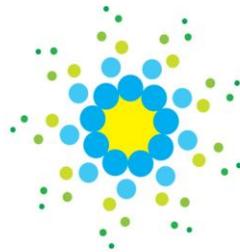


# Military Transformation Strategy

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## **INTRODUCTION**

Hillsborough County – along with its three cities of Tampa, Plant City, and Temple Terrace – is the centerpiece of the Tampa Bay region, which has undergone a transition and an economic recalibration like most of Florida and many markets across the United States.

As it evolves, post-recession, the Tampa community has been keenly aware of the need to develop new and more effective ways to proactively facilitate business development and create new jobs. Responding to this opportunity has been the platform of the Tampa Hillsborough Economic Development Corporation (EDC); marked by its growth, staff, volunteer leadership, operating revenue, business development plans, and most importantly, its solid track record of facilitating deal flow inside Hillsborough County. Indeed, the EDC today stands as the primary business development team for Hillsborough County and a significant partner to the Tampa Bay Partnership in their efforts to promote the Tampa Bay region.

Continuing the evolution to uncover more business development opportunities, the EDC was asked by the City of Tampa to administer an effort to leverage the asset of MacDill Air Force Base (AFB), along with the broader defense-industry presence, to generate additional economic growth.

Supported by funding from the Florida Defense Alliance's Defense Reinvestment Grant, the EDC issued a Request for Proposal to craft a Military Transformation Strategy. After undergoing a competitive review process, KMK Consulting was selected by a sub-committee of the EDC Defense and Security Task Force, due to a demonstration of previous experience in the market, as well as a familiarity with defense-related economic development projects.

Working with the Task Force, which would operate as the project's stakeholder steering committee, as well as key staff members, KMK was charged with crafting a business development strategy that leverages the military impact in Hillsborough County and the Tampa Bay region. It is a great testament to the breadth and balance of Tampa Bay's economy that a military strategy has not been a priority thus far in the economic-development annals of Tampa. However, the great potential in focusing on this market segment is evident.

Consistent with the new culture of proactive business development competitiveness that is sweeping Florida, the following proposed Military Transformation Strategy establishes a defined blueprint for business development opportunities that not only seize on the horsepower of MacDill, but do so with a focus on those factors that truly differentiate the Tampa market.

Our process was underpinned by the intersection of the Defense and Security Task Force leadership, interviews across the community with key stakeholders, and our review of military strategies in a selection of competitive markets across the United States.

We would like to express our sincerest thanks to the EDC's Defense and Security Task Force, supporting staff, and the other leaders listed in Exhibit A for their time, interest, and invaluable guidance in the formation of this plan.

There are significant future economic development opportunities readily actionable for meaningful business development success by leveraging four of Tampa Bay's profound assets: MacDill Air Force Base, local defense contractors, the local veteran workforce and the retired military leaders who reside in the area. These assets form the foundation of the Military Transformation Strategy recommended in this report.

## **MILITARY HORSEPOWER IN FLORIDA**

Within Florida, there are 20 major military installations and three unified combatant commands.

Issued in January 2011, the 2010 Florida Defense Industry Economic Impact Analysis confirms the obvious . . . Florida is a major player when it comes to military activity. For decades, Florida's military presence has been a significant employment, sales, and tax generator for the state and its local environs. Equally important, the findings validate Tampa/Hillsborough County's movement to seize on the opportunity afforded by the assets of MacDill AFB.

Highlights of Volume 1 of the report produced by the University of West Florida's Haas Center for Business Research and Economic are:

- **\$64.6 billion** – Florida's gross state product due to defense-related spending in fiscal year 2010. That total is projected to increase to \$67.7 billion in 2013.
- **\$30 billion** – Amount the military spent in Florida during fiscal year 2010; including goods and services, pensions and transfers, and salaries and wages.
- **686,181** – Estimated jobs (direct and indirect) associated with Department of Defense spending in Florida.
- **\$5.86 billion** – Value of defense-procured goods and services supplied by the ten largest Florida defense contractors.
- **188 percent** – Average earnings per military job compared to average earnings across all Florida jobs.

In October 2012, the Florida Defense Support Task Force released its 2012-2015 strategic plan. It too confirms the importance of Florida's military presence moving forward. Pointedly, in line with the intended results of the Military Transformation Strategy, key long-term strategies related to all military installations include:

- Promote Florida as a trusted, defense-friendly partner, advocating solutions of mutual benefit to the Department of Defense and Florida communities
- Promote and grow Florida military missions and installations
- Provide support and incentives for defense missions to remain or relocate to Florida
- Lower installation' costs of doing business

## **SCALE AND CHARACTERISTICS OF MACDILL AIR FORCE BASE**

MacDill Air Force Base, located eight miles south of Tampa on 5,767 acres, was activated in 1941. MacDill's population consists of approximately 15,485 military and 2,798 civilian personnel. It is estimated that more than 46,000 military retiree households can be found within a 50-mile radius of MacDill, including perhaps as many as 150 retired general officers.

The host unit at MacDill is the 6th Air Mobility Wing (6 AMW), which is capable of rapidly providing air-refueling service throughout the world. Co-located at MacDill is 6 AMW's associate wing, the 927th Air Refueling Wing of the Air Force Reserve Command. Additionally, MacDill is home to the headquarters of two unified commands; United States Central Command (USCENTCOM) and United States Special Operations Command (USSOCOM), and 35 other Mission Partners.

USCENTCOM is one of the Department of Defense's 10 combatant commands and is responsible for a specific geographical region where combatant commanders may plan and conduct operations. Specifically, USCENTCOM is responsible for U.S. security interests in 27 nations, including Afghanistan, Egypt, Iran, Iraq, Kuwait, Lebanon, Pakistan, and Saudi Arabia.

USSOCOM is responsible for providing fully capable Special Operations Forces to defend the United States and its interests. Activated in 1987, USSOCOM fully coordinates the planning of global operations against terrorist networks.

As posted on its Web site on September 23, 2011, MacDill's estimated total economic impact on the Greater Tampa Bay Area in Fiscal Year 2010 (Oct. 1, 2009 - Sept.30, 010) was \$2.87 billion. In addition, the military-retiree population adds another \$2.11 billion; for a total economic impact of \$4.98 billion. The total economic impact of the base on the Tampa area was computed by summing annual base payroll, annual base contract expenditures, and the estimated annual dollar value of indirect jobs created. Including the impact of retirees:

<b>Total Annual Payroll</b>	\$2.31 billion
<b>Total Annual Contract Expenditures</b>	\$1.42 billion
<b>Value of Job Creation</b>	\$1.25 billion
<b>Total Economic Impact</b>	\$4.98 billion

By all accounts, past and future, MacDill Air Force Base is a significant asset to the Tampa Bay region. In the past, the economic impact has been impressive . . . and that, barring significant defense cuts, should continue. But in the future, MacDill will offer a unique economic development opportunity that, if enthusiastically pursued, should create new high-wage, high-value jobs in the region.

