



**SDMAC**  
SAN DIEGO MILITARY ADVISORY COUNCIL

# 2025 MILITARY ECONOMIC IMPACT REPORT

**UC San Diego**  
RADY SCHOOL OF MANAGEMENT



COVER | The guided-missile destroyer USS Carney (DDG 64) launches land attack missiles while operating in the U.S. Naval Central Command area of operations. As part of the USS Dwight D. Eisenhower Carrier Strike Group, Carney was deployed to the U.S. 5th Fleet area of operations to support maritime security and stability in the Middle East.”



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# ABOUT

## SDMAC

The San Diego Military Advisory Council (SDMAC) is a not-for-profit 501(c)(6) organization established in 2004 to advocate on behalf of the military, veterans, and their families living in the San Diego region. SDMAC's advocacy efforts include facilitating the partnership among our military, elected officials, civic leaders, and the business community to improve the understanding of the important contributions made by the military.


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

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## THE RADY SCHOOL

The University of California San Diego Rady School of Management is the region's premier business school, internationally recognized for the intellectual contributions of its faculty and the quality of its academic programs. The Rady School offers a full-time MBA program, Flex and Executive MBA programs for experienced working professionals, a Ph.D. program, a Master of Quantitative Finance program, a Master of Science in Business Analytics program, a Master of Professional Accountancy program, Executive Education, and undergraduate courses. To find out more about the Rady School, visit [www.rady.ucsd.edu](http://www.rady.ucsd.edu).

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**FROM OUR MAYOR TODD GLORIA**  


"SDMAC's Military Economic Impact Report is an annual reminder of how crucial the military and defense industry are to our local economy. San Diego is America's premier military town, not just because we understand the importance of a strong national defense, but because of the servicemembers, their families, and our veterans who are the bedrock of our community."

## ABOUT THE MILITARY ECONOMIC IMPACT REPORT

SDMAC's annual Military Economic Impact Report highlights the positive impact of federal defense budgets, veteran benefits, and community involvement by our local military, veterans, and their families on our local economy. Through the partnership formed at the start of 2020, the 2025 MEIR report is a product of the rigorous work of MBA students at the Rady School of Management. Leveraging insights from the frontier of academic research, the team's data analysts applied tools to calculate the impact of military dollars on the San Diego region. The team focused on continued transparency in data collection and presentation, using clear methodology again in this year's report.







SDMAC ACKNOWLEDGMENTS

On behalf of the San Diego Military Advisory Council (SDMAC) Board of Directors, I am pleased to present to you the 18th annual Military Economic Impact Report. This has certainly been an interesting year given Administration directives impacting the direction of our national defense focus. We are seeing manifestations in this report, and we will continue to monitor how this evolves. However, more dramatic changes are generally codified through Congressional appropriations which have not yet been enacted at the time of this writing. Simultaneously, there continues to be an escalation of international conflict in Eastern Europe and the Middle East as well as many other locations including where our Navy has had to contend with attacks in the Red Sea. Our military continues to operate as a force for good to help deter conflict around the world.

I want to express our sincere gratitude for our sponsors' invaluable support of the annual Military Economic Impact Report. Your continued commitment to SDMAC and the broader military community in the San Diego Region makes this important initiative possible. The Report is a cornerstone of our mission to advocate for the military and defense-related industries in the San Diego region. Your generous contribution allows us to gather essential data, conduct comprehensive analysis, and produce a report that not only highlights the significant contributions of our military community but also underscores the critical role defense plays in our local economy.

We also want to thank the Rady School of Management at UC San Diego for their incredible work on this report. The generous support and engagement by Dean Lisa Ordóñez, Assistant Dean Jon Masciana, and Professor Michael Meyer and his team bring the rigorous analysis to the project that is so important in helping our community understand the numbers. Your support enables us to continue providing policymakers, community leaders, and the public with accurate and up-to-date information that informs decision-making and strengthens our region's ties to the military. As a result, we are better equipped to advocate for the needs and interests of our service members, veterans, families, and defense-related businesses.

Thank you.  
With warmest regards,

David M. Boone  
President and CEO  
San Diego Military Advisory Council

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EXECUTIVE SUMMARY



In our most recent Military Economic Impact Reports, FY 2023 and 2024, we observed local Defense spending resume its normal pattern of sustaining existing infrastructure and operations while investing in future-focused technologies and capabilities. Prior to that, through the pandemic crisis years of FY 2020-22, we saw a practical demonstration of the stability provided our local economy by these predictable, programmatic appropriations combined

with a unique ability to flex upwards to counter rising threats, whether foreseen or unexpected.

In FY 2025, we begin to detect the leading edge of a disruption to this model. For all of FY25, we operated under a full year of continuing resolution which restricted Defense spending overall to essentially the previous year’s authorized level, placed limitations on new programs, and introduced uncertainty for existing programs and personnel. DoD civilians encountered ad hoc review and exit incentives. The challenge for military leadership to balance spending to meet the cost of current operations while continuing to invest in future capabilities intensified while the resources available to them diminished.

Defense funds flow through the San Diego economy via many different channels: pay and benefits for military personnel and federal employees, defense contracts for more than 2,000 local businesses, retirement and veteran benefits, and spending through government purchase cards, along with a significant multiplier effect as all these people and companies generate additional economic activity living, shopping, and doing business within San

Exhibit 1.  
Defense Spending and Jobs in San Diego Declined in FY 2025

	DIRECT SPENDING	JOBS	GROSS REGIONAL PRODUCT (GRP)
FY 2025	\$39.3 B	356,994	\$61.3 Billion
%Δ from FY24	-3.0%	-4.4%	-3.0%
% of SD Economy	N/A	22.4%	22.2%

Diego. The net effect is a total defense contribution to our Gross Regional Product (GRP) of \$61.3 billion and more than 356,000 jobs, a 3.0% decline from FY 24. With San Diego’s GRP also declining by 0.5% through 2025, the fraction that defense spending contributes to total GRP decreases to 22.2%, roughly equivalent to its relative contribution of 22.3% in FY 2019.

More than 109,000 active-duty service men and women call San Diego home; they work alongside 6,000 military reservists, and 27,000 civilians directly employed in federal defense jobs. Payroll to support these employees declined by 3.5% in FY 25, to \$15.1 billion, the net effect of opposing impacts: military pay increases offsetting declining retention and recruitment, and the loss of civil servants. Pensions and veterans’ benefits rose by 1.1%.

In FY 25, Defense contracting activity spent \$19.8 billion directly into the San Diego region, funding more than 214,000 civilian jobs. This represents a decline of 3.5% from FY 24.

As we quantify and report on the current economy, our 2025 issue also continues our exploration of high-potential activities and less-well-known programs, highlighting unique aspects of San Diego that contribute to a particularly fruitful partnership between our region and our armed forces. A



common theme uncovered by all of our spotlights this year is the demonstrated value of effective collaboration between local military commands, regional and state government, large and small enterprise, civic organizations, and institutions of higher education and research.

Continuing to explore San Diego’s Defense Innovation Economy, we highlight some of the channels available to funnel capital and expertise to local defense-related startups, existing and in-process collaborations between our academic institutions, DoD, and San Diego-based entrepreneurs, along with a model that has proven successful for similar collaborations in Austin, Texas. Our Energy resilience spotlight explores multiple initiatives that further contribute to a particularly Californian interpretation of building future capabilities, that of environmental sustainability and resilience, and highlights efforts by San Diego area commands to partner with California state agencies to deliver upon that need, along with the contributions of basic and applied scientific research focused upon long-term breakthrough energy technologies. The Armed Services Support Nonprofit and Defense Support to Civil Authorities spotlights focus upon intensely local collaborations that are largely unknown by the communities they serve, until the need for them becomes urgent.

Forging effective collaborations among San Diego’s vital resources to benefit the region, the state and the nation; the Defense economy is vital to our local economy.



