

2020



THE U.S. DEFENSE INDUSTRIAL BASE: CAN IT COMPETE IN THE NEXT CENTURY?

Expert Advice on Maintaining
U.S. Technological Edge

THE U.S. DEFENSE INDUSTRIAL BASE: **CAN IT COMPETE IN THE NEXT CENTURY?**



Expert Advice on Maintaining
U.S. Technological Edge

TABLE OF CONTENTS

EXECUTIVE SUMMARY	4
INTRODUCTION	5
ABOUT NSI AND DUCO	