## **IMPORTANCE OF EXISTING DEFENSE CONTRACTORS IN THE TAMPA BAY REGION**

Not surprisingly, military spending has a profoundly positive impact on national, state, and local economies; the *extent* to which it does may be.

The Department of Defense reported national defense spending in 2011 reached \$706 billion dollars. Further, Deloitte estimated in its March 2012 report – “The Aerospace and Defense Industry in the U.S.: A Financial and Economic Impact Study” – that the U.S. aerospace and defense industry directly employed 1.05 million workers in 2010. These workers received \$84.2 billion in wages, equating to an attractive average wage of \$80,190.

According to a multi-volume report issued in January 2011 and commissioned by Enterprise Florida, Inc., the state’s economic-development organization, the military spent about \$30 billion across Florida counties in fiscal year 2010. Of this amount, \$5.3 billion was for salaries and wages. The report – Florida Defense Industry Economic Impact Analysis – states, “Defense-related spending is estimated to be responsible for over \$64.8 billion in gross state product in 2010 and to reach \$67.7 billion in 2013.” EFI reports that the state’s top 10 contractors alone employ more than 28,000 Floridians.

The local impact is equally impressive. According to the Enterprise Florida commissioned report, defense-related spending was expected to contribute \$7.3 billion in 2010 and \$7.5 billion in 2013. According to the industry accepted database compiled by Washington, D.C. based OMB Watch in 2011, within U.S. Representative Kathy Castor’s Congressional District 11, there were a total of 1,370 federal contractors who collectively were awarded 8,657 contracts that totaled \$1.65 billion.

It is important to note that not all 1,370 contractors, not all contracts, and therefore not all of the \$1.65 billion were defense-related. That said, based on OMB Watch data, it is estimated that 76 percent of the total volume, \$1.25 billion, is related to defense and national security. It can be assumed that not all contractors, even those doing work for some portion of the Department of Defense, are providers of high-wage, high-value jobs. Further, it can be assumed that some local defense contractors are performing work for an entity other than MacDill Air Force Base and the contracts may actually be performed outside the area.

According to OMB Watch, the following companies are the largest defense contractors, in terms of award-dollars, with a presence in Hillsborough County:

**CAE, Inc.**

*Modeling, Simulation and Training*

**Telecommunication System, Inc.**

*Mobile communication technology*

**Science Applications International Corporation (SAIC)**

*Scientific and technological applications*

**Jacobs Engineering Group, Inc**  
*Engineering and technical assistance to USSOCOM*

**DSE, Inc.**  
*Military products*

**General Dynamics Corporation**  
*Information Technology*

**FMQAI (Health Services Holdings, Inc.)**  
*Healthcare information*

Other major defense contractors with a presence within the county that cannot be overlooked include: Lockheed Martin, Textron, Northrop Grumman, Celestar and Harris Corporation.

The consequence of underserving this segment of the local economy is harsh. The National Association of Manufacturers (NAM), in its report titled, *Defense Spending Cuts: The Impact on Economic Growth and Jobs*, concluded that job loss due to the Budget Control Act of 2011 will peak in 2014 when 1,010,000 private-sector jobs, including 130,000 manufacturing jobs will be lost. NAM predicted that Florida will lose 56,600 jobs in 2014. It is imperative to pursue a plan to minimize this dramatic job-loss possibility in Hillsborough County.

A critically important strategy for all full-service economic-development organizations revolves around the nurturing of local high-wage, high-value companies. Often these companies are creators of primary jobs and their operations can be located in any number of cities.

A well defined local-industry outreach program, which solidifies relationships and resolves identified growth hurdles, mitigates the community risk of significant job loss. The EDC took a positive step in that direction with the creation of a dedicated, staff-driven Business Retention and Expansion (BRE) program in 2012. While such a program for the Tampa Hillsborough EDC should include companies not related to the defense industry, it is the intent of this report to place high priority for those related to defense.

Although this is core value work for the EDC, the effort to complete a comprehensive database of defense contractors in Hillsborough County continues, under the direction of the Defense and Security Task Force and BRE department staff.

Attached as Exhibit C is the list of defense and security industry companies that currently comprise the EDC business database.

## **CRITICAL MASS OF RETIRED MILITARY MAKING TAMPA BAY THEIR HOME**

As previously stated in this report, there are 46,154 retired military households living within 50 miles of MacDill. Further, the Greater Tampa Chamber of Commerce reports that approximately 150 retired generals and senior officers reside in the area also.

In the world of economic development, where relationships with, and accessibility to, prospective clients is a critical success determinant, the identification and engagement of high-ranking retirees with attractive “rolodexes” is an important consideration.

One might ask, “What is the value proposition for the retirees?” The answer is simple. Military retirees have tremendous talent – technical skills, leadership and networks. They have tremendous passion for contributing to team goals and they are members of the local community. Recognizing economic development is everyone’s business, with all citizens having a vested interest in their collective prosperity, and retirees have an ideal way to blend their skills with the critical mission of economic development and the EDC in particular.

Our research points to a commonplace phenomenon . . . the purposeful inclusion of retired military personnel in the work of economic-development organizations for communities with military installations. In reviewing other economic-development organizations, two nearby organizations highlight this practice:

Economic Development Council of Okaloosa County, Florida: The Defense Support Initiative is a three-county effort led by their EDC. The “committee” supports Eglin Air Force Base, Hurlburt Field, Duke Field, Coast Guard Station Destin, and NAS Whiting Field. Its vision is to “ensure the survival and accommodate the growth of all military organizations and commands” in the three counties. Both active and retired military personnel are involved in the initiative.

Economic Development Commission of Florida’s Space Coast: The EDC’s Space Coast Defense Council, which includes both active and retired military personnel, address “issues that face defense operations throughout the Space Coast and help secure Brevard County’s military operations,” including Patrick Air Force Base.

## **SWOT ANALYSIS OF THE MILITARY-RELATED ENVIRONMENT IN TAMPA BAY**

The goal of this engagement is to “propose a strategic plan for the community to capitalize on the presence of MacDill Air Force Base, to enhance its ability to create new jobs through recruitment of new businesses and expansion of existing businesses.” The following highlights the strengths, weaknesses, opportunities, and threats related to accomplishing this goal.

This is not intended to be an all-inclusive listing, rather it reflects the more salient points raised in our interviews and research.

