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THE DEPARTMENT OF DEFENSE BUDGET CUTS: ECONOMIC IMPACT TO GEORGIA AND SELECTED COUNTIES

Introduction

This brief examines the economic impact Department of Defense procurement contracts, grants, and civilian wages have on the state of Georgia as well as selected counties. Due to the continued fiscal pressure on the federal government as well as the Budget Control Act of 2011, Department of Defense spending is likely to decline in Georgia in the years to come. This brief estimates the impact of the proposed "sequestration" of Department of Defense spending on employment levels and the types of jobs affected. In federal fiscal year (FFY) 2013, a 10 percent cut in Department of Defense spending in Georgia would result in the loss of an estimated 9,420 jobs (or equivalent payroll reductions) throughout the state. Many of these jobs would be in high paying sectors such as aircraft manufacturing, engineering and related services. In addition, Georgia could lose an estimated $1.6 billion in output.

The Budget Control Act of 2011 (BCA) originally was to take effect on January 1, 2013. The BCA required automatic spending reductions of $1.2 trillion from FFY 2012-2021. In September 2012, the Office of Management and Budget (OMB) estimated that if the automatic cuts in the BCA (commonly referred to as the sequester) were to go into effect, the defense budget would have to be reduced by $54.7 billion per fiscal year starting in 2013 for nine years. These cuts would not be distributed evenly among all Department of Defense (DOD) programs. Because the President exempted military personnel accounts, as allowed by the BCA, the remaining defense spending categories face greater budgetary reductions. OMB estimated that these remaining defense related budget cuts would be between 9.4 percent and 10 percent.[1] Since then these reductions were deferred until March 1, 2013 by the American Taxpayer Relief Act of 2012 and this deferral has had the effect of reducing the amount of the sequester by $24 billion and lowering the impact of the across the board cuts to DOD programs to 7.7 percent in FFY 2013. The larger reductions would take effect from FFY 2014 onward.[2]

To estimate state and county level economic effects of the BCA reductions or some other similar reduction, IMPLAN economic modeling software was used, as well as data from the Consolidated Federal Funds Report for FFY 2010 (CFFR) and USAspending.gov. The methods used in this brief are discussed in detail in the attached Appendix. This modeling software allows the analysis to capture direct and "multiplier effects" of DOD cuts on three levels of job type (and the associated economic impact):

1) Direct jobs provided by firms that receive DOD procurement contracts and grants or are civilian DOD employees;

2) Indirect jobs provided by firms that participate in inter-industry trade and supply goods and services to those firms engaged in the direct activity; and

3) Induced jobs provided by firms that benefit from the increased household purchases of goods and services in the region by persons employed by firms that have direct and indirect economic impacts.

It is worth noting that this analysis does not address precisely how the DOD will reduce jobs. The IMPLAN model estimates jobs lost as a result of reductions in spending in different industries. However, the DOD or firms affected may choose to reduce spending on payroll differently such as through furloughs, wage cuts or other methods that are economically equivalent to "one lost job." Additionally, this brief presents three estimates of the BCA's impact on Georgia: the 7.7 percent cut relevant to FFY 2013; a 10 percent reduction equivalent to the amount that OMB and CBPP estimate will be the reduction in FFY 2014 and beyond;[3] and a 23 percent reduction.

The first two estimates assume that budget cuts will be allocated in proportion to prior spending. However, the DOD has already indicated that certain programs will continue to receive full funding at the expense of other programs, thus the budget cuts may not be distributed uniformly by industry or even by state.[4] The third estimate was guided by a report by Stephen Fuller.[5] Fuller's estimated impact on Georgia includes cuts to military personnel accounts, which were excluded from the BCA. While military personnel are excluded from the BCA, Georgia could experience a reduction in military personnel stationed within the state as a result of on-going budget negotiations.[6] In order to get a similar order of magnitude of job losses as Fuller, spending would have to be reduced by 23 percent. This final estimate attempts to capture potential variation at both the program level and the state level. The 10 percent estimate is primarily discussed here, as the 7.7 percent estimate likely only applies for FFY 2013 and the 23 percent reduction, while possible, is at the high end of the relevant range of estimates.

