OKLAHOMA

A World Hub for Aerospace
Oklahoma

Population: 3,986,639
Area: 181,195 km²
GDP: $208.8B

In the U.S., it doesn’t get any more central than Oklahoma.

135
public-use airports, including two international airports — 94% of Oklahoma’s population is within a 30-minute drive of a jet-capable airport.

101
million people within 500 miles — Oklahoma has a population of approximately 4 million, with nearly 1.5 million in the Oklahoma City metro and over 1 million in the Tulsa metro.

3
intersecting interstate highways offering access to every corner of the country.

4
inland ports, including one of the largest, most inland, ice-free river ports in the U.S.

Equidistant from New York, Los Angeles, Mexico City and Toronto.

Location & Transportation Network

Equidistant from New York, Los Angeles, Mexico City and Toronto.
Aerospace companies find success operating in Oklahoma — and for good reason. The state is a major hub for MRO, flight training, defense operations and manufacturing.

The Two Largest MRO Facilities in the World
The American Airlines Maintenance and Engineering Center, the largest commercial MRO, employs more than 6,000 in Tulsa; the Oklahoma City Air Logistics Complex at Tinker Air Force Base is the largest air depot maintenance facility for the U.S. Department of Defense and employs approximately 26,000.

120,000+ Employees
More than 120,000 Oklahomans are employed in Oklahoma’s aerospace and defense industries.

1,100+ Aerospace Entities
More than 1,100 aerospace entities including manufacturers, MRO, research and development, military and others.

Supply Chain Database
Connex Oklahoma helps manufacturers find alternate suppliers, view their supply chain visually, avoid supply chain risks and find local suppliers.

Oklahoma vs. the Competition
See how Oklahoma stacks up against other aerospace locations.

<table>
<thead>
<tr>
<th>State</th>
<th>State and Local Tax Business Burden Rank</th>
<th>Corporate Tax Rank</th>
<th>Unit Labor Cost</th>
<th>Sales Tax Rank</th>
<th>Property Tax Rank</th>
<th>Cost of Living Index</th>
<th>Avg. Electricity Price-Industrial Cents/kWh</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oklahoma</td>
<td>46</td>
<td>10</td>
<td>$91,126</td>
<td>37</td>
<td>28</td>
<td>93.2</td>
<td>4.61</td>
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<tr>
<td>Alabama</td>
<td>38</td>
<td>17</td>
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<td>19</td>
<td>93.1</td>
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<tr>
<td>California</td>
<td>8</td>
<td>46</td>
<td>$115,849</td>
<td>47</td>
<td>14</td>
<td>135.2</td>
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<td>Florida</td>
<td>43</td>
<td>7</td>
<td>$99,676</td>
<td>21</td>
<td>12</td>
<td>101.1</td>
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<td>Georgia</td>
<td>41</td>
<td>32</td>
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<td>33</td>
<td>25</td>
<td>93.4</td>
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<tr>
<td>Kansas</td>
<td>22</td>
<td>21</td>
<td>$80,586</td>
<td>27</td>
<td>31</td>
<td>98.2</td>
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<tr>
<td>Missouri</td>
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<td>3</td>
<td>$108,151</td>
<td>25</td>
<td>8</td>
<td>90.3</td>
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<tr>
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<td>1</td>
<td>24</td>
<td>$81,876</td>
<td>42</td>
<td>47</td>
<td>112.4</td>
<td>5.54</td>
</tr>
<tr>
<td>South Carolina</td>
<td>40</td>
<td>5</td>
<td>$96,301</td>
<td>31</td>
<td>36</td>
<td>98.6</td>
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<td>Texas</td>
<td>47</td>
<td>47</td>
<td>$111,515</td>
<td>36</td>
<td>37</td>
<td>98.6</td>
<td>5.07</td>
</tr>
</tbody>
</table>

Sources: Tax Foundation, Anderson Economic Group, Joes, EIA, C2ER and others.

Aerospace Industry Economic Impact
Aerospace and Defense is Oklahoma’s second largest sector with an economic impact approaching $44 billion annually. Additionally, aerospace is one of the state’s fastest-growing industries.
Oklahoma’s Aerospace Cluster Map

Oklahoma’s aerospace and defense clusters are comprised of 1,100+ entities, including manufacturers, MRO, research and development, military and others.

