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Ladies & Gentlemen,
Below please find this week's edition of *Executive Insight Brief* from The Roosevelt Group.

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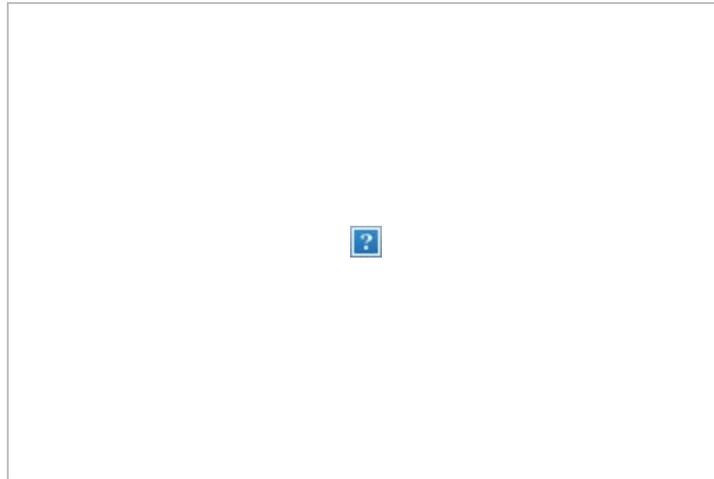
Notable Headlines

- [Obama again feels the 'fierce urgency of now' as Trump eyes return to power](#)
- [Australia announces \\$4.7 billion purchase of US air defense missiles](#)
- [China leading 'rapid expansion' of nuclear arsenal, Pentagon says](#)

- [Dutch military faces a tough mission: finding space to prepare for war](#)
- [Shapiro delivered Pennsylvania for himself. Can he do the same for Harris?](#)

Worth Listening: [Matt Herrmann and Kyle Klein discuss the 2024 general election](#)

View From The Hill



Should Republicans hold on to their House majority going into next year, the House GOP is bracing for a massive internal [struggle](#) over the now-infamous motion to vacate (MTV) procedural weapon that took out former Speaker Kevin McCarthy (R-CA) just over a year ago. McCarthy had allowed the far-right Members of his conference to demand a rule change, allowing the MTV to be offered by a single Member. This move ultimately became his undoing and has hamstrung the House Republican Conference ever since. Now, Speaker Mike Johnson (R-LA) and others in leadership and throughout the party are preparing to raise the threshold for MTVs to give more power and flexibility back to leadership. Hardline Members, such as those in the House Freedom Caucus, are, of course, staunchly oppose to reverting to a higher threshold, as they believe the reform has given them a much stronger hand in negotiated with their fellow Republicans. Of course, Democrats are widely expected to make this change if they win back control of the chamber. While the ins and outs of House parliamentary procedure may seem boring, keep in mind that changing the threshold to offer an MTV has completely paralyzed the House Republican Majority for the entire 118th Congress, impacting everything from the National Defense Authorization Act (NDAA) and full year appropriations bills.

Staying briefly with the fight for House control, Republicans are feeling good about flipping Alaska's at-large House district back into their column, with GOP candidate Nick Begich [polling](#) ahead of first-term incumbent Rep. Mary Peltola (D). Despite this, other races in upstate [New York](#) and [Nebraska](#) are spelling trouble for GOP Members in seats where President Biden won in 2020.

Increasingly, official Washington will begin [speculating](#) about what happens next year with a new administration and changes in the majorities of one or both chambers of Congress. At the front of this speculation will be the legislature's role in policymaking and oversight of

tech. During their Senate majority, Democrats have taken an oversight approach to big and emerging tech companies, advocating for stronger privacy protections and attempts to reign in some tech behemoths. Should Republicans flip the Senate in November, however, most analysts speculate a pivot away from a regulatory approach towards a more business-friendly one, though some Republicans have joined with Democrats in recent years in calling out the failures of big tech. Further, as cybersecurity policy continues to play an increasingly large role across critical infrastructure and the U.S. economy, experts are already seeking to [influence](#) the future administration and Capitol Hill in what cyber policy should look like in 2025 and beyond.

