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**Fortune 500 Companies in the Washington
Metropolitan Area**

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Forty-Three (43) Fortune 500 companies are located in the Washington Metropolitan Area (WMA) that are not entirely dependent on federal contracts or for government services. Additionally, access to federal clients is the primary focus for 19 of the Fortune 500 companies (Table1). A total of 203 Fortune 500 companies are not located in the WMA. The remaining 235 companies in the WMA operate in extractive industries, provide low-value added retail operations, or are in the region exclusively for lobbying.ⁱ These companies fall outside the scope of this analysis. This analysis will examine the Fortune 500 companies in each of these categories with the exception of retail/extractive and local. High value-added firms with area locations are presented in Appendix A.

Table 1
Regional Presence of Non-Retail Fortune 500 Companies

	Fortune 500 Companies	Firms
Not Present in WMA		203
Fortune 500 Firms with an operation in the WMA (297)	Retail and Local Servicing	235
	Retail/Extractive Industries (Excluded)	79
	Lobbying-Only	48
	Local Servicing	108
	Federal Contractors (Only)	19
	Business-Oriented not Federally Dependent	43
	Federal Contractors also doing Business-to-Business Sales	18
	Business-to-Business Sales	25
	Total	500

Source: Center for Regional Analysis

Business to Business Sales

The decline in federal spending in the Washington area underscores the need to diversify away from a dependence on the federal government. Firms operating in the Washington area that are not primarily engaged in the federal markets are defined as business-to-business. These firms have far more choice to do business in other markets than do federal contractors. Business-to-business firms suggest sectors that the Washington area has a competitive market in which to operate and represent competitive advantages for non-federally dependent business expansion. Twenty-five (25) such firms operate in the Washington area serving non-local markets.

Eight of the business-oriented Fortune 500 Companies are headquartered regionally. Three headquarters are those of hotel chains: Marriot, Hilton, and Host Hotels. The remaining headquarters are Danaher, Discovery Communications, Gannett, NII Holdings, and Capital One.

ⁱ Excluded industries include: Wholesalers: Diversified; Wholesalers: Electronics and Office Equipment; Wholesalers: Food and Grocery; Wholesalers: Health Care; Specialty Retailers: Apparel; Specialty Retailers: Other; Food and Drug Stores; General Merchandisers; Specialty Retailers: Apparel; Automotive Retailing, Services; Oil and Gas Equipment, Services; Petroleum Refining; Pipelines; Mining, Crude-Oil Production; Utilities: Gas and Electric, and Metals.

Capital One is the only financial services firm headquartered regionally, although there are five other Fortune 500 financial services firms in the Washington area: General Electric's GE Capital Healthcare Financial Services is headquartered in Bethesda, MD;¹ McGraw Hill Financial has a corporate office in Washington, DC with market insight operations;² financial data services firm Fidelity National Information Services (FIS) has offices as well as a consulting subsidiary Capco in Herndon, VA;^{3,4} VISA processes 80 billion transactions in its Ashburn, VA Data Center East, one of only two such centers VISA runs in the US;⁵ and UnitedHealth Group insurance company operates an office with approximately 500 employees in Frederick, MD.⁶ GEICO, wholly owned by Berkshire Hathaway, is excluded as it falls outside Berkshire Hathaway's core business.

In the healthcare and pharmaceutical sector, Laboratory Corporation runs testing labs regionally and recently acquired Covance, also with regional testing offices.⁷ Quest Diagnostics runs a 1,000 plus employee Nichols Institute in Chantilly, VA, just one of three in the nation.⁸ Thermo Fisher Scientific has several local repository facilities and a central laboratory in Maryland.⁹ Pharmaceutical company Amgen bought Rockville, MD based cancer drug developer Micromet in 2012, continuing regional operations.^{10,11} Pharmaceutical consultant Quintiles, has a research office in Rockville, MD.¹²

In telecommunications, Time Warner Cable operates a large corporate office of several hundred employees in Fairfax County.^{13,14} Regionally headquartered NII Holdings recently filed for bankruptcy and is currently restructuring.^{15,16} Corning recently bought distributed antenna services provider MobileAccess, headquartered in Vienna, VA, and absorbed it into Corning Optical Communications.¹⁷

Other business-to-business firms include Texas Instruments, that operates a research facility in Germantown, MD with approximately 100 employees.¹⁸ Micron Technology has a large 1,800-employee semiconductor manufacturing plant in Manassas and has been recently the largest exporter in the entire Commonwealth of Virginia.¹⁹ The remaining firms include engineering firm KBR, printing firm RR Donnelley & Brothers which operate a large printing shop in Frederick County, and CBS which has large radio and television productions in the region.^{20,21,22}