Results

All DOD Related Jobs

Table 1 shows the distribution of jobs and potential job losses across 17 counties that account for 97 percent of all DOD procurement contracts and grants received in Georgia. The BCA reductions also include the amount spent by the DOD on civilian payroll. The amount spent by DOD on procurement contracts, grants, and civilian payroll, is referred to as "DOD related" programs throughout the rest of the brief.

Table 1 illustrates how DOD related programs are allocated around the state. The table is sorted by urban area with the most supported jobs. In FFY 2010 DOD related programs supported an estimated 94,198 direct, indirect, and induced jobs in Georgia. Thus, a 10 percent cut in spending would result in a loss of approximately 9,420 jobs (or job equivalent expenditures) statewide. A 10 percent cut in spending would also be associated with a drop in output of $1.6 billion statewide.[7] The 17 counties that received the most procurement contracts are generally associated with an urban area or Metropolitan Statistical Area (MSA).

Cobb County was the largest beneficiary of DOD procurement contracts and grants in the state receiving $3.6 billion in FFY 2010. These procurement contracts and grants, mostly for aircraft manufacturing, supported 22,645 total jobs and 14,063 direct and indirect jobs. A 10 percent cut would result in the estimated loss of 2,265 total jobs in Cobb County. Not surprisingly, Georgia's most populous MSA, Atlanta, contains eight of the selected 17 counties. These eight Atlanta metropolitan counties account for 3,902 of the estimated job losses from a 10 percent budget cut in DOD related programs, 41 percent of the state total (see Chart 1).

Other counties in other MSAs beside Atlanta also receive considerable DOD support. In Muskogee and Chattahoochee counties, part of the Columbus MSA, DOD related programs supported an estimated 11,845 jobs in FFY 2010. In the counties of Bryan, Chatham, and Liberty, part of the Savannah MSA, DOD related programs supported an estimated 8,829 jobs. A 10 percent budget cut in the DOD related programs would eliminate an estimated 2,067 jobs in these five counties. The counties located in the MSAs of Atlanta, Columbus, and Savannah accounted for 63 percent of all the DOD supported jobs in Georgia in FFY 2010.

Direct and Indirect Jobs Analysis

Table 2 shows the total direct and indirect jobs supported by DOD related programs for the 17 selected counties. These are jobs that exist in firms that receive DOD money directly or supply those firms that do. Firms that specialize in defense related work tend to have relatively high paying jobs. Statewide, DOD related programs supported 60,838 direct and indirect jobs. Note that the statewide average labor income per direct and indirect job supported by the DOD related programs was $65,624 versus $42,000 for induced jobs.

TABLE 1. TOTAL JOBS SUPPORTED BY URBAN AREA AND SELECTED COUNTIES

County	Urban Area	Total Employment	Labor Income Per Job	-------Estimated Job Losses----- 7.7% Cut	10% Cut	23% Cut
Cobb	Atlanta	22,645	$71,340	1,744	2,265	5,208
Fulton	Atlanta	9,460	$85,417	728	946	2,176
Gwinnett	Atlanta	2,408	$61,926	185	241	554
Hall	Atlanta	2,222	$53,479	171	222	511
Dekalb	Atlanta	1,206	$31,465	93	121	277
Clayton	Atlanta	693	$40,728	53	69	159
Forsyth	Atlanta	384	$56,068	30	38	88
Chattahoochee	Columbus	7,936	$47,819	611	794	1,825
Muscogee	Columbus	3,909	$47,175	301	391	899
Bryan	Savanah	5,661	$33,845	436	566	1,302
Chatham	Savanah	2,797	$89,543	215	280	643
Liberty	Savanah	371	$45,877	29	37	85
Houston	Warner Robins	4,365	$60,804	336	437	1,004
Richmond	Augusta	3,824	$63,106	294	382	879
Dougherty	Albany	883	$47,884	68	88	203
Lowndes	Valdosta	612	$100,796	47	61	141
Camden	Brunswick	485	$76,906	37	48	111
Georgia State Total		94,198		7,253	9,420	21,665

(includes selected + all other counties.)