Northwest Region
- Vance AFB
- Aircraft Structures International Corporation (ASIC)
- Vantage Plane Plastics

Central Region (Oklahoma City)
- Tinker AFB
- Federal Aviation Administration
- AAR
- Acorn Growth Companies
- Boeing
- Bombardier
- Delaware Resource Group
- Field Aerospace
- Frontier Electronic Systems Corp.
- GE Aviation
- General Dynamics
- Kratos Defense & Security Solutions

Southwest Region
- Altus AFB
- Fort Sill
- BAE Systems
- Duncan Machine Products
- Oklahoma Air & Space Port
- Raytheon Missile & Defense

Northeast Region (Tulsa)
- Tulsa Air National Guard
- Ferra Aerospace
- Malone’s CNC Machining
- Orizon Aerostructures
- American Airlines MRO
- BizJet (Lufthansa Technik)
- Consolidated Turbine Specialists
- FlightSafety
- Intercontinental Jet Service Corp.
- L3Harris
- Lufthansa Technik
- MST Manufacturing
- NORDAM
- Spirit AeroSystems
- Valence Surface Technologies
- Vertical Aerospace
- WHI Global

Southeast Region
- McAlester Army Ammunition Plant
- AERO Component Repair
- Choctaw Defense
- Choctaw Nation Daisy Ranch
- Enviro Systems

Northeast Region
- Lockheed Martin
- Meta Special Aerospace
- Moog
- Northrop Grumman
- North Star Scientific
- Pratt & Whitney
- Raytheon Advanced Radar Systems/Technologies
- Rolls-Royce
- Skydweller
- SkyWest

Southwest Region
- Raytheon
- Kratos Defense
- L3Harris
- Lufthansa Technik
- MST Manufacturing
- NORDAM
- Spirit AeroSystems
- Valence Surface Technologies
- Vertical Aerospace
- WHI Global

Southeast Region
- General Dynamics
- Orizon
- Safran
- FlightSafety
- Intercontinental Jet Service Corp.
- Lufthansa Technik
- MST Manufacturing
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- Valence Surface Technologies
- Vertical Aerospace
- WHI Global

Northeast Region
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- Bombardier
- Delaware Resource Group
- Field Aerospace
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- GE Aviation
- General Dynamics
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Southeast Region
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- SkyWest
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- NORDAM
- Spirit AeroSystems
- Valence Surface Technologies
- Vertical Aerospace
- WHI Global
“Since announcing Kratos’ operations were expanding to Oklahoma in 2018, our investment here has continued to pay off. Not only did all of the pieces fit what we were looking for then, but, from the Burns Flat spaceport to a growing and highly skilled workforce, Oklahoma has continued to offer even more benefits and resources ideal for defense and aerospace companies located here.”

- Steve Fendley
  PRESIDENT, UNMANNED SYSTEMS DIVISION
  KRATOS DEFENSE & SECURITY SOLUTIONS INC
Oklahoma’s Defense Industry

Oklahoma has been a key player in the defense and homeland security industry since World War II. With the largest DOD air depot, a central location and strong military presence, Oklahoma offers defense companies the expertise and strategic advantage necessary for success.

- **5 Military Installations**
  - Tinker AFB
  - Vance AFB
  - Fort Sill
  - Altus AFB
  - McAlester Army Ammunition Plant
  - 7 National Guard assets — 2 Air National Guard campuses and 5 Army National Guard complexes

- **Oklahoma Aerospace & Defense Institute (OADII)**
  OADII brings together the full range of the University of Oklahoma’s capabilities and resources to provide holistic solutions addressing aerospace, defense, and global security challenges.

- **FISTA Innovation Park**
  Located in Lawton, Okla., near Fort Sill, the Fires Innovation Science & Technology Accelerator (FISTA) is a high-security acceleration hub for the nation’s top defense contractors, academic institutions and innovators.

