

# EXECUTIVE REPORT

A QUARTERLY DIGEST FROM THE AEROSPACE INDUSTRIES ASSOCIATION



AMERICA'S FUTURE IN SPACE AFTER SHUTTLE



## EXECUTIVE REPORT

PRESIDENT'S

# Message

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Susan Lavrakas, AIA's director of workforce, is one lucky individual. On July 8, 2011, she was one of NASA's invited guests to witness history—the final launch of the space shuttle program.

From the closest point any viewer can get to the launch, Susan watched the Space Shuttle Atlantis rocket into space for the last time. Like thousands of others who witnessed the event in person, Susan felt the rumble in her chest and the pride in her heart for what NASA and its extended aerospace family have accomplished over the last 30 years.

What's to be done now that the space shuttle program is shuttered and thousands of contractor employees are laid off putting an already fragile space industrial base at risk? On top of that, we're faced with paying the Russian government \$60 million to ferry each astronaut into space.

However, there's one story not making top of the fold news—NASA has a human space plan to follow shuttle and Congress continues to remain supportive of funding new human space systems. Congressional funding of these systems represents 18 percent of NASA's current budget and while there was a recent House action cutting the fiscal year 2012 budget, we're optimistic that the funding will be sustained.

As NASA transitions to a new space exploration launch system, major debate today centers on whether space technology is mature enough to allow commercial crew operations to reach low Earth orbit. The debate and time lag between shuttle and the new program is reminiscent of past transitions – for instance, from the last Apollo launch in 1975, it was nearly six years before the first Space Shuttle mission in 1981.

AIA members favor a balanced approach that supports funding for both commercial crew systems going to the International Space Station, as well as the development of the Orion Multi-Purpose Crew Vehicle to go beyond Earth orbit.

Beyond these steps, I've repeatedly said that the U.S. government needs to work with industry on developing and implementing a comprehensive human space strategy. Unless a plan with actionable goals and designated milestones is implemented, progress will be difficult and slow.

On the national security space side, the Defense Department is just starting to implement \$460 billion in cuts and more could be on the way with the recently

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ABOUT THE COVER: *Space shuttle Atlantis being towed to an orbiter processing facility at NASA's Kennedy Space Center in Florida for the last time in July 2011.*



Space Foundation's 27th National Space Symposium's "Industrial Base Mega Session" with: (left to right) Marion Blakey, President & Chief Executive Officer, Aerospace Industries Association; Dr. David M. DiCarlo, Sector Vice President, Space Systems Division, Northrop Grumman Aerospace Systems; Roger A. Krone, President, Network & Space Systems, The Boeing Company; Moderator: Dr. William F. Ballhaus, Jr., Chairman, Space Foundation Board of Directors; Brett Lambert, Deputy Assistant Secretary of Defense for Manufacturing and Industrial Base Policy; Joanne M. Maguire, Executive Vice President, Lockheed Martin Space Systems Company; James Maser, President, Pratt & Whitney Rocketdyne; and Richard W. McKinney, Deputy Under Secretary of the Air Force for Space Programs

enacted Budget Control Act. The prospect of a deadlock and a \$600 billion sword of Damocles crashing down could have a significant impact on military space programs.

Already, the House Defense Appropriations bill has proposed \$600 million in cuts to national security space programs for fiscal year 2012.

National security space systems are invisible to us on the ground but provide vital capabilities to our warfighters. Just think of the role space played in the death of Osama Bin Laden. From the satellites that identified his compound to the precision navigation that brought our troops through Pakistani radar unscathed to the secure communications linking our forces across the globe, success of that exercise depended on controlling the "high ground" of space.

In the face of more austere budgets, AIA's National Security Space Committee is drawing up innovative ideas to maintain a strong space industrial base. One idea worth noting is the Evolutionary Acquisition for Space Efficiency, an Air Force conceived block-buy approach for purchasing

satellites. Another approach involves "hosted payloads," where the military piggybacks its space payloads on a commercial satellite.

Any discussion of space systems wouldn't be complete without addressing the valuable role of weather satellites. Millions of Americans had their eyes glued to television as Hurricane Irene made her way up the East coast. Many of them depended on the news for accurate information to prepare their homes for the onslaught or to evacuate safely.

