



Maryland Aerospace & Technology Commission Strategic Plan

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Elevating Maryland to Global Aerospace Leadership

Prepared For:

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Maryland Economic Development Commission
Maryland General Assembly

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Executive Summary

Maryland is an aerospace state. Anchored by NASA’s Goddard Space Flight Center, Naval Air Station Patuxent River, Johns Hopkins University Applied Physics Laboratory, National Oceanic and Atmospheric Administration, and more than 9,000 aerospace companies, the state brings together a concentration of federal assets, industry partners, and specialized talent unmatched in the region. With the highest density of aerospace engineers in the nation and a strong pipeline of dual-use technologies, Maryland already plays a critical role across the aerospace value chain.

Maryland is also poised for growth. Federal research centers, top universities, and a highly skilled workforce are attracting “new space” and commercial sector investment positioning the state to expand its share of a global market that is scaling rapidly in areas such as space systems, autonomy, and advanced materials and manufacturing. These assets give Maryland a unique competitive advantage and a clear opportunity to convert national investments into lasting economic impact.

Importantly, aerospace investment delivers measurable returns. Maryland aerospace companies generate above-average wages, drive significant private investment, and expand the state’s tax base. Independent analyses, such as those conducted by the Maryland Economic Development Association, demonstrate that every state dollar invested in economic development yields many times that amount in economic impact—underscoring why aerospace merits prioritization.

To guide this growth and communicate Maryland’s strategic strengths, the state is defining its aerospace identity through the **SMART Aerospace Hub** framework—highlighting leadership in **Systems & Missions, Materials & Manufacturing, Autonomy, Resilient Navigation, and Talent**. This framework reflects Maryland’s rare ability to deliver end-to-end aerospace missions and technologies and serves as the foundation for its vision and strategy moving forward.

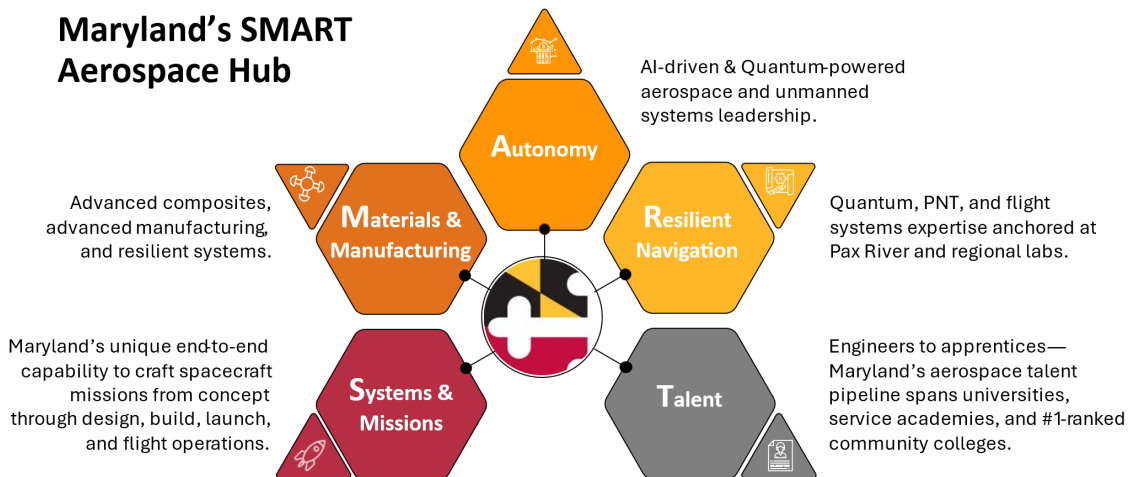


Figure 1: Maryland's SMART Aerospace Hub

Vision

To establish Maryland as the nation’s most advanced, agile and integrated aerospace hub—where discoveries are made, missions are born, built, and flown, and where innovation in autonomy, materials, manufacturing, and navigation drives the future of flight and space.

Mission

Create an integrated, collaborative aerospace ecosystem that attracts leading businesses and top talent, fosters breakthrough innovations in systems, materials, manufacturing, autonomy, and navigation, and generates high-value economic growth for Maryland.