- **Top Defense Contractors Operating in Oklahoma**
  - Aviation Training Consulting, LLC
  - BAE Systems
  - Berry Aviation
  - Boeing
  - Booz Allen Hamilton
  - Delaware Resource Group
  - Dynetics
  - FlightSafety
  - GE
  - Kratos Defense
  - L3Harris
  - Lockheed Martin
  - Moog Inc.
  - Northrup Grumman
  - Pratt & Whitney
  - Raytheon Technologies
  - SAIC
  - Vertex

Veterans & Federal Agencies

Affordable places for Veterans (OKC #6, Tulsa #9), Veterans United Home Loans, Feb. 2020.

Veterans account for 9% of Oklahoma’s population.

Oklahoma has a significant presence of Federal Agencies, including the FAA and training for the U.S. Postal Service.

United Nations fighter pilots from around the world visit Oklahoma for critical training with NATO allies.

“Oklahoma has a strong, proud military presence, a robust aerospace ecosystem, and a sensible business environment. Boeing enjoys a meaningful partnership with Oklahoma’s federal delegation, the state, the City of Oklahoma City, Tinker Air Force Base, community leaders and non-profit organizations. Each of these critical factors support our positive outlook for continued multi-year business and employment growth in the state.”

- Todd Pauley
  DIRECTOR, GOVERNMENT OPERATIONS
  THE BOEING COMPANY
Oklahoma’s Aerospace Workforce

Oklahoma aerospace companies employ more than 120,000 aerospace and defense professionals, including engineers, sheet metal mechanics and skilled pilots.

In Oklahoma, we epitomize hard work as a way of life. Representatives from higher education, school districts and technical training partner with leaders from key industry sectors and civic organizations to create the framework that is moving Oklahoma’s workforce model to a top 10 status. Having a talented, easily accessible workforce is a key component to the success of any business. We have the tools, resources and business-friendly policies in place to help your business hire a qualified workforce – and sustain it.

Our workforce services can help your business find the skilled workers you need now and develop a pipeline of talent for the future.

Preparing a Workforce for the Future

In Oklahoma, aerospace education starts early. Recognizing the need for a skilled workforce in the aerospace and aviation industry, many Oklahoma high schools offer aviation curriculum developed by the Aircraft Owners & Pilots Association (AOPA). The Oklahoma Aeronautics Commission offers the four year “You Can Fly” curriculum free to schools committed to providing high quality aviation STEM pathways for students and creating a future workforce for Oklahoma companies. The state also provides schools and organizations with Aerospace & Aviation Education Grants to support learning programs that have a direct application to aerospace and aviation for primary through post-secondary education.

Aerospace Industry Wage Profile

Wages in Oklahoma’s Aerospace & Defense sector are more than 30% lower than the national average.

