

Federal Regional Snapshot: DC, Maryland & Virginia



Federal
Regional
Report

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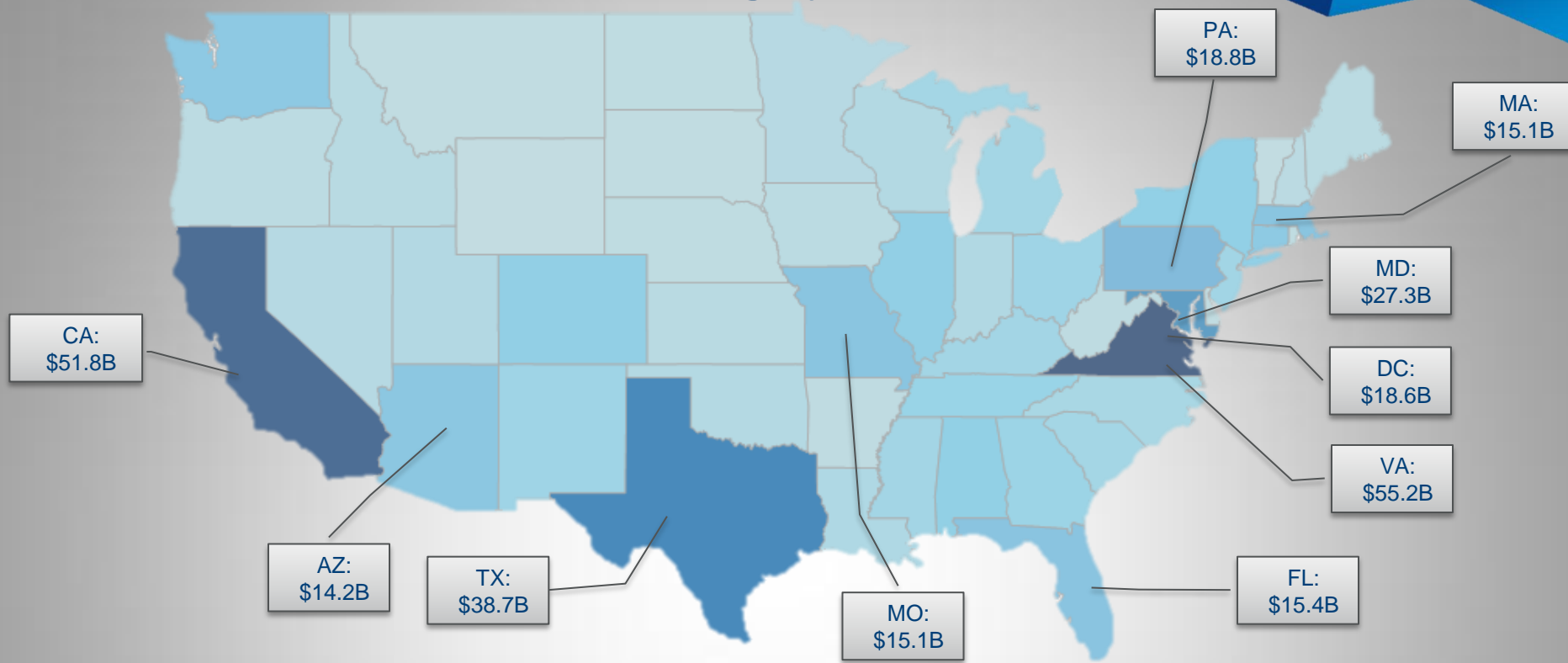
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- **Deltek Content:** GovWinIQ Federal Opportunities query run November 27, 2013. This report is based on that query; solicitation dates, values, and statuses may have changed since that point in time.
- Federal Procurement Data System (FPDS) spending data FY 2012, reported as of November 2013.
- Various government websites and documentation

FY2012 Federal Reported Spending by State



Virginia had the highest level of reported federal spending in FY 2012, followed by California and Texas. Maryland and D.C. were in the top ten states for reported spending, at #4 and #6, respectively.

The three states combined had a total of \$101.1B in reported federal spending.

