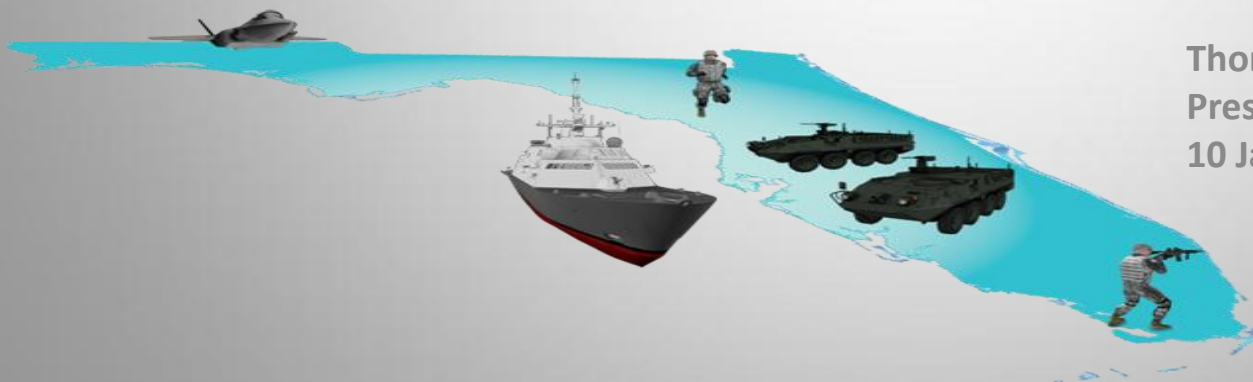




Orange County—the epicenter of the world’s Modeling, Simulation & Training (MS&T) Industry

“Team Orlando--A Unique Collaboration of Academia, Industry & Smart Government Dedicated to Improving Human Performance Through Simulation”



Thomas L. Baptiste, Lt Gen, USAF (Ret)
President/Executive Director
10 January 2013