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Aerospace Engineers</td>
<td>1,274</td>
<td>$29.47</td>
<td>$50.14</td>
<td>$43.22</td>
<td>$55.43</td>
</tr>
<tr>
<td>Aircraft Mechanics and Service Technicians</td>
<td>3,943</td>
<td>$17.21</td>
<td>$32.16</td>
<td>$27.16</td>
<td>$30.05</td>
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<tr>
<td>Aircraft Structure, Surfaces, Rigging, and Systems Assemblers</td>
<td>1,079</td>
<td>$16.20</td>
<td>$25.72</td>
<td>$22.55</td>
<td>$26.63</td>
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<tr>
<td>Architectural and Engineering Managers</td>
<td>2,145</td>
<td>$40.38</td>
<td>$74.90</td>
<td>$63.37</td>
<td>$70.34</td>
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<tr>
<td>Avionics Technicians</td>
<td>720</td>
<td>$23.08</td>
<td>$31.01</td>
<td>$28.37</td>
<td>$30.63</td>
</tr>
<tr>
<td>Business Operations Specialists, All Other</td>
<td>5,682</td>
<td>$21.54</td>
<td>$41.06</td>
<td>$34.57</td>
<td>$36.39</td>
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<tr>
<td>Computer and Information Systems Managers</td>
<td>3,358</td>
<td>$32.21</td>
<td>$62.26</td>
<td>$52.26</td>
<td>$71.97</td>
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<tr>
<td>Computer Systems Analysts</td>
<td>3,727</td>
<td>$22.64</td>
<td>$41.95</td>
<td>$38.17</td>
<td>$44.57</td>
</tr>
<tr>
<td>Computer-Controlled Machine Tool Operators, Metal and Plastic</td>
<td>2,508</td>
<td>$12.50</td>
<td>$21.92</td>
<td>$18.80</td>
<td>$19.71</td>
</tr>
<tr>
<td>Electrical Engineers</td>
<td>1,791</td>
<td>$29.52</td>
<td>$52.16</td>
<td>$44.62</td>
<td>$47.88</td>
</tr>
<tr>
<td>Engineers, All Other</td>
<td>1,603</td>
<td>$20.43</td>
<td>$51.44</td>
<td>$41.11</td>
<td>$47.74</td>
</tr>
<tr>
<td>First-Line Supervisors of Production and Operating Workers</td>
<td>8,038</td>
<td>$16.97</td>
<td>$33.65</td>
<td>$28.08</td>
<td>$30.14</td>
</tr>
<tr>
<td>Industrial Engineering Technicians</td>
<td>813</td>
<td>$19.38</td>
<td>$35.63</td>
<td>$30.24</td>
<td>$36.49</td>
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<tr>
<td>Industrial Engineers</td>
<td>2,135</td>
<td>$26.39</td>
<td>$48.13</td>
<td>$40.87</td>
<td>$43.41</td>
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<tr>
<td>Industrial Machinery Mechanics</td>
<td>5,090</td>
<td>$17.02</td>
<td>$28.94</td>
<td>$24.95</td>
<td>$25.53</td>
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<tr>
<td>Industrial Production Managers</td>
<td>2,043</td>
<td>$27.79</td>
<td>$59.18</td>
<td>$48.70</td>
<td>$53.17</td>
</tr>
<tr>
<td>Inspectors, Testers, Sorters, Samplers, and Weighers</td>
<td>5,942</td>
<td>$12.16</td>
<td>$23.94</td>
<td>$20.00</td>
<td>$19.71</td>
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<tr>
<td>Logisticians</td>
<td>2,702</td>
<td>$25.24</td>
<td>$42.12</td>
<td>$36.49</td>
<td>$37.84</td>
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<tr>
<td>Machinists</td>
<td>5,651</td>
<td>$14.28</td>
<td>$24.66</td>
<td>$21.20</td>
<td>$21.25</td>
</tr>
<tr>
<td>Materials Engineers, Composites</td>
<td>296</td>
<td>$25.38</td>
<td>$48.13</td>
<td>$40.53</td>
<td>$47.40</td>
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<tr>
<td>Mechanical Engineers</td>
<td>3,259</td>
<td>$28.08</td>
<td>$48.08</td>
<td>$41.39</td>
<td>$43.99</td>
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<tr>
<td>Production, Planning, and Expediting Clerks</td>
<td>5,224</td>
<td>$14.28</td>
<td>$27.69</td>
<td>$23.22</td>
<td>$23.56</td>
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<td>Software Developers, Applications</td>
<td>4,841</td>
<td>$26.49</td>
<td>$50.19</td>
<td>$42.31</td>
<td>$51.30</td>
</tr>
<tr>
<td>Software Developers, Systems Software</td>
<td>3,061</td>
<td>$23.80</td>
<td>$45.10</td>
<td>$38.03</td>
<td>$53.75</td>
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<tr>
<td>Structural Metal Fabricators and Fitters</td>
<td>1,499</td>
<td>$13.13</td>
<td>$19.86</td>
<td>$17.60</td>
<td>$19.47</td>
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<tr>
<td>Team Assemblers</td>
<td>12,678</td>
<td>$10.38</td>
<td>$17.12</td>
<td>$14.86</td>
<td>$15.96</td>
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<tr>
<td>Welders, Cutters, Solderers, and Brazers</td>
<td>9,317</td>
<td>$13.99</td>
<td>$25.05</td>
<td>$21.35</td>
<td>$20.87</td>
</tr>
</tbody>
</table>
The Pathway to Your Talent Pipeline

From elementary through higher education, Oklahoma’s education system supports the development of aerospace and defense talent. Here’s a look at a few programs available to grow the state’s aerospace workforce.