The National Oceanic and Atmospheric Administration polar-orbiting satellite that provided crucial information on Irene is scheduled to go out of service in 2016 with no replacement plan funded. According to an interview with the deputy administrator of NOAA, polar-orbiting satellites are responsible for 93 percent of the data fed into forecast models provided to services like The Weather Channel. They provide unparalleled accuracy and when you look at weather events such

as Hurricane Irene, accuracy measured in miles affects thousands of people in a storm's path.

Even in times of budget austerity, we must continue to replace aging

systems, keep pace with advances in technology, and invest in research and development. Our interview on page 4 with General Bruce Carlson, director of the National Reconnaissance Office,

provides some insight as to how that important agency is preparing for the future.

As the government works to reduce our deficit, it's important that AIA make a case that these programs produce jobs, stimulate our economy and protect our nation.

AIA will continue to advance an industry consensus to drive policy toward better solutions for civil and national security space programs that benefit the nation and our members.

Marion C. Blakey  
President & Chief Executive Officer



Boeing Goes-N weather satellite

# Q&A

WITH GEN. BRUCE C. CARLSON, USAF (RET.)  
DIRECTOR OF THE NATIONAL RECONNAISSANCE OFFICE

The 17th director of the Chantilly, Va.-based NRO, Gen. Bruce C. Carlson has a broad space and intelligence gathering background with more than 3,500 flying hours in ten aircraft as a command pilot. The NRO, which is celebrating its 50th anniversary, develops and operates space reconnaissance systems, conducts intelligence related activities vital to U.S. national security, and collects and with help, analyzes information from aircraft and military satellites. This Q&A explores NRO's current strategic role in the face of looming budget cuts.



Gen. Bruce C. Carlson, USAF (Ret.), Director of the National Reconnaissance Office

**AIA:** *How has NRO evolved over the years to meet changing strategic and tactical needs?*

**Carlson:** The fundamental point is that NRO remains the foundation for global situational awareness. We provide the over-the-world look that no other system can provide. After the Cold War, NRO transitioned to a diverse mission that includes international terrorists, drug traffickers, peacekeeping, humanitarian relief and more recently, impending natural disasters.

Working with our military services partners, we're able to fuse some airborne and satellite data. We help locate bad guys and IEDs before they explode, something you don't hear about typically. We have evolved with the changing world environment.

**AIA:** *The Budget Control Act of 2011 directs significant cuts to U.S. national security spending, with greater cuts in the future. What effect will the constrained budget have on NRO and its capabilities?*

**Carlson:** We, like everyone else, expect budgets to drop. But because of our evolutionary acquisition system, which involves block upgrades of satellites, we think we can hold our current constellation and evolve it in ways that are relevant to the world's situation. I believe that the seed corn for future savings is investing in science and technologies today. Even though our budgets are dropping, we've worked hard to make sure our investment in science and technology is protected.

**AIA:** *AIA is a staunch advocate of maintaining the workforce and capabilities that are part of our space industrial base. Do you have any concerns related to the industrial base?*

**Carlson:** I do. I think we're operating on the edge of a moderately healthy space industrial base. If we don't maintain it, however, it will be to the detriment of our national security. NRO has several ongoing initiatives to sustain that base. The keys are a set of well-defined requirements and a government plan to accomplish the program along with stable budgets. Even if budgets decline, I can manage if I have some predictability.

NRO tries to buy satellites in multiples. We sole source the basic satellite and compete the payloads or some of the subsystems. Then you form a team to drive cost out of the system.

Additionally, while there are some missions where we must have extreme levels of reliability and sensitivity, we mainly go with the commercial model.

**AIA:** *You've been in this job for around two years. It has been a busy period with a highly successful launch campaign. Does this counter the oft-heard concerns that government space acquisition programs are broken?*

**Carlson:** When I look back, our track record is nearly flawless. However, when we did fail, we failed big. We failed because we gave up the proven methods of acquisition, strong system engineering and program management. We learned from those mistakes and it is starting to pay off. We haven't forgotten how to launch payloads—we've launched six payloads in seven months, the most aggressive launch campaign in 25 years.