Aerospace & Defense

[Attack on aerospace firm in Turkey's Ankara kills 5, injures 22](#)

Two attackers carried out a terrorist attack at the Turkish Aerospace Industries headquarters near Ankara, killing five people and injuring 22 others. Interior Minister Ali Yerlikaya confirmed both attackers were killed and suggested the (Kurdistan Workers' Party) PKK was likely responsible for the assault. Witnesses reported hearing gunfire and explosions as employees were evacuated from the building, and security forces neutralized the attackers. Turkish airstrikes later targeted PKK positions in northern Iraq and Syria, destroying 32 targets and killing several militants. Turkish President Erdogan condemned the attack, and international organizations like NATO, the EU, and the U.S. expressed solidarity. A full investigation is underway to confirm the attackers' identities.

[Northrop expects next B-21 contract by year's end](#)

[Prolonged F-35 negotiations take a bite out of Lockheed Martin's third quarter results](#)

Lockheed Martin is experiencing a \$700 million revenue shortfall in Q3 2024 due to delayed contract negotiations with the Pentagon for F-35 Lots 18-19. With initial funding depleted, the company has used its own resources to continue production but couldn't recognize \$400 million in revenue and faces \$300 million in supply chain impacts. Invoicing for \$450 million has also been delayed. Lockheed expects to finalize the contract by the end of 2024, but warned that if negotiations extend into 2025, it could shift \$2 billion in sales and \$1 billion in free cash flow. Despite these challenges, Lockheed raised its financial outlook for the year, and increased their price per share. The company is also recovering from delays related to the F-35 Technology Refresh 3 upgrade, which could result in a \$600 million financial hit in 2024. However, they aim to deliver up to 110 F-35s this year and 180 annually in the next three years.

Advanced Technologies

[White House presses gov't AI use with eye on security, guardrails](#)

On Thursday, the Biden administration outlined plans for the US government to develop and use artificial intelligence to advance national security while managing its risks. A White House memo directed federal agencies “to improve the security and diversity of chip supply chains...with AI in mind.” It is also prioritizing the “collection of information on other countries’ operations against the US AI sector and passing that intelligence along to AI developers” to ensure their products are secure. NSA Jake Sullivan said, “we have to get this right, because there is probably no other technology that will be more critical to our national security in the years ahead.” The aim of the White House’s effort is to balance the need for fair competition and open markets, while protecting privacy, human rights and ensuring that AI systems do not undercut US national security.

[Big Tech is going all in on nuclear power as sustainability concerns around AI grow](#)

[Space Development Agency builds vendor pool for future demo missions](#)

The Space Development Agency has picked 19 companies to experiment with new satellite technologies through its Hybrid Acquisition for Proliferated Low Earth Orbit Program (HALO). Through the effort, the agency will “run rapid on-orbit demonstrations aimed at reducing risk and speeding up technology development for future operational missions.” Each company selected received an initial \$20 million contract and will be eligible to compete for future prototype orders. Frank Turner, SDA’s Technical Director, said this approach allows SDA to “fly before they buy.” He continued saying, “it’s the idea of, we’re not 100% sure about this technology yet, but let’s go figure it out.” Early missions will seek to build and launch two spacecraft within 12 to 18 months, testing optical communications and tactical data links.

Military Installations & Communities

[Hunt Military Communities Announces Acquisition of Atlantic Marine Corps Communities](#)

Hunt Military Communities (HMC), the largest U.S. military housing provider, has acquired Atlantic Marine Corps Communities (AMCC) from Lendlease, adding 7,900 housing units across eight major military installations. This acquisition reinforces HMC’s dedication to supporting military families. With the addition of AMCC, HMC’s portfolio will encompass nearly 60,000 homes across more than 55 military installations serving the Army, Navy, Air Force, Marine Corps, and Space Force.