# MILITARY SPENDING & JOB CREATION

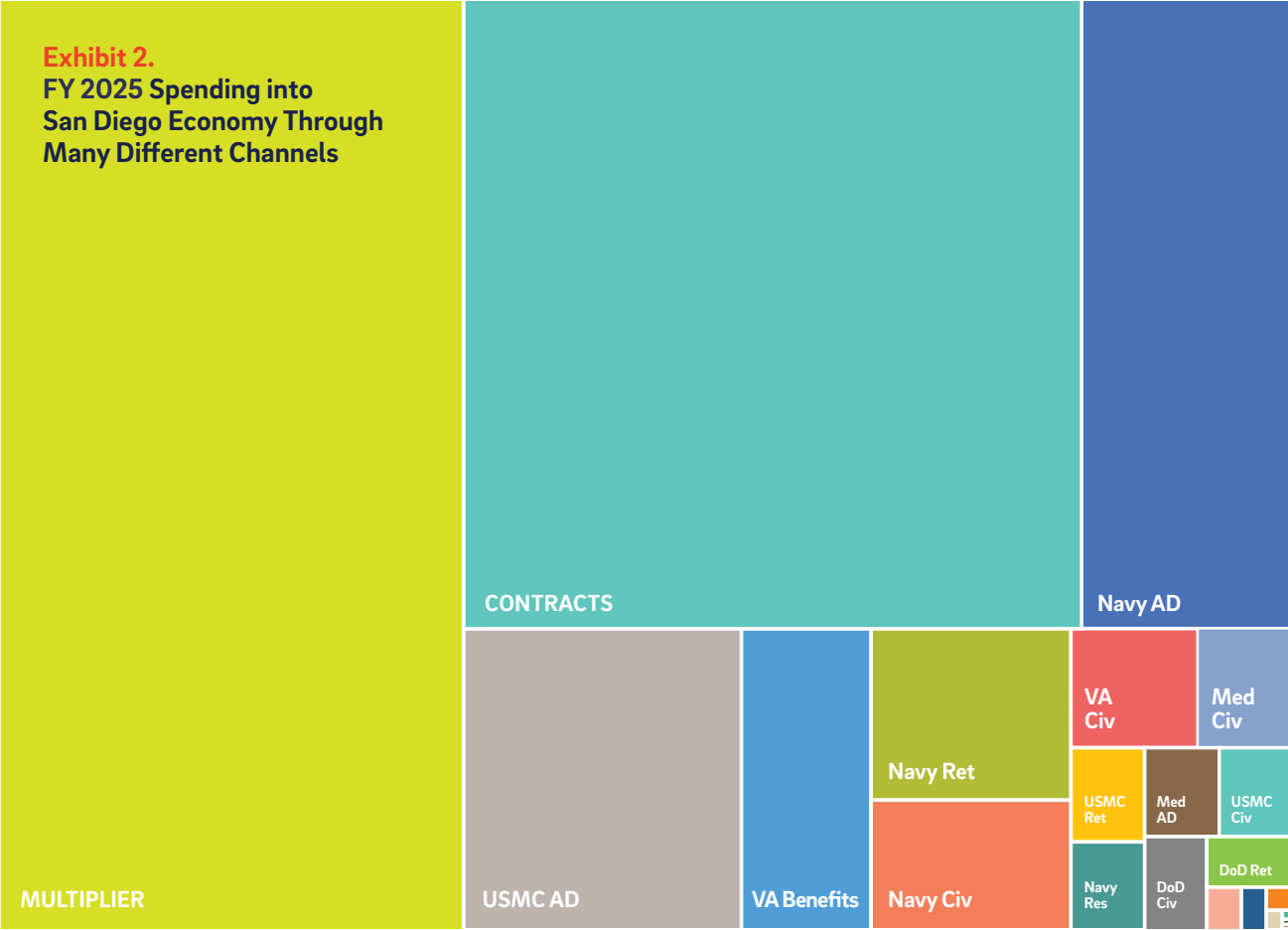
## MILITARY SPENDING



San Diego's economy historically flourishes thanks to several key sectors including tech, travel, tourism, and defense. As our economy settles into its new normal, Defense spending also establishes its balance of current and future priorities, tending to change more predictably than the civilian sector due to the military's large investment in personnel and infrastructure and its duty to maintain a constancy of service to the nation.

The diverse components of FY 2025 defense spending in our region help strengthen other economic sectors, through small business targeted contract awards, spending by active duty and retired military families, and direct purchases of products through government

charge cards. Employee compensation includes the direct wages and benefits provided to active-duty military personnel, federal civilian employees, and military reservists in the region across the U.S. Navy (USN), U.S. Marine Corps (USMC), U.S. Coast Guard (USCG), and other Department of Defense (DoD) organizations. Military branches distribute retirement funds to previous military employees across the entire San Diego County. The Veterans Affairs (VA) office distributes key resources to San Diego veterans, including education benefits and health care. Exhibit 2 depicts the multiple different sources of spending and the relative size of different groupings of funding within each branch's contribution. (Some may be too modest to appear legibly in the charts.) Another major contribution to the local economy is the estimated \$19.8 billion in defense contracting dollars across more than 2,000 different companies in San Diego County during FY 2025. Exhibit 3 depicts the companies in receipt of the greatest percentages of these dollars, and Exhibit 4 shows the types of programs these defense contracting dollars are funding in our region (FN1).



- |                      |                      |                      |                     |
|----------------------|----------------------|----------------------|---------------------|
| ● Navy Active Duty   | ● USMC Active Duty   | ● USCG Active Duty   | ● Med Active Duty   |
| ● Navy Civilian      | ● USMC Civilian      | ● USCG Civilian      | ● Med Civilian      |
| ● Navy Reserves      | ● USMC Reserves      | ● USCG Reserves      | ● Med Purchase Card |
| ● Navy Retired       | ● USMC Retired       | ● USCG Retired       | ● VA Civilian       |
| ● Navy Purchase Card | ● USMC Purchase Card | ● USCG Purchase Card | ● VA Purchase Card  |



Exhibit 3.  
Funds Obligated in San Diego by Company

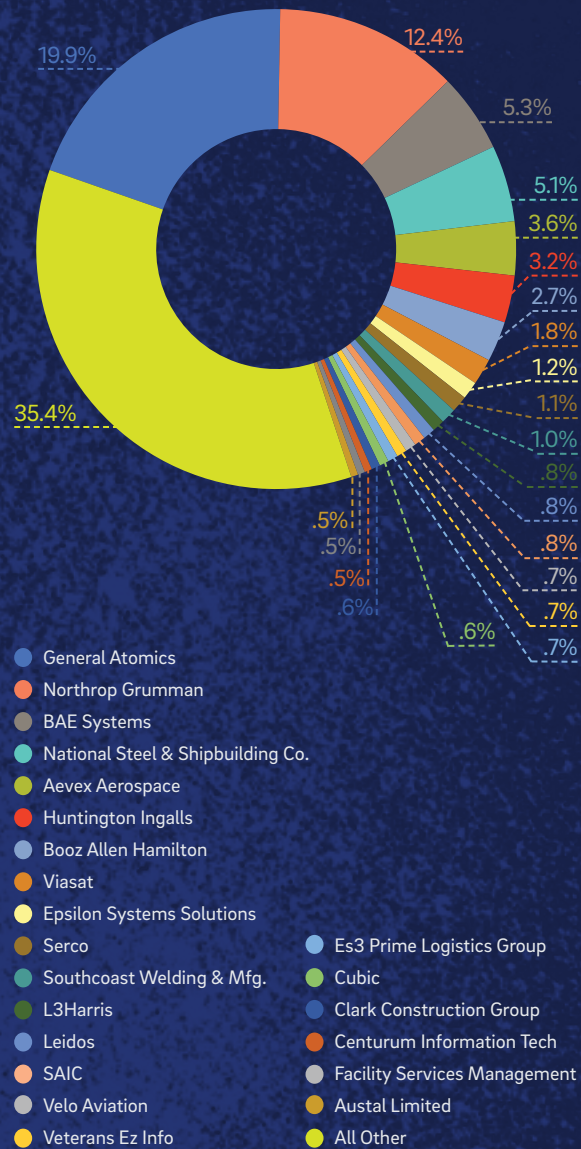
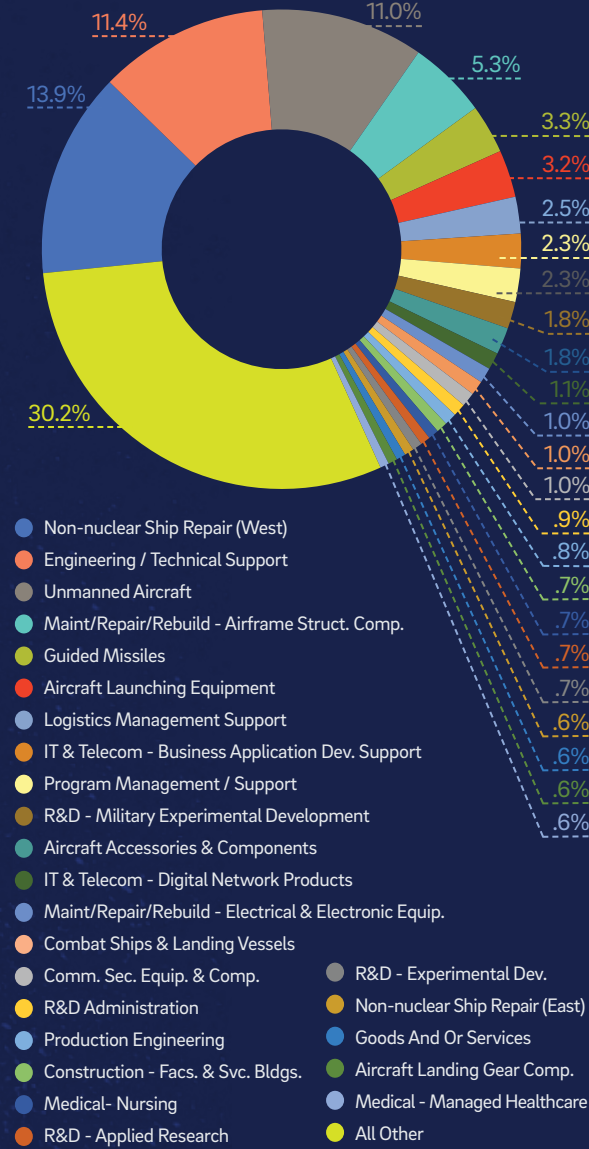