CHART 1. COUNTY JOB LOSSES AS A PERCENT OF GEORGIA DOD RELATED TOTAL JOB LOSSES

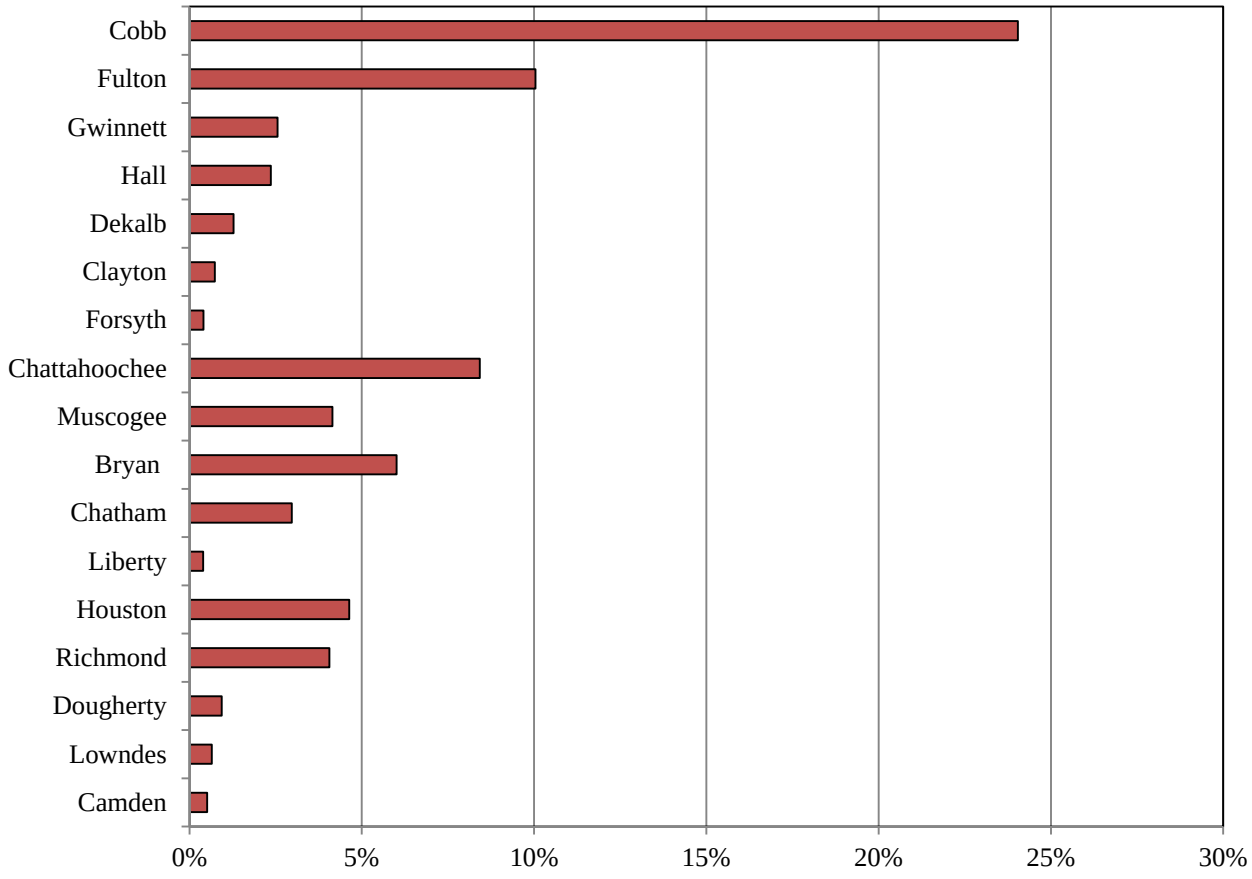

TABLE 2. DIRECT AND INDIRECT DEFENSE RELATED EMPLOYMENT

County	Urban Area	Direct + Indirect Supported Jobs	---------Estimated Job Losses--------			Labor Income Per Job
			7.7% Cut	10% Cut	23% Cut	
Bryan	Savanah	4,901	377	490	1,127	$35,478
Camden	Brunswick	358	28	36	82	$94,345
Chatham	Savanah	7,841	604	784	1,803	$48,011
Chattahoochee	Columbus	1,431	110	143	329	$138,958
Clayton	Atlanta	559	43	56	129	$42,997
Cobb	Atlanta	14,063	1,083	1,406	3,234	$89,517
Dekalb	Atlanta	975	75	98	224	$29,415
Dougherty	Albany	737	57	74	169	$50,140
Forsyth	Atlanta	308	24	31	71	$60,117
Fulton	Atlanta	6,692	515	669	1,539	$96,767
Gwinnett	Atlanta	1,650	127	165	379	$71,664
Hall	Atlanta	1,550	119	155	356	$60,734
Houston	Warner Robins	3,497	269	350	804	$68,746
Liberty	Savannah	347	27	35	80	$47,170
Lowndes	Valdosta	466	36	47	107	$62,321
Muscogee	Columbus	2,984	230	298	686	$49,819
Richmond	Augusta	2,969	229	297	683	$71,143
Georgia State Total		60,838	4,685	6,084	13,993	$65,624

(includes selected + all other counties)

TABLE 3. HIGH PAYING DIRECT DEFENSE SECTOR JOBS

Description	Supported Direct jobs	---------Estimated Job Losses---------		
		7.7% Cut	10% Cut	23% Cut
Employment and Payroll Only (Federal Gov't, Military)	8,229	634	823	1,893
Aircraft Manufacturing	6,514	502	651	1,498
Architectural, Engineering, and Related Services	3,532	272	353	812
Other Aircraft Parts and Auxiliary Equipment Manufacturing	1,141	88	114	262
Advertising and Related Services	1,061	82	106	244