CEO Brian Stann emphasized HMC’s dedication to providing high-quality homes and community support for military personnel. HMC plans to invest in home improvements, community amenities, and advanced property management technology to enhance the living experience for residents, while ensuring a smooth transition with minimal disruption.

[Army Secretary Wormuth's Tenure May Soon End. But She Still Has Ideas for Improving Soldiers' Lives](#)

[Marines tackle barracks repairs with elbow grease, outside expertise](#)

At Camp Pendleton, Marines are partnering with building maintenance experts in "Operation Clean Sweep," a two-week initiative aimed at addressing housing issues in barracks as part of a broader effort to improve Marine housing. Running from Oct. 16-30, this is part of the larger "Barracks 2030" initiative, which seeks to repair, restore, and modernize Marine housing. The initiative will consolidate Marines into better buildings, demolish deteriorating ones, and increase funding for improvements. I Marine Expeditionary Force and Marine Corps Installations-West are investing \$4.2 million in repairs, addressing maintenance backlogs, and installing air conditioning. Marines can now submit maintenance requests via a QR code system, QSRMax, to streamline the process. Marine housing has suffered from deferred maintenance, with 17% of barracks in poor condition, and many barracks falling short of standards. Recent inspections revealed that half of the barracks rooms were below living standards, prompting increased funding and repair efforts.

Homeland Security

[S&T Continues Counter-Unmanned Aerial System Technologies Testing](#)

The Science and Technology Directorate's (S&T) defensive drone program, Counter-Unmanned Aerial System (C-UAS), is furthering collaborations in the private sector to continue developing defensive drone technology. This program has evaluated kinetic and non-kinetic mitigation technologies that are capable of detecting, tracking, and countering drones that would be used maliciously. The Department of Defense has been using kinetic mitigation which physically alters or destroys drones with things such as nets, projectiles and lasers. This testing has helped S&T to understand collateral effects, such as falling debris, and evaluate the effectiveness of different technologies for their program.

[DHS is seeking more than 600 migrants for possible ties to Venezuelan gang](#)

[Homeland Security to migrate biometric identity systems to the cloud](#)

DHS published a request for information to learn more about moving their biometric data to a cloud-based system. The DHS biometric database is one of the largest of its kind, with

more than 260 million pieces of data logged from ports of entry including iris scans, fingerprints, and facial recognition. The current system is hardware-based and the Office of Biometric Identity Management (OBIM) seeks to move to a cloud system so they can expand their service to include more stakeholders and modalities. DHS is hoping to gain insight from several academic disciplines as well as experienced vendors in the industry to determine next steps. OBIM's biometrics priorities are scheduled to be shared in more detail at the 2024 Homeland Security Summit in November.

Transportation & Infrastructure

[Biden-Harris Administration Announces More Than \\$4.2 Billion From the Bipartisan Infrastructure Law for Transformational, National Infrastructure Projects](#)

More than \$4.2 billion in funding was awarded to 44 projects that will help improve the safety and mobility of our infrastructure. The funds for these projects come from two grant programs, the National Infrastructure Project Assistance program and the Infrastructure for Rebuilding America (INFRA) program. The projects include large bridges, ports, rails, and highway improvement and more than 53% are in rural communities. One such project will reconstruct one of the most dangerous highway interchanges, located in Des Moines, Iowa, to increase traffic capacity and improve safety. Transportation Secretary Pete Buttigieg believes that these projects will shape our nation's infrastructure for generations.