### **1. STRENGTHS:**

- a. University of South Florida’s Center for Advanced Medical Learning and Simulation (CAMLS): Opened in February 2012, this 90,000-square-foot facility is located in close proximity to MacDill AFB and Tampa General Hospital, two USF partners that could provide long-term success when it comes to the community’s job-creation initiatives. CAMLS could be instrumental in establishing a health-technology accelerator. Additionally, CAMLS could enhance the further development of clusters such simulation technology, aviation science, nanotechnology, and cyber/national security, especially with a strong partnership with MacDill AFB.
- b. United States Special Operations Command (USSOCOM): Headquartered at MacDill AFB, USSOCOM’s mission is to provide fully capable Special Operations Forces to defend the United States and its interests. Combining both military and civilian personnel, USSOCOM provides the nucleus for attracting related support services. By itself, USSOCOM is a significant employer in the area.
- c. United States Central Command (USCENTCOM): Responsible for 20 countries in the “central” area of the globe, USCENTCOM’s main headquarters is located in a 260,000-square-foot facility at MacDill AFB. USCENTCOM’s presence, and its important mission—promoting cooperation among nations, crises response, aggression deterrence, development, and reconstruction—provides Hillsborough County with a unique opportunity to attract defense- and security-related businesses.
- d. Coalition Forces at USCENTCOM: MacDill AFB is home to more than 230 coalition partners, representing 40 nations. The partners, operating on the bilateral agreements established between their country and the United States, represent a tremendous vehicle to connect to international markets.
- e. Retired Generals Living in Tampa Bay: It is estimated that Tampa Bay is home to more than 150 retired Generals. When coupled with other locally retired military personnel, this is an economic-driver. But, it can be much

more. Retired Generals can provide wise counsel related to job-creation based on the area's military presence and help deliver the message.

- f. Community Support: It is evident that Tampa Bay passionately embraces its military establishments and its personnel. Cities, counties, chambers of commerce, economic-development groups, and other community-based organizations understand the value of the military's economic and socioeconomic influence, and provide a linkage between the business community and all MacDill commands and all branches of service. Going forward, as the community seeks to enhance its job-creation efforts, the strength of the community/business/military partnerships will be viewed as an asset.

## 2. WEAKNESSES:

- a. No Focused Effort: In terms of economy-building based on the assets of Tampa Bay's military presence, there lacks a long-term commitment to create and execute a vision, and an associated strategic marketing plan. Without either, desired outcomes will not be realized.
- b. No Marketing Message: Currently without one, a marketing strategy that relates the positive story of Tampa, MacDill AFB, and the area's defense industry must be created. The message must be conveyed to the "outside world" through national and international outlets and events.
- c. Financing for Defense and Security Initiatives: Going forward, the EDC will have a defined role as related to the Military Transformation Strategy, perhaps including the costly activities of business development, entrepreneurship, and marketing. There currently is insufficient funding for this effort.
- d. Contractors Not Connected: According to the *Tampa Bay Business Journal*, there were, in 2010, at least 74 area companies doing defense work. If united in the community's efforts to expand the local defense industry, these corporate leaders could serve as a resource to themselves and others, including those involved in the Military Transformation Strategy. The connecting process best begins with a comprehensive database of companies and contacts; which doesn't fully exist today.
- e. Lack of Support Firms: The review of rosters of military-related committees and task forces uncover a dearth of important support firms, such as accounting and law. Such firms deliver expertise that will be needed during the execution of the overall military strategy.
- f. Talent Transition into Civilian Jobs: Talent development is a critical element of a community's economic-development strategy. In Tampa Bay, this factor

takes on an additional facet; the successful transition of military personnel to civilian jobs upon duty completion. A renewed emphasis to the community's process is needed; one that encompasses the partnership of MacDill, workforce-development groups, educational institutions, and the business community.

- g. Senior Military Absent From Tampa Business Leadership: Senior leadership within Tampa's business community is often void of Commanders and Chiefs of Staff at MacDill AFB. Future success will necessitate a shift to embrace military leaders, including retired Generals, within the business infrastructure.

### 3. OPPORTUNITIES:

- a. Tampa Bay Defense Alliance: In particular, because of the October Florida Defense Support Task Force report suggesting the need for much better collaboration in Tampa, the new Defense Alliance appears to be an ideal vehicle to crystallize a strong collaborative working partnership among the several important military focused groups. This will also enhance Tampa's standing and voice in Tallahassee.
- b. USSOCOM's Increased Budget: USSOCOM's proposed FY 2013 budget is an estimated \$1.2 billion more than the current year's budget. Highlights of the proposed budget bode well for the Command and Tampa Bay's economy: increased specialized training for Special Operations Forces, additional aircraft and equipment, supplementary maintenance, and support for commands.
- c. USSOCOM's Technology & Industry Liaison Office (TILO): As a way of continually evolving capabilities, USSOCOM established TILO, which reviews ideas from industry that are related to USSOCOM's areas of interest. This is a proactive process that encourages solutions developed by private enterprise, an opportunity for the community to emphasize and market. TILO provides the platform to link businesses and the military, something that bodes well for future economic-development efforts.
- d. New Commander of MacDill AFB: Col. Scott "DeTom" DeThomas recently became Commander of MacDill AFB. The timing of the change of command is perfect, as the Task Force seeks to strengthen the perceived weakness related to the lack of military leaders who are involved in the business community. Col. DeThomas' arrival is an excellent opportunity to strengthen those ties.
- e. Marketing Messages: The weakness of "no marketing message," creates an opportunity on which to capitalize. MacDill AFB is a tremendous asset to those who live and work in Tampa Bay, as well as prospective employers

who might be enticed to participate in the benefits. Crisp, strategically placed messages should facilitate the military-related economic-development process.

- f. Retired Generals Living in Tampa Bay: Retired corporate leaders are often involved in a community's economic and community development efforts. They offer an array of talent, including strategic planning (they understand what drives location decisions) and a "rolodex" of important contacts. Likewise, retired Generals in the area should be considered a part of the economic-development team.
- g. Commander Engagement: Two unified multi-service commands, USCENTCOM and USSOCOM, are headquartered at MacDill AFB. The commands are currently led by Gen. James N. Mattis and Adm. William H. McRaven, respectively. The engagement of these two commanders, as well as Col. DeThomas, would be an essential component of the successful implementation of the Military Transformation Strategy. Without the linkage of the military's three top leaders or their Chiefs of Staff, local governments, and the business community, the desired outcomes of the transformation strategy may not be as fully realized.
- h. Coalition Forces: Economic-development efforts often incorporate an "ambassadors" program, whereas corporate leaders are actively engaged in the "selling" of a community. Such leaders—armed with community knowledge, business acumen, resources, and significant contacts—are immersed in the economic development process. Many of MacDill's 200-plus coalition partners who represent 40 nations should be positioned as Tampa Bay's "ambassadors;" helping implement the international portion of the Military Transformation Strategy. But a much greater opportunity is the Coalition Institute recently launched. This Institute can be expanded into a valuable international business development initiative.
- i. Base Realignment and Closure (BRAC): The Pentagon is proposing BRAC rounds in 2013 and 2015, the sixth and seventh such events. During the most recent round, 2005, MacDill AFB netted new military/civilian jobs, primarily due to its involvement in military operations in Iraq and Afghanistan. While the BRAC process can result in downsizing and the elimination of unnecessary infrastructure, there is also tremendous potential to gain and grow from the event, particularly if the community coalesces in an effort to promote the important mission of, and ensure the safekeeping of all aspects of MacDill AFB.

