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Nota di contenuto	Figures; Tables; Executive Summary; What Is DoD Buying?; Birth of the Defense Innovation Initiative-Third Offset Strategy; A Five-Year Trough Has Developed in the Weapon Systems Pipeline; Services Contracts Surprisingly Resilient; How Is DoD Buying?; Major Acquisition Reform Efforts in 2015 Will Take Time to Deliver Results; Effective Competition Rates Are Steady, Despite Desire to Promote Competition; Contract Outcomes Can Be Examined Using Contract Data; Whom Is DoD Buying From?; Small Vendors Accounted for Their Largest-Ever Share of Defense Contracts in 2014 The Big 5 Defense Vendors Are Winning a Declining Share of R&D Contract ObligationsThe Present and Future of Defense Industry Consolidation; DoD Starts with a Narrow But Sustained Base for Outreach to Silicon Valley; What Are the Defense Components Buying?; Service Acquisition Portfolios Are Shifting In Distinct Ways; Army; Navy; Air Force; 1. Introduction; 1.1. Report Organization; 1.2. DoD Contract Spending in a Budgetary Context; 2. What Is DoD Buying?; 2.1. Innovation, R&D, and Technological Superiority; 2.1.1. Defense

## Innovation Initiative-"Third Offset Strategy"

2.1.2. Defense Innovation Unit Experimental: Finding New Sources of Innovation  
2.1.3. Research and Development Contracting during the Budget Drawdown;  
2.2. Defense Contract Obligations by Platform Portfolio;  
2.3. Defense Contract Obligations by Budget Account;  
2.3.1. Procurement;  
2.3.2. Operations & Maintenance;  
2.3.3. Research, Development, Test, and Evaluation;  
3. How Is DoD Buying It?;  
3.1. Reforming the Defense Acquisition System;  
3.1.1. Better Buying Power;  
3.1.2. 2016 National Defense Authorization Act;  
3.2. Contract and Fee Type  
3.3. Defense Contract Obligation by Rate of Effective Competition  
3.4. Contract Outcomes beyond the Headlines;  
3.4.1. Terminations;  
3.4.2. Change Orders;  
4. Whom Is DoD Buying From?;  
4.1. Changes in the Composition of the Defense Industrial Base;  
4.1.1. Army;  
4.1.2. Navy;  
4.1.3. Air Force;  
4.1.4. Defense Logistics Agency;  
4.1.5. Products;  
4.1.6. Services;  
4.1.7. Research and Development;  
4.2. The Present and Future Consolidation of Defense Industry;  
4.2.1. Top Products Vendors;  
4.2.2. Top Services Vendors;  
4.2.3. Top Research and Development Vendors  
4.3. Silicon Valley Participation in the Defense Industrial Base  
4.3.1. Narrow Silicon Valley Base;  
4.3.2. Persistence in the Top Tier, Tumult Below;  
4.3.3. Silicon Valley Avoids Drawdown and Budget Cap Cuts Thanks to HP;  
4.3.4. Implications for the Future;  
5. What Are the Defense Components Buying?;  
5.1. Army;  
5.2. Navy;  
5.3. Air Force;  
5.4. Defense Logistics Agency;  
5.5. Missile Defense Agency;  
5.6. Other DoD;  
6. Conclusion;  
Appendix A: Methodology;  
About the Authors

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### Sommario/riassunto

This study examines contracting trends at the U.S. Department of Defense (DoD). It relies on empirical analysis of DoD contracting transaction data from the open-source Federal Procurement Data System (FPDS).

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