



Assessing the Impact of Department of Defense Weapons Systems on the Defense Industrial Base

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Research Question

From FY2013-FY2023, the Department of Defense (DoD) directed nearly 20% of procurement dollars into 400+ distinct weapons systems—also known as “major systems” or “equipment programs” (EPs).

How does resourcing for EPs reflect DoD mission priorities? To what extent has this resourcing contributed to broader trends in the defense industrial base (DIB)? What role should EPs play in today’s world, particularly given the proliferation of low-cost weapons technologies and cyber threats?

Isolating EP Procurement Data

FY	Total DoD Procurement (Funded & Awarded)	Total DoD EP Procurement	Total DoD Non-EP Procurement	% Total DoD Procurement on EPs	Count EPs >\$o
2013	\$269,017,594,888	\$78,207,054,095	\$190,810,540,794	29%	247
2014	\$256,118,674,160	\$65,748,247,606	\$190,370,426,554	26%	222
2015	\$246,499,913,917	\$59,781,559,745	\$186,718,354,172	24%	205
2016	\$272,614,429,221	\$71,262,605,215	\$201,351,824,006	26%	179
2017	\$298,820,054,772	\$76,382,601,753	\$222,437,453,019	26%	185
2018	\$351,276,245,245	\$79,910,910,067	\$271,365,335,177	23%	167
2019	\$386,118,124,062	\$84,853,729,518	\$301,264,394,543	22%	148
2020	\$436,878,063,385	\$110,928,352,549	\$325,949,710,836	25%	142
2021	\$401,837,146,161	\$71,019,308,770	\$330,817,837,391	18%	152
2022	\$377,897,271,584	\$68,343,434,135	\$309,553,837,450	18%	181
2023	\$521,941,878,995	\$116,384,440,405	\$405,557,438,590	22%	242

Grouping EPs by Total Obligations

Total DoD Obligations to Individual EPs, Binned, FY2013-FY2023	Count EPs	Total Obligations Within Bin, FY2013-FY2023	%Total EP Obligation
\$0 to \$100,000	38	\$1,244,003	0.0001%
\$100,001 to \$10.00M	143	\$333,696,056	0.0377%
\$10.01M - \$15.00M	14	\$164,473,492	0.0186%
\$15.01M - \$100.00M	71	\$3,088,036,706	0.3493%
\$100.01 - \$500.00M	59	\$14,909,087,532	1.6864%
\$500.01M- \$1.000B	26	\$18,439,306,018	2.0857%
\$1.01B - \$10.00B	73	\$280,189,888,103	31.6933%
> \$10.00B	16	\$566,940,194,467	64.1287%
Total		\$884,065,926,377	

While hundreds of EPs have received < \$100M million in total DoD procurement, **most EP spend is concentrated in the multi-billion-dollar weapons systems. 16 EPs received more than \$10 billion in DoD contracts from FY2013-FY2023.**

EP	Description	Total Obligations, FY2013-FY2023
F-35	Joint Strike Fighter program; largest DoD procurement initiative in history	\$193,684,357,325
MISSILE DEFENSE AGENCY SUPPORT	Encompasses ballistic missile development and sustainment	\$73,315,797,734
SSN 774	Virginia-class submarine	\$54,081,887,858
DDG 51	Arleigh Burke-class destroyers	\$26,971,995,363
TRIDENT II MISSILE	Three-stage, solid-fuel, inertially-guided submarine-launched ballistic missile	\$26,690,118,950
KC-46A	Aerial refueling and strategic military transport aircraft	\$25,718,471,267
C-130J	Tactical airlift	\$24,798,475,323
P-8A	Multi-mission maritime patrol and reconnaissance aircraft	\$22,352,861,892
V-22	Vertical takeoff aircraft	\$20,261,130,937
LCS	Littoral combat ship	\$16,800,964,672
CVN 78	USS Gerald R. Ford aircraft carrier	\$16,085,769,254
GMLRS/GMLRS AW	Guided Multiple Launch Rocket System/Alternative Warhead	\$14,213,226,852
E-2D AHE	Hawkeye early warning aircraft	\$14,155,874,423
NSSL	National Security Space Launch program	\$13,999,811,494
MRIC	Medium Range Intercept Capability	\$13,795,895,289
EA-18G	Electronic warfare aircraft	\$10,013,555,833

EP Prime Contractors

FY2013-FY2023

5,677 companies, total, received EP contracts.