Fortune 500 companies with a local and regional focus reflect a wide variety of sectors. Financial services sector companies with a local and regional orientation include: Suntrust, BB&T, PNC Financial, and Ameriprise Financial. There are 25 publicly traded insurance offices with local servicing offices locations, primarily sales offices, including: New York Life, MetLife, Nationwide and Assurant. Other companies with a regional market-orientation include: Starbucks, FedEx, General Motors, CSX, DirecTV, Waste Management, Nike, Sherwin-Williams, Coca-Cola Enterprises, Alaska Air and Delta Air.

Companies that Combine Markets

There are 18 firms located in the Washington region that are engaged in both federal and non-federal business for which the primary focus could not be determined. These firms can be categorized as: (1) IT & computer support or (2) building engineering & logistics firms. All of these firms received a federal contract in 2013 to 2014 or have a federal-relations office in addition to undertaking private sector work from their Washington office.

Eleven (11) of these firms provide IT services and computer support to both federal and non-federal clients. Six firms - NETAPP, Level-3 Communications, CenturyLink, IBM, Amazon.com and Google - have data centers in the region. In addition, NETAPP has its public sector headquarters office in Vienna, VA supporting several hundred employees.²³ Level-3 Communications builds and manages IT infrastructure for enterprises as well as the federal government.²⁴ CenturyLink operates large corporate offices in Fairfax County along with its six regional data centers.^{25,26,27} IBM has a Global Business Services office in Herndon which oversees all North American Consulting services, public and private as well as data storage operations with federally oriented resiliency services.^{28,29} Amazon.com is hiring several hundred employees in the region, including software developers and engineers, for Amazon.com Web Services that serviced over one million customers in 2014.³⁰ Google has offices in both Washington, DC and Reston that provide engineering and design in addition to public sector advising.^{31,32}

Other technology firms located in the Washington area serving federal and non-federal markets are: Cisco, Oracle, Microsoft, and 3M. Cisco Systems has sales and systems engineering in Herndon, VA in addition to one of its five US Experience Centers.^{33,34} Oracle has a Financial Services offices in Reston, VA, one of only three in the US, as well as federal and non-federal support offices.^{35,36} As of 2002, Microsoft's Reston, VA office was Microsoft's largest office outside Washington State.³⁷ Microsoft's Public Sector operation is in Chevy Chase, MD.³⁸ 3M's Health Information Systems and medical software has a several hundred person office in Silver Spring, Md.³⁹

The most substantial operations of any company in the Washington area in a non-headquarter function is Verizon, which operates a 4,200 person campus in Ashburn, VA.⁴⁰ Verizon stores and processes nationwide data, tests FiOS products, and services the federal government at this campus.

Other firms located in the Washington area serving both federal and non-federal markets are in the building engineering & logistics industry. These firms include Peter Kiewit Sons', Fluor, AECOM, CH2M Hill, Emcor Group, URS, and Jacobs Engineering. URS and AECOM, which have the largest local presence, merged in late 2014 when AECOM acquired URS.⁴¹ Of these seven firms, URS has the largest office with more than 500 employees in Germantown, MD. While these firms provide services for the federal government (e.g., URS contract for renovations and additions of the nearly million square-foot Defense Intelligence Agency Headquarters, a \$404 million eight-year FAA contract starting in 2001 for Jacobs Engineering performed in Arlington, VA), all are also engaged in non-federal business (e.g., Verizon data center and security work contracts for both URS and Jacobs Engineering)^{42,43,44,45}

Federal Contractors

The final set Fortune 500 firms are export-based and operate in the Washington area for access to the federal market. Of the 19 Fortune 500 companies categorized as federal contractors, 11 are headquartered in the Washington area. The aerospace & defense and information technology (IT) industries dominate the federal contractors, comprising 10 of the 19 identified. The seven aerospace & defense firms include: Textron, Boeing, L-3 Communications, Northrop Grumman, General Dynamics, Raytheon, and Lockheed Martin. Two additional firms not usually associated with the aerospace industry, Honeywell International and Ball, also operate local aerospace divisions. Honeywell

Technologies Solutions provides field-engineering and logistics management to the Department of Defense.⁴⁶ Ball Aerospace provides engineering and development in a variety of satellite technologies.⁴⁷