1/5 of all FY 2012 Reported Federal Spending was done in DC, MD & VA

Departmental Spending* in DC, MD & VA

60% of all Commerce

54% of all Homeland Security

51% of all Transportation

47% of all Justice

38% of all HHS

Industry Spending* in DC, MD & VA

50% of all Information Technology

33% of all Professional Services

18% of all Research & Development

* FY 2012 Federal Reported Spending

Total Reported Federal Spending DC, MD & VA FY 2009-2012

- Total Spending for the Region, FY 2009-2012: \$416.2B

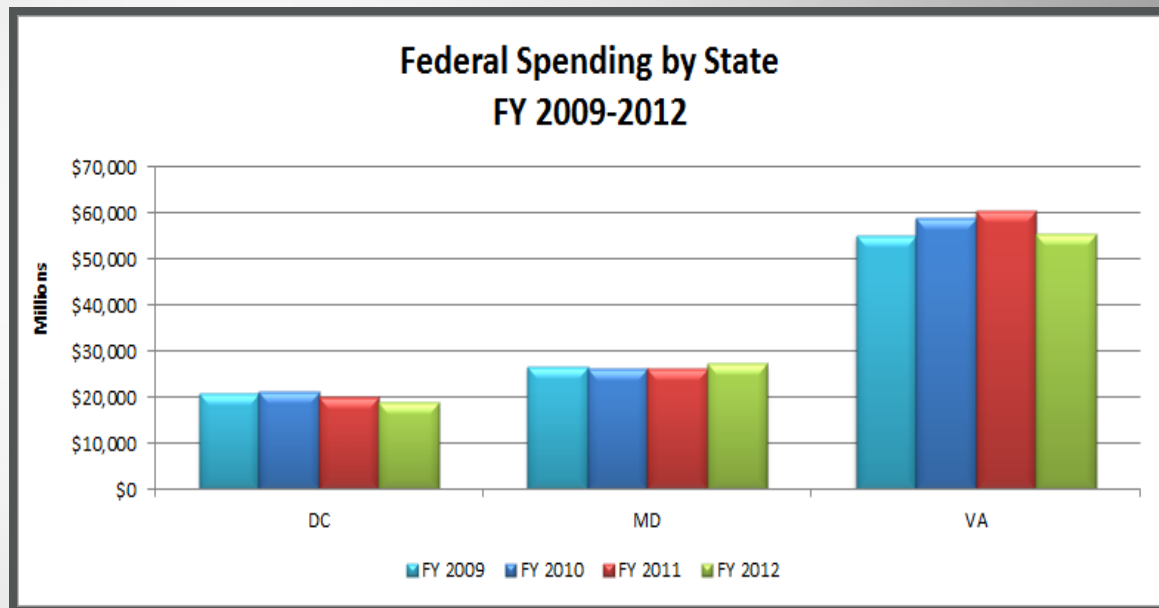
- Totals by state:

- DC: \$80.5B
- MD: \$106.4B
- VA: \$229.4B

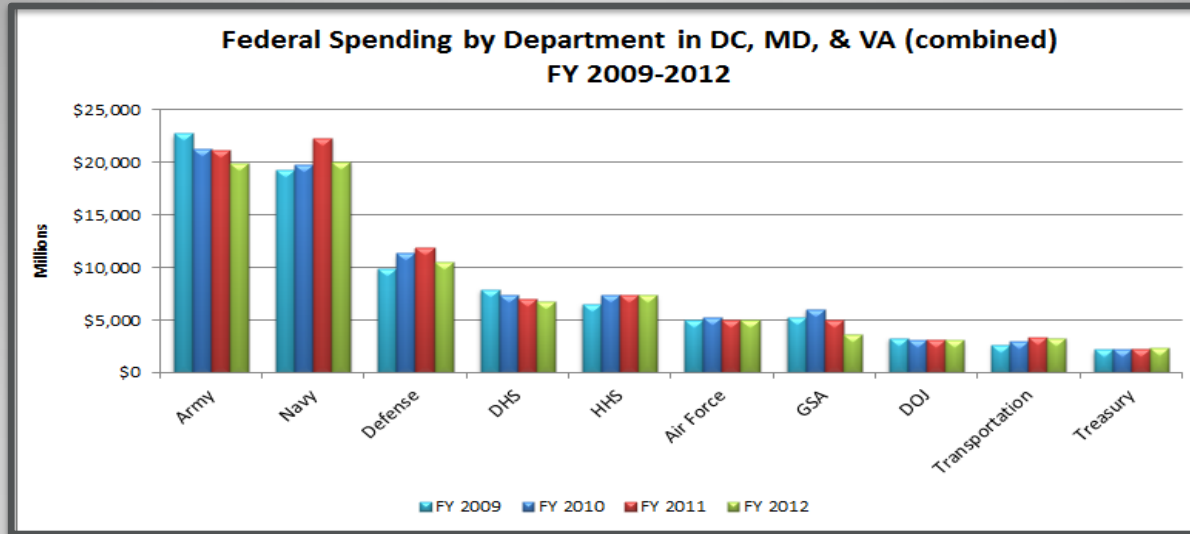
- Regional spending levels were FLAT, with a 0% CAGR.

- CAGRs by state:

- DC: -3%
- MD: 1%
- VA: 0%



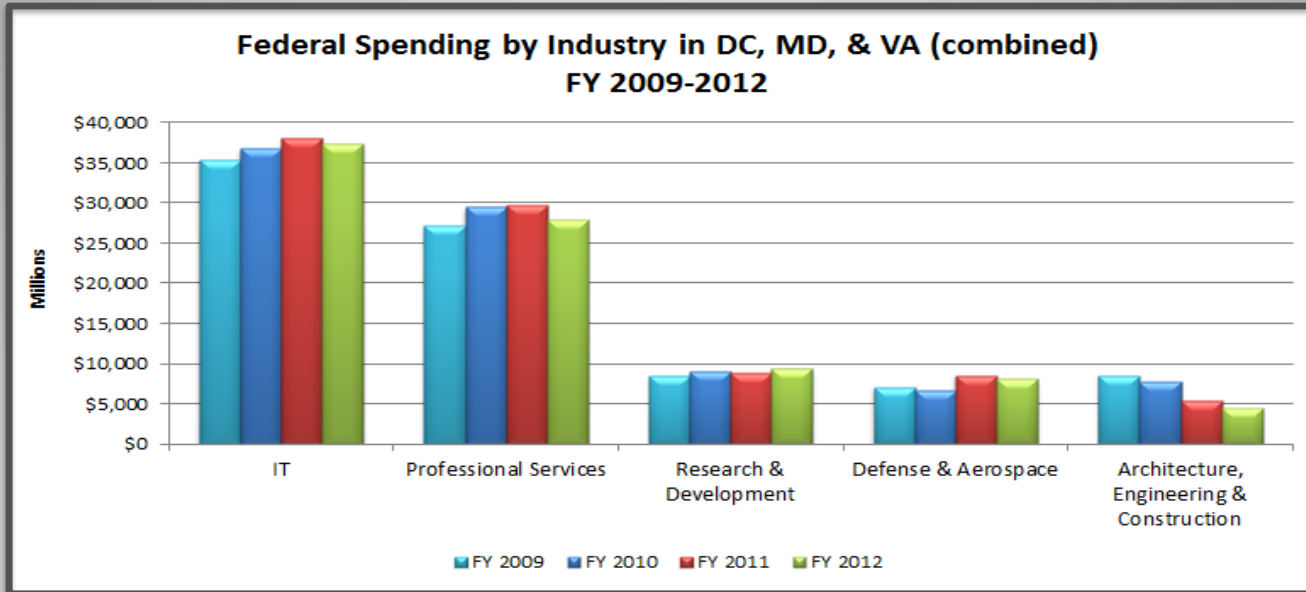
Total Reported Federal Spending by Department DC, MD & VA FY 2009-2012