Scope of this Strategy

This strategic plan is intentionally focused and disciplined, reflecting both Maryland’s fiscal realities and the need to avoid duplication with other state-led efforts. The Maryland Aerospace and Technology Commission concentrates on areas where Maryland has unique assets and can achieve outsized impact, specifically:

- Space technology and exploration
- Defense and security systems
- Advanced materials and manufacturing and resilient supply chains
- Aerospace software, AI, quantum, and precision navigation & timing (PNT)
- End-to-end workforce and talent development pipelines

Areas outside this scope, such as advanced air mobility and certain commercial aviation initiatives, are recognized as important but are being addressed through other commissions and state-led processes.

A regional approach grounds this strategy, aligning local strengths—from federal anchors in Central and Southern Maryland to launch capacity on and flight test ranges off the Eastern Shore—within a cohesive statewide framework.

Current Urgency

Maryland’s aerospace economy is at an inflection point. Aerospace is at the leading edge of competitive global markets. Federal investments in space, defense, and dual-use technologies are accelerating nationally, and other states are moving aggressively to capture these opportunities. Without near-term action, Maryland may forfeit competitive ground to states making aggressive investments.

At the same time, Maryland faces immediate challenges. Several of our federal anchors, including NOAA, NIST, and NASA Goddard, are experiencing uncertain or reduced growth trajectories. These headwinds underscore the importance of diversifying and strengthening Maryland’s aerospace economy.

Strategy Development Approach

The approach to developing this strategy has been straightforward and conversational, drawing on commissioner input and feedback from stakeholders. Early tools, such as an “As-Is State” diagram of Maryland’s aerospace ecosystem and a force field analysis of enablers and constraints, helped surface themes for discussion. From there, the Commission outlined the Maryland SMART Aerospace Hub Framework, design principles, and regional focus areas.

Guiding Design Principles

These principles provide a framework for immediate decision-making and investment, ensuring Maryland’s aerospace strategy is disciplined, high-impact, and aligned with measurable outcomes. They may be refined as the Commission advances its work and Maryland’s aerospace brand evolves.

- **Accelerate Innovation Through Speed and Agility** – Adopt models that shorten timelines and position Maryland as the fastest partner.
- **Focus on Dual-Use and High-Growth Technologies** – Concentrate resources on AI, autonomy, quantum, advanced materials, and resilient PNT.
- **Catalyze Private Capital, Don’t Replace It** – Use incentives to de-risk first builds/tests and spark private and corporate investment.
- **Build on Regional Strengths, Act as One Maryland** – Harness diverse assets across regions under a unified state plan.
- **Leverage Federal Anchors for State Growth** – Maximize opportunities from federal assets while building resilience against shifting priorities.
- **Invest in People, Not Just Infrastructure** – Prioritize apprenticeships, internships, clearances, and credentials that create lasting, high-wage careers.
- **Maximize Visible Returns for Citizens** – Tie every initiative to jobs, wages, supply chain resilience, and student STEM pathways.

Strategic Goals and Expected Outcomes

The Commission is committed to producing results that can be measured within the next year, while also laying the foundation for growth through 2035 and beyond.

To help decision-makers understand the range of possible impacts, the Commission has outlined potential outcomes at three levels of investment for both near-term action and long-term positioning. These scenarios illustrate what can be achieved with modest resources, how greater commitment can accelerate progress, and what transformational impact is possible with bold investment.

Immediate Action (next 20 months)

To move from strategy to action, we outline steps achievable within 20 months under three funding scenarios, giving policymakers clear options for speed and scale.

\$0 Level of Investment = Low Maintain Current Path	\$750k Level of Investment = Medium Targeted Progress	\$1.5M Level of Investment =High Accelerated Positioning
<ul style="list-style-type: none"> ● Continue convening & coordination ● Produce a snapshot economic impact statement with very limited new data collection ● Leverage existing partnerships and branding channels <p>Risk: Maryland remains reactive; loses momentum to peer states</p>	<ul style="list-style-type: none"> ● Launch 2 pilot workforce/supplier programs ● Expanded economic impact analysis, strategic intelligence, & strategy refinement ● Seed marketing campaign for SMART Aerospace Hub (few key trade events) ● Build initial public-private partnership commitments toward future investments 	<ul style="list-style-type: none"> ● Multi-site pilot programs for workforce, expanded supplier incentives ● Expand the economic impact statement into a 10-year Aerospace Strategy baseline with policy levers and investment scenarios. ● Full-spectrum strategic intelligence and marketing campaign



Figure 2: Recommended investment pathways over the next 20 months, showing how different funding levels translate into action, outcomes, and long-term positioning for Maryland’s aerospace strategy.