The aerospace and defense industry may be located in the Washington area due to its federal market, but the decline in federal outlays has encouraged these firms to diversify. Sectors that these companies have already begun to grow into are healthcare IT systems and cyber-security. Lockheed Martin has acquired several healthcare IT firms providing services to the Veterans Affairs and the National Institutes of Health.^{48,49} Several companies made a bid for an \$11 billion DoD electronic healthcare records contract including General Dynamics Information Technology, IBM, Leidos (SAIC), Computer Sciences Corporation, and HP.⁵⁰ Northrop Grumman recently partnered with U.M.B.C. on healthcare analytics.⁵¹ EMC provides both systems engineering and virtual IT infrastructure, with large offices in McLean, VA and Rockville, MD.^{52,53} AT&T Government Solutions is headquartered in Vienna, VA and has most of its 4,000 employees located regionally providing IT and cloud services to federal markets.⁵⁴

The IT sector is similarly diversifying into the healthcare sector. Booz Allen Hamilton recently acquired electronic health record providers Epidemico and Genova Technologies.⁵⁵ SAIC split into two separate companies in 2014. One retained the SAIC name and the federal contracting business while the other half was renamed Leidos and focuses on private markets including healthcare engineering and IT contracts. Hewlett-Packard's enterprise services also supports electronic healthcare records.⁵⁶ HP Enterprises division hosts over a 1,000 employees in Herndon, VA.⁵⁷ The Harris corporation, providing federal network solutions, has its healthcare solutions headquarters in Reston, VA but notes they "depend significantly on U.S. Government contracts" in their 2014 annual report.^{58,59}

Raytheon is diversifying into the private sector cyber security sector after buying Austin, TX-based cyber-security firm Websense.⁶⁰ While neither is based locally, Raytheon's Intelligence, Information and Services group is located in Dulles. L-3 Communications split off government service provider Engility in 2011, but remains reliant on federal contracts.⁶¹ L-3 Communications has a joint-venture cyber-security research lab with Virginia Tech in Arlington, VA.⁶² After buying private sector cyber-security firm Fidelis in 2012, General Dynamics sold it in 2015 noting the private sector contracts were outside the company's core capabilities.^{63,64} Fidelis is headquartered in Boston, but retains a large federal office in Bethesda, MD. Northrop Grumman is expanding its federal cyber-security division to the UK.⁶⁵

Two financial institutions, Freddie Mac and Fannie Mae are government-sponsored enterprises. Fannie Mae has its headquarters in Washington, DC, and Freddie Mac is headquartered in McLean, VA. Another final financial firm, NCR, provides software, hardware, and IT support for federal financial transactions.

Lobbying Functions Only

Of the Fortune 500 companies, 48 were found to be operating in the Washington area only in a lobbying or very limited government relations capacity. The pharmaceutical industry has seven firms located only for lobbying purposes while the chemical industry has five firms. The medical products

industry has four, and other categories have three or fewer firms (Table 2). Pharmaceutical firms with a lobby-only presence include: Merck, Mylan, Bristol-Myers Squibb, Pfizer, Biogen Idec, and Eli Lilly. Chemical companies include: Celanese, Dow Chemical, CF Holdings, Dupont, and Monsanto. Medical Products firms with lobby-only presence include: Baxter International, Medtronic, Becton Dickinson, and Boston Scientific.

Table 2
Lobby-Only Presence in Washington Metropolitan Area, Selected Industries

Industry	Count of Firms
Pharmaceuticals	7
Chemicals	5
Medical Products and Equipment	4
Commercial Banks	3
Aerospace and Defense	2
Entertainment	2

Source: Center for Regional Analysis

Not Located In WMA

There were 203 Fortune 500 Companies with no local presence. Of these companies, 72 were in retail and extractive industries, leaving 131 firms operating in export-based industries with no local presence. The industries with the largest number of firms with no local presence in the WMA include: utilities, gas & electric (13), food consumer products (11), motor vehicles and parts (10), mining and crude-oil production (9), petroleum refining (7), property and casualty insurance (6), metals (6), pipelines (6), semiconductors and other electronic components (6). All sectors that have a large number of firms and are not present in the Washington area represent business lines in which the WMA lacks a competitive advantage. Some of these firms include: Campbell Soup, Kellogg, Autolive, Visteon, Borgwarner, American Family Insurance Group, Pacific Life, and Philip Morris International.