Exhibit 4.  
Funds Obligated in San Diego by Program Type



MULTIPLIER EFFECT

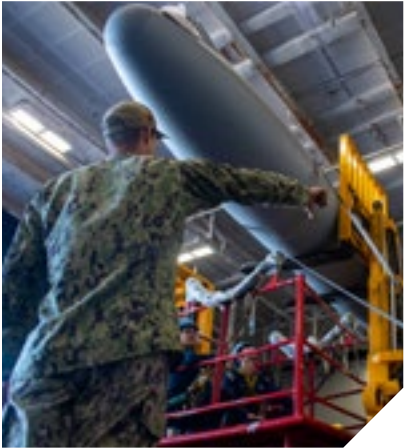
In addition to direct spending, defense spending in the San Diego region also has indirect spillover effects on the gross regional product (GRP) and job creation. Defense spending supports development, which can then be leveraged for alternative revenue, creating a multiplier effect. A first-of-its-kind study of local fiscal multipliers found that \$1 of defense spending contributes up to \$1.56 to GRP and every \$100,000 creates 1.08 jobs per year (FN2). Research also indicates the impact of defense spending is even greater during economic downturns, suggesting a conservative estimate with the application of the Auerbach study results (FN3). As a result of the multiplier effect, the total economic impact of the military in San Diego in 2025 is \$61.3 billion (Exhibit 5). We compare the defense contribution to San Diego's GRP to a credible estimate decline of 0.5% in current-year dollars, which shows that the defense contribution declined slightly to 22.2% of total GRP, a figure on par with the pre-pandemic 2019 contribution of 22.3% (FN4). Throughout the report, the indirect job impact and GRP multiplier are applied to determine full economic impact.

Exhibit 5.  
\$61.3 Billion Impact to San Diego GRP

(\$ in millions)	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	%Δ OVER FY 24
Employee Compensation	\$11,929	\$12,341	\$13,094	\$12,852	\$13,452	\$15,609	\$15,067	-3.5%
Retirement & VA Benefits	\$3,577	\$3,688	\$3,568	\$3,507	\$3,482	\$4,292	\$4,338	1.1%
Contracts & Procurement	\$16,194	\$17,474	\$18,594	\$19,338	\$19,050	\$20,561	\$19,840	-3.5%
Government Purchase Cards	\$65	\$67	\$85	\$267	\$166	\$23	\$5	-76.7%
TOTAL DIRECT	\$31,765	\$33,570	\$35,341	\$35,964	\$36,092	\$40,485	\$39,252	-3.0%
Multiplier Impact	\$17,789	\$18,799	\$19,862	\$20,211	\$20,284	\$22,752	\$22,059	-3.0%
GRP IMPACT	\$49,554	\$52,369	\$55,203	\$56,176	\$56,375	\$63,237	\$61,311	-3.0%

JOB CREATION

The military, through the DoD, Department of Homeland Security (DHS), and the VA, directly employed 142,714 San Diego residents in FY 2025. Approximately 76% of those are active duty (AD) military personnel, 19% civilians (CIV), and 5% reserve military personnel (Exhibit 6). In addition to direct employment, the \$19.8 billion in government contract and procurement dollars generate approximately 214,280 more jobs in San Diego, given estimates that \$100,000 creates 1.08 jobs per year (FN1,4,5). Together the total direct and indirect employment make up 22.4% of the current labor force in San Diego (FN4)



This year marks the return by popular demand of Exhibit 6a, providing a breakout of staffing levels across major commands and facilities in the San Diego region.





Exhibit 6.  
357K Jobs Supported in San Diego

	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025
USN (AD)	51,850	57,937	59,071	63,747	59,670	62,615	61,760
USMC (AD)	46,189	48,240	46,680	46,063	46,453	42,687	42,772
USCG (AD)	927	927	916	916	823	898	823
Medical (AD)	5,391	5,513	4,806	4,439	4,622	4,827	3,889
CIV	28,498	30,430	29,699	29,290	26,194	30,279	23,187
Reserve	5,352	5,831	2,950	2,745	7,181	6,235	6,365
VA	4,175	4,193	4,177	4,142	3,761	3,919	3,919
TOTAL DIRECT	142,382	153,071	148,299	151,342	148,704	151,460	142,715
Indirect (Result of DoD contracts)	175,617	189,426	200,813	208,858	205,735	222,059	214,280
TOTAL JOBS	317,999	342,497	349,112	360,200	354,439	373,519	356,995

Exhibit 6a.  
Wide Distribution of Active Duty and Civilian Employment across Military Bases

	USN	USMC	USCG	AD MEDICINE	CIV	TOTAL
Naval Base San Diego	26,935	28	187	-	6,614	33,764
Naval Base Coronado	25,392	282	-	-	4,341	30,015
Naval Base Point Loma	2,770	26	-	-	5,557	8,353
MCB & MCAS Camp Pendleton & Naval Hospital Camp Pendleton	2,705	34,402	119	943	4,776	42,945
MCAS Miramar	171	7,799	-	-	623	8,593
MCRD San Diego	45	1,351	-	-	244	1,640
USCG San Diego	51		430	-	10	491
Naval Medical Center San Diego	-	-	-	2,925	1,953	4,878
Naval Health Research Center	-	-	-	21	68	89
Other	2,340	235	87		2,920	5,582
TOTAL*	60,409	44,123	823	3,889	27,106	136,350

\*Does not include Reserve component figures.

RETIREES

San Diego remains home to many long after their orders are complete. FY 2025 sees 45,476 retired military personnel deciding to stay for the long term (FN1). The most immediate effect of these men and women choosing to make America’s Finest City their long-term home is a bolstering \$2.3 billion dollar impact on San Diego’s economy from retirement paychecks alone (Exhibit 7).

Exhibit 7.  
Military Retirement Adds \$3.6 Billion to Our Local Economy



SPOTLIGHT

SAN DIEGO’S INNOVATION ECONOMY

San Diego occupies a unique position at the critical crossroads of top-tier research universities, a vibrant entrepreneurial culture, innovation-focused industries, and a vast concentration of military units that greatly contribute to San Diego’s overall economic heartbeat. San Diego is home to several defense contractors and has earned a reputation as an innovation hub for biomedical and technology firms, but the region still has yet to fully capitalize on its potential for hosting and amplifying startups, particularly for technologies with dual military and civilian uses.

Capital

Of the estimated \$5 billion dollars of venture capital invested in California in 2025, only approximately 0.5% was committed to defense startups in San Diego. The most well-known San Diego-based success stories, Shield AI and Firestorm Labs, secured \$250 million and \$47 million, respectively, in funding so far in 2025 (FN 5).

The Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) programs exist to provide seed funding to startups and entrepreneurs to develop products and services that can benefit the DoD. While these impactful programs have been available for more than 30 years, the venture capital environment for defense startups in San Diego remains largely fragmented with no obvious paths for entrepreneurs seeking capital elsewhere. This means that local entrepreneurs struggle to connect with a strong network of investors specifically targeting defense and dual-use technologies, and that they are also challenged in securing the very investments that turn ideas and prototypes into viable products. Thus, in both a nationally and globally competitive environment, San Diego risks losing talent and innovation to other regions that have stronger and better resourced ecosystems.

With the recent expansion of the Defense Innovation Unit (DIU) in San Diego, DoD’s priority is clear: connect entrepreneurs, academia, capital, and the DoD to accelerate San Diego’s potential to develop a vibrant defense startup culture. In order to accomplish this, the concentration of entrepreneurs, access to capital, and relevant defense research organizations should ideally occur in a single, shared space. The Capital Factory in Austin, Texas provides an ideal model for this concept. There, DIU, AFWERX, NAVALX, and Army Futures Command have a presence in addition to multiple, defined sources of capital and a multitude of startups from a variety of industries. The Capital Factory has been and continues to be the most active investor in Texas for more than a decade.

Academic Centers

The academic powerhouses of San Diego – University of California San Diego (UCSD) and San Diego State University (SDSU) – are at the forefront of innovation collaboration with the Department of Defense. UCSD’s i4NS (Innovating for National Security) is a structured course for UCSD undergraduate and graduate-level students to develop solutions in a commercial startup environment to solve the most pressing issues faced by the DoD.

SDSU is spearheading the construction of a shared space venue akin to Austin’s Capital Factory. SDSU’s Mission Valley Innovation District is a sprawling 1.6 million square foot property in Mission Valley adjacent to Snapdragon Stadium, and is setting the stage for a 2028 opening (FN6). The intent of the SDSU Mission Valley Innovation District is the convergence and acceleration of public and private partnerships, and SDSU is in final discussions with tenants ranging from startups to large companies looking to expand or relocate to San Diego. These partners will be co-located with academic research labs as part of the mixed-use development consisting of housing, recreational facilities, open space parks, and retail.

