

GOVERNMENT CONTRACTING

Greater Baltimore is a leader in federal government contracting. In federal fiscal year 2016, Greater Baltimore received more contract obligations than 39 states, and Maryland as a whole ranked 4th in total contract dollars. Outside of the D.C. Metro, Greater Baltimore received more than twice the federal spending per capita than any of its peer metropolitan areas in the Mid-Atlantic.



GREATER BALTIMORE INDUSTRY PROFILE

DEFENSE SPENDING AND THE NEW ADMINISTRATION

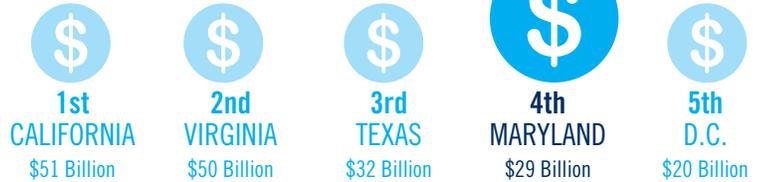
The strength shown by the Greater Baltimore contracting market in recent years is likely to continue under the new administration. Recent statements by the President suggest that defense spending is likely to affect the Greater Baltimore region positively, as more than 60% of federal contract dollars in the region stem from defense agencies. Since the early 1980s, party affiliation has been an indicator of likely trends in defense spending. Using federal projections in combination with the proposed \$54 billion increase in defense spending results in an approximate \$100 billion in the discretionary defense budget by 2020.

Discretionary government spending projected to increase by almost

\$200 BILLION

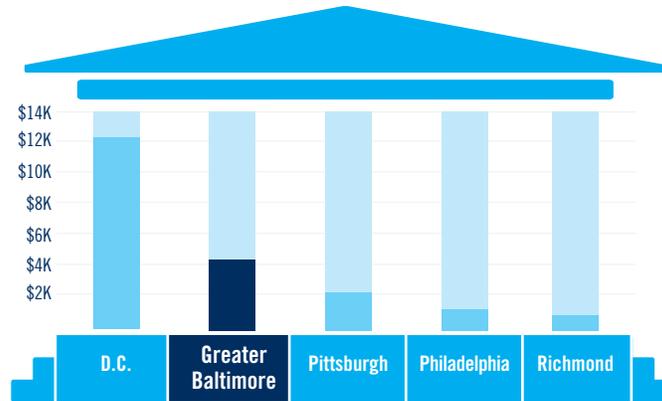
IN THE NEXT 8 YEARS

TOTAL GOVERNMENT CONTRACT SPENDING BY GEOGRAPHY

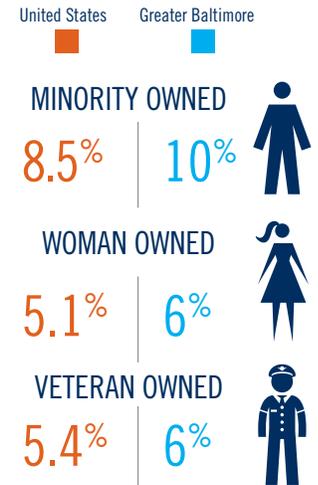


If Greater Baltimore were a state, it would rank 12th with **\$12.2 Billion**

OBLIGATED CONTRACT DOLLARS PER CAPITA



OBLIGATED CONTRACT DOLLARS BY BUSINESS OWNER



CONTRACTING OBLIGATIONS OVER THE PAST 5 YEARS:



DISCRETIONARY DEFENSE SPENDING PERCENTAGE OF GDP BY WHITE HOUSE ADMINISTRATION YEARS



CHANGE IN DISCRETIONARY DEFENSE SPENDING (FROM PRESIDENTIAL ENTRY TO EXIT)

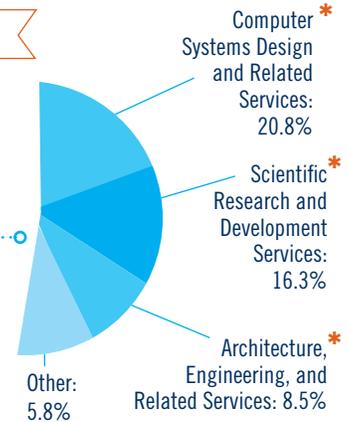
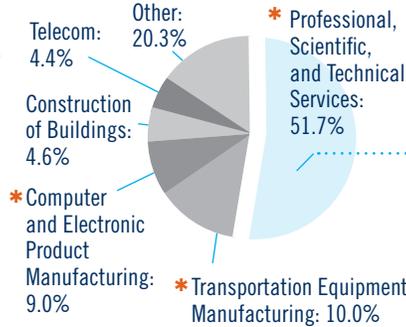