Five Sector Total	20,476	1,577	2,048	4,709
Georgia Total Direct Defense Sector Jobs	45,759	3,523	4,576	10,524

There is variation in labor income per direct and indirect job supported by the DOD related programs in the various counties. Three industry sectors, which accounted for 31 percent of all the estimated direct and indirect jobs supported by the DOD related programs in the state in FFY 2010 are all relatively low-paying sectors with $44,000 per job or less. These sectors are: construction of new nonresidential structures; maintenance and repair of nonresidential structures; and facility support services. Counties that generally have lower labor income per job have more of these lower paying sector jobs.

Premium Jobs and the Defense Industry

Table 3 shows the top-five industry sectors in terms of direct employment that generate labor income per job of $65,000 or more, referred to here as high paying jobs. These high paying industry sectors include: aircraft manufacturing; architectural, engineering, and related services; and other aircraft parts and ancillary equipment manufacturing. The DOD related programs supported 20,476 direct jobs in these top-five sectors. If the budgets of the DOD related programs were to be cut by 10 percent, the state could lose an estimated 2,048 direct jobs, if budget cuts were 23 percent, the state could lose an estimated 4,709 direct jobs. To put the size of these job losses in perspective, the Kia automobile manufacturing plant that opened in West Point, Georgia, created 3,000 direct jobs.