Although creating a shared space is a significant first step to improving San Diego’s edge for innovation, obstacles remain. The primary challenge for entrepreneurs and startups that decide to base out of San Diego is the attraction of venture capital and availability of other sources of funding. In addition to venture firms, a private-public partnership funding model, like those available through Austin’s Capital Factory, could be a significant benefit for startups and will be a key investment in San Diego’s future as an innovation hub. If San Diego aims to have a more structured and significant role in defense innovation using the SDSU Mission Valley Innovation District as a primary hub, incentives from academia, venture capital, and especially with public policy must be aligned with DoD priorities and carefully orchestrated to have the greatest impact.

Recommendation

With the Mission Valley Innovation District opening around 2028, San Diego has the prime opportunity to create a robust private-public partnership funding framework to attract entrepreneurs and venture capital firms.

Key components could include:

- **Initial seed funding:** Public sector acts as the anchor, with venture capital firms contributing 2–4x.
- **Focus:** Startups with dual-use potential, leveraging SBIR and STTR funding opportunities.
- **Tax incentives:** Startups and investors using the fund could be exempt from state/local taxes for five years, with a reduced rate for the next five years.
- **Reinvestment requirement:** Profitable firms contribute a percentage back into the fund to grow it and encourage continued entrepreneurship.

This model aligns incentives, strengthens collaboration, and gives San Diego a competitive edge over existing innovation hubs like Austin, reinforcing the city’s emerging defense innovation culture.





# UNITED STATES NAVY

San Diego Harbor, designated a National Strategic Port by the Department of Defense because of its location, transportation hubs, and cargo handling capacity, is vital for our Nation's military readiness. San Diego has grown past previous projections to become the homeport for 63 of the Navy's ships, including Aircraft Carriers (CVN), Amphibious Ships (LHA, LHD, LPD, and LSD), Cruisers (CG), Destroyers (DDG and DDG-1000), Littoral Combat Ships (LCS), Mine Countermeasure Ships (MCM), and Fast Attack Submarines (SSN). Additionally, several classes of ships owned by Military Sealift Command and manned by Civilian Mariners are homeported in San Diego. The count of vessels, termed "laydown," does fluctuate and can be attributed to modified ship maintenance schedules, forward deployed vessels (abroad), change of homeporting, and decommissioning of vessels based on prepositioning decisions made by higher authority.

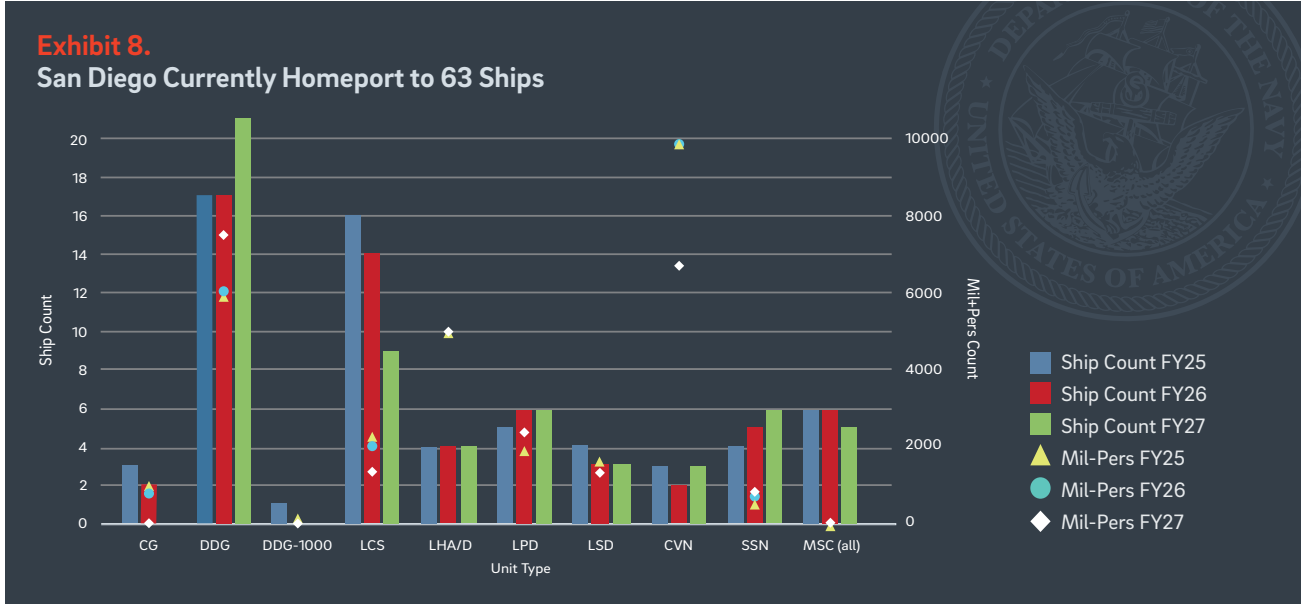
San Diego is also home for 1 of every 6 Sailors in the Navy and the home-base for numerous operational and administrative commands, including Naval Special Warfare Command (responsible for manning, training, and equipping SEALs), the Navy's Third Fleet (operational control of all Navy activities in the Eastern Pacific Ocean), Naval Surface Force (responsible for manning, training, and equipping all surface ships), Naval Air Forces (responsible for manning, training, and equipping all aircraft and aircraft carriers in the Navy), Navy Region

Southwest (oversight of Base Operating Shore Support for 10 Naval Installations across six states), Naval Information Warfare Systems Command (headquarters for the development and production



of all Naval command and control systems), Naval Medical Forces Pacific (Oversight of Navy Medicine's Western U.S. and Pacific operational medical capability within hospitals and Navy Medicine's medical research and development laboratories), and Naval Surface and Mine Warfare Development Command (training and doctrine headquarters). San Diego is also the operational home to Carrier Strike Group headquarters and Expeditionary Strike Group, each led by an Admiral.

The Navy organizes activities under operational or administrative commands and locates these commands at several Navy Bases in our Region, with the bases under the oversight of a Navy Regional Commander.





## NAVY REGION SOUTHWEST

Navy Region Southwest (NRSW) headquarters (HQ) is located in Downtown San Diego across from the Broadway Pier and is responsible for the oversight of 10 Navy shore installations and various special areas within the six southwest states. The installations under the NRSW Area of Responsibility (AOR) include Naval Base San Diego (NBSD); Naval Base Point Loma (NBPL); Naval Base Coronado (NBC); Naval Air Facility El Centro (NAFEC); Naval Air Station Lemoore (NASL); Naval Air Weapons Station China Lake (NAWSCL); Naval Base Ventura County (NBVC); Naval Air Station, Fallon (NASF), Naval Support Activity Monterey (NSAM) and Naval Weapons Station Seal Beach (NWSSB).

NRSW is the naval shore installation management headquarters and provides base operating support (BOS) for the fleet and family throughout the region. NRSW continuously seeks innovation efforts, new technologies, and business practices to optimize service costs while continuing to meet the Fleet's demand. Services include providing administrative and operational force tenants with family services, housing, bachelor quarters, security, port services, air services, supply, maintenance, logistics, and environmental support. These services are provided for hundreds of



tenant commands that occupy the installations and for thousands of active duty, reserve and retired military members and their families. Additionally, NRSW ensures environmental compliance actions with local, state and federal regulatory agencies, and provides oversight for the Department of the Navy response to civil emergencies.

## NAVAL BASE CORONADO

Naval Base Coronado (NBC) is the Navy's West Coast Quarterdeck, employing more than 30,000 military and civilian personnel encompassing nearly 60,000 land acres with multiple runways, piers, and training facilities. NBC is a consortium of nine installations: Naval Air Station North Island (NASNI); Naval Amphibious Base Coronado (NAB); Navy Outlying Landing Field Imperial Beach (NOLF IB); Navy Auxiliary Landing Field San Clemente Island (NALF SCI); Silver Strand Training Complex (SSTC); Remote Training Site Warner Springs (RTSWS); Camp Michael Monsoor; Camp Morena; and Naval Training Site Otay Mesa.

NBC provides shore-based support for fourteen rotary wing helicopter squadrons, including two FRS squadrons, three tilt-rotary wing squadrons, three nuclear-powered aircraft carriers, four SEAL Teams, and other ashore and afloat expeditionary commands. NBC strives to increase combat readiness while simultaneously delivering exceptional quality of life and wellness services for NBC's Sailors and their families, with 24/7 fitness centers, the Sea 'N Air Golf Course, the award-winning Navy Lodge, and the number one Morale, Welfare, and Recreation program in the Department of Defense.