Positioning for the Future (FY2028 - 2035)

The figure below illustrates how different levels of long-term investment can scale the SMART Aerospace Hub -- from maintaining Maryland’s role as a convener and coordinator, to driving targeted growth in workforce and suppliers, to achieving transformational impact as a nationally recognized aerospace leader.

\$0 Annual Program Budget Level of Investment = Low No New Annual Funding	\$10M Annual Program Level of Investment = Medium Comparable to Build our Future Investment	\$50M Annual Program Budget Level of Investment = High Comparable to Rural Maryland Economic Development Fund
<ul style="list-style-type: none"> Continued MATC convenings and Maryland ecosystem analysis Expand international partnership forums Industry coordination and partnership with federal agencies 	<ul style="list-style-type: none"> Establish competitive grant programs for workforce training targeting 1,500 workers Fund supplier readiness programs such as AS9100 and AS9120 through partnership with Maryland Manufacturing Extension Partnership) Fund accelerator sprints targeting SMART Technologies Offer enhanced location and expansion incentives Support early-stage site readiness at strategic aerospace locations through MEDCO partnership 	<ul style="list-style-type: none"> Scale workforce grant programs to reach 6,000 workers Expand supplier readiness, accelerator sprints, and relocation incentives Create a Maryland Aerospace Growth Fund to co-invest with federal and private partners in technology acceleration and commercialization Partner with MEDCO on bond-backed infrastructure investments (range enhancements, test facilities)

Figure 3: Potential annual investment levels 2028-2035 and the projected outcomes for Maryland’s aerospace industry.

Public investment in aerospace should yield measurable benefits for Maryland’s economy and citizens. Comparable state initiatives in other states, such as Space Florida, have documented multi-billion-dollar impacts on state GDP, job creation, and tax revenues.¹

¹ **Space Florida.** “Space Florida: \$5.9 Billion Economic Impact on Florida’s Economy.” *Space Florida*, 21 May 2024, <https://www.spaceflorida.gov/news/space-florida-5-9-billion-economic-impact-on-floridas-economy>

Requests of the Maryland General Assembly

To realize Maryland's aerospace potential, we recommend targeted statutory adjustments to strengthen the Maryland Aerospace & Technology Commission (MATC), including expanded authorities, membership, and reporting flexibility. We also request budget support for innovation funding, staff capacity, and a dedicated funded aerospace program line within the Department of Commerce. These changes will equip Maryland to attract commercial investment, secure federal tenants, elevate small businesses, and ensure the aerospace sector is recognized and resourced as a core driver of the state's economy.

Conclusion and Next Steps

This strategy reflects Maryland's commitment to act with discipline, urgency, and foresight. Every initiative outlined here is designed to maximize the return on each state dollar invested by leveraging federal anchors and private capital to deliver jobs, innovation, and long-term economic growth for Maryland's citizens.

The release of the draft economic strategy on October 1 marks the beginning of Maryland's aerospace momentum. While future investment decisions will ultimately shape the scale of impact, there are important no-cost actions the Commission can take immediately to sustain visibility, deepen stakeholder engagement, and position Maryland for success once resources are appropriated. These follow-on steps, taken by MATC and partner organizations, are designed to keep aerospace front-of-mind for policymakers, industry, and the public while demonstrating the Commission's commitment to implementation and accountability.

- **Out-briefs for Legislative Staff** – Deliver tailored updates either in person (during Aerospace Day) or via Zoom, ensuring early alignment with General Assembly priorities.
- **Governor's Office Briefing Note** – Provide a concise summary and talking points that link the strategy to statewide economic priorities, equity, and workforce agendas.
- **Federal Agency Alignment Sessions** – Convene briefings with NASA Goddard, Wallops, NAVAIR, NOAA and other federal anchors to share the strategy and identify joint opportunities.
- **Industry Listening Sessions** – Host 2–3 virtual roundtables with Maryland aerospace firms to gather feedback on implementation priorities and refine near-term action items.
- **Media/Comms Rollout** – Coordinate with Commerce communications to place op-eds, issue press releases, and brief trade press.
- **Regional Council Engagement** – Present the strategy at regional economic development councils and chambers of commerce to encourage local buy-in and advocacy.
- **Higher Education & Training Engagement** – Build on the momentum of the proposed Mid-Atlantic Aerospace Talent Hub (coordinated by the Maryland Space Grant Consortium) by convening universities, community colleges, training providers, and industry partners to design a scalable approach to workforce pipeline alignment with the SMART Aerospace Hub framework.