#### 4. THREATS:

- a. Failure to Act: The City of Tampa's proactive decision to create the Military Transformation Strategy was bold and insightful, and its decision to transfer

the undertaking to the EDC was wise. It is very apparent that the support for MacDill AFB is strong; from governments to chambers to economic development groups. What has been lacking is an overall strategy that galvanizes all participants, including the military. Such a strategy being created is one that will serve as the foundation for future action. All too often, such studies go unfulfilled. That cannot be the case with this Military Transformation Strategy. Failure to act will leave the community with an unwanted sense of not building on its unique strengths, improve its weaknesses, capture future opportunities, and divert the threats.

## **RECOMMENDATIONS**

Based on the research and feedback obtained throughout the course of this project, we believe there are three key areas in which Tampa and Hillsborough County can make a significant impact on the economic growth of the defense and security industry:

- Marketing Tampa as a Military Community
- Leveraging Military Relationships
- Expansion of Defense-Related Workforce, Training and Entrepreneurial Opportunities

### **Marketing Tampa as a Military Community**

Renowned branding authority Simon Anholt offers a telling perspective on the importance of branding:

*“All of our decisions – whether they are as trivial as buying an everyday product or as important as relocating a company – are partly rational and partly emotional. No human activity is exempt from this rule, and the brand images of cities underpin the emotional part of every decision connected with those places, which in turn affects the rational part.”*

*“Paris is romance, Milan is style, New York is energy, Washington is power, Tokyo is modernity, Lagos is corruption, Barcelona is culture, Rio is fun. These are the brands of cities, and they are inextricably tied to the histories and destinies of all these places.”*

*“In today’s globalized, networked world, every place has to compete with every other place for its share of the world’s consumers, tourists, businesses, investment, capital, respect and attention. Cities, the economic and cultural powerhouses of nations, are increasingly the focus of this international competition for funds, talent and fame.”*

In 2006, CEOs for Cities (a network of mayors, corporate CEOs, university presidents, and business and civic leaders from the nation’s leading cities) issued a report on the branding of cities. The report establishes an important foundation:

*“This competitive environment is a reality of our times, and how a city stakes out and communicates its distinctive place within it largely decides which cities succeed and which falter in the race for economic prosperity. To this end, places are just like companies: those with a strong brand find it much easier to sell their products and services and attract people and investment.”*

*“Put simply, branding is a tool that can be used by cities to define themselves and attract positive attention in the midst of an international information glut. Unfortunately, there is the common misconception that branding is simply a communications strategy, a tagline, visual identity or logo. It is much, much more. It is a strategic process for developing a long-term vision for a place that is relevant and compelling to key audiences. Ultimately, it influences and shapes positive perceptions of a place.”*

How do these citations apply to Tampa? The answers are clear.

- The community has a storied history of exceptional economic-development success. It has, and will always have, a strong desire to influence job-creating decisions.
- If nothing else, the Military Transformation Strategy validates the notion that the community's military-related assets are momentous and worthy of capitalizing.
- The community is currently under-utilizing the value of its military-related assets in economic development marketing efforts.

**Thus, it is recommended that the community, led by the Tampa Hillsborough EDC, create and implement a dedicated marketing effort that positively promotes Tampa as a destination for military-related business opportunities.**

The Tampa Hillsborough EDC is the lead marketing agency for Tampa and Hillsborough County, as it relates to economic development. The opportunity to expand Tampa's presence as one of the leading military defense business centers in the U.S. is ripe with opportunity, and ready for their leadership. However, it will take a meaningful increase in the Tampa Hillsborough EDC's budget to develop a new, targeted marketing campaign.

To some extent, this could be an expansion of current marketing concepts. The new and/or expanded effort should focus on the global influence of Tampa due to the presence of USSOCOM, and highlight the significant differentiators, focusing on three key areas:

- Cyber security and related ISR businesses
- Healthcare and rehabilitative innovation companies
- Workforce

### **Leveraging Military Relationships**

The **USCENTCOM Coalition Forces** are a truly unique differentiator for Tampa, and one that is currently underutilized as a support tool for business growth objectives. **We believe efforts to engage and leverage the presence of the Coalition Forces should be significantly expanded relative to their purpose and activities.** While several enterprising business owners have recently taken the initiative to form and launch the Coalition Institute, which seeks to create a connection between these international representatives and the local community, more remains to be done. Not only is the Coalition a relevant opportunity for Tampa's qualifying local companies to do business in some of these foreign countries, reverse investment is equally as applicable. We believe the Coalition is a huge opportunity similar to the SOCOM procurement "gold mine," and represents a terrific platform for international business development.

Another significant military asset is the **critical mass of retired senior military officers**, including O6s as well as senior NCOs. This group of highly accomplished individuals comes with a career of technical expertise, years of major leadership accomplishments and, most

importantly, a business network that often rivals the largest private sector CEOs across the country. **We believe this asset needs to be incorporated in the economic development toolkit, and recommend establishing the association with these military leaders as a formal alliance.**

Although it would require some effort to recruit these individuals, the quality and quantity of these retired leaders so outpaces the vast majority of other markets in the U.S. that we believe the investment will pay off many times over. This alliance would be an excellent source of mentorship, instruction, and even management talent for new, expanding or relocating businesses, helping them take advantage of our enhanced relationship and proximity to USSOCOM procurement. We believe that this alliance can be built with little, if any, cost involved.

We also believe, along these lines of retired military leadership, that there is an opportunity to be pursued with senior active duty leadership at USCENTCOM, USSOCOM and The Wing. While these active duty leaders have historically become engaged in a limited scope (within the normal objectives of the Military Affairs Council at the Tampa Chamber, for instance), they are not viewed as strategic resources with respect to the role of Tampa's top tier CEOs in addressing the most significant issues facing the economic growth of the community. **We recommend a dedicated effort to cultivate and recruit the Chief of Staff at USCENTCOM and USSOCOM, along with the Wing Commander, to become a participating partner in the top tier CEO leadership of their Tampa community.** Timing, personalities, careful cultivation and perseverance all underpin this strategy, which can add significantly to Tampa's senior leadership structure once this is properly built and becomes part of the local culture.

### ***Expansion of Defense-Related Workforce, Training and Entrepreneurial Opportunities***

#### **Establishment of a Cyber Institute and Business Accelerator**

Earlier this year, a Florida Defense Support Task Force study made a recommendation to acquire the 2.6 acres adjacent to the front gate of MacDill AFB. While the report's position relating to land acquisition supports the policy of developing buffer zones around military installations, the MacDill location is, we believe, destined to serve a much higher purpose.