## NAVAL BASE SAN DIEGO

Homeport to the Pacific Fleet Surface Navy with 59 U.S. Navy ships and two auxiliary vessels, Naval Base San Diego is also home to more than 250 tenant commands, each having specific and specialized fleet support purposes. The base comprises over 1,700 land acres and 326 acres of water along the San Diego Bay and is divided into the wet-side, dry-side, and the Fleet and Family Complex. Other areas of responsibility include Commander, Navy Region Southwest and Naval Facilities Engineering Systems Command Southwest headquarters, Naval Medical Center San Diego, and Admiral Baker Golf Course. The base is a workplace for more than 33,000 military, government civilian, and contract personnel. Additionally, the base has rooms to house more than 4,000 men and women in modern apartment-like barracks.

## NAVAL BASE POINT LOMA

Located in the Point Loma neighborhood of San Diego, Naval Base Point Loma (NBPL) includes three main areas: the Peninsula, Harbor Drive Annex and the Old Town Campus. The installation supports operational forces, research and development, and training for surface and submarine Sailors. NBPL is the home for five Los Angeles Class Submarines, a floating dry dock, the largest Defense Fuel Support Point on the west coast, two U.S. Coast Guard patrol boats, and other research vessels. The base supports over 50 tenant commands including U.S. 3rd Fleet, Naval Information Warfare Center (NIWC) Pacific, Naval Information Warfare Systems Command (NAVWAR), Surface Combat Systems Training Command, Tactical Training Group Pacific, and a detachment from the Portsmouth Naval Shipyard. NBPL is the workplace for more than 18,000 military, government civilian and contract personnel.

## NAVAL INFORMATION WARFARE SYSTEMS COMMAND

Naval Information Warfare Systems Command (NAVWAR) is one of five major Department of Navy acquisition commands. While other Navy acquisition commands, like Naval Air Systems Command (NAVAIR) and Naval Sea Systems Command (NAVSEA), focus on specific platforms, NAVWAR focuses on secure and effective communications and networks across all warfighting domains, from seabed to space.

NAVWAR provides research and development, systems engineering, testing and evaluation, and support

services to its three affiliated acquisition program executive offices (PEOs) throughout all phases of a program's lifecycle. The PEO for Command, Control, Communications, Computers, and Intelligence (PEO C4I), headquartered at NAVWAR's Old Town Campus in San Diego, oversees eleven program offices responsible for acquiring, fielding, and supporting C4I systems across Navy, joint, and coalition platforms. The PEO for Digital and Enterprise Services (PEO Digital), headquartered in the Washington, DC area, delivers modern, secure, and effective information technology and business systems and services. PEO for Manpower, Logistics and Business (PEO MLB), also headquartered in the Washington, DC area, provides



the tools and systems that enable daily operations in staffing, training, organizing, and equipping Navy and Marine Corps forces worldwide.

NIWC Atlantic is located in Charleston, SC, while NIWC Pacific is located in San Diego, and includes facilities in Japan, Guam, and Hawaii. The NIWCs conduct research, development, prototyping, engineering, test and evaluation, installation, and sustainment of integrated information warfare capabilities and services afloat and ashore to drive innovation and give warfighters an information advantage.

CNRSW is leading the revitalization of the Old Town Campus (OTC) at Naval Base Point Loma. OTC Revitalization is a Department of the Navy real estate project aimed at replacing 80-year-old obsolete World War II B-24 bomber factories with secure, safe, modern, state-of-the-art facilities, utilities and infrastructure to meet NAVWAR's information technology, artificial intelligence, and cyber warfare operational needs on the approximately 70.3-acre Naval Base Point Loma OTC. The project requires approximately 1.7 million





gross square feet of office, lab, and warehouse space for approximately 5,000 Federal and contractor personnel. Revitalization could include commercial mixed-use development (housing, retail, commercial).

In January 2024, the Navy began exclusive negotiations with its selected exclusive negotiating partner to develop all aspects of the public and private development of OTC. The Navy will produce site-specific details for the project that will inform environmental analyses reports before the Navy makes a decision to move forward. This complex and meticulous process is expected to take a couple of years and will involve extensive engagement with all stakeholders to include City, County, State and Federal agencies and elected officials, community members, commercial industry, local businesses, civic groups and DoD partners. For more information: <https://navwar-revitalization.com/>

#### NAVAL SPECIAL WARFARE COMMAND

Located in NAB Coronado's "wet side", Naval Special Warfare (NSW) Command leads the Navy's maritime special operations force and is the Navy component of the U.S. Special Operations Command, headquartered in Tampa, Fla.

NSW provides maritime SOF capability to enable Joint Force lethality and survivability inside denied and contested areas. NSW specializes in a broad range of tactical areas, including unconventional warfare, direct action,

counterterrorism, special reconnaissance, and personnel recovery. NSW is organized primarily around eight Navy SEAL teams, three Special Boat Teams, and various supporting commands, totaling approximately 10,000 personnel. Units can operate independently, as part of navy carrier battle groups and amphibious ready groups or integrated with other US special operations forces. By utilizing the United States Navy's ships, submarines, and overseas facilities, NSW forces can be deployed rapidly around the world.

#### NAVAL MEDICAL FORCES PACIFIC

Navy Medicine plays a critical role in the San Diego region, with Naval Medical Forces Pacific (NMFP) serving as the regional command, headquartered at Naval Base San Diego. In a partnership with the Defense Health Agency (DHA), which oversees the delivery of health care in Military Treatment Facilities (MTF), NMFP provides command and oversight of all subordinate Navy Medicine Readiness and Training Commands (NMRTC), Navy Medicine Readiness and Training Units (NMRTU), and assigned operational platforms in the Western U.S. and Pacific regions. Additionally, NMFP oversees eight research laboratories around the globe, including the Naval Health Research Center (NHRC) in Point Loma. NMFP also manages the Naval Expeditionary Medicine Warfighter Development Center (NEMWDC), which plays a critical role in preparing medical teams for expeditionary and operational environments.

In the San Diego Region, NMFP and Defense Health Network - Pacific Rim (DHN-PR) oversee NMRTC San Diego/Naval Medical Center San Diego (NMCSD) and NMRTC Camp Pendleton/Naval Hospital Camp Pendleton (NHCP), along with their network of 24-branch medical and 11 dental clinics. Together with the Department of War (DOW) TRICARE health insurance program, these MTFs support 357,000 eligible beneficiaries in the San Diego area. Military medicine employs over 7,500 in San Diego, including nearly 5,000 active-duty service members.

NMRTC San Diego/NMCSD, with more than 5,600 active-duty military personnel, civilians, contractors, and volunteers, is the premier site for medical force generation providing exceptional quality care and ensuring readiness to the Fleet and Marines. There are approximately 234,000 people eligible to receive care at the Naval Medical Center and branch health clinics. NMRTC San Diego has multiple Expeditionary Medicine Platforms (EXMEDS) that train and deploy







to support specific military operational requirements. A leader in the medical field, the center pioneers medical advancements through teaching and research. NMCSO is affiliated with the University of California San Diego, Rady Children's Hospital, Scripps Clinic and Research Foundation La Jolla, Johns Hopkins, and many other prestigious institutions throughout the United States, where Navy Medicine trainees perform rotations for integral areas of their residency. Hailed for its innovative and highly transformative "Jaw-In-A-Day" medical procedure that was introduced to University of California San Diego Health in 2023, NMCSO takes pride in elevating the collective medical capabilities beyond its confines. NMCSO's program is one of the few in the country to offer "Jaw-In-A-Day," a procedure that combines immediate jaw reconstruction with 3D-printed dental implants, all completed within a single surgery.

For NMRTC Camp Pendleton/NHCP, while delivering health care services for our warfighters, the Naval hospital also contributes to the local economy in various ways. Total salary compensation for the uniformed and civilian employees of the hospital sums to approximately \$170 million. Additionally,

service members collectively receive around \$31 million in housing allowance and more than \$3.7 million in sustenance allowance. Together, these institutions bolster San Diego's economy while ensuring the health and readiness of military personnel and their families.

Navy Medicine is also at the forefront of research and development in San Diego, particularly through NHRC. Comprising a diverse team of active-duty service members, federal civil service employees, and contractors, NHRC focuses on operationally relevant research, ensuring readiness while advancing lethality. Areas of expertise span physiology, microbiology, biomedical engineering, psychology, epidemiology, and software engineering. The research conducted—ranging from physical readiness to joint medical planning to wounded warrior recovery and behavioral health—meets the critical health and readiness needs of our Nation's warfighters and their families. NHRC's primary research divisions include Operational Readiness, Military Population Health, and Operational Infectious Diseases. NHRC is a civilian-heavy command, with 90 percent of its workforce consisting of high-paying civil service and professional contract positions, significantly contributing to San Diego's economy through job creation.

## SPOTLIGHT

### ENERGY RESILIENCE INITIATIVES FOR SAN DIEGO COUNTY

As the frequency of extreme weather-related disruptions and grid vulnerabilities intensify, the need for robust energy resilience has never been more urgent. In San Diego County, a region hosting numerous vital military installations, the Department of Defense has partnered with local agencies, research institutions, and private industry to implement cutting-edge microgrid systems, long-duration energy storage (LDES), and strategic energy investments. These efforts not only safeguard operational continuity during grid outages but also support California's broader state environmental goals through initiatives such as the Low Carbon Fuel Standard (LCFS). This spotlight examines the development of optimization and control strategies, as well as emerging power generation solutions with potential for future deployment across the region's military bases, to strengthen energy security, drive innovation, and deliver both military and civilian benefits.