There is a near even - 55/45 percent - split between Defense and Civilian spending in the area, with **Defense totaling \$230.4B and Civilian totaling \$186B.**

- Army and Navy spending totaled \$85B and \$81B, respectively.
- Regional **Army spending declined with a -4% CAGR**, driven by a reduction in AEC spending of \$2.2B from FY 2009 to FY 2012 as work was completed in support of BRAC requirements.
- Despite declines in AEC and Defense & Aerospace spending, **Navy spending remained essentially flat** with a 1% CAGR, driven by increased IT spending on the NGEN program in Herndon, Arlington, and Quantico, VA.
- A combination of increased spending on the DISA Global Information Grid (GIG) and Special Operations Tailored Logistics programs contributed to **modest growth** in regional **Defense** spending resulting in a 2% CAGR.
- **Both DHS and GSA spending in the region declined** from FY 2009-2012, with -5% and -12% CAGRs, respectively. DHS saw decreases of close to \$600M each in IT and professional services spending, including a \$260M decrease on the US-VISIT program. GSA's significant drop was driven by a \$1.3B decrease in purchasing/leasing of facilities and equipment spending from FY2009-2012.
- **HHS and Department of Transportation both experienced growth** at 4% and 8% CAGRs, respectively. The big boost in HHS spending is a result of the CMS CCIIO Healthcare Insurance Exchange, while slightly increased spending on the FAA's En Route Automation Modernization (ERAM) program and the uptick of work on the NextGen Network Enabled Weather (NNEW) program drive the growth in the Department of Transportation.

Total Reported Federal Spending by Industry DC, MD & VA FY 2009-2012



Half of all reported federal IT spending, and a third of all professional services reported federal spending, is associated with the region.

More than half of both the regional IT and professional services spending takes place in Virginia.

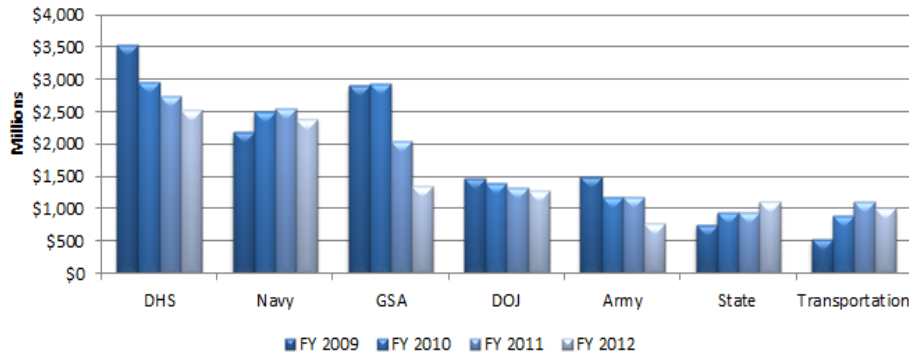
The top four regional federal industries experienced growth from FY 2009-2012, while AEC experienced a significant decrease:

- IT: 2% CAGR
- Professional Services: 1% CAGR
- R&D: 3% CAGR
- Defense & Aerospace: 5% CAGR
- AEC: -19% CAGR