Conclusion

In summary, many jobs in Georgia are supported by the DOD related programs. Using FFY 2010 CFFR data, the IMPLAN model projects that roughly 94,198 jobs are supported statewide. These jobs vary from higher paying sectors such as aircraft manufacturing to lower paying construction jobs. The state could lose 9,420 jobs if DOD related programs are cut at the 10 percent level and 21,665 jobs if cut at the 23 percent level. These cuts could also cause declines in statewide economic output, estimated using IMPLAN to be $1.6 billion to $3.68 billion. While the BCA cuts may be postponed or altered by Congress, it does appear that DOD spending will decline over time as is estimated in a 2012 DOD report.[8] These estimated declines in spending in Georgia are at similar levels to the mandatory reductions required in the BCA. How these reductions are distributed and what types of programs are affected will have important economic impacts on employment and output throughout Georgia.

Methods Appendix

Data for this brief came primarily from two sources: the last full data set from the CFFR for fiscal year 2010 and USAspending.gov.[9] For this brief, CFFR data were necessary as they have several features unavailable in USAspending.gov. CFFR includes, salary and wage data necessary to estimate effects of DOD civilian workforce cuts. CFFR also has complete documentation discussing data sources, their reliability, what is excluded, and how the dollar amounts are summarized. The report also has summary tables of certain agency expenditures including DOD. These DOD summary tables were necessary to ensure all relevant DOD spending was allocated accurately to counties.

The CFFR reported total expenditures for DOD are $22.8 billion in Georgia for FFY 2010. However, a large part of Georgia total expenditures are military personnel accounts, which are exempt from the BCA. Total military personnel accounts in Georgia that are not subject to the BCA are approximately 49 percent of total DOD spending. Georgia has a higher share of military personnel spending than the US average, which was 27 percent of US total DOD spending in FFY 2010.[10] However, wages paid by DOD to civilians are not exempt from the BCA.

Verifying Georgia DOD Spending

The reliability and completeness of CFFR data can sometimes pose problems for researchers. To validate the estimate of total Georgia DOD spending, several methods were used. First, the county level allocation of all DOD spending from the electronic CFFR data were summed and matched to the total state spending listed in the CFFR printed report for Georgia for FFY 2010. Second, the DOD's estimates of projected spending were also utilized as another robustness check of the CFFR data.[11] The report lists the published estimates of DOD future expenditures by state and industry sector going forward six years. The DOD estimated 2010 total expenditures in Georgia to be approximately $24.6 billion in calendar year 2010, while the CFFR estimated total actual expenditures to be $22.8 billion in FFY 2010. While these estimates are different, they are similar enough that it would be unlikely that the estimate used in this brief of Georgia DOD spending on relevant programs was missing a large program or area of spending.[12]

The IMPLAN Model

The effects to the Georgia economy as well as the selected counties of reduced DOD spending on the related programs were modeled using IMPLAN. The IMPLAN software package

allows the estimation of the multiplier effects of changes in final demand for one industry on all other industries within Georgia. Multipliers may measure total changes in output, income, employment, or value added. The economic data for IMPLAN is for calendar year 2010, and comes from the system of national accounts for the United States based on data collected by the US Department of Commerce, the US Bureau of Labor Statistics, and other federal and state government agencies. Economic output and labor income are presented in 2012 dollars.

IMPLAN uses a 440 sector input output model to measure the effects of three types of impacts: direct, indirect, and induced. Direct impacts consist of employment and purchases of goods and services in the region resulting from the activity being evaluated, in this case, DOD procurement contracts, grants, and civilian employment. Indirect impacts, the result of inter-industry trade, consist of goods and services purchased by the firms, which supply inputs consumed in the direct activity. Induced impacts consist of increased household purchases of goods and services in the region by persons employed by firms that have direct and indirect economic impacts. The model generates multipliers, which summarize the magnitude of the indirect and induced effects generated by a given direct change, to estimated changes in output, income, and employment. Most simply, the multiplier is the ratio of total impact to direct impact.