Navy Region Southwest (NRSW) continues to prioritize energy resilience across its installations to ensure mission continuity during power outages. A flagship initiative at Naval Base San Diego (NBSD) involves a microgrid system powered by solar photovoltaics, supported by backup generators and an innovative zinc-hybrid long-duration energy storage system, partially funded by the California Energy Commission (CEC). Additional developments are underway at Point Loma in collaboration with Stanford University and the Naval Postgraduate School to design modular microgrids for critical infrastructure. At Naval Base Coronado, a partnership with the Defense Innovation Unit is advancing the deployment of large-scale and mobile battery energy storage systems to support high priority loads during utility outages.

Marine Corps Installations West's (MCI-West) current energy resilience priorities are derived from its 2023 strategy, focusing primarily on operational load management and expanding on-premises battery storage. In December 2024, the CEC approved a \$42 million grant to construct and operate the Haybarn Energy Reliability Center (HERC) aboard Marine Corps Base Camp Pendleton. This grant was provided under CEC's LDES program to fund a 6MW / 48MWh project to spearhead the HERC proposed total system capacity of 50MW / 486MWh of energy storage, representing the largest LDES project across the DoD. With an expected completion date in 2027, this project aims to support Camp Pendleton's emergency operations for up to 14 days and provide excess power back to the local grid when operationally feasible.

While the focus is on microgrid control and optimization, infrastructure improvements and flexible storage solutions

are enhancing the energy resilience of the region's military bases. However, organic, persistent power generation remains a critical shortfall in any comprehensive strategy. Emerging technologies, including fusion, fission, and hydrogen energy systems, hold real promise for supplementing current intermittent generation capacities. Executive Order 14299, signed on May 23, 2025, calls for the deployment of advanced nuclear and resilient energy technologies to strengthen national security.

Portable fusion and fission microreactors are being developed with target deployments by the end of the decade—well aligned with the 2028 goal of Executive Order 14299. Fusion systems, such as those by Helion, aim to deliver 1–10 MW of power in truck-sized units, while fission microreactors like the DOE-backed Oklo Aurora are container-sized and capable of producing 1–20 MWe. Both technologies offer scalable, mobile, and resilient energy solutions for defense, remote sites, and off-grid applications.

In alignment with the objectives of EO 14299, hydrogen fuel cell systems—such as the U.S. Naval Research Laboratory's Hydrogen Small Unit Power (H-SUP)—present a compelling complement to the microgrid infrastructure currently being developed across San Diego County bases. These portable, low-signature power systems offer high energy density, minimal thermal and acoustic footprint, and can operate off the main grid, making them ideal for supporting modular and mission-critical microgrids. Integrating hydrogen fuel cells into microgrid designs at installations like Camp Pendleton, NBSD, and MCAS Miramar could significantly extend off-grid endurance, reduce reliance on diesel generators, and support mission readiness and resilience goals.

The energy resilience and supply diversification strategies unfolding across San Diego County's military bases underscore a powerful model for interagency collaboration, technological innovation, and long-term infrastructure planning. Through advanced microgrid deployment, large-scale battery storage projects, and successful participation in LCFS markets, installations like Naval Base San Diego and Camp Pendleton are leading the way in securing both operational readiness and environmental responsibility. These initiatives not only ensure uninterrupted mission capability during grid disturbances but also position military infrastructure as a testing ground for scalable alternative energy solutions. Looking ahead, continued investment and coordination among defense agencies, academic partners, and private stakeholders will be critical to sustaining and expanding these gains, helping San Diego to serve as a national benchmark for energy resilience.



# UNITED STATES MARINE CORPS



The San Diego region hosts the largest concentration of Marine Corps operational and support commands in the United States. With access to the interconnected sea, land, and air ranges our terrain and climate create ideal conditions to prepare Marines for deployed operations including combat. 1 of every 4 Marines is stationed in the San Diego Region and even more significantly, 95% of all Marines train in the Southwest (predominantly Southern California) before deploying.



Nearly 150,000 acres of San Diego County are part of the Marine Corps' most important installations, including Marine Corps Base Camp Pendleton, Marine Corps Air Station Camp Pendleton, Marine Corps Air Station Miramar, and Marine Corps Recruit Depot San Diego. San Diego's active-duty Marines total over 43,000 service men and women, and local Marines are active partners with the San Diego community through school volunteer programs while also training alongside and supplementing the San Diego Fire Departments during wildfire and rescue operations.

## MARINE CORPS INSTALLATIONS WEST

Located at Camp Pendleton, Marine Corps Installations (MCI) West provides oversight of five Marine Corps installations and functional support to three additional Marine Corps Installations on the West Coast. MCI West implements strategies and prioritizes resources to support the operating forces and tenant commands located on these installations. As a regional command, MCI West seeks to protect our forces and their families, provide for the long-term viability of bases and stations, support the warfighter, and provide for the quality of life for Marines, Sailors, and their families. In doing so, this standardizes all support actions across installations and allocation of funding where it is most effective. This support includes building, maintaining, and protecting the infrastructure for utilities; procuring, distributing, and conserving power and water; providing housing for Marines and their families; and maintaining installation security. MCI West strives to make utilities reliable, secure, and efficient. This includes seeking and developing sufficient and diverse sources of energy and bringing innovative technologies through partnership with state, industry, and academia.

## MARINE CORPS BASE CAMP PENDLETON

Encompassing 125,000 acres, Marine Corps Base (MCB) Camp Pendleton is home to the I Marine Expeditionary Force (I MEF), 1st Marine Division, 1st Marine Logistics Group, and major tenant commands including Marine Corps Installations West, Marine Corps Air Station Camp Pendleton, School of Infantry (SOI) West, Naval Hospital Camp Pendleton, and the Marine Corps Tactical System Support Activity. MCB Camp Pendleton's vast acreage, varied terrain, and 17 miles of coastline provide the Marines superb pre-deployment training including combined arms, amphibious operations, and direct air support by rotary and fixed-wing aircraft. MCB Camp Pendleton has more than 30,000 Marines and nearly 3,000 civilian government workers.

## MARINE CORPS AIR STATION CAMP PENDLETON

Marine Corps Air Station (MCAS) Camp Pendleton is a critical ship-to-shore training facility covering over 450 acres. The nearly 4,500 Marines assigned to operate the air station and aircraft support equipment during all-weather operations that replicate forward-deployed amphibious and combat

operations. MCAS Camp Pendleton is also home to Marine Aircraft Group 39 composed of AH-1Z Cobra and UH-1Y Venom light attack helicopter squadrons and two MV-22 Osprey squadrons that are under the 3rd Marine Aircraft Wing command. The aircraft based here provide combat-ready naval expeditionary capabilities for combat aviation support, aviation ground support, and aviation logistics. They also operate UC-12Ws to provide transport capability critical for direct support to I MEF and 3rd Marine Airwing equipment, parts, and personnel movements.

## MARINE CORPS AIR STATION MIRAMAR

With over 23,000 acres, Marine Corps Air Station (MCAS) Miramar, located about 14 miles north of downtown San Diego, is home to the 3rd Marine Aircraft Wing (MAW), the aviation element of the I Marine Expeditionary Force. 3rd MAW comprises F-35 Lightning II B and C variants, F/A-18C/D Hornet, and KC-130J Hercules fixed wing aircraft; and CH-53E Super Stallion and MV-22B Osprey rotary wing aircraft. MCAS Miramar is also home to Marine Air Control Group 38, which provides command and control for the Air Wing. The nearly 10,000 Marines stationed here base and support aircraft conducting training operations over water and at the inland ranges, including air-to-air and air-to-ground operations.

## MARINE CORPS RECRUIT DEPOT SAN DIEGO

Marine Corps Recruit Depot (MCRD) San Diego is located in the Point Loma area of San Diego and is home to the Recruit Training and Western Recruiting Region Headquarters. One of two MCRDs in the United States, MCRD San Diego is responsible for recruiting and providing basic training for 18,000 young men and women recruits who come from states west of the Mississippi River and the Western Pacific. Despite an exceedingly difficult military recruiting climate, nearly 1500 recruiters spread across 24 recruiting stations and 653 substations in 24 states continue to meet their assigned fiscal year recruiting mission. Post shipping, thirteen weeks of Recruit training transitions young men and women from civilians to United States Marines and includes the development of mental, moral, and physical strength, along with self-discipline, initiative, and decision-making skills. It includes rigorous training in marksmanship, field skills, martial arts, physical fitness, and simulated combat operations.





## SPOTLIGHT

### ARMED SERVICE SUPPORT ORGANIZATIONS

More than 75 local and national nonprofit organizations provide essential services to San Diego's active duty and veteran military communities. The nonprofits provide assistance with food, employment, childcare, the transition between active duty and civilian careers, and recreational activities. There are at least 66 nonprofit organizations based in San Diego dedicated to improving the lives of the military community. These nonprofits contribute over \$120 million annually to the local economy through salaries and services such



as childcare, food assistance, education, recreation, transition support, and veteran services. Events such as the GI Film Festival, the San Diego Military Summit, and Hiring Our Heroes Amplify, attract visitors to the region and generate additional economic activity.

