

F-35 Offset Program Overview & Project Considerations

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Switzerland F-35 Offset Program Overview



Offset Obligation

- 60% of total contract value
- ~\$3.05B

Program Requirements

- 20% Direct, 40% Indirect
- Distributed across all 3 regions

Period of Performance

- Offset POP through 2034

Offset Implementation Strategy / Priorities:

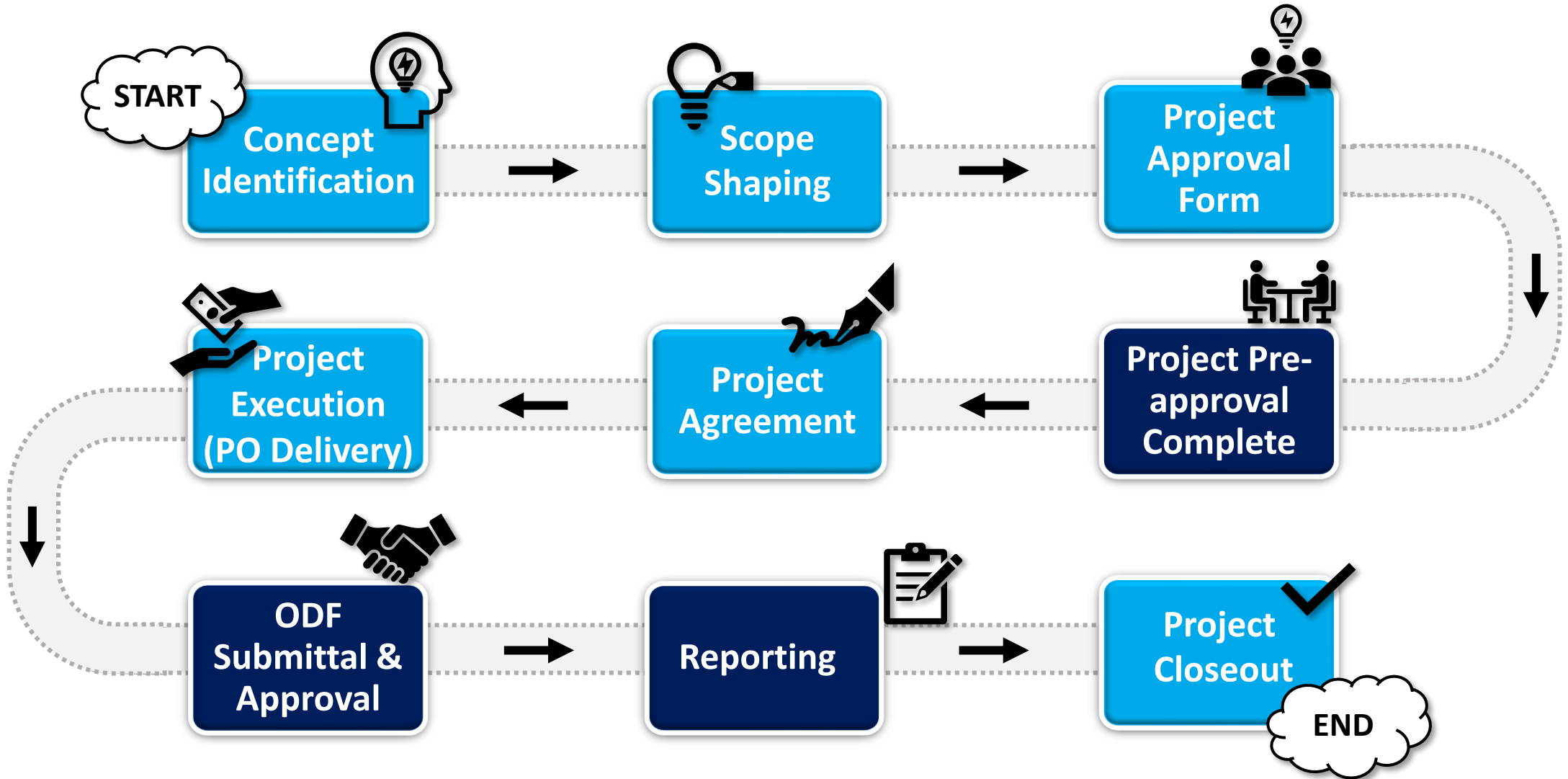
- *Develop projects that provide economic benefit*
- *Meet regional distribution guidelines*
- *Partner with Pratt & Whitney and Northrop Grumman*
- *Focus on Security Relevant Technologies*
- *Prioritize advanced innovative projects with long-term sustainability over build-to-print procurement*
- *Universities & Industry Groups cooperation*
- *Establish long-term relationships with Swiss industry*



Project Development & Approval Process

Legend:

- LM & Swiss Industry (Light Blue)
- LM & armasuisse (Dark Blue)



Project Concept Template



- Streamlined Process to Capture Potential Offset Concept Ideas and Opportunities from Swiss Industry
- Tailored to Swiss Offset Policy
- Internally Used by LM ID Team to Ensure it Aligns with Offset Policy
- Internally Used by LM Subject Matter Experts to Assess for Technical Viability



