

1. Record Nr.	UNINA9910826701403321
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Titolo	Federal research and development contract trends and the supporting industrial base, 2000-2015 // Jesse Ellman, Kaitlyn Johnson
Pubbl/distr/stampa	Washington, District of Columbia ; ; Lanham, Maryland : , : Center for Strategic & International Studies : , : Rowman & Littlefield, , 2016 ©2016
ISBN	1-4422-7963-X
Descrizione fisica	1 online resource (77 p.)
Collana	CSIS Reports
Disciplina	338.97306
Soggetti	Research and development contracts, Government - United States United States
Lingua di pubblicazione	Inglese
Formato	Materiale a stampa
Livello bibliografico	Monografia
Note generali	Description based upon print version of record.
Nota di contenuto	Federal Research And Development Contract Trends And The Supporting Industrial Base, 2000-2015; Contents; List of Figures; Executive Summary; Federal R&D contracts have been disproportionately impacted by the budget drawdown; DoD is in the midst of a six-year trough in its development pipeline for major weapons systems; The budget drawdown has caused profound changes to the DoD R&D contracting industrial base; Much of the conventional wisdom was incorrect; Introduction; 1. Federal R&D Contracting in Context; Department of Defense; Army; Navy; Air Force; MDA; NASA Department of Health and Human ServicesDepartment of Energy; 2. Literature Review; Structure of Overall U.S. R&D Funding; How Does R&D Function during a Recession?; Benefits of R&D Spending during a Shock; Magnitude of R&D Spending; Prioritization of R&D spending within an organization; R&D Spending during Times of Shifting Priorities; Changes in R&D Funding; Changes in targets of R&D spending; Conclusion; 3. How Has the Budget Drawdown Affected Federal R&D Contracting? Hypothesis 1: Cuts in R&D due to budget drawdown will be done on a salami slice basis, rather than reflecting a thoughtful prioritization of resourcesDepartment of Defense; NASA; HHS; Findings; Hypothesis 2: Newer R&D contracts will bear a disproportionate share of cuts during

budget drawdowns; Department of Defense; NASA; HHS; Department of Energy; Findings; Hypothesis 3: Budget drawdowns will lead to shifts away from early-stage, seed-corn R&D, toward mid- to late-stage R&D tied to high-profile programs; Department of Defense; NASA; HHS; Findings

Hypothesis 4: Large prime vendors will account for increasing shares of federal R&D during budget drawdowns; Department of Defense; NASA; HHS; Findings; Hypothesis 5: During budget drawdowns, R&D will be increasingly funded out of non-R&D-focused funding accounts;

Department of Defense; HHS; NASA; Findings; Hypothesis 6: During budget drawdowns, competitively sourced R&D contracts will attract increasing numbers of offerors; Department of Defense; NASA; HHS; Basic Research; Applied Research; Advanced Technology Development; Advanced Component Development & Prototypes

System Development & Demonstration; Operational Systems Development; Operation of Government R&D Facilities; Findings;

Hypothesis 7: The budget drawdown will discourage new entrants into the federal R&D contracting marketplace; Department of Defense; NASA; HHS; Findings; Final Thoughts; Appendix: Methodology; Inherent Restrictions of FPDS; Constant Dollars and Fiscal Years; Data Reliability Notes and Download Dates; Detailed Methods; Competition; Vendor Categorization; About the Project Directors and Authors

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## Sommario/riassunto

As the current U.S. defense budget drawdown has progressed, numerous analysts have expressed concern about the ability of the United States to retain technological superiority, particularly given how research and development (R&D) contracting appears to be in serious decline.

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