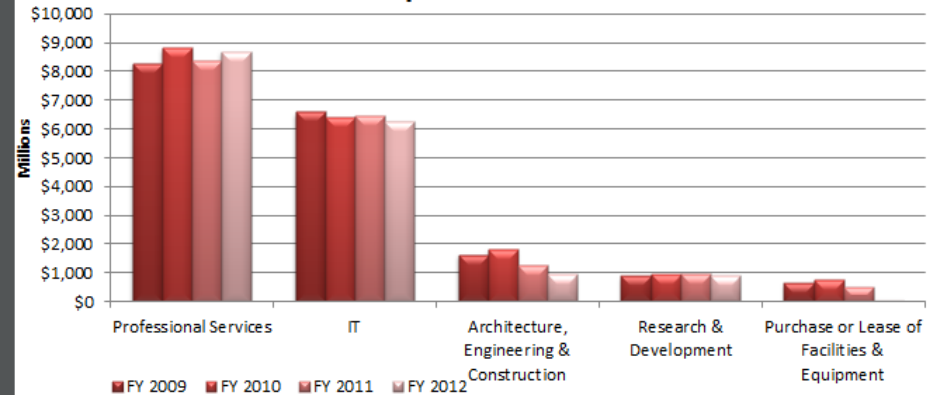
Spending Snapshot: District of Columbia

- In the District of Columbia, the **Navy saw modest growth** with a 3% CAGR, but **both the Departments of State and Transportation saw double-digit growth**, with 14% and 25% CAGRs, respectively. DHS, GSA and DOJ reduced spending in DC, with -11%, -25%, and -20% CAGRs.
- Professional Services rule in DC**, totaling over \$34B, driven by DHS, Navy and Department of Labor spending.
- Booz Allen Hamilton's primary market in DC is Professional Services, driven by obligations from DHS and OPM. 96% of Creative Information Technology Inc.'s obligations are from the State Department for IT.

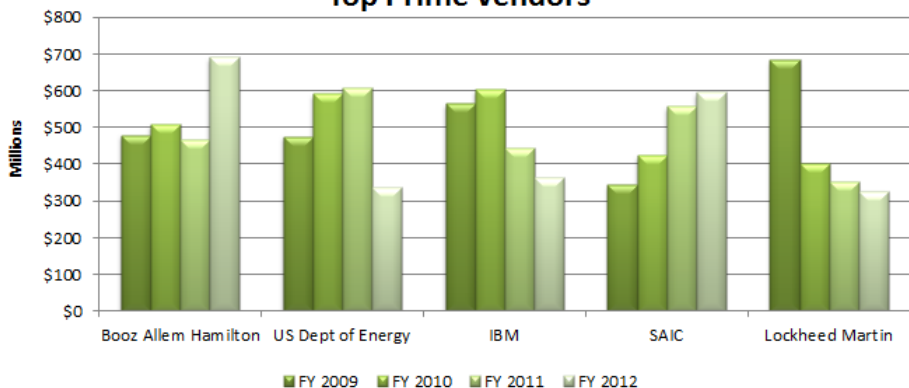
Top Spending Departments



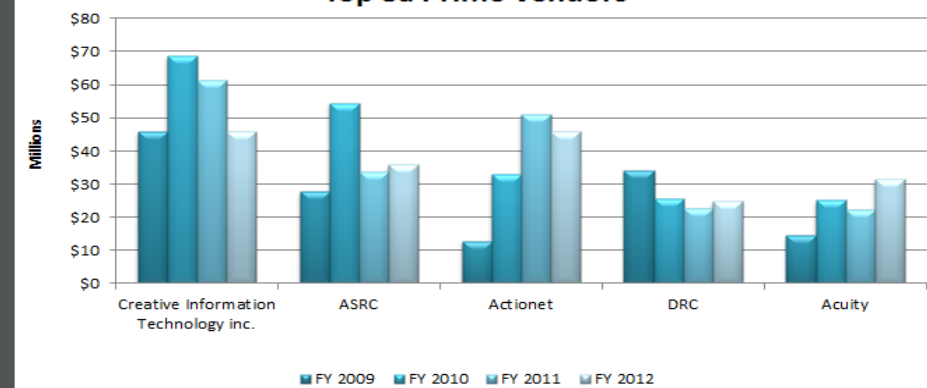
Top Industries



Top Prime Vendors



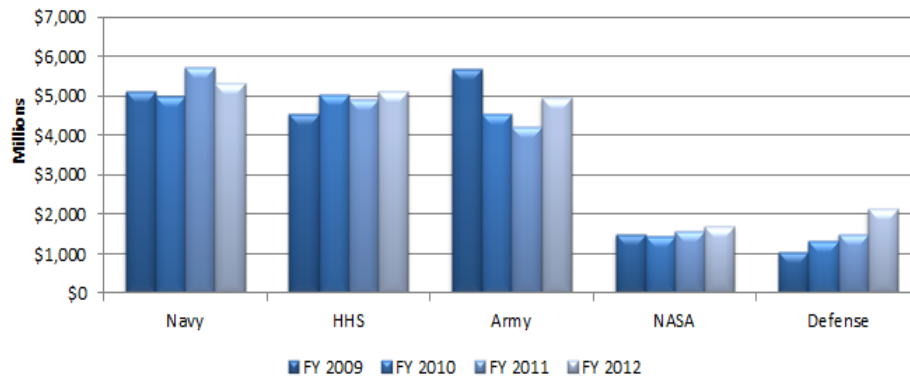
Top 8a Prime Vendors



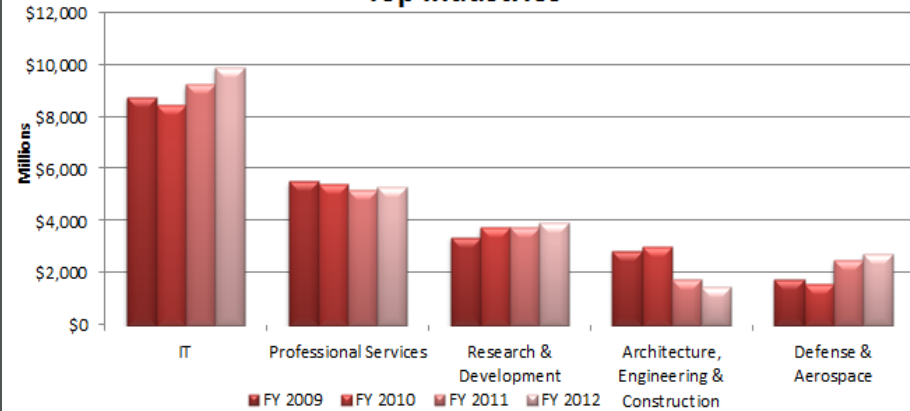
FY 2009-2012 Spending Snapshot: Maryland