- Joined UEI for each EP-associated contract action, grouped the contracts by UEIs, & filtered for distinct UEIs.
- Manually joined UEIs for entities clearly associated with the same parent company.
- In instances when we were aware of acquisition events, we consolidated companies to a parent company (the acquirer).
- Excluded entities with < \$1000 in total EP-associated contract awards during analysis period.

31 companies received \$1 billion+ in EP-associated contract awards. They collectively received >\$824 billion in EP contracts—more than 93% of all funding for major weapons systems.

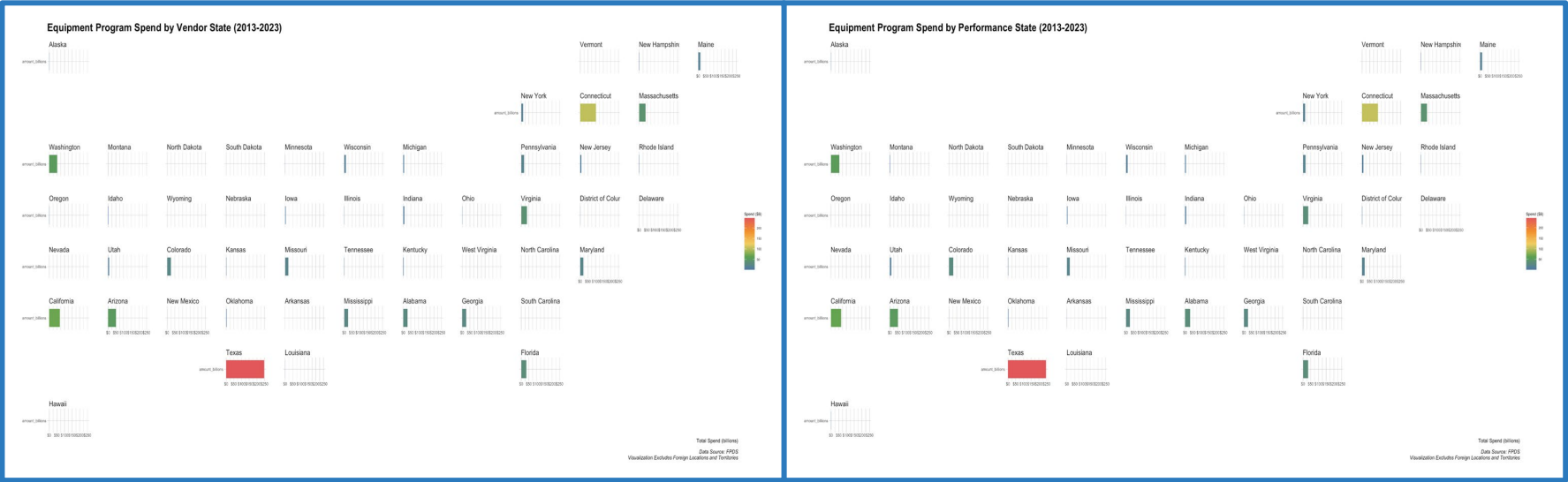
Company	Total EP \$
LOCKHEED MARTIN	\$325,775,571,468
BOEING	\$106,539,237,903
GENERAL DYNAMICS	\$76,773,885,401
RAYTHEON	\$70,673,827,378
NORTHROP GRUMMAN	\$45,188,718,754
HUNTINGTON INGALLS INC	\$43,586,145,027
RTX CORPORATION	\$34,816,197,577
BELL BOEING JOINT PROJECT OFFICE	\$16,814,755,793
UNITED LAUNCH SERVICES LLC	\$12,550,261,676
BAE SYSTEMS	\$10,949,171,046
GENERAL ATOMICS	\$10,045,561,769
OSHKOSH DEFENSE LLC	\$7,509,296,463
TEXTRON	\$7,422,797,922
GENERAL ELECTRIC	\$6,780,981,312
ALTUS LLC	\$6,175,240,351
L3HARRIS	\$5,888,520,692
ROLLS-ROYCE	\$4,491,107,655
THE CHARLES STARK DRAPER LABORATORY INC	\$4,228,047,194