In the IMPLAN model, inter-industry relationships are classified based on data on the production functions of different industries in the region. The IMPLAN model was used to estimate the multipliers based on those coefficients for the state of Georgia as well as the 17 counties that received 97 percent of the funds from the DOD related programs. The model uses the county spending allocations determined through the CFFR spending data and the North American Industry Classification System (NAICS) codes in the USAspending.gov, described below.

Assigning Industry Sector Codes

The CFFR has all DOD agency spending allocated by county and includes the relevant program or branch of the military that funded the program. However, the CFFR data does not include an industry sector that is necessary to code the spending into IMPLAN. In order to match up the CFFR spending data to the appropriate IMPLAN industry sector code a NAICS code is necessary. USAspending.gov has DOD agency spending identified by zip code and includes a NAICS code as well. USAspending.gov data were aggregated by county using the zip code spending data and then merged with the CFFR data using the relevant agency code. A few CFFR county level spending data points did not have a match in the USAspending.gov data. For those county data points without a match, researcher judgment had to be used to match up similar levels of spending by the same military agency in another similar county.

Researcher judgment also had to be used in several counties that had armory construction funds. The NAICS code for armory construction does not correspond to a specific IMPLAN code. Rather IMPLAN requires the researcher to specify what type of construction is being performed. The USAspending.gov data provided no insight here. Heavy military construction is broken out into two IMPLAN categories: construction of other new nonresidential structures; and maintenance and repair construction of nonresidential structures. The agency spending was allocated to these two codes based on the following rule: if the county level spending was $5 million or less, the full amount was allocated to maintenance and repair. If the total county amount was more than $5 million half was allocated to new construction and half to maintenance and repair.

Information about how military civilian jobs are distributed throughout Georgia was also not readily available. To allocate these funds to counties, data from the 2010 CFFR printed report were relied on, which has DOD spending in Georgia identified by civilian military and civilian other. Military civilian wages were estimated to be $1.313 billion while civilian other wages were estimated to be $105 million in FFY 2010. Two IMPLAN categories were used to model the economic impact of DOD civilian wages: employment and payroll only (federal government, military) for civilian military employment; and employment and payroll only (federal government, non-military) for civilian other employment. To allocate civilian payroll to counties, the share of total county DOD procurement contracts and grants was used. Note that federal government civilian jobs in these two sectors do not generate any indirect jobs as IMPLAN treats them as an industry that does not produce a commodity. IMPLAN captures the benefits to suppliers of the federal government through money spent on procurement contracts by DOD.

Other BCA Economic Impact Estimates

Several other estimates of the economic impact of the BCA are available. Fuller estimated the BCA economic impact on the national as well as state economies using various models, including IMPLAN. Fuller estimated job losses for Georgia due to the BCA of roughly 27,000. Fuller's estimate was based on payroll as well as procurement spending. However, since he

conducted his research, the President notified the CBO that military personnel accounts would not be subject to the BCA.

Recently, state level estimates of the effects of looming defense budget cuts, as well as prior shortfalls in funding were released by different branches of the armed services.[13] These estimates list actual programs that are likely to be cut or limited due to the BCA as well as a prior continuing resolution. These reports are not meant to be exhaustive lists and are subject to change. They are helpful to pinpoint what programs are likely to be cut and their location in the state.

However, the methods and economic model used in this brief to estimate job losses and economic impact, are likely different from those used in the reports issued by the Army, Navy or Air Force. For instance, the Army in its report estimated an economic loss of $931 million and that 17,163 jobs will be affected in Georgia due to budget uncertainty. The Army considers budget uncertainty to include not only the BCA, but also a shortfall from the prior continuing resolution, and pressure created by emerging Overseas Contingency Operations requirements.