Economic impact of the MS&T cluster

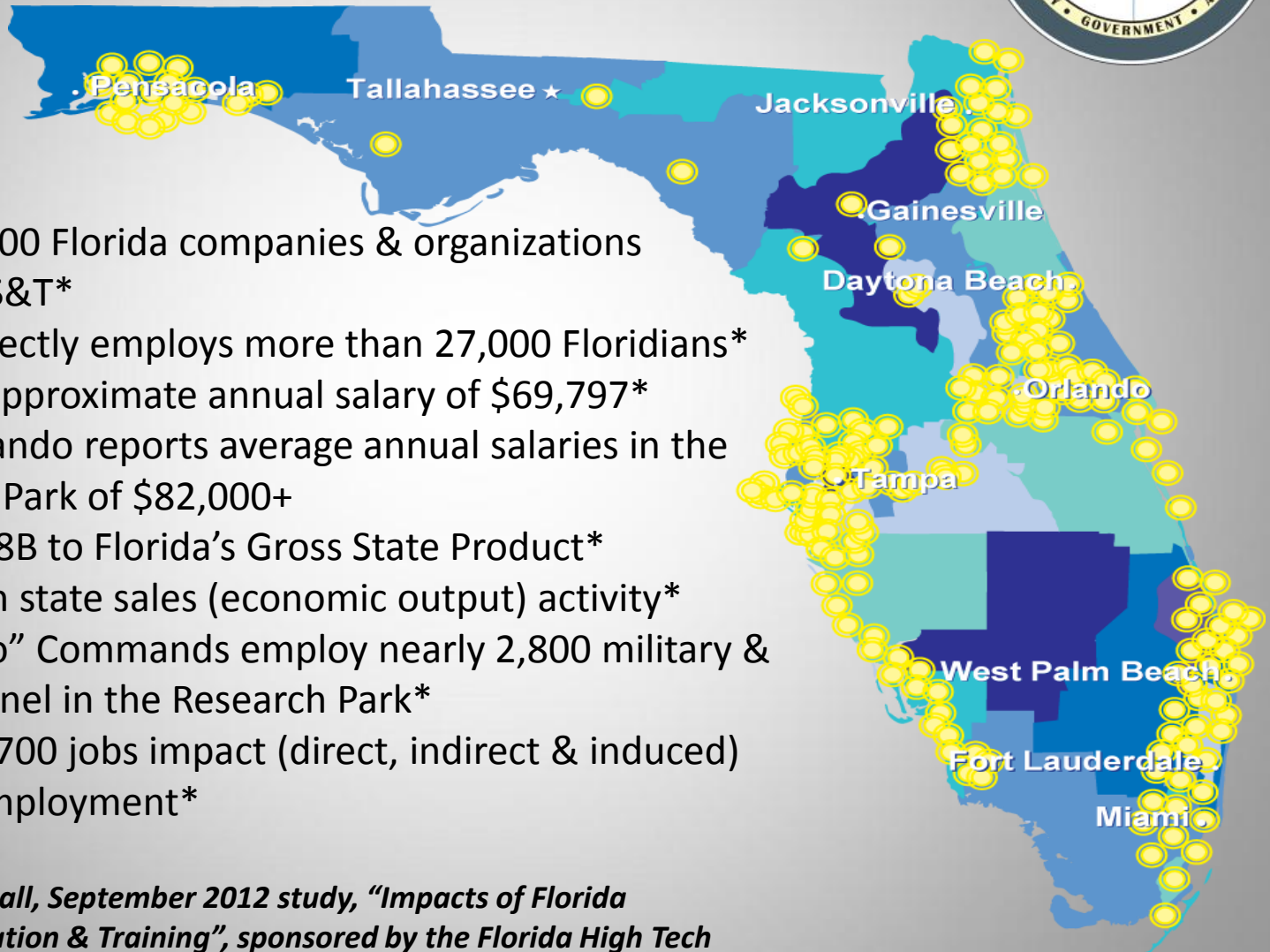


- The Florida High Tech Corridor Council (FHTCC) commissioned an update to a 2008 study to refresh the economic impact numbers
- Dr. Guy Hagen, TuckerHall conducted the analysis and updated his original 2008 study
- The complete study can be found at:

www.simulationinformation.com

or call 407-384-6111

MS&T Economic Impact



- More than 1,000 Florida companies & organizations involved in MS&T*
 - Sector directly employs more than 27,000 Floridians*
 - Average approximate annual salary of \$69,797*
 - Team Orlando reports average annual salaries in the Research Park of \$82,000+
- More than \$4.8B to Florida's Gross State Product*
- Nearly \$8.0B in state sales (economic output) activity*
- "Team Orlando" Commands employ nearly 2,800 military & civilian personnel in the Research Park*
- More than 60,700 jobs impact (direct, indirect & induced) on Florida's employment*

**Source: Tucker/Hall, September 2012 study, "Impacts of Florida Modeling, Simulation & Training", sponsored by the Florida High Tech Corridor Council (FHTCC) for the National Center for Simulation (NCS)*



A potential round of Base Realignment & Closure (BRAC) in 2015?



A challenge and an Opportunity!



BRAC in 2015



- Declining Defense Budgets have caused the Joint Chiefs and Secretary of Defense to ask for 2 rounds of BRAC
- The President asked both Houses of Congress to support rounds of BRAC in 2013 & 2015
- Neither Houses supported the request in 2013
- We must assume there will be a round in 2015

State level preparations for a round of BRAC in 2015

- Florida Defense Support Task Force (FDSTF) formed by Governor Scott
 - Contracts given to Principi & Spectrum Groups
- The Spectrum Group site visits are complete
- Their SWOT Analyses & Threat Assessments have been passed to the Florida Defense Support Task Force (FDSTF)
- If BRAC happens—Team Orlando may be vulnerable!
- The Principi & Spectrum Groups will now shift to an advocacy role
- Their findings and recommendations will guide the Central Florida community preparations as we move forward



Community preparations for a round of BRAC in 2015



- A community “steering committee” has been convened
- A broad cross section of Stakeholders have been identified and a 2-3 year resource estimate has been agreed
- Each of the stakeholders has identified a ROM contribution to fund the community effort—commitments are to be confirmed

Confirmed Partners

Office of the Orange County Mayor
Office of the Orlando Mayor
Seminole County
Metro Orlando EDC
Central Florida Partnership
Florida High Tech Corridor Council (FHTCC)
University of Central Florida (UCF)
Central Florida Research Park (CFRP)
National Center for Simulation (NCS)

Other Potential Partners

Osceola County
Lake County
Other Area Communities
Private Industry



Preparations for a potential round of BRAC in 2015



- The Steering Committee has set the stage to secure FDSTF and State of Florida funding to support our community effort
 - A community proposal was submitted to the FDSTF on Tuesday, 8 Jan 2013
- A detailed action plan has been produced to guide our efforts
 - The plan is designed to protect the current military infrastructure and includes specific initiatives to leverage the opportunity of BRAC to attract more Industry, Academia and Government to Central Florida

Is there a role for you and your organization? Come join us as we execute a detailed action plan to protect and enhance this high tech cluster!

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