**We recommend the creation of a cybersecurity-related technology business development, education, research and training center.** A multi-purpose facility, located on the site recommended for purchase in the State's recent Defense Support Task Force study, would combine an accredited series of courses in cybersecurity, intelligence, surveillance and recognizance, and Special Ops technology support, led by the University of South Florida. Within this facility, Hillsborough Community College could operate a workforce transitioning and training program for the successful repositioning of veterans into the civilian workforce of Tampa, Hillsborough County and Tampa Bay, geared to specifically recognize the high skill set advantages of these men and women. The facility could also house a business accelerator targeting these specific categories within the

defense industry, which would serve as a major marketing asset as Tampa leverages the value proposition of MacDill AFB.

In our multiple meetings with John Schueler of the University of South Florida, and a Co-Chair of the Defense Alliance, we discussed and supported their following case for such a bold initiative:

**The Need:**

- “The uncomfortable reality of our world today is that bits and bytes can be as threatening as bullets and bombs” Gen. Martin Dempsey, Joint Chief of Staff Chairman
- Defense Secretary Leon Panetta said the United States faces the possibility of a “cyber-Pearl Harbor” with vulnerability of nation’s power grid, transportation systems, financial network and government
- Solutions provided to cure and prevent are mostly “stove-piped” focusing on narrow and constrained missions with limited constituencies and restricted access
- There is currently a dramatic shortage of IT security professionals, and the estimates are that the demand will grow 20 times over the next decade

**Addressing the problem and developing the opportunity:**

- Establishing The Florida Cybersecurity Partnership (already established as a 501(c)(3) comprised of the Florida Cybersecurity Center and the Florida Cybersecurity Institute)
- Home to the USF Institute of Secure and Innovative Computing and the Florida Cyberwarfare School
- Within the Institute are talent development (education and training), certification, public awareness, grants and gifts, conferences and public policy
- Within the Center (a for-profit entity) will be a facility housing a SCIF, data center, equipment testing, contract research, facility leasing, technology transfer, data services, classroom/meeting rooms, classified and non-classified development space

**Most importantly, the differentiators for such a facility relative to other markets in the US include:**

- Land for the facility is contiguous to MacDill AFB. Approvals/permits have already obtained from the City and FAA for building the facility
- Proximity to MacDill and the Commands matter
- Relationship between the community/USF and the MacDill is strong – interns, research, support, communications and advocacy are already in place
- Integration of public/private partnership and the consortium model brings in existing businesses of all sizes as well as providing attraction to businesses wanting to locate here
- “Florida” is by design, to include the entire State’s effort to support this initiative politically and financially

- Political connections are well established at each level – Tampa, Tampa Bay, State (Defense Task Force membership) and Federal (Congressman Young, Congresswoman Castor)
- Subject matter expertise exists with USF Engineering, College of Business and Arts and Science – providing interdisciplinary and strategic rigorous approaches.
- Industry expertise coming from strategic business partners.
- Nucleus of small and mid-sized businesses exist around this space in Tampa Bay.

There is a similar concept utilized by the University of Central Florida (UCF). Over the years, UCF has established a series of three buildings in the adjacent Central Florida Research Park known as Partnership I, II, and III. Housed within II and III is the Institute for Simulation and Training (IST), which is an important part of the business development and marketing efforts of the Metro Orlando Economic Development Commission (MOEDC).

Established in 1982, IST is the research unit of UCF that provides a wide range of research and information services for the modeling, simulation and training community. The newest in the series, Partnership III, which opened in October 2010, is a 230,000-square-foot office and research lab facility that IST shares with various components of the military. Led by prominent Orlando legislators, funding for Partnership III was provided by the State of Florida. This could present another leverage opportunity for Tampa as the Tampa Bay Partnership and the MOEDC continue to explore ways to strengthen mega-region strategies.

Meetings were conducted with the USSOCOM procurement office, as well as with locally based companies that do business associated with MacDill and USSOCOM. When analyzed, the information gleaned from those conversations led to a clear conclusion; the creation of a business accelerator specializing in companies associated with cybersecurity, intelligence, surveillance and reconnaissance objectives and Special Ops technology. Interestingly, the initial target property for the accelerator is ideally located across the street from USSOCOM's procurement office.

Consider this. There is currently a monthly acquisition update led by USSOCOM Procurement Office. All of the big USSOCOM contractors participate. This is a good example of where a company, by being located in Tampa, has an advantage to hear firsthand USSOCOM's issues. Companies located in Maryland or Virginia will not get this advantage. These three categories, together, are unique for Tampa. Seizing this focus, especially around that of an accelerator program, we believe, is a terrific opportunity.

While this, alone, can become a very attractive business development opportunity and bring marketing attention to Tampa by increasing the Tampa brand as a cyber related hub, this important piece of real estate is ideal for a comprehensive cybersecurity education and research center, which can be sponsored, and perhaps owned and operated by USF. We have discussed this significant opportunity with USF officials, have researched their white paper on this new center opportunity currently referred to as the Florida Cybersecurity Center (FCSC) and support this wholeheartedly. We also note that it is very important to

build this Center as a “cleared facility”. This will allow the USSOCOM procurement manager to use the Center to discuss USSOCOM projects and for businesses growing in the accelerator program to perform classified work (assuming of course the employees have proper clearances). Again, this can significantly enhance the business development and brand broadening opportunities for Tampa. Furthermore, this location can serve a broader educational purpose through a partnership with Hillsborough Community College in HCC’s objective to fill current gaps in the transition process for military personnel leaving active duty and entering the civilian workforce. This initiative will also lessen the workload for the military on Base. Moreover, this “no gaps” education and training facility should include similar support for spouses of the veterans.

We also recommend that this location be developed into a focal point for visibly tying the relationship between Tampa and the USSOCOM procurement office such that, through this Center, as well as through focused and heightened effort and partnership with the local industry associations, the EDC is able to develop a sustainable message that businesses around the country and around the world that wish to do business with USSOCOM can increase their opportunities by being physically located in the Tampa community. While this would of course include Tampa Bay, the point here is a common business principle, which holds that suppliers and vendors realize better results with non-commodity products and services when they are physically located closer to their customer.

We have concluded through our interviews and our research of the industry and our research at major defense centric locations across the country, that the strategy focusing on cyber, ISR and Special Ops technology is a winner for Tampa. Maryland, for example, who has decided to join the list of cyber centric communities, is a market that Tampa will be able to strongly compete with by combining the advantages of US SOCOM with the location and cost advantages of Florida.

We believe this initiative will evolve quickly into a major asset of its own with global impact in the service offerings and similarly global brand impact for Tampa. This particular strategy coupled with the USF Rehabilitation Health Institute discussed below form the two anchors of this proposed Military Transformation Strategy. When these two new initiatives are aligned with CAMLS, the path of opportunity for Tampa and the surrounding region is now targeted at an entirely new level.