[Spirit AeroSystems weighs hundreds more furloughs or layoffs if Boeing strike goes beyond Nov. 25](#)

[US fines American Airlines record \\$50 million over treatment of disabled passengers](#)

The US Department of Transportation has fined American Airlines a record \$50 million for its mistreatment of passengers with disabilities. This record breaking fine is 25 times larger than the previous record for violations of this type and the department hopes it will set a "new precedent" for enforcement. The investigation found cases of dangerous and undignified treatment toward wheelchair users, and included the mishandling of wheelchairs and failing to provide assistance. American Airlines' poor treatment caused injuries to disabled passengers and damage to thousands of wheelchairs, making it the worst violator among US airlines. The settlement requires a \$25 million fine, and \$25 million spent to address underlying issues and compensation to passengers who were affected.

Biotechnology & Healthcare

[Novo Nordisk asks FDA to ban compounding pharmacies from making Ozempic, Wegovy copies](#)

Novo Nordisk, the company that produces the weight-loss drugs Ozempic and Wegovy, has asked the FDA to prevent compounding pharmacies from creating cheaper alternatives. Compounding pharmacies create custom medications that can help to bridge the gap when branded medications are expensive or in short supply. Novo Nordisk argues Ozempic and Wegovy are too complex to be safely manufactured in compounding pharmacies, despite high cost and frequent shortage, and has nominated these drugs to the FDA's "Demonstrable Difficulties for Compounding" lists. These medications are under patent protection and Novo Nordisk does not supply the active ingredients to pharmacies, which raises safety concerns.

[How Trump, Harris propose cutting healthcare costs](#)

[GE HealthCare announces time-saving AI tool for doctors who treat cancer](#)

GE Healthcare announced CareIntellect for Oncology, an AI software for doctors who treat cancer patients. This tool will allow oncologists to quickly learn about a patient's medical history and disease by summarizing relevant data to the doctor, without the nuisance of looking through different files. Combining the data from imaging, lab reports, chart notes into a quick synopsis will save oncologists time and allow them to spend more of their time on patient care. CareIntellect for Oncology will also be able to flag when patients deviate from their treatment plan, and help match patients with clinical trials they may be eligible for. GE Healthcare plans to make the tool widely available in 2025.

Climate & Development

[UN report says planet to warm by 3.1 C without greater action](#)

According to a new United Nations report, current climate policies will result in global warming of more than 3 degrees Celsius (5.4 Fahrenheit) by the end of the century. These new numbers are "more than twice the rise agreed to nearly a decade ago." The annual Emissions Gap report, takes stock of "countries' promises to tackle climate change compared with what is needed, finds these trends will continue if governments do not take greater action on slashing planet-warming emissions." Many governments signed onto the Paris Agreement nearly 10 years ago and agreed to a cap of 2.7 F warming to "prevent a cascade of dangerous impacts." UN General Secretary Antonio Guterres said, "either leaders bridge the emissions gap, or we plunge headlong into climate disaster." Global greenhouse gas emissions rose by 1.3% between 2022 and 2023, to a new high of 57.1 gigatonnes of carbon dioxide equivalent.

[Biden seeks to cement legacy on climate change in remaining months as president](#)

[Coastal erosion threatens homes on North Carolina's barrier islands. Climate change is speeding it up.](#)

In the last four years, the Atlantic Ocean has toppled 10 homes on Hatteras Island. While there are less than 70,000 permanent residents, “many of them count on the more than 5 million visitors every year to make their living.” Barrier islands, long, narrow strips of sand, buffer the mainland from the power of the ocean. In the eastern US, barrier islands cover 2,300 miles of shoreline, and naturally they are always moving. Photographer Daniel Pullen says, “I think people are meant to live on a barrier island, but I don’t know to what extent you have a massive economy on it.” A potential solution to the problem is to rebuild the beach by “pumping sand out of the ocean onto the shore.” However, the process to do so can cost nearly \$25 million dollars. With rising sea levels and more intense storms, new sand is being washed away at a more rapid rate.

Next Week's Hearings

Armed Service Committee:

House: NONE

Senate: NONE

Appropriations Committee:

House: NONE

Senate: NONE

Homeland Security Committee:

House: NONE

Senate: NONE



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