DOMINANT CONTRACTING SUBSECTORS

A majority of Greater Baltimore federal contract dollars are obligated to companies classified as professional, scientific, and technical services. Much of this spending can be attributed to research and development, cybersecurity, computer-related and engineering contracts. In the last five years, professional, scientific and technical service contract dollars have increased more than 60 percent; contract dollars to computer systems design services, an industry group within that subsector, have grown more than 121 percent. Of the five largest spending government agencies, four obligated the most dollars to computer systems design services in 2015.

TOP CONTRACTING SECTORS: GREATER BALTIMORE

* Spending increases in these sectors outpaced the national average over last 5 years.



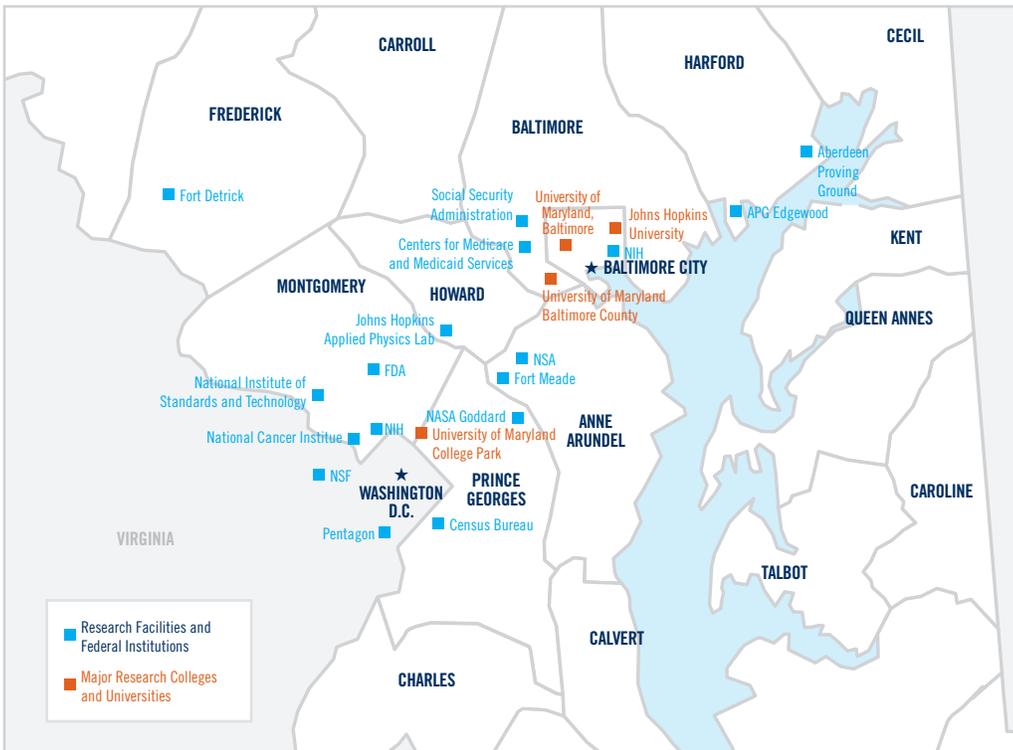
TOP REGIONAL CONTRACTORS: PROFESSIONAL, SCIENTIFIC AND TECHNICAL

COMPANY	CONTRACT OBLIGATIONS
The Johns Hopkins Univ.	\$1,049,320,170
Northrop Grumman	\$356,452,779
Booz Allen Hamilton Inc.	\$318,274,207
Ventech Solutions Inc.	\$119,837,347
AAI Corporation	\$107,816,706
Lockheed Martin	\$104,435,846



IN 2015, 4 OF THE 5 LARGEST SPENDING AGENCIES OBLIGATED THE MOST DOLLARS TO COMPUTER SYSTEMS DESIGN SERVICES

FACILITIES AND INSTITUTIONS MAP



REGIONAL GOVERNMENT CONTRACTORS



Booz | Allen | Hamilton