Higher Education Supports Aviation & Aerospace

9

Oklahoma colleges and universities offer aerospace degrees and certifications

1st

University in the nation with a PhD program focused on UAS design at Oklahoma State University

3,686

Aerospace and engineering program completions in Oklahoma (2020-2021)

The University of Oklahoma offers an Executive MBA in Aerospace & Defense. Students from companies like Boeing, Northrup Grumman, Raytheon, Booz Allen Hamilton, Pratt & Whitney, and Southwest Airlines, as well as active duty military and veterans are previous and current participants.

Oklahoma’s Aerospace Degrees Are on the Rise

The Oklahoma Aerospace Institute for Research and Education was launched in 2021 by Oklahoma State University to support partnerships between university, commercial, military and governmental agencies to help generate high-tech jobs and cutting-edge research.

With aerospace being one of the state’s key industries, degrees in aerospace and aviation are increasing, year over year.

18,000+

Projected aerospace-related degree completions 2022-2026

#5

OU Executive Aerospace MBA ranked #5 program by College Consensus

Oklahoma’s CareerTech Network

Oklahoma’s CareerTech has the ability to respond quickly to the aviation industry’s need to develop skilled workers through specialized training programs and facilities located across the state.

29

technology center districts

6

technology centers with aerospace-focused certification, training and testing

59

campuses statewide

CareerTech covers all aspects of aircraft maintenance, repair and overhaul (MRO), aircraft manufacturing and supporting industries, and can customize any of their courses to meet a particular industry’s need to include incorporation of the company’s standards.

Aerospace-Related Programs

Over the next five years, Oklahoma CareerTech projects more than 10,000 graduates from its aerospace-related programs.

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<tbody>
<tr>
<td>Aerospace Maintenance Pathway (A&amp;P Mechanics)</td>
<td>184</td>
<td>203</td>
<td>207</td>
<td>211</td>
<td>215</td>
<td>220</td>
<td>286</td>
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<tr>
<td>Aerospace Sheet Metal Technician</td>
<td>78</td>
<td>115</td>
<td>50</td>
<td>55</td>
<td>60</td>
<td>65</td>
<td>62</td>
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<tr>
<td>Production Pathway (Machinists)</td>
<td>291</td>
<td>256</td>
<td>261</td>
<td>266</td>
<td>272</td>
<td>277</td>
<td>220</td>
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<tr>
<td>Programming &amp; Software Development Pathway (Software)</td>
<td>38</td>
<td>38</td>
<td>39</td>
<td>40</td>
<td>40</td>
<td>41</td>
<td>61</td>
</tr>
<tr>
<td>Welding &amp; Metal Fabrication Pathway (Metal Workers)</td>
<td>793</td>
<td>741</td>
<td>756</td>
<td>771</td>
<td>786</td>
<td>802</td>
<td>653</td>
</tr>
</tbody>
</table>

“Oklahoma CareerTech is a leader in pipelining high school and post-secondary students to aerospace careers via strategic partnerships. Their efforts are helping provide the required workforce for aerospace businesses in the state.”

- Ryan Goertzen
VICE PRESIDENT WORKFORCE DEVELOPMENT AAR
Incentive Programs

Oklahoma has some of the lowest tax rates and some of the best tax incentives in the nation. With some incentives, businesses can choose between a cash incentive or a tax credit package, and in some cases, qualifying businesses can take advantage of both programs. The following are incentives often utilized by aerospace companies.

### Quality Jobs Program
Cash payments of up to 5% of new payrolls for up to 10 years
- $2.5 million annual payroll within 3 years of start date
- Create new full-time positions
- Pay new Oklahoma employees average wages above the state index wage

### Small Employer Quality Jobs Program
Cash payments of up to 5% of new payrolls for up to 7 years
- Qualifying small employer (500 employees or less)
- Create new full-time positions
- Pay new Oklahoma employees average wages above the state index wage

### 21st Century Quality Jobs
Cash payments of up to 10% of new payrolls for up to 10 years
Create 10 new full-time positions within 3 years
- Pay average wage of at least $99,485 annually (wage threshold can be lower if 300% of the average county wage)
- Requires 50% out-of-state sales