National nonprofits include USO, Hire Heroes USA, Gary Sinise Foundation, and Onward to Opportunity. The USO provides a place for active-duty service members and their families to relax while waiting for a flight at the San Diego Airport. The USO also provides a place for new recruits to recharge by providing food and beverages, gaming, and showers before they catch shuttles to their respective bases. Hire Heroes USA assists veterans and their spouses with employment opportunities. They connect companies with job seekers and provide one-on-one transition support and mentoring. The Gary Sinise Foundation provides custom-built smart homes for severely wounded service members, hosts concerts, and brings awareness to the public about the challenges the military community faces. The Lt. Dan Band has performed

in San Diego many times since with the most recent concert in January 2025 at the Naval Medical Center San Diego. Onward to Opportunity provides validation of skills for transitioning military members and spouses and provides programs to become proficient in IT and business management. The Armed Services YMCA is a national non-profit with two locations in San Diego, one in Murphy Canyon and the other at Camp Pendleton. Both locations provide resources for families such as childcare, food distribution, and recreational activities.

San Diego based nonprofits include zero8hundred, Support the Enlisted Project, Resounding Joy, and Dogs on Deployment. The zero8hundred organization was started as a coalition of San Diego County cross-sector leaders came together to address obstacles facing active-duty military members, recently transitioned veterans, and military spouses such as unemployment and under-employment, lack of affordable housing, and health services. Zero8hundred connects the military community with Peer Navigators and works to determine the most appropriate services from over 150+ resources in Southern California. Support the Enlisted Project works to improve financial wellness through counseling, education, and support for enlisted service members, veterans, and their families. Resounding Joy brings healing through the therapeutic use of music through credentialed and board-certified music therapists. Resounding Joy partners with veteran and social service organizations in San Diego to



offer free or discounted programming to strengthen resilience, and increase the quality of life through music skills, collaboration, and emotional wellness strategies. Dogs on Deployment works to connect military members with volunteer boarders for their pets while they are on deployment, training, or in an emergency. There are numerous nonprofits all dedicated to aiding the military community in San Diego and if there is an issue there is likely a nonprofit working to address the need on a local and national level.

The recent Murphy Canyon plane crash into military housing underscores both the critical role of nonprofits in supporting the military and the importance of coordinated emergency response. Several nonprofits, San Diego Armed Services YMCA (ASYMCA), Support the Enlisted Project, zero8hundred, Feeding San Diego, and the San Diego Military Advisory Council (SDMAC) formed an Emergency Action Group (EAG) in early 2025 with the foresight to see the need for coordinated emergency services for the military community. Within

hours of the tragedy the EAG mobilized to provide immediate assistance through their coordination of services. The crash destroyed one home, damaged four others, and destroyed or damaged 19 vehicles, displacing more than 100 individuals and affecting 42 families. In the first 72 hours, ASYMCA distributed over \$35,000 in gift cards, while an additional \$68,000 in grants supported the 15 families who lost vehicles. Long-term recovery efforts include financial counseling, food distribution, mental health services, and community rebuilding assistance. This response highlights the value of the EAG in ensuring timely, coordinated aid during emergencies. In recognition of its leadership after the crash, ASYMCA received SDMAC's 2025 Nonprofit of the Year award.

Nonprofits are essential to the military community and the complete extent of their financial impact is difficult to measure as they rely on countless volunteer hours and generous donations from the community at large. San Diego has a robust and active network of military support organizations which contribute to the overall quality of life in San Diego.

**FEEDING  
SAN DIEGO**

**the  
Y  
YMCA**  
ARMED SERVICES YMCA

**SDMAC**  
SAN DIEGO MILITARY ADVISORY COUNCIL

**STEP**  
SUPPORT THE ENLISTED PROJECT

**zero8hundred**  
with love. for the military.



## UNITED STATES COAST GUARD

The U.S. Coast Guard operates under the U.S. Department of Homeland Security during peacetime. During times of war, it can be transferred in whole or in part to the U.S. Department of the Navy under the Department of Defense by order of the U.S. President or by act of Congress. As a branch of the U.S. Armed Forces, a law enforcement organization, a regulatory agency, a member of the U.S. Intelligence Community, and a first responder, the Coast Guard employs a unique mix of authorities, broad jurisdiction, flexible operational capabilities, and a network of partnerships. The Coast Guard is the principal Federal agency responsible for maritime safety, security, and environmental stewardship in U.S. ports and inland waterways.

### COAST GUARD SECTOR SAN DIEGO

Coast Guard Sector San Diego provides marine safety, security, and environmental protection to our major seaport and throughout the region. The Sector's Area of Responsibility encompasses more than 150,000 square miles including 60 linear miles of international boundary with Mexico and 114 coastal border miles along the Pacific Ocean. The Coast Guard Sector provides for rapid, coordinated response to emergencies, whether natural or man-made, along with integrated daily operations to enforce regulations governing marine safety, security, and environmental protection. Sector San Diego is responsible for all Coast Guard missions

including Search and Rescue, Ports Waterways and Coastal Security, Waterways Management, Maritime Homeland Security, Marine Science Activities, Aids to Navigation, and Command and Logistical Support.

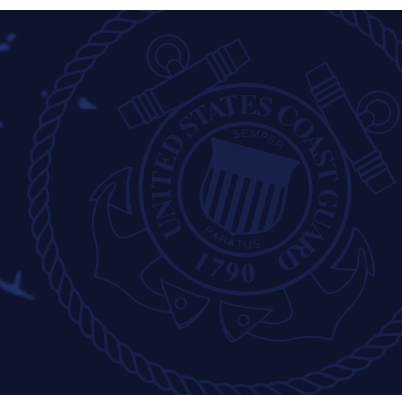
San Diego is one of few locations that integrate aviation into a Coast Guard sector, operating



several MH-60T Jayhawk helicopters. The Sector also houses several patrol boats, utility boats, and special-purpose crafts for law enforcement, search and rescue, and aids to navigation. Its prime location gives these "Guardians of the Southwest" immediate access to guard and protect the Southwest Maritime border. In addition, the Coast Guard's Joint Harbor Operations Center includes personnel from the Department of Homeland Security, California National Guard, and San Diego Harbor Police.

### EACH YEAR, COAST GUARD SECTOR SAN DIEGO:

- » Performs safety inspections on 488 domestic vessels
- » Oversee the safety of ~1 M commercial maritime passengers
- » Maintains 97 aids to navigation
- » Investigated 80 marine casualties
- » Performs safety and security exams on 73 foreign vessels
- » Permitted 95 marine events
- » Participates in approximately 270 Search and Rescue cases
- » Saves approximately 75 lives
- » Assists approximately 150 mariners in distress
- » Apprehends approximately 1,200 illegal aliens
- » Responds to and investigate 250 pollution cases





## SPOTLIGHT

### DEFENSE SUPPORT TO CIVIL AUTHORITIES (DSCA) – SUSTAINING READINESS THROUGH RELATIONSHIPS

#### FROM LOCAL COORDINATION TO NATIONAL COMMAND: A UNIFIED EMERGENCY MANAGEMENT VISION

If the San Diego region faces a disaster on the scale of the recent Los Angeles fires, is it ready to respond? In the event of a major earthquake or other large-scale emergency, are civil and military organizations prepared to coordinate effectively across different jurisdictions? That is the question we are proposing here. The San Diego region faces increasingly complex disaster threats that demand close coordination between civilian authorities and military capabilities. While the Defense Support of Civil Authorities (DSCA) framework has improved interoperability, the federal mission request process remains an area where greater clarity is needed. In California, requests for support flow first through Cal OES, which can then elevate them to FEMA—often the Lead Federal Agency under the Stafford Act—or to another designated federal agency depending on the mission. Navy emergency managers also highlight a disconnect in command responsibilities: although San Diego is located within U.S. Northern Command's area of responsibility, U.S. 3rd Fleet reports operationally to U.S. Pacific Fleet under U.S. Indo-Pacific Command. This dual chain of command can slow response timelines, underscoring the need for a shared operational picture and interoperable command pathways. At the same time, San Diego benefits from the Immediate Response (IR) authority, established after the 2003 wildfires, which allows local commanders to provide lifesaving support before formal requests are processed.

#### COST TRACKING AND REIMBURSEMENT CHALLENGES

Military DSCA wildfire support is reimbursable through the Interagency Agreement for the Provision of Temporary Support during Wildland Firefighting Operations, with funding routed via the National Interagency Fire Center (NIFC). While reimbursement mechanisms are established, cost tracking across services remains fragmented. For example, flight hours and fuel

usage from Navy helicopters supporting CAL FIRE are documented, but inconsistently coded across systems. Third Fleet lacks a unified database to consolidate DSCA expenditures. Despite Department of Defense financial management guidance, decentralized systems constrain cost transparency and complicate reimbursement.