**AIA:** *What message do you have for your industry partners that help the NRO perform its vital mission? How do you see the expanding commercial sector contributing to your efforts?*

**Carlson:** We've grown in our partnership with industry and will continue to do so. We work hard to take care of our own people here, but we will take good ideas from wherever they come. Launch competition is good whenever you can get it. We're working with NASA and the Air Force to make sure that boosters of SpaceX, the new entrant into the launch business, are qualified as quickly as possible. When certified, we'll use them as long as they are dependable.

**AIA:** *How critical is stable R&D funding for NRO and what steps have you taken to increase this funding?*

**Carlson:** R&D funding is critically needed. If you look at our recent launch campaign, around 60 percent of the technology on those satellites came out of our in-house science and technology efforts. So I have to maintain that investment. When I got here, I saw that R&D had dropped off significantly and committed to raising R&D back to historic levels. And we've done that, even during this budget period.

**AIA:** *In light of these budget cuts, do you think we have enough satellites up there?*

**Carlson:** I do. We're meeting the requirement, although we are on the ragged edge of some of them. But unless we continue to do this work at this level, we will not meet future requirements. So we will have to continue our investment in science and technology, or we won't maintain the balance we have today.

**AIA:** *Projecting forward, what are the major challenges facing NRO?*

**Carlson:** There're two major challenges. One is we have another campaign with four launches planned that we have to launch on time because of a lot of pressure on the launch apparatus with other people's satellites. Challenge number two is how to deal with shrinking budgets. If I am projecting correctly on how these budgets will shrink, then I think our path forward will be successful. We have nearly unanimous support on Capitol Hill for NRO programs. It is fairly straightforward to convince the majority of Congress that these are valid requirements, that the money invested in the NRO is money well spent.

**AIA:** *To some, NRO represents large, monolithic satellites that take years and lots of funding to see to fruition. Others believe that a stable commitment to small- and medium-sized systems demonstrates new capabilities, supports the warfighter and keeps the industrial base healthy and competitive. Do you see such systems contributing to the NRO mission?*

**Carlson:** I am not pre-disposed to small, medium or large satellites. But I am pre-disposed to satisfying requirements. There is no use building a satellite that doesn't meet the needs of the Defense Department, the intelligence or analytical communities. We build satellites of varying size and we're always looking for ways to decrease weight and size. One of those six satellites we launched in the last seven months was small and built in 24 months for a cost of around \$20 million.

We should have changed the names of our satellites as they evolved. But we didn't. Consequently, people think that the satellites we launch today are the same as those we sent up in 1990s. Not so. Each of our new satellites has new, evolutionary and, in some cases, revolutionary technology. We try to save money by using the same truck or bus on which we put the payload. By doing this, we've been able to achieve more power, cooling and energy out of the bus, making those payloads more capable.

**AIA:** *How does the NRO stay relevant in light of rapid advances in technology in the commercial sector?*

**Carlson:** We stay in touch with the commercial sector. We are now looking at some new technologies with an eye to competing them for our future payloads. In addition, we continue to partner with Air Force and Navy labs to ensure there is a synergy to our efforts. I keep returning to our evolutionary acquisition, but this method gives us the flexibility to put evolving or revolutionary capabilities on our platforms. So we're able to respond fairly quickly and get new technology into space. ▼

*A Delta VI launches a NRO payload Jan. 20, 2011, from Vandenberg AFB, Calif.*





Senator Patty Murray receives AIA's prestigious Wings of Liberty Award for her longtime service to the aerospace industry. Left to right front row: James F. Albaugh, AIA Chairman and Boeing Commercial Airplanes President & CEO; Senator Patty Murray, (D-Wash.); Marion Blakey, AIA President and CEO; Scott Donnelly, Textron Chairman & CEO; Back row: Chuck Gray, Frontier Electronic Systems Corporation Vice President & COO; Mark deYoung, ATK President & CEO; & AIA Vice Chair David Hess, Pratt & Whitney President.



**National Aerospace Week** was celebrated Sept. 11-17 with dozens of events across the country and in the nation's capital. House and Senate Aerospace luncheons, STEM Education Coalition and Supplier Management Council meetings were just some of the high-profile events. More than 70 member companies delivered a strong message to their congressmen during a 'March to the Hill' about the importance of aerospace and defense to our economy and national security. Read more at

[www.NationalAerospaceWeek.org](http://www.NationalAerospaceWeek.org).