### **Establishment of a Rehabilitation Health Institute and Business Accelerator**

There is another significant asset ready for a proactive business development strategy, which we believe is the rehabilitation health institute proposed at the USF Research Park, which promises a major partnership with the James A. Haley VA Hospital, the Bay Pines VA Hospital, CAMLS and MacDill AFB.

USF is already one of the top veteran-friendly institutes in the U.S. It currently serves 2,200 veterans and their families as students and is ranked 5<sup>th</sup> in the nation for “Best Colleges for Veterans.”

As we look at its landscape today, CAMLS is off to a fast start pursuing significant contracts with the military for simulation training for battlefield surgery and other targeted military medical treatment capabilities. CAMLS and MacDill will become a synergistic relationship and will spawn new business opportunities.

Leveraging CAMLS to even greater impact is the potential with the USF rehabilitation science, engineering and medicine facility currently on the drawing board and moving toward reality quickly under the focused leadership of General Martin Steele and Dr. Paul Sanberg at USF. Beyond the obvious objective of serving veterans, especially focused on the top military healthcare priority of Post Traumatic Stress Disorder (PTSD) and Traumatic Brain Injury (TBI), we believe an ideal opportunity exists to create another industry-specific accelerator to grow new businesses. **We recommend the creation of the rehabilitative health accelerator to be located at the USF research park or perhaps even in the new rehabilitation center itself.** The objective is to attract startup companies in the rehabilitative health sector bringing not only business opportunities but also another notch in Tampa's brand message about this community being a major rehabilitation health center for veterans and a center of excellence in related research, treatment and commercial products and services supporting PTSD and TBI treatment.

This would complement the accelerator at the cyber center outside MacDill's front gate. So two new industry targeted accelerators, each with a compelling value proposition, would both leverage CAMLS and offer a competitive advantage tied to MacDill.

We are committed to these two accelerators for an important reason beyond the obvious objective of attracting and nurturing startup businesses that fit within these two focused industries related to cyber and rehabilitative healthcare. Specifically, a new study by the Kaufman Foundation reports that veterans initiated only 6 percent of new businesses in 2011 but yet accounted for more than 12 percent of all startups in 1996. Kaufman Foundation experts are worried that younger veterans may not pursue entrepreneurship as often as older generations of veterans did. Up until three years ago, startup rates for veterans were higher than they were for non-veterans.

Dane Stangler, Director of Research and Policy at the Kaufman Foundation, reports that "younger veterans have less support from within their own community of veterans as they consider their own entrepreneurial ventures: fewer networking opportunities, mentors and funders among the older generation of vets. What we don't yet know is how this may affect younger veteran's pursuit of entrepreneurship."

Encouragingly, it's worth noting that the Small Business Administration has partnered this year with the Department of Veterans Affairs and Department of Defense to provide entrepreneurship training. The SBA also backed more than 3,200 loans totaling \$2.1B to veteran-owned businesses in Fiscal 2012.

So we believe this call to accelerators is not only good for business growth in Tampa but also good for veterans and is a great manifestation of one thing that Tampa has done a

great job with over the years, which is to show its tremendous support and loyalty to veterans and active duty personnel. We also note that when it comes to implementation and designing specific business plans to create, fund and operate these accelerators, this is not the job of the EDC. The EDC is not equipped for this role and does not need to be. We've had preliminary discussions already with retired senior officers, the Tampa Bay Defense Alliance and others, and have no doubt that the creation of these accelerators can be easily outsourced and effectively created in a timely manner.

Graduating from these two accelerators, there is a follow on opportunity through a program with the state's GrowFL initiative to work with these new companies creating an entrepreneurial ecosystem for these specific industries that further attracts such entrepreneurs to move to Tampa.

## **THE ROLE OF THE TAMPA HILLSBOROUGH EDC**

Premier economic development organizations, especially those representing metro areas similar in size to Tampa, are often fully diversified in their business development strategies. The Tampa Hillsborough EDC has a distinct opportunity to succeed at a higher level, emphasizing Tampa's tremendous military-related assets and to do so at three distinct geographic levels: local, domestic, and international.

With an emphasis on job-creation, the following business development strategies are recommended:

### **Local Business Development Strategies**

As referenced earlier, **it is recommended that the EDC enhance their focus on existing industries that are military-related, such as defense contractors, through local visitation programs.** Because roughly 80 percent of all new jobs created in a community come from the existing employer base, EDCs place a high value on Business Retention and Expansion programs. While it is always important to thank local industries for their commitment to the community, it is also critical to identify and resolve barriers to success. Visitation programs do both. **It is also recommended that the EDC use this enhanced outreach program to identify local defense contractors and related defense industry businesses, to build a local database of these companies.**

An important aspect of the Military Transformation Strategy is the establishment of two business accelerator programs, one at the proposed Cyber Institute and one at the proposed Rehabilitation Health Institute. Typically, accelerators provide services such as: access to capital, mentorships, enhanced marketing, legal assistance, and high-tech plug-and-play space free or at below-market occupancy costs. Often, the assistance is intense, thus the term "accelerator." Modern structures include competing for admission, capital support, and require a formal residency participation period. These accelerators are vastly popular in attracting startup companies. **While the EDC is not designed to take on the lead role in the creation and management of the proposed accelerators, it is recommended that they work closely with these partners and support their efforts.**

### **Domestic Business Development Strategies**

Successful economic development organizations market the assets of their community. Using the information in this report, the Tampa Hillsborough EDC will be positioned to market the assets related to MacDill to targeted companies throughout the country, and in collaboration with regional efforts led by the Tampa Bay Partnership. By necessity, the transformation strategy requires the marketing, in its broadest sense, of Tampa's military infrastructure and how it can increase a company's profitability while reducing its risk. This will require a major marketing effort, one that boasts the area's military assets, especially those related to USSOCOM and USCENTCOM. Leveraging these assets with

CAMLS and the two new USF-led centers discussed herein presents a powerfully attractive business recruitment package.

In particular, the EDC should focus on targeted companies in targeted regions. **The EDC should seek companies that specialize in rehabilitation health and specific defense technology, especially as it relates to both USSOCOM needs as well as the transitioning of defense-related technologies to civilian applications.** As this strategy remains focused on these specialized technologies, Tampa's reputation will grow, its brand will penetrate targeted markets and high paying jobs will grow.

As it creates and implements future marketing plans – to include target advertising, public relations, social-media, sales missions, etc. – **the EDC should focus its efforts in specific geographic regions of the country. Ideal targets include District of Columbia, Northern Virginia, Maryland and San Diego, to name a few.**

### **International Business Development Strategies**

Another significant opportunity for Tampa and Hillsborough County exists internationally. No other community has the business development advantage of housing a coalition of military officers from 40 countries, including many that are likely targets for corporate reverse investments, and some officers destined to run their country some day.