**Note:** For wildland firefighting support, NIFC is the designated reimbursement channel. Other DSCA missions may utilize different reimbursement mechanisms, such as those under the Stafford Act, which are managed by FEMA.



#### THE READINESS GAP: JOINT TRAINING AND REGIONAL INTEGRATION

Southern California faces rising disaster risks, but large-scale regional training remains uneven. Bases maintain strong local ties, yet coordination across installations is inconsistent. Navy drills like Citadel Rumble stay confined to individual bases, and while civilian agencies invite military participation, operational demands often limit involvement. Fleet Weeks in San Francisco, Los Angeles, and San Diego provide some of the best opportunities to close this gap, with preparatory drills and Senior Leadership Seminars that bring leaders together and translate planning into action. These engagements are especially important because both military and civilian personnel rotate frequently—rarely is the same team in place year to year—making ongoing relationship-building and at least annual



consistency essential. Before the pandemic, base emergency managers and local agencies met quarterly, fostering trust and coordination, but that rhythm has not fully returned, leaving the region more vulnerable during large-scale disasters.

Partnerships remain strong with CAL FIRE, CAL OES, and San Diego County, and the annual Cory Iverson Wildland Firefighting Exercise highlights what joint training can achieve. Marines, Navy crews, and CAL FIRE firefighters conduct live water drops and integrated flights, with CAL FIRE firefighters training aboard Marine aircraft for the first time in 2024. These efforts demonstrate that readiness depends on relationships, and that consistent collaboration strengthens both military and civilian communities. Commanders also rely on Immediate Response authority to act quickly when lives are at risk, reinforcing the importance of strong civil-military ties, as seen during the Henderson Fire and the 2025 military housing aircraft crash, where these relationships translated into decisive action when it mattered most.

#### STRENGTHENING REGIONAL COORDINATION

San Diego already has strong forums where the military, government, and community partners plan together for emergencies. The Resilience Working Group (RWG), led by the Port of San Diego, brings together the Navy, Marine Corps, Coast Guard, U.S. Army Corps of Engineers, Port member cities, County OES, state and federal agencies, private businesses, nonprofits, and academic partners. This broad coalition has often served as a springboard for multi-agency collaboration on resilience and port-related challenges.



As County OES transitions leadership—much like military command rotations—the need is not to start over but to continue these practices and keep them consistent. At the same time, with frequent turnover among federal and state partners, maintaining strong relationships and updated response playbooks is more important than ever. By reinforcing the RWG, linking it with the existing Civ-Mil Working Group, and tying it together at the annual Senior Leadership Seminar, San Diego can ensure that when disasters strike, the region responds as one coordinated team.



# U.S. DEPARTMENT OF VETERANS AFFAIRS

The Department of Veterans Affairs runs programs benefiting Veterans, their families, caregivers, and survivors. It offers education opportunities and rehabilitation services and provides compensation payments for disabilities or death related to military service, as well as home loan guaranties, pensions, burials, and health care that includes the services of nursing homes, clinics, and medical centers. In San Diego County, there are approximately 176,906 veterans, a decline of more than 21,000 from 2024 (FN7).



## VETERANS BENEFITS ADMINISTRATION - SAN DIEGO REGIONAL OFFICE

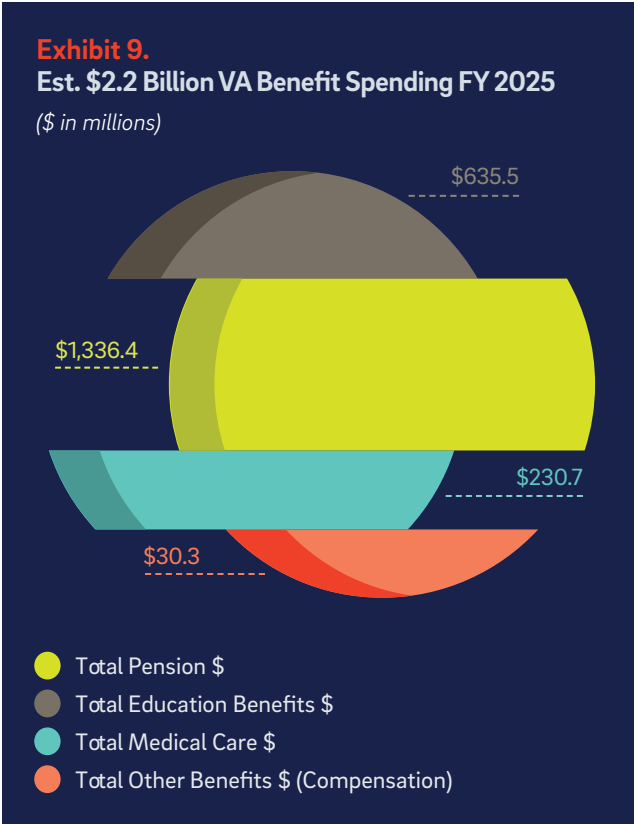
The San Diego Veterans Affairs Regional Office (VARO) administers a wide array of benefits to Veterans, and for their families, caregivers, and survivors living in San Diego. These Veterans have served the nation in various conflicts, dating back to World War II. The Veteran's Benefits Administration, part of the VA, aids service members in their transition from active duty to civilian life and supports them and their families through education benefits, home loans, life insurance, and much more.

During Fiscal Year 2025, the San Diego VA Regional Office administered approximately \$30 million in VA for non-service-connected pension benefits for Veterans and survivors based on wartime service. \$635 million in total education benefits, \$230 million in total medical care in San Diego County alone, and \$1.3 billion in VA Compensation benefits (Exhibit 9). In total, the San Diego VA Regional Office spent approximately \$2.2 billion in FY 2025.

## VETERANS' HEALTH ADMINISTRATION - SAN DIEGO

Rated as a Centers for Medicare and Medicaid Services 5-star facility for the second year in a row, VA San Diego Healthcare System provides comprehensive medical inpatient and outpatient

services through the Jennifer Moreno VA Medical Center in La Jolla and outpatient services in six different clinics across the county. As part of the nation's largest integrated healthcare network, VA San Diego employed over 3,900 people in FY 2025.





## CONCLUSION



This year in San Diego's Defense-related economy is perhaps best characterized as a glimpse into the importance of a normal appropriations process – transparent, collaborative, and predictable, with shifts in budget tied to shifts in policy and discussed well in advance, in order to strike an effective balance between supporting current operations and building future capabilities. We see this in the data: judicious spending by military leadership prioritizing the recruitment and retention of vital military personnel through pay raises, promotions, and bonuses, offset by modest restraint in contracting to balance a budget that is both constrained and uncertain. Our region would be well served by

resuming the return to normalcy we saw in previous years. Equally important are the emerging opportunities that signal a path forward, particularly when considering the administration's defense innovation and acquisition reform agenda. By leveraging the region's strengths, aligning investments and policy, and fostering collaboration across DoD, industry, academia, and civic organizations, San Diego is well-positioned for long-term growth.

In upcoming reports, we will continue our multi-year exploration of topics that have proved challenging to unpack quantitatively: our region's Defense Innovation Economy, one of the elements that helps to provide that balance while also contributing directly to the future of the larger San Diego Innovation Economy, and the separation of new acquisition funding from operations and maintenance, to bring visibility to sustaining our existing infrastructure. In this way, we hope to foster a well-rounded understanding to inform the decisions and policies that provide the balance to secure our nation's and our region's competitive advantage.

## FOOTNOTES

**FN1:** Data provided directly from military sources

**FN2:** Chodorow-Reich, Gabriel. Geographic Cross Sectional Fiscal Spending Multipliers: What Have We Learned? *American Economic Journal: Economic Policy* (2019), 11(2): 1-34

**FN3:** Auerbach, Alan J., Yuriy Gorodnichenko, and Daniel Murphy. Local Fiscal Multipliers and Fiscal Spillovers in the USA. *IMF Economic Review* (2020) 68:195-229.

**FN4:** Bureau of Labor Statistics; San Diego Labor Force  
[https://data.bls.gov/timeseries/LAUMT064174000000005?amp%253bdata\\_tool=XGtable&output\\_view=data&include\\_graphs=true](https://data.bls.gov/timeseries/LAUMT064174000000005?amp%253bdata_tool=XGtable&output_view=data&include_graphs=true)

**FN5:** San Diego Venture Funding  
<https://www.sdbj.com/real-estate/sd-life-sci-projects-drawing-investors/>

<https://techcrunch.com/2025/03/06/shield-ai-raises-240-million-at-a-5-3-billion-valuation-to-commercialize-its-ai-drone-tech/>

**FN6:** Mission Valley Innovation District  
<https://missionvalley.sdsu.edu/explore/innovation-district>

**FN7:** San Diego Veteran Population  
[https://data.census.gov/profile/San\\_Diego\\_County,\\_California?g=050XX00US06073](https://data.census.gov/profile/San_Diego_County,_California?g=050XX00US06073)







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