Company	Total EP \$
BECHTEL GROUP INC	\$3,416,990,216
BECHTEL PARSONS BLUE GRASS A JOINT VENTURE	\$3,279,476,001
LEIDOS	\$3,161,722,506
MARINETTE MARINE CORPORATION	\$2,597,768,554
DATA LINK SOLUTIONS LLC	\$2,260,784,585
JACOBS SOLUTIONS	\$2,120,243,764
ROCKWELL COLLINS	\$2,036,122,964
PARSONS GOVERNMENT	\$2,028,913,569
VIASAT INC	\$1,870,841,569
HONEYWELL INTERNATIONAL INC	\$1,794,148,371
AIRBUS US SPACE & DEFENSE INC	\$1,725,905,650
AM GENERAL LLC	\$1,527,618,805
INTREPID LLC	\$1,096,217,819

Geography

For **more than half of all states**, from FY2013-FY2023EP vendors based there **received \$1 billion+ in EP obligations**, and **EP-associated contract actions generated \$1 billion+**.

Congressional oversight is critical. Yet the fact that these programs drive such significant revenue into so many states gives them, and their suppliers, political cover.



Conflicting Interests: Returns vs. National Security

Lockheed Martin's \$1.7 trillion F-35 fighter jet is 10 years late and 80% over budget—and it could be one of the Pentagon's biggest success stories

How America's biggest defense contractor turned a military spending fiasco into a business victory.

≡ Bloomberg

Politics

New US Subs Running \$17 Billion Over Budget, Lawmaker Says

- Navy 'has been hiding behind' a curtain, Ken Calvert says
- Delays on subs could undercut the US-Australia-UK alliance

NEWS & FEATURES / PROCUREMENT

Cost Of Navy's Newest Arleigh Burke Destroyers Is Ballooning

A wide array of chronic cost overruns and industrial capacity factors could torpedo the Navy's goal of fielding a 390-ship force by 2054.

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Company	Is Publicly Traded?
LOCKHEED MARTIN	Yes
BOEING	Yes
GENERAL DYNAMICS	Yes
RAYTHEON	Yes
NORTHROP GRUMMAN	Yes
HUNTINGTON INGALLS INC	Yes
RTX CORPORATION	Yes
BELL BOEING JOINT PROJECT OFFICE	Yes
UNITED LAUNCH SERVICES LLC	JV between Boeing & Lockheed Martin (two public companies)
BAE SYSTEMS	Yes
GENERAL ATOMICS	No
OSHKOSH DEFENSE LLC	Yes
TEXTRON	Yes
GENERAL ELECTRIC	Yes
ALTUS LLC	No
L3HARRIS	Yes
ROLLS-ROYCE	Yes
THE CHARLES STARK DRAPER LABORATORY INC	No

Company	Is Publicly Traded?
BECHTEL GROUP INC	No
BECHTEL PARSONS BLUE GRASS A JOINT VENTURE	No (but Parsons is)
LEIDOS	Yes
MARINETTE MARINE CORPORATION	No
DATA LINK SOLUTIONS LLC	JV between two public companies
JACOBS SOLUTIONS	Yes
ROCKWELL COLLINS	Yes
PARSONS GOVERNMENT	Yes
VIASAT INC	Yes
HONEYWELL INTERNATIONAL INC	Yes
AIRBUS US SPACE & DEFENSE INC	Yes
AM GENERAL LLC	No
INTREPID LLC	No

Does maximizing shareholder value align with America's defense and national security needs?



What Role Should EPs Play Today?

- What should change in light of the proliferation of low-cost weapons technologies?
- What does a global supply chain mean for the security of EP components?
- What new incentives are needed to ensure key stakeholder groups are aligned?

Major weapons systems remain critical to American military dominance. Stakeholders involved in resourcing and delivering these systems must protect their integrity at all costs.



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