Strategic Opportunities

Several firms that match regional strengths and either have no location in the region or are only present for lobbying purposes represent strategic opportunities for the Washington areas continuing economic diversification. Three firms with no location presently that match the strengths of the Washington area as evidenced by their peers having local presence are: Agilent Technologies (Scientific, Photographic, and Control Equipment), Precision Castparts (Aerospace and Defense), and First Data (Financial Data Services). Four firms currently with only lobbying activities in the WMA that may represent strategic opportunities are Mastercard (Financial Data Services), Huntington Ingalls Industries' geospatial work in its UniversalPegasus subsidiary, United Technology(Aerospace and Defense), Time Warner and Viacom (Entertainment).

Summary

Forty-Three of the Fortune 500 companies are located in the Washington area for reasons other than access to federal markets. Several key industries include IT, data processing and analysis, hospitality, telecommunication, and civil engineering. Data processing and analysis is the most pervasive strength of the Washington area. Capital One was founded by the utilization of data; Visa processes transaction data; Verizon processes television data; and numerous Fortune 500 data centers are located in the Washington area. IT and data-systems have also been adopted by the federally focused firms who are adding to their traditional portfolios of contracts in defense and healthcare support the data-oriented sectors of healthcare databases and cyber-security. While some portions of the IT and data-systems management sector are prone to automation, data storage, analysis and security requires a very well educated population to build, maintain and utilize gathered information. Based on the Fortune 500 companies operating in the Washington area, IT and data-systems management appears to a crucial competitive advantage on which the region could build.

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Methodology

All firms were searched by geographic location in three databases: D&B Million Dollar Database, Washington Business Journals Book of Lists (2013) and the Federal Procurement Data System. The primary focus of this research is on the core industries of the firms and excludes subsidiaries which fall too far outside the parent company's core business. In order to identify export-based firms and categories relevant to the Washington Area economy, several industrial categories were excluded. These include: retail and wholesale activities and industries not well suited for the local economy such as oil & gas, and mining. The next filter involved firms with a lobbying presence only. Senate lobbying disclosure records were cross-referenced with an additional dataset, Maryland Workforce Exchange (MWE) data provided by InfoGroup, to determine if local presence was specifically for lobbying. The MWE database was also used as the primary reference for office location employment numbers. There is no known dataset on the individual activities of identified firms operating locally.

In order to determine the relative mix of federally oriented to non-federally oriented work, two methods were used. The first was to use the FPDS by place of performance to identify federal contractors. The second method used web-based searches to discern the nature of the local business; retail and local servicing was additionally recorded. Judgments on the federal/non-federal nature of work were made using these sources, those for which a reasonable mix could not be identified were classified as operating in both federal and non-federal markets.

Appendix A

Focus	Name	Local Description
B2B	Capital One Financial	McLean Headquarters
B2B	General Electric	GE Capital Healthcare services corporate office in Bethesda
B2B	McGraw Hill Financial	DC Office does administration and computer software
B2B	Fidelity National Information Services	Credit Card Processing offices. Seems to collocated with Equinix Data Centers.
B2B	Visa	Inovant Llc (Subsidiary of VISA) has huge data processing facilities in Ashburn, VA. One of two mobile payment processing center in the US.
B2B	UnitedHealth Group	Large office in Frederick, MD
B2B	Quest Diagnostics	Nichols Institute in Chantilly doing clinical diagnostic tests
B2B	Laboratory Corporation of America	Numerous area offices for pharmaceutical testing. Acquired Covance, a pharmaceutical testing firm with area offices.
B2B	Quintiles Transnational Holdings	Research operation in Rockville, MD.
B2B	Thermo Fisher Scientific	Repository facilities and a central laboratory in Maryland, noted that they are close to NIH.
B2B	Amgen	Bought cancer therapy designer Micromet in 2012 based in Rockville, MD.
B2B	Corning	Bought MobileAccess (wireless network) and incorporated into Corning Optical Communications. Office in Vienna, VA
B2B	Time Warner Cable	Corporate Office in Fairfax County.
B2B	NII Holdings	Headquarters in Reston. Nextel provider going through bankruptcy
B2B	Texas Instruments	Research Facility in Germantown, MD
B2B	Micron Technology	Semiconductor Manufacturing in Manassas.
B2B	CBS	Large CBS News and Radio office in DC.
B2B	Gannett	Headquarters in McLean. Newspapers, Television and Internet publishing. Splitting in two, Will likely remain in the DC Area.
B2B	Discovery Communications	Headquarters in Silver Spring, and a large office in Sterling, VA. Half of current growth is international.