- Of the top five departments, only the Army saw negative growth. Navy spending was flat, with a 1% CAGR, HHS and NASA both had a 4% CAGR, and Defense grew at 26% CAGR.
- IT spending grew at a 4% CAGR, driven by increased spending from Centers for Medicare & Medicaid Services (CMS) and the Defense Intelligence Systems Agency (DISA).
- IT, Defense & Aerospace comprise the majority of Lockheed Martin's federal work in the state. The company's largest IT customer is the FAA. The majority of ASRC's obligations are from NASA for IT and Professional Services.

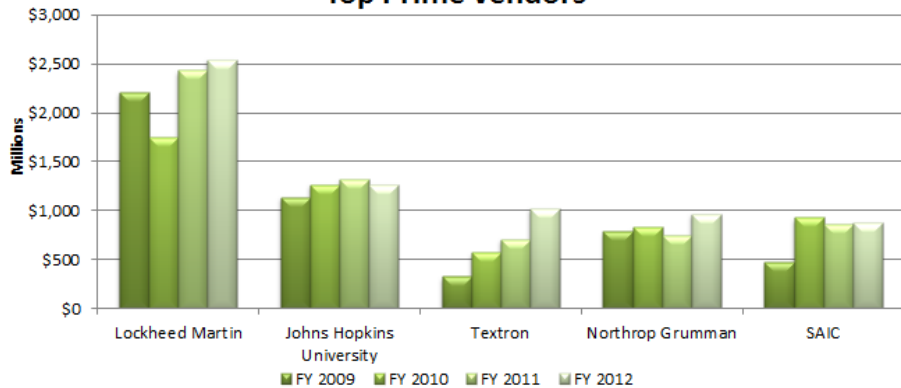
Top Spending Departments



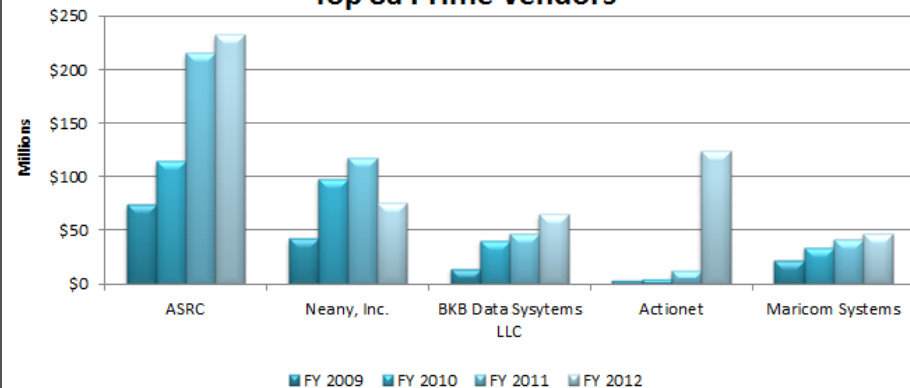
Top Industries



Top Prime Vendors



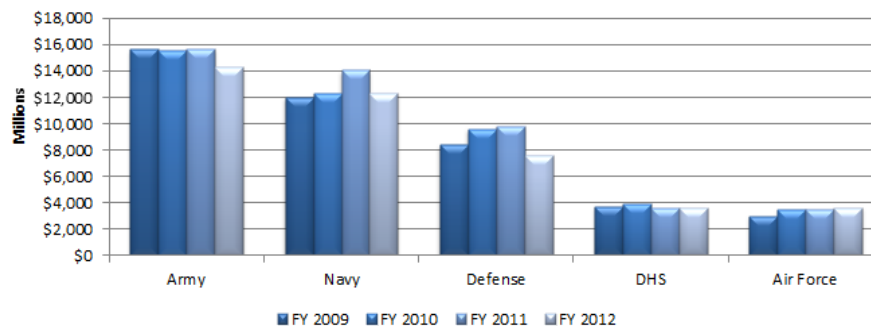
Top 8a Prime Vendors



Spending Snapshot: Virginia

- **Federal spending in the state has been flat**, with decreased spending in three of the top five spending departments: Army, Defense and DHS. The **Navy experienced slight growth**, 1% CAGR, and **the Air Force spending grew** at a 6% CAGR.
- **AEC suffered the biggest decline in federal spending**, with a -21% CAGR, while there was **modest growth in the remaining top markets**: IT, Professional Services, Defense & Aerospace, and Research & Development at 2%, 1%, 1% and 2% CAGRs, respectively.
- Over half of Northrop Grumman's obligations are for IT, with the Navy, Army and DoD as its top IT customers. Significant growth associated with SAIC's obligations in the state may be attributed to the move of the company's headquarters from San Diego, CA to McLean, VA. Eyak's primary work in the state supporting the USACE to provide technology for infrastructure, geospatial, and environmental requirements, has ended. Microtechnologies has leveraged its portfolio of GSA Schedules and GWACs, including Schedule 70, SEWP IV, and VETS, to grow its IT business base in the state.