Project Concept Template



1. Project Name Click or tap here to enter text.

2. Company Background

3. General Description of Opportunity

4. LM Support to Execute Offset Project

5. Crediting – [\(Switzerland Offset Policy\)](#)

6. Other Company(ies) Involvement (If Applicable)

7. Competitive Environment

8. Competition Details (If Applicable)



Project Concept Template



2. Company Background		Website: Click or tap here to enter text.
2.1. When was the company funded?	Click or tap here to enter text.	
2.2. Where are the company's headquarters located?	Click or tap here to enter text.	
2.3. What are the company's competitive advantage(s) and capabilities?	Click or tap here to enter text.	
2.4. In what industries is the company currently involved?	Click or tap here to enter text.	
2.5. What is the company's size considered?	<input type="checkbox"/> Large Enterprise <input type="checkbox"/> Small /Medium Enterprise	
2.6. Is the company included in the Security and Technology Industrial Base (STIB) of Switzerland?	<input type="checkbox"/> Yes <input type="checkbox"/> No Does the company has previous experience with Switzerland's offset process? <input type="checkbox"/> Yes <input type="checkbox"/> No	
2.7. Listing of company certifications (e.g. AS9100, ISO9001, etc.)	Click or tap here to enter text.	
2.8. Previous business experience	<input type="checkbox"/> Government – % <input type="checkbox"/> Military – % <input type="checkbox"/> Commercial – %	
2.9. Is the company a member of any Swiss Industry Organization(s)?	<input type="checkbox"/> Yes – Click or tap here to enter text. <input type="checkbox"/> No	
2.10. Is the company actively involved with local Swiss Universities?	<input type="checkbox"/> Yes – Click or tap here to enter text. <input type="checkbox"/> No	



Project Concept Template



3. General Description of Opportunity	
3.1. Description of opportunity / problem to be solved	<input type="checkbox"/> Competition <input type="checkbox"/> Sole Source
Click or tap here to enter text. <i>If selected "competition", please fill out section 8 below</i>	
3.2. Targeted Customer	
Click or tap here to enter text.	
3.3. End-user	
Click or tap here to enter text.	
3.4. Execution Timeline / Period of Performance?	
Click or tap here to enter text.	
3.5. Is the Execution Timeline flexible? If not, what are the drivers?	
Click or tap here to enter text.	
3.6. Key milestones to implement during Execution	
Click or tap here to enter text.	
3.7. Necessary Resources	
Click or tap here to enter text.	
3.8. Any potential risk of execution and/or receiving credits?	
Click or tap here to enter text.	



Project Concept Template



4. LM Support to Execute Offset Project

4.1. What is wanted / expected from LM? *Please describe in detail*

Click or tap here to enter text.

4.2. Specifically what is required from the Lockheed Martin Business Area of interest:

- N/A
- Funding (in US dollars and need timeline) – Click or tap here to enter text.
- Technology – Click or tap here to enter text.
- Know How – Click or tap here to enter text.
- Intellectual Property – Click or tap here to enter text.
- Assets – Click or tap here to enter text.
- In-kind Contribution – Click or tap here to enter text.
- Other – Click or tap here to enter text.



Project Concept Template



5. Crediting – (Switzerland Offset Policy)

5.1. What is the expected / applicable offset transaction type? ([Section 5.2 - Switzerland Offset Policy](#))

Select Offset Transaction Type

5.2. What items / activity will count for credit?

Click or tap here to enter text.

5.3. What is the Swiss Content Value / Crediting values? ([Section 5.5 - Switzerland Offset Policy](#))

Select Swiss Value-Added Option → Click or tap here to enter text.

5.4. Applicable Security-Relevant Economic Sector(s)? (Offset Policy – Appendix 1) **Add more rows as necessary*

- 1) Select Security-Relevant Economic Sector
- 2) Select Security-Relevant Economic Sector
- 3) Select Security-Relevant Economic Sector

5.5. Applicable Security-Relevant Technology(ies)? (Offset Policy – Appendix 2) **Add more rows as necessary*

Click or tap here to enter text.



Project Concept Template



6. Other Company(ies) Involvement (If Applicable)

6.1. List companies and/or and what each is contributing to the project. *Add more rows to table as necessary*

Company Name	Relationship	Contribution

Additional Comments:

Click or tap here to enter text.

6.2. If there's any kind of Intellectual Property, who will own background / foreground Intellectual Property?

Click or tap here to enter text.

- Is the Intellectual Property licenseable? *Click or tap here to enter text.*
- Is the Intellectual Property export controlled? Commercial information? *Click or tap here to enter text.*



Project Concept Template



7. Competitive Environment

7.1. Who are the primary competitors in the market? And what is their position?

Click or tap here to enter text.

7.2. What is your company's competitive advantage(s)?

Click or tap here to enter text.

7.3. Target Market

General Market – Click or tap here to enter text.

Specific Market – Click or tap here to enter text.



Project Concept Template



8. Competition Details (If Applicable)

8.1. Who is the main customer

Click or tap here to enter text.

8.2. Scope

Off-the-shelf Build to Print Build to Spec R&D Other

- Estimated Proposal due date: Click or tap here to enter text.
- Estimated Order(s) Placed: Click or tap here to enter text.
- Period of Performance: Click or tap here to enter text.
- Competitors:
 - o List any known companies that will potentially participate as part of this competition
- Development Details
 - o Current State – Has there been any pre-development work? are there any pre-requirements/constraints the company will need to start development?
 - o Estimated date when the development will be completed
 - How does align with Proposal Submission
- Necessary Certification(s) – who? When? Prior to Proposal submission?
- What is total cost to complete from today (in USD)



Closing Thoughts



- The F-35 Team is Deeply Engaged with Swiss Industry
- Lockheed Martin has Dedicated Offset Team for Switzerland
- Lockheed Martin is Committed to a Long-term Relationship with Swiss Partners
- Swiss Industry & Industry Association Engagement is a Priority
- Implementation for Major Projects will occur after LM receives orders to execute contract



For More Information, Please Visit: www.F35.com/Switzerland



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Questions?

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