B2B	Host Hotels & Resorts	Headquarters Bethesda with several hundred employees.
B2B	Marriott International	Headquarters in Bethesda (Moving Soon)
B2B	Hilton Worldwide Holdings	Headquarters in Mclean
B2B	Danaher	Headquarters in DC. Local operations employ very few people.
B2B	R.R. Donnelley & Sons	Several Small 24- Print shops. Large print shop in Frederick County.
B2B	KBR	Engineering office, both Public and Private sector work
B2B & Fed	NETAPP	Data storage solutions. Public Sector office in Vienna, VA.
B2B & Fed	CenturyLink	Large corporate offices in Herndon, data center in Sterling. CenturyLink bought Savvis in 2011 and expanded the Sterling data center in 2014.
B2B & Fed	International Business Machines	Resiliency Services in Gaithersburg, Global Cities Team Challenge is being held there. Unclear number of employees. Other Resiliency operations in College Park. Other local offices are sales related.
B2B & Fed	Amazon.com	DC corporate office. Fulfillment Centers in VA. Data center under construction in Ashburn, mostly for federal clients.
B2B & Fed	Google	Data storage in Ashburn. Office in Washington DC.
B2B & Fed	Level 3 Communications	IT management. Data Centers regionally
B2B & Fed	Microsoft	Regional Office in Reston was the largest Microsoft Office outside of Redmond, WA in 2002. Public Sector in Chevy Chase, MD.
B2B & Fed	Oracle	Support and education offices in Reston. Financial Services is one of three in the US.
B2B & Fed	3M	Health Information Systems, Medical Software and consulting.
B2B & Fed	Cisco Systems	Offices in Fairfax County.
B2B & Fed	Verizon Communications	4,200 employees at Ashburn Verizon Business Campus in Loudoun County. Buying AOL which is located regionally.
B2B & Fed	Peter Kiewit Sons'	Kiewit Building group office. Kiewit Federal Group is headquartered in McLean.
B2B & Fed	AECOM Technology	Large offices in Arlington and Alexandria engaged in engineering services. Bought URS.
B2B & Fed	CH2M Hill	Several area offices engaged in Civil Engineering projects. Largest office is in Chantilly.
B2B & Fed	Emcor Group	Construction services and Government relations offices.
B2B & Fed	Fluor	Several Fluor Civil Engineering. Both Federal and Enterprise.
B2B & Fed	URS	Engineering, Others Scientific and Technical Services in Germantown, MD. Recently bought by AECOM.
B2B & Fed	Jacobs Engineering Group	Sizeable Engineering and Consulting office in Arlington, VA . Private and public sector work

Fed	L-3 Communications	Large offices in Reston for their L-3 National Security Solutions.
Fed	Boeing	Regional Headquarters in Crystal City.
Fed	Textron	Geospatial primarily for public but some private sector work as well in Sterling, VA
Fed	Lockheed Martin	Headquarters in Bethesda
Fed	Northrop Grumman	Bethesda Headquarters. One of Fairfax County's largest employer.
Fed	Raytheon	Intelligence and Information Systems HQ in Falls Church, largest local operations. Technical Training HQ in Loudoun County.
Fed	General Dynamics	Headquarters in Falls Church. Recently sold Fidelis, a commercially focused cyber-security firm to refocus on "core" mission.
Fed	EMC	Offices in McLean, and Rockville . EMC does enterprise resource planning for the government.
Fed	Hewlett-Packard	Enterprise Services in Herndon. HP is splitting in two, with HP Enterprise Services becoming a separate company.
Fed	NCR	Checkout electronics and financial transaction services, federal government systems location in Germantown, MD.
Fed	Booz Allen Hamilton Holding	Headquarters in McLean
Fed	Leidos Holdings	Headquarters in Reston. Biomedical Research in Frederick, MD.
Fed	Computer Sciences	Headquarters in Falls Church.
Fed	Harris	Communications. Network solutions focus on government, energy, healthcare, broadcast, and enterprise networks.
Fed	Honeywell International	Honeywell Technology Solutions in Alexandria. Building support for local businesses such as Howard Hospital
Fed	Ball	Ball Aerospace has large operations regionally.
Fed	AT&T	Government substantial solutions operations in Oakton, VA and Vienna, VA.
Fed	Fannie Mae	Headquarters in DC.
Fed	Freddie Mac	Headquarters in McLean.