some of its most ambitious development programs.



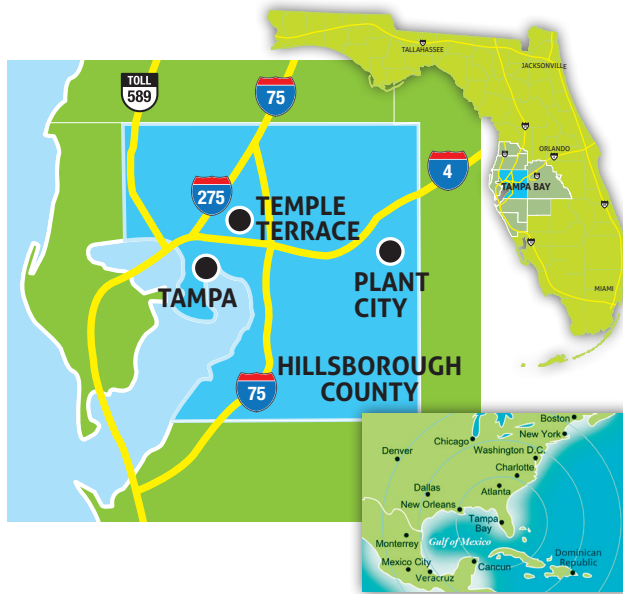
DEMOGRAPHICS

TOTAL MSA POPULATION: **3M**
 TOTAL MSA LABOR FORCE: **1.5M**
 MEDIAN AGE: **37**
 COLLEGE DEGREE HOLDERS: **31%**
 COST OF LIVING INDEX: **94.8** (2017)

RANKINGS

#1 CITY FOR FIRST TIME HOME BUYERS
 (ZILLOW, 2018)
#1 BEST STATES IN THE NATION FOR
 HIGHER EDUCATION
 (U.S. NEWS & WORLD REPORT, 2018)
#2 BEST STATES FOR BUSINESS
 (CHIEF EXECUTIVE MAGAZINE, 2017)

CONNECTIVITY



Hillsborough County is home to the top-rated Tampa International Airport (TPA), located just 15 minutes from downtown Tampa. Approximately 19 million people are served by major air carriers each year at TPA on more than 250 daily flights. TPA offers over 80 nonstop flights to domestic and international destinations.

Port Tampa Bay is the largest and most diversified port in Florida, with more than 5,000 acres of land and handling over 37 million tons of cargo every year. As the closest full-service port to the Panama Canal, Port Tampa Bay opens up exporting opportunities to Latin America and Asia.

Tampa and Hillsborough County are connected to the entire United States by roads and rail as well. Interstate systems I-4, I-75, and I-275 link the region to numerous major U.S. cities and more than 33 million consumers within an eight-hour drive.



TAMPA HILLSBOROUGH
 ECONOMIC DEVELOPMENT CORPORATION



For more information on the defense and security industry in Tampa and Hillsborough County, please contact Steve Morey, Vice President, Business Development, at 813-518-2630 or smorey@tampaedc.com

Tampa Hillsborough Economic Development Corporation is the lead designated economic development agency for Hillsborough County and the cities of Tampa, Plant City, and Temple Terrace. Established in 2009 as a partnership between the public sector and private corporate investors, the EDC works to develop and sustain a thriving local economy through the attraction, retention, and expansion of high wage jobs and capital investment within targeted industry sectors.