The key to seizing this unique opportunity is the identification of leaders from targeted countries and the corresponding invitation to participate in a two-fold effort: **(1) assist local companies in doing business in partner countries; and (2) assist companies from targeted countries as they seek to expand into the United States, with an emphasis on Tampa and Hillsborough County.**

The coalition-centered effort would work best in a broader environment, thus it is recommended that the new Coalition Institute partner with the EDC with the specific responsibility of assisting the EDC with its business development efforts, both internationally and domestically. Members of the Coalition Institute would include senior-level personnel, both active and retired personnel from U.S and foreign forces in addition to Tampa and Tampa Bay companies interested in Coalition country business. The Institute's specific tasks could be expanded to include: business intelligence, introductions to international (and domestic) companies, hosting applicable prospects during the site-selection process and other business development activities.

Additionally, the EDC's Defense and Security Task Force is positioned to be the stewardship group for the implementation of the strategies relative to the initiatives within the EDC's area of responsibility, and **should place a significant focus on the addition of new task force members representative of the businesses and leadership that can actively influence the transformation process.**

## **IMPLEMENTATION**

At the outset, we want to be mindful of the recent comprehensive work of the Florida Defense Support Task Force. Relative to the strategies presented, there is a significant reason to cite this State of Florida military base assessment that was completed in October.

Our research and interviews lead us to agree with their finding that the level of collaboration among leadership organizations in Tampa needs to be at a higher level in order to make the military business development strategy perform at its optimum level. Anything less than total collaboration will create confusion and misunderstanding, and could lead to unnecessary competition between otherwise well-intended organizations, as well as the potential for missed opportunities.

To effectively implement the recommendations contained within this report, it is not necessary to *consolidate* the efforts of those involved in supporting the military, expanding defense industry jobs and companies, and marketing the assets of MacDill and the defense sector... but it is imperative to increase their *collaboration* and *communication*, while clearly defining their respective roles and responsibilities.

**We believe the most efficient way to leverage the individual strengths and strategies of the various entities involved in military-related outreach is to unite their efforts under the leadership and guidance of the Tampa Bay Defense Alliance.** Formed in early 2012, this group of community leaders and retired senior officers can serve a valuable purpose in assuring that organizations such as the Tampa Hillsborough EDC, the Greater Tampa Chamber of Commerce and the Tampa Bay Partnership focus on their highest and best use. Concurrently, the organizations should work together to facilitate specific tasks and seize special opportunities related to the community's new economic development focus on its tremendous military strengths.

The Tampa Bay Defense Alliance can be positioned as an appropriate leadership group to coordinate and facilitate the Military Transformation Strategy at an overarching level, incorporating other entities which would logically have lead responsibility for initiatives where the EDC has only a support or minimal role, i.e. the Cyber Center and its accelerator, the Rehabilitation Health Institute accelerator and the COS/Commander Alliance.

While the determination of who leads and who supports is critical to implementation, and includes discussions with other partners such as the Greater Tampa Chamber of Commerce's Military Affairs Council, City of Tampa Mayor Bob Buckhorn, the Hillsborough County Board of County Commissioners and the Tampa Bay Partnership, the issues of delivery capacity, strategy, tactics, cost and timing are every bit as critical, if not more so.

**It is more important to produce valuable results for Tampa and Hillsborough County than is it who does the work.**

Once the Military Transformation Strategy is properly adopted, we suggest (1) socializing it with the following leadership groups and others similarly situated to build excitement and

garner support and (2) pursuing an implementation plan starting with the following outline:

- Tampa Hillsborough Economic Development Corporation
  - Defense and Security Task Force
  - Executive Committee
  - Board of Directors
- City of Tampa
  - Mayor
  - Economic Development Staff
  - City Council
- Hillsborough County
  - Hillsborough County BOCC Chairman
  - Economic Development Staff
  - County Commission
- Community Partners
  - University of South Florida
  - Hillsborough Community College
  - Tampa Bay Workforce Alliance
- Community Organizations
  - Greater Tampa Chamber of Commerce
  - Tampa Bay Partnership
  - Tampa Bay Defense Alliance
  - Coalition Institute
- Media
- Enterprise Florida
- Florida Defense Alliance

## Recommended Implementation Overview

KEY STRATEGIES			MEASURING SUCCESS		
STRATEGY	LEAD	EDC ROLE	2013	2014	2015
<b>Collaboration</b>	TBDA	Support	Define roles of key players	Develop a “best of class” MOU	Secure a national collaboration award
<b>Cyber Center</b> <i>USF Courses Accelerator HCC Training Center</i>	USF	Support	Acquire land and develop a business plan	Construct the facility, maximize USSOCOM connection and raise accelerator funding	Open the center and launch the accelerator
<b>Coalition Engagement</b>	EDC	Lead	Develop a business plan	Conduct business development missions	Secure first Coalition country company location
<b>Rehabilitation Health Institute</b> <i>Accelerator</i>	USF	Support	Create the accelerator and build a business plan	Secure accelerator funding and staffing	Complete first class of new companies
<b>Senior Officer Business Alliance</b>	EDC	Lead	Create and recruit the group	Form committees and enhance the value proposition	Team, boards and USSOCOM advisory playing active role in business development
<b>COS/Commander Alliance</b>	TBDA	Support	Cultivate relationships	Cultivate relationships	Working with elected officials and CEO’s
<b>MacDill/Defense Marketing</b>	EDC	Lead	Develop a marketing plan and campaign, identify funding sources to support marketing efforts	Identify target markets, launch PR efforts and target company contacts	Achieve top-tier location recognition

## **CONCLUSION**

During the exhaustive process of discovery used for developing recommendations for the Military Transformation Strategy, it became all too clear that during the past 20 years, when one was asked to name the top four assets of Tampa in order of impact, that MacDill Air Force Base has been severely overlooked. Our message to thought leaders in Tampa is that if you thought Tampa was successful before in its business opportunities, strap yourself in for a great ride over the next several years as the new Military Transformation Strategy connects the business world to MacDill. The bushel basket is coming off this supernova as the EDC leverages these differentiators to take this community to a new level of business and job-creation success.

Strategically adding two major facilities – one outside MacDill’s gate focusing on cyber and related specialties and one at the USF Rehabilitation Institute focusing on PTSD, TBI and related businesses and veterans treatment can be game changers in business development and brand enhancement for Tampa, particularly as they are leveraged with USSOCOM, USCENTCOM, The Coalition Forces, CAMLS and USF itself.

As with all strategies, leadership driven implementation is the key element of success. We believe the Tampa Hillsborough EDC, along with the members of their Defense and Security Task Force, is equipped and ready for this major journey. Sustainability of their passion along with proper financing support will be the key elements to the success formula.