In addition, the Army includes civilian furloughs in its estimate of jobs affected. In our analysis, it was not practical to model spreading budget cuts across jobs in terms of lost hours rather than a lost job. However, for a given level of civilian payroll reductions, the economic impact of a lost job versus decreased hours for many employees should be roughly the same on the economy. The Army's economic loss figure appears to be the sum of lost wages as well as diminished spending on construction and base operations. Unfortunately, the Army's report does not discuss the methods used to arrive at these estimates of jobs affected or economic loss. The reports by the Air force and the Navy do not offer any discussion of how the estimated job and wage losses were estimated either. Thus, caution must be used in comparing the estimates in this brief, with those of the Army, Air Force, and Navy.

NOTES:

1. The OMB report issued pursuant to the Sequestration Transparency Act of 2012. Office of Management and Budget (2012). *OMB Report Pursuant to the Sequestration Transparency Act of 2012*, at Deputy Secretary of Defense. 2013. Handling Budgetary Uncertainty in Fiscal Year 2013. at zyn.com/sbir/insider/DoD_handling_budgetary_uncertainty.pdf.

2. Kogan, Richard (2013). *How Big Are the Automatic "Sequestration" Cuts Scheduled for March 1?*, Center on Budget and Policy Priorities, at http://www.offthecharts blog.org/how-big-are-the-automatic-sequestration-cuts-scheduled-for-march-1/.

3. Both the OMB and the Center on Budget and Policy Priorities have estimated reductions that include 9.8 percent (see OMB Transparency Act Report in footnote 1 and Kogan, Richard (2012). *Two Sequestrations How the Pending Automatic Budget Cuts Would Work, Center on Budget and Policy Priorities*, at http://www.cbpp.org/cms/index.cfm? fa=view&id =3879).

4. Deputy Secretary of Defense (2013). *Handling Budgetary Uncertainty in Fiscal Year 2013*, at zyn.com/sbir/insider/DoD handling_budgetary_uncertainty.pdf.

5. Fuller, Stephen S. (2012). *The Economic Impact of the Budget Control Act of 2011 on DOD & Non-DOD Agencies*, aia-aerospace. at http://www.aia-aerospace.org/assets/Fuller_II_ Final_Report.pdf.

6. Several other reports were recently released by different branches of the armed services. The armed services reports estimated various economic impacts from the BCA, as well as the effects of the funding shortfalls due to a past continuing resolution that currently controls funding levels and expires March 27, 2013. These reports are discussed in the Appendix.

7. IMPLAN generally defines output as firm revenue.

8. Department of Defense (2012). *Projected Defense Purchases: Detail By Industry and State Calendar Years 2011 Through 2017*, at www.economics.osd.mil/DEPPS2012.pdf

9. The CFFR data has been replaced by USAspending.Gov. See US Census (2011). *Consolidated Federal Funds Report for Fiscal Year 2010*, Issued September 2011, at www.census. gov/ prod/ 2011pubs/cffr-10.pdf.

10. In FFY 2010 Georgia military wages were $12.607 billion and US military wages were $181.946 billion. Total US DOD expenditures were $556.659 billion (Consolidated Federal Funds Report for Fiscal Year 2010, issued September 2011 referenced in footnote 9 above).

11. Department of Defense (2010). *Projected Defense Purchases: Detail By Industry and State Calendar Years 2009 Through 2015*, at www.economics.osd.mil/DEPPS2010.pdf

12. The difference between fiscal years and calendar years is noted and may be one source of the variation.

13. The reports from the Army, Navy and Air Force are available here:

    US Army (2013). *Budget Uncertainty Impact on the U.S. Army State-by-State Comparison As of: 15 February 2013*, at http://www.scribd.com/doc/126277313/Army-cuts.

    US Navy (2013). *Fiscal Year 2013 Draft Plan for Continuing Resolution and Sequestration*, at http:// www.scribd.com/ doc/126318434/Navy-Cuts.

    US Air Force (2013). *Sequestration, Civilian Furlough, FSRM & MILCON $ Impact*, at http:// www.scribd.com/doc/ 126383995/Sequestration-State-Impact.

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