

Powering Growth
and Affordability

The Role of Transmission in National Security

SOUTHEAST

The region has a concentration of special operations, expeditionary forces, missile development, and cyber and intelligence missions. It houses approximately 21% of U.S.-based military personnel and a \$55.2 bn defense industrial base.

By the Numbers (FY24)

\$33.78 bn

Defense payroll
spending

\$55.2 bn

Defense contract
spending

1.9%

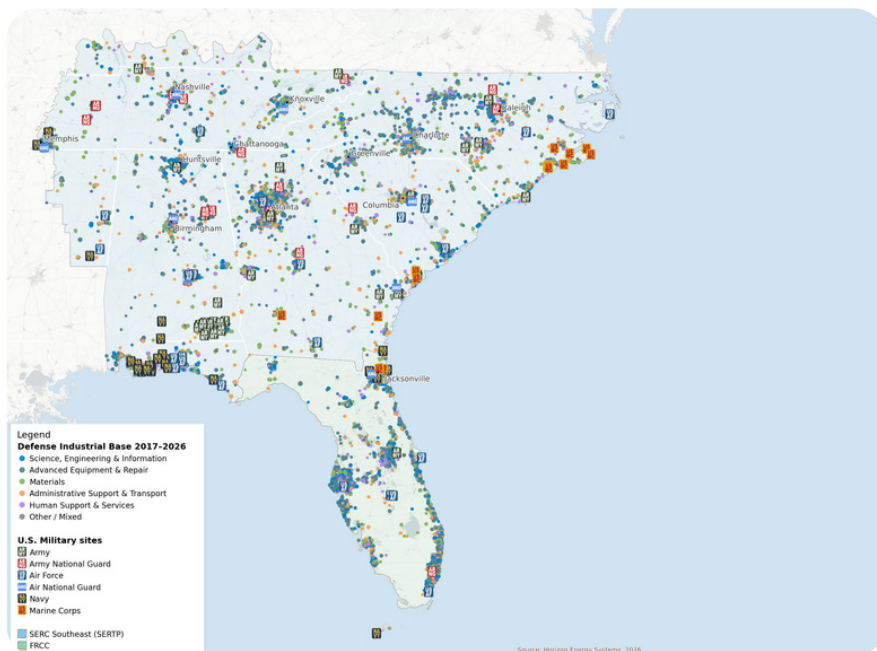
Defense spending as
share of regional GDP

Why Transmission Matters

Missions and installations. The Southeast is home to 65 major military installations that include special operations forces and commands; Army intelligence and cyber operations; aviation missions; and a Marine Corps expeditionary, training, and logistics network spanning the Carolinas and Georgia.¹

Defense communities. There are approximately 540,000 active-duty, civilian, National Guard, and Reserve personnel supporting defense missions in the Southeast.² There are also approximately 574,000 military family members living in the region.³ Military installations and their personnel rely on interdependent utility infrastructure located within defense communities. The Marine Corps installations in SC,⁴ for example, rely on civilian natural gas, water, sewer, and broadband systems, which are vulnerable to power outages and coastal hazards.

Defense Industrial Base. The Southeast DIB is strong in military aviation, combat-vehicle support, and nuclear-defense activities, with major capabilities in aircraft production and maintenance, missile development, and specialized explosives and materials.



Horizon Energy Systems, 2026



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What's At Stake

- Fort Bragg in NC is one of the Army's largest installations and a major center for airborne and special operations forces. It is home to the U.S. Army Special Operations Command, Joint Special Operations Command, the 3rd Special Forces Group, and the 82nd Airborne Division, supporting units that are trained to deploy quickly for missions around the world.
- MacDill Air Force Base in Tampa, Florida, is a major center for air refueling and military command operations. The 6th Air Refueling Wing operates KC-135 Stratotanker aircraft from the base. MacDill also hosts the headquarters of U.S. Central Command and U.S. Special Operations Command, which oversee forces around the world.
- Redstone Arsenal in Huntsville, AL, is a major Army center for developing missiles, aircraft systems, sensors, and other defense technologies. The installation focuses on research, engineering, testing, and prototyping, helping move new technologies from development into military use.

¹ Adapted from Military One Source, <https://installations.militaryonesource.mil/>.

² Adapted from Office of Local Defense Community Cooperation, *Defense Spending by State: Fiscal Year 2024* (U.S. Department of Defense, November 2025), <https://oldcc.gov/defense-spending-state-fiscal-year-2024>.

³ Adapted from Military State Policy Source, <https://statepolicy.militaryonesource.mil>.

⁴ Low Country Council of Governments, *Lowcountry MIRR: Military Installation Resilience Review of MCAS Beaufort, MCRD Parris Island, and the Surrounding Areas* (May, 2022).