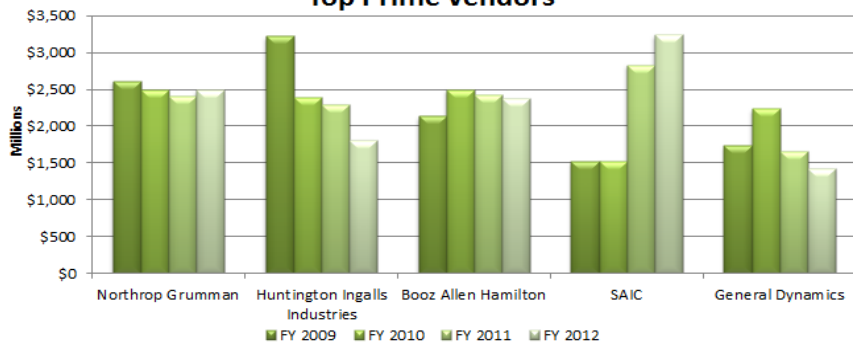
Top Spending Departments



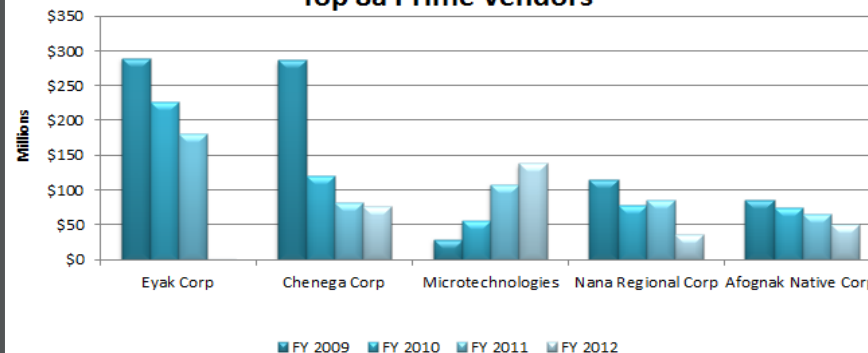
Top Industries



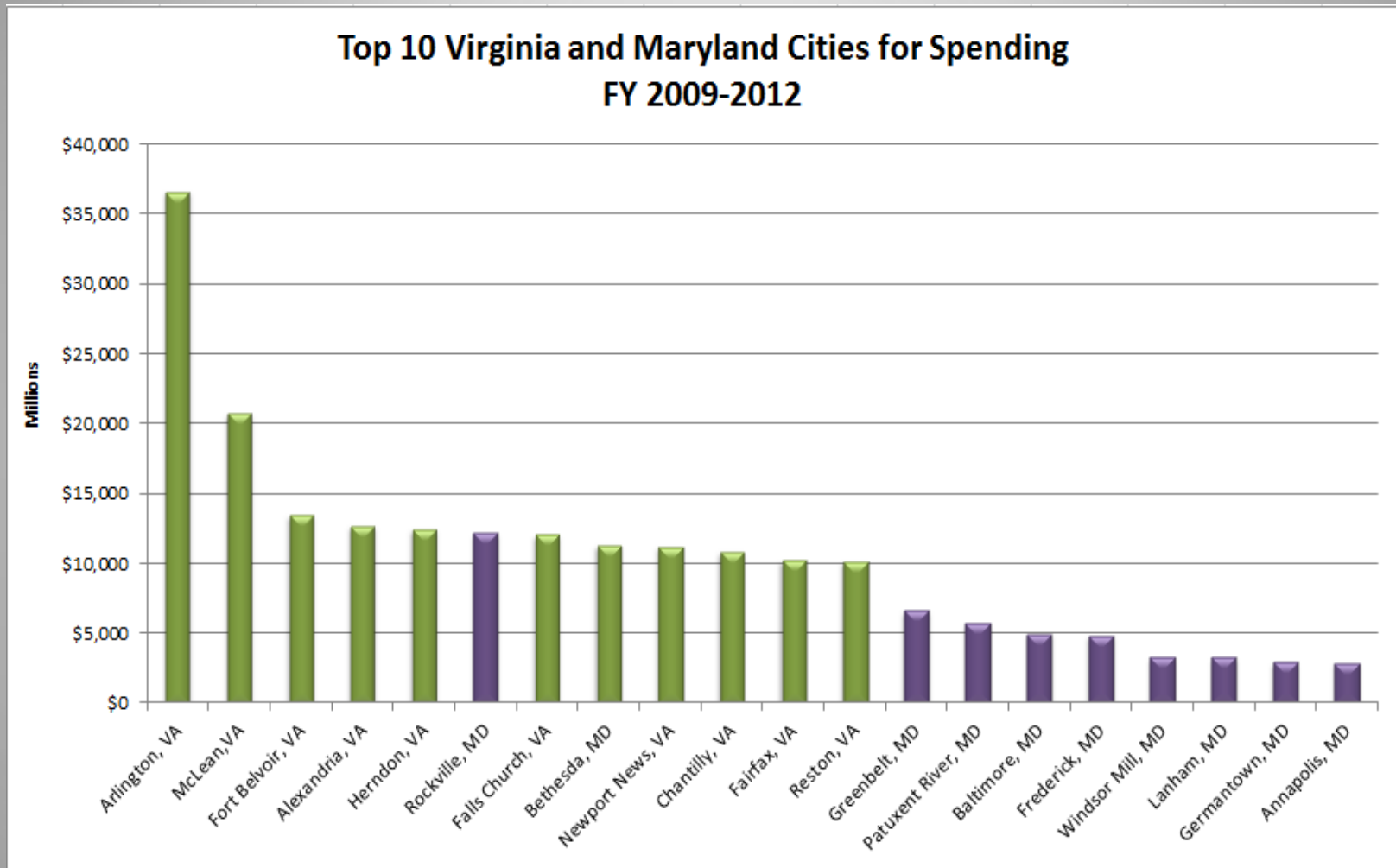
Top Prime Vendors



Top 8a Prime Vendors



Reported Spending by City (MD, VA)