## AIA'S ROSTER CONTINUES TO GROW

**A**IA's membership has continued to expand with 10 new companies joining in the third quarter of 2011.

Full membership has increased more than 50 percent since January 2010.

The new members are:

**AeroVironment, Inc.** is a leading manufacturer of Unmanned Aircraft Systems and Unmanned Aerial Vehicles used for surveillance and reconnaissance for various industries and government agencies.

**Castle Metals Aerospace** provides a comprehensive range of specialty metals and structural solutions.

**DigitalGlobe, Inc.** provides earth imagery products and solutions using its three high resolution imagery satellites.

**HCL America, Inc.** provides technology-led solutions to aerospace and defense manufacturers.

**Hydra-Electric** designs and manufactures pressure, temperature and liquid flow switches and sensors for aerospace application.

**Infotech Enterprises** is a leader in delivering complete product lifecycle engineering solutions to the global aerospace industry.

**KEMET Electronics Corporation** together with its subsidiaries,

manufactures and sells capacitors worldwide.

**O'Neil and Associates** is a global leader in the development of product support documentation and logistics support activities.

**RAF Tabtronics** creates advanced electromagnetic technologies and cost-effective mission-critical customized solutions for world-leading technology companies.

**RIX Industries** designs and manufactures gas compressors and gas generators for use on aircraft.



**AIA also approved the following new associate members:**

**Aerospace Joint Apprenticeship Committee** is a non-profit organization that develops and implements Washington State registered apprenticeship programs for aerospace and advanced manufacturing occupations.

**Kennametal, Inc** is a global provider of industrial cutting tools and advanced materials to all industries including aerospace.

**MAG IAS, LLC** is a global machine tool company providing comprehensive solutions and services tailored to local requirements.

From center to right: Caren Turner, Turner GPA CEO and Pete Rettaliata, Air Industries Machining Corporation President

## Summer Supplier Management Council Meeting Breaks All Attendance Records

**AIA's Summer Supplier Management Council Meeting**, hosted by Embraer Aircraft Holding, broke all attendance records with more than 180 members attending the meeting in Ft. Lauderdale in July. The recent improvements made to the Supplier Management Council have been making a difference and provide members greater involvement in the governance of the council as well as a better meeting experience.

Brett Lambert, Deputy Assistant Secretary of Defense for Manufacturing and Industrial Base Policy, led a panel on industrial base issues. The meeting was rounded out with a panel discussion with senior industry leaders on global,

operational and strategic risk management, in the wake of the disaster in Japan. The panel was moderated by SMC Executive Committee Chair Dana Hullinger. Hullinger is director of Strategic Sourcing and Early Supplier Involvement at Boeing Defense, Space and Security. ▼

*If you would like to appoint an official representative to the Supplier Management Council, request to serve on the Board of Managers of the Supplier Management Council, get involved in one of the newly forming Working Groups or host an upcoming meeting, please contact Bill Peterson, Director of Supplier Management at [william.peterson@aia-aerospace.org](mailto:william.peterson@aia-aerospace.org) or (703) 358-1090.*