# EXHIBIT A

## DEFENSE AND SECURITY TASK FORCE MEMBERS

<b>MILITARY TRANSFORMATION STRATEGY STAKEHOLDERS COMMITTEE (EDC Task Force)</b>	
<b>NAME</b>	<b>AFFILIATION</b>
Don Phillips	Phillips Equity & Trust (CHAIR)
Rich McClain	COL (Ret.) Air Force, Deloitte (CO-CHAIR)
Jon Bayless	RADM, USN (Ret), Tandel Systems
Rhea Law	Fowler White Boggs
Dr. Art Kirk	Saint Leo University
Ken Coppedge	BB&T
Chip Diehl	BG, USAF (Ret)*, Tampa Bay Defense Alliance
Greg Celestan	LTCOL, USA (Ret), Celestar Corp.
John Lenyo	CAE USA, Inc.
Scoop Jackson	COL (Ret), Liquid Robotic, Inc.
Martin Steele	LT GEN, USMC (Ret), University of South Florida
Dave Scott	MG, USAF (Ret.), Computer Sciences Corporation
Danielle Weitlauf	Florida Federal Contractors Association
Ed Spenceley	Bank of America
John Brabson	Lykes Insurance
Tony Gray	Coalition Institute
Garth Arevalo	Lukos, Inc.
Jay Civitillo	Sypris Electronics, LLC
Fred Hames	Skanska USA
Marty Clay	Hillsborough Community College

## EXHIBIT B

### INTERVIEWS CONDUCTED

<b>COMMUNITY OUTREACH MEETINGS</b>	
<b>NAME</b>	<b>AFFILIATION</b>
Dr. Debbie Sutherland	Center for Advanced Medical Learning and Simulation (CAMLS)
Dr. Michael Fountain	Tampa Bay Research and Innovation Center (TBRIC)
Danielle Weitlauf	Florida Federal Contractors Association
Lt. General Martin Steele	University of South Florida (USF)
Commissioner Al Higginbotham	Hillsborough County
Garth Arevalo	Lukos, Inc.
Rich McClain	Deloitte / EDC Defense and Security Task Force
Rhea Law	Fowler White Boggs
Ben Cross	National Defense Transportation Association
Dr. Beth Carter	Saint Leo University
Kenny Gonzalez	Saint Leo University
Chip Diehl	Tampa Bay Defense Alliance
John Schueler	Tampa Bay Defense Alliance
Greg Celestan	Celestar Corporation
Cori Cutler	Greater Tampa Chamber of Commerce
Ed Spenceley	Bank of America
Randy Goers	City of Tampa
Maj. Gen. Karl Horst	U.S. Central Command / MacDill Air Force Base
Amy Swinford	Calhoun International
Chris Harrington	U.S. Special Operations Command
Ret. Admiral Jon Bayless	Tandel Systems
Hugh Campbell	AC4S International
John Brabson	Lykes Insurance
Joe Falanga	MilitaryParts.com
Michael Niezgoda	Pragmatics, Inc.
Matthew Herring	UDC USA
Chris Ellet	ReliaQuest, LLC
USAF Maj. Gen. Dave Scott	NDIA / EDC Defense and Security Task Force
Don Phillips	Phillips Equity & Trust / EDC Defense and Security Task Force
Jeff Young	Marjau Systems Corporation
Chuck Sleeper	UBC Inc.
Joe Marino	Florida League of Defense Contractors
Tony Gray	Coalition Institute
Roy Sweatman	Southern Manufacturing Technologies
Ed Peachey	Tampa Bay Workforce Alliance
Stuart Rogel	Tampa Bay Partnership
Ron Hytoff	Tampa General Hospital
Scoop Jackson	Liquid Robotic, Inc.
Rob Wolf	Hillsborough Community College
Bob Rohrlack	Greater Tampa Chamber of Commerce

Valerie McDevitt	University of South Florida (USF)
David Carmichael	Armor Products Manufacturing
Tim Jones	The Cybrix Group
Bob Fernandez	Aero Simulation, Inc.
Kevin Jans	Skyway Acquisition Solutions
Rick Homans	Tampa Hillsborough Economic Development Corporation
Lt. Gen. Tom Baptiste	National Center for Simulation
Randy Berridge	Florida High Tech Corridor Council
Jim Breitenfeld	Spectrum Group
Mike Meidel	Pinellas County Economic Development
Tammie Nemecek	GrowFL
John Osterweil	J.W.O. Enterprises, Inc.

## EXHIBIT C

### SAMPLE OF LOCAL DEFENSE AND SECURITY-RELATED COMPANIES

AC4S  
Adcom Worldwide  
Aero Simulation, Inc.  
Alliant Techsystems, Integrated Systems Division  
American Bridge Company  
Archimedes Global, Inc.  
Arma Global Corporation  
Armor Products Manufacturing  
Austin IT Consulting, LLC  
Bauer Foundation Corp.  
CAE USA Inc.  
Calhoun International  
Celestar Corporation  
Chromalloy  
Clark/Hunt Joint Venture  
Clark Caddell A Joint Venture  
Clar, Design/Build, LLC  
Cobham Life Support  
Commercial Design Services, Inc.  
Cortez Professional Consultants  
CTC Tampa Bay, LLC  
Cyberspace Solutions LLC  
The Cybrix Group  
Defense Standard  
Digital Hands  
DSE Inc.  
EMD Strategies  
Engineering & Manufacturing Services, Inc.  
First Choice Marine Supply  
FIT Systems  
FMQAI (Health Services Holdings, Inc.)  
General Dynamics Corporation  
Hapag-Lloyd USA, LLC  
Harris Corporation  
Honeywell International, Inc.  
iGov  
Jacobs Technology Inc.  
L-3 Communications Corporation  
Liquid Robotic, Inc.  
Lockheed Martin  
Lukos, Inc.  
Marjau Systems Corporation  
M.E. Wilson Company, Inc.  
MilitaryParts.com  
Misener Marine Construction, Inc.  
NewCom C3 Planners (NC3)  
New Horizons Computer Learning Center  
Northrup Grumman  
Pall Aeropower Corporation  
PBS&J Constructors, Inc.  
PICA Corporation  
Post Buckley Schuh & Jernigan Inc.  
Pragmatics, Inc.  
ReliaQuest, LLC  
Riverhawk Fast Sea Frames, LLC  
Rosetech Solutions  
Ruag Ammtec USA, Inc.  
Science Applications International Corp. (SAIC)  
Shim Enterprises, Inc.  
SimPhonics, Inc.  
Southern Manufacturing Technologies  
StratCorp, Inc.  
Strategic Defense Solutions  
Superior Communication Solutions, Inc.  
Sypris Electronics LLC  
Tampa Armature Works  
Tape, LLC  
Telecommunication System, Inc.  
Textron  
UBC Inc.  
UDC USA  
URS Group, Inc.  
Vastec, Inc.  
Veantore LLC  
Visual Awareness Technologies & Consulting Inc.  
VLOC Incorporated  
Vulcan machine Inc.  
Vykin Corporation