### Investment/New Jobs Tax Credit Package
Provides growing manufacturers with a substantial tax credit based on either an investment in depreciable property or on the addition of full-time-equivalent employees engaged in manufacturing, processing or aircraft maintenance.
- Choice of tax credit based on investment or new employees
- 5-year state tax credit on the greater of 1% per year of investment in new depreciable property or $500 per new job
- Credit doubles to 2% or $1,000 per employee in Enterprise Zones or for investments of $40 million

### Business Expansion Incentive Program
Annual cash payments
- Helps existing companies expand in Oklahoma
- Targets major capital investments in depreciable items like equipment and buildings
- Qualifying companies may choose between direct cash payments or payments that service private bonds

### Engineer Workforce Tax Credit for Aerospace
Employer Benefits
- New engineer graduates
  - 50% tax credit for reimbursed tuition costs for first 4 years of employment
- Hire Oklahoma graduates
  - Up to 10% of wages paid during first 5 years of employment
  - (Maximum of $12,500 per employee annually)
- Hire non-OK graduates
  - Up to 5% of wages paid during first 5 years of employment
  - (Maximum of $12,500 per employee annually)

Employee Benefits
Engineers currently employed in aerospace industry are eligible to receive individual tax credit up to $5,000 per year for 5 years.

### Training for Industry Program
A program of Oklahoma’s CareerTech System, the Training for Industry Program (TIP) provides low-to no-cost training for virtually most industry sectors. Whether the company is new to Oklahoma or an expansion, TIP offers services, including: training needs assessment and customized training program; training provided on-site or alternate locations; training delivered through local CareerTech centers throughout Oklahoma; reimbursement of training costs and more.

### Five-Year Ad Valorem Exemption
A qualifying company can be exempt for 5 years from ad valorem taxes upon completion of new or expanded facilities. This incentive is available for manufacturing, research and development, warehouse and distribution, and certain computer/data processing services, refineries or aircraft repair companies.

### New Market Tax Credits
A federal incentive created to spur private investment in low-income urban and rural communities, investors receive a 39% federal tax credit.

### Other Incentives
- Oklahoma’s 39 Native American tribes participate with communities and companies in their tribal jurisdictions.
- Each community in Oklahoma typically has local incentives available to companies expanding in or relocating to their city.
- Several aerospace companies and airport properties were designated Federal Opportunity Zones and potentially have additional state level benefits for qualified companies.
Aerospace exports from Oklahoma have grown by 25% since 2014. In 2021, exports of aircraft, aircraft engines and parts totaled approximately $500 million. Aerospace exports is one of Oklahoma’s top three export categories.

In 2018, the state proved its commitment to the aerospace and defense sector by passing legislation to create Oklahoma ACES. Led by the Oklahoma Aerospace & Defense Team with the Oklahoma Department of Commerce, ACES has resources dedicated to developing and growing the state’s aerospace industry.

ACES has ongoing conversations with military partners such as Tinker Air Force Base to address roadblocks in the base’s vendor process. ACES is actively working with these partners to dissolve barriers to entry and increase supply chain opportunities for Oklahoma companies.

The team facilitates B2B events to help Oklahoma companies become suppliers to commercial operations as well as the U.S. DoD and prime contractors. ACES also coordinates hiring events across the state to facilitate connections between companies and potential employees.

Through two supply chain platforms, Connex Oklahoma and Sustainment Technologies, the ACES team is helping Oklahoma manufacturers find new suppliers and diversify their businesses.

The Commerce A&D Team leads national and international trade show delegations, providing an opportunity for Oklahoma companies that may not have the budget to attend on their own to display and meet with potential customers at some of the most highly attended industry events.

“NSS chose the state of Oklahoma as the site of our expansion because of the favorable business environment and the availability of personnel and other resources that benefit aerospace companies.”

- Dr. James Stamm
CEO OF NORTH STAR SCIENTIFIC CORPORATION

### Top Oklahoma Export Categories

<table>
<thead>
<tr>
<th>Country</th>
<th>Establishments</th>
<th>Employment</th>
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