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Air Industries Machining Corporation	Burton Industries	Dayton T. Brown Inc.	Houlihan Lokey	McCann Aerospace	Omniplot Networks Inc.	Sea Air Space Machining & Molding (formerly named North Cape RIM Manufacturing)	Sypris Electronics	VISTAGY
Airborn Operating L.P.	California Manufacturing Technology Consulting	Embry-Riddle Aeronautical University	Hughes Bros. Aircrafters, Inc.	Machining Corporation	Orion Industries	SEAKR Engineering	Tactair Fluid Controls	Vulcanium Metals Incorporated
Airfasco Industries, Inc.	CDG	Enhart Technologies	Industrial Metals Intl. Ltd.	Meehan Electronics Corporation	P3 - North America Consulting Limited	Seal Science, Inc.	TCS America	Whitcraft LLC
Albany Engineered Composites	Celltron Inc.	Black & Decker Company	InfoTrust Group	Meyer Tool Inc.	Parkway Products, Inc.	Sechan Electronics, Inc.	TechSolve, Inc.	Wind River Systems
Alcoa Fastening Systems	Cherokee Nation Distributors	ENSCO, Inc.	Intergrum	Microsemi Corporation	PCC Airflows, LLC	Senior Aerospace	Tedopres International, Inc.	Windings, Inc.
Allen Aircraft Products, Inc.	CIT Aerospace	ESSner Manufacturing L.P.	InterConnect Wiring International	Mid-State Aerospace Inc.	Pelican Products, Inc.	Serco Inc.	TEK Precision Co. Ltd.	X-Ray Industries
Altemp Alloys, Inc.	Cling's Manufacturing	ETA Global, Inc.	International Techgroup Inc. (TranscenData Division)	Mil Spec Sales Co.	Perillo Industries, Inc.	Service Steel Aerospace	Telephonics Corporation	Yarde Metals
American Brazing	CMC Electronics	Exotic Metals Forming Company LLC	Intrepid Learning Solutions	Millitech, Inc.	Phillips Screw Company	Servotronics, Inc.	The Ferro Group	
AMI Metals, Inc.	Co-Operative Industries Defense, LLC		ITW CIP	Modern Industries	Plymouth Engineered Shapes	Shapes Aerospace International	The World Academy	
APV Manufacturing & Engineering Co.			Janex Capital Partners	Moritz Aerospace, Inc.	Precision Gear	Sigma Metals, Inc.	Thermacore, Inc.	
			JRH Electronics, LLC.	Monogram Aerospace Fasteners	Precision Tube Bending	SMT Corp	ThyssenKrupp Aerospace North America	
					Premier Precision Group	Sonfarel, Inc.	TIGHTCO, Inc.	
					QMC LLC		Tiodize Co., Inc.	
							Tri Polus Inc	



AIA launched the Second to None campaign with a press briefing at the National Press Club during National Aerospace Week. Top picture left to right: AIA's Marion Blakey; Jim Albaugh, President & CEO, Boeing Commercial Airplanes (see photo below); David Hess, Pratt & Whitney President at the podium; Richard McNeel, President & CEO, Lord Corporation; Chuck Gray, Frontier Electronic Systems Corporation Vice President & COO and Dawne Hickton, RTI International Metals Vice Chair, President & CEO.

## PRESERVING AMERICAN LEADERSHIP IN AEROSPACE AND DEFENSE

National Aerospace Week, already a tradition three years into the making, and a new advocacy campaign called Second to None, converged September 11-17 to carry important messages to Capitol Hill and district offices across the country.

The messages aren't all new but the circumstances of their delivery are unlike anything we've seen before. The national debt is topping out at nearly \$15 trillion or \$131,000 per U.S. taxpayer, more than most Americans have in their checking account. So truly, the call to reduce our debt is a responsibility we all share.

However, the concern of the aerospace and defense industry is that ill-considered cuts will result in unintended consequences. That's why earlier this year AIA embarked on developing the Second to None initiative to make sure that those consequences were well understood by the officials who were going to have to make some tough decisions.

Our priorities: Preventing additional cuts to defense, continuing development of the Next Generation Air Transportation System and retaining NASA's leadership role in space.



Second to None captures the unquestioned technological leadership of our industry and the countless innovations that our workers bring to American manufacturing. This campaign implicitly acknowledges that the industry needs to do a better job educating government officials to

ensure we remain Second to None over the long term.

This year's National Aerospace Week, an event established by Congress to highlight aerospace and defense contributions to our nation, was a rallying point for Second to None in September with additional events being planned for the rest of the year. Visit [www.SecondtoNone.org](http://www.SecondtoNone.org)

and see how you can get involved. You can write your congressmen using a tool on the ACT page and there are industry facts and news to keep you informed.

After all, the aerospace and defense industry is the lifeblood of America's industrial base, employing more than one million workers directly and supporting 2.9 million middle-class jobs in related fields. More than 30,000 suppliers in the industry provide high-skill, high-paying jobs in all 50 states.

That's a message everyone should hear. ▼

[www.SecondtoNone.org](http://www.SecondtoNone.org)

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