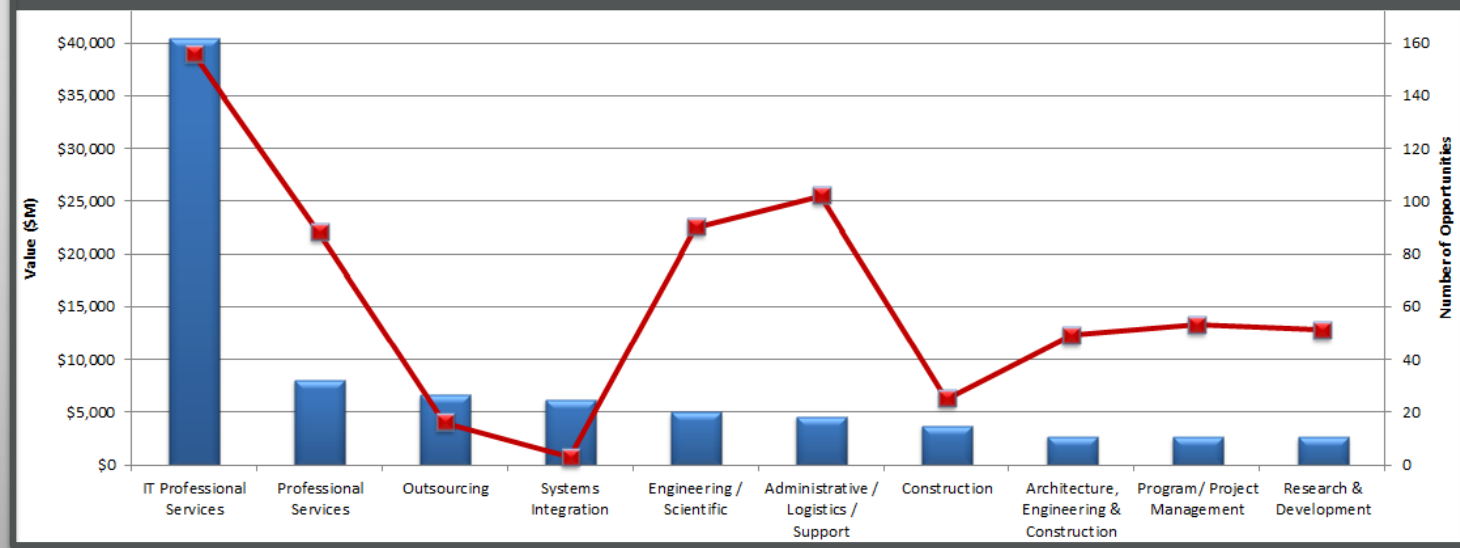
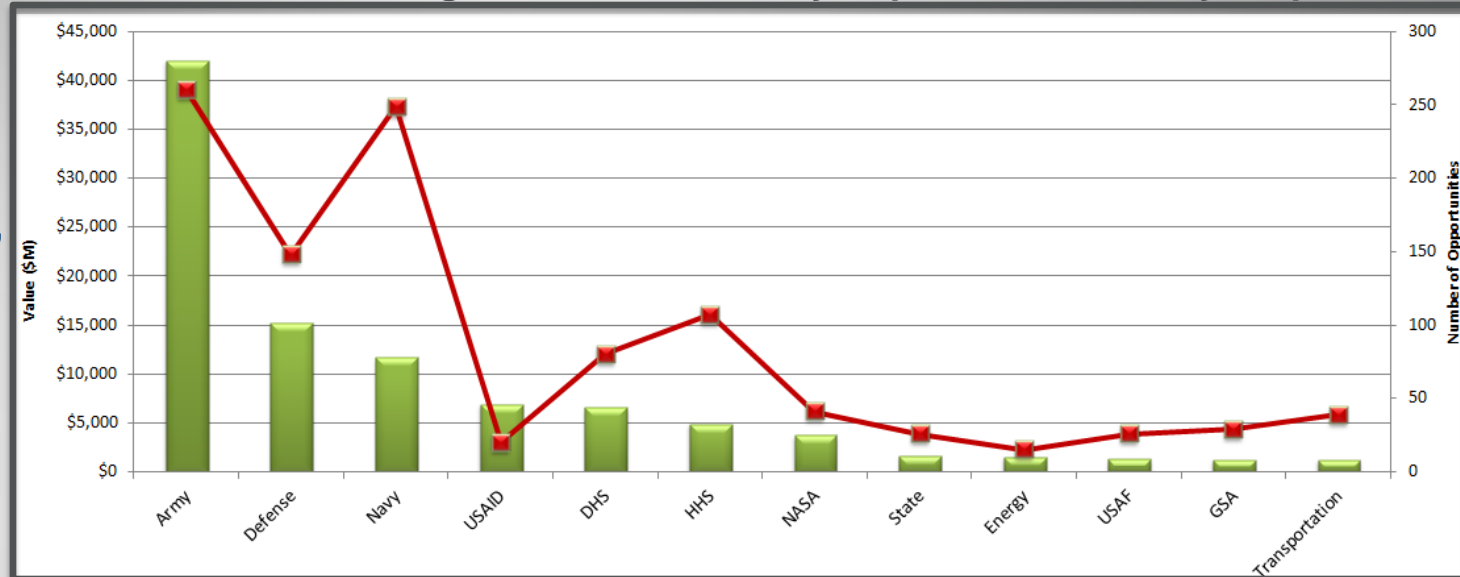
Regional Opportunities Anticipated for Release in Next 18 Months

- Over **1300** opportunities anticipated for release before July 1, 2015

- Total Value: **\$103B**
 - DC: \$31.75B
 - MD: \$55.94B
 - VA: \$15.37B

- IT and Professional Services opportunities dominate the pipeline, supporting regional spending trends identified.

Total Value of Federal Regional Solicitations by Department, Primary Requirement



Top 5 Regional Opportunities - DC

Department	Opportunity ID*	Program	Total Value (\$K)	Anticipated Solicitation Release Date	Primary Requirement	Competition Type	Place of Performance
DEFENSE	95727	ENHANCED SOLUTIONS FOR THE INFORMATION TECHNOLOGY ENTERPRISE	6,000,000	01/15/2014	Systems Integration	Small Bus Set-Aside, Full and Open / Unrestricted	District Of Columbia
AGENCY FOR INTERNATIONAL DEVELOPMENT	37284	SINGLE AWARD IQC PROCUREMENT AND SUPPLY CHAIN ASSISTANCE FOR GLOBAL HEALTH SUPPLY CHAIN PROGRAM	5,000,000	12/15/2013	Professional Services	Full and Open / Unrestricted	District Of Columbia
HOMELAND SECURITY	75503	PROGRAM MANAGEMENT ADMINISTRATIVE CLERICAL AND TECHNICAL SERVICES	1,500,000	03/15/2014	Administrative / Logistics / Support	Service Disabled Veteran Owned Small Business	District Of Columbia
HOMELAND SECURITY	97210	ENTERPRISE APPLICATIONS DEVELOPMENT INTEGRATION AND SUSTAINMENT	1,066,888	05/15/2014	Enterprise Applications	Full and Open / Unrestricted	District Of Columbia
ENERGY	76216	AEC DESIGN INTEGRATE CONSTRUCTION COMMUNICATIONS AND ENGINEERING SERVICES II	1,000,000	12/15/2014	Engineering / Scientific	Small Bus Set-Aside	District Of Columbia

Top 5 Regional Opportunities - MD

Department	Opportunity ID*	Program	Total Value (\$K)	Anticipated Solicitation Release Date	Primary Requirement	Competition Type	Place of Performance
ARMY	54023	STRATEGIC SERVICES SOURCING 2ND GENERATION	30,000,000	04/2014	IT Professional Services	Other	Aberdeen Proving Ground, Maryland
ARMY	93315	AEC EAST CAMPUS MULTIPLE AWARD TASK ORDER CONSTRUCTION CONTRACT AT FORT MEADE IN MARYLAND	2,500,000	05/2014	Construction	Undetermined	Fort Meade, Maryland
HEALTH AND HUMAN SERVICES	61752	CONSOLIDATED INFORMATION TECHNOLOGY INFRASTRUCTURE CONTRACT	1,269,000	04/2015	Outsourcing	Other	Woodlawn (Baltimore), Maryland
ARMY	104752	MOUNTED COUNTER RADIO CONTROLLED IMPROVED EXPLOSIVE DEVICE ELECTRONICS WARFARE SYSTEM	937,000	03/2014	Defense & Aerospace	Full and Open / Unrestricted	Aberdeen Proving Ground, Maryland
DEFENSE	58370	EMS TECHNICAL SUPPORT SERVICES	545,000	04/2014	Engineering / Scientific	Full and Open / Unrestricted	Annapolis, Maryland

Top 5 Regional Opportunities - VA

Department	Opportunity ID*	Program	Total Value (\$K)	Anticipated Solicitation Release Date	Primary Requirement	Competition Type	Place of Performance
AIR FORCE	89470	SAFAQ TECHNICAL AND ANALYTICAL SUPPORT	874,000	11/2014	Management, Scientific, and Technical Consulting Services	Undetermined	Arlington, Virginia (Pentagon)
NAVY	87690	ENGINEERING TECHNICAL TRAINING INSTALLATION AND PROGRAM SUPPORT SERVICES	840,000	01/2014	IT Professional Services	Full and Open / Unrestricted	Portsmouth Integrated Support Command Hampton Roads, Virginia
HOMELAND SECURITY	77772	DATA CENTER 2 SUPPORT SERVICES	820,000	02/2014	Base Operations / Facilities Management	Undetermined	Clarksville, Virginia
NAVY	82384	C4I ENGINEERING AND TECHNICAL SUPPORT SERVICES	739,700	01/2014	IT Professional Services	Undetermined	Portsmouth Integrated Support Command Hampton Roads, Virginia
TRANSPORTATION	63591	CYBER SECURITY MANAGEMENT CENTER	642,400	12/2013	IT Professional Services	Full and Open / Unrestricted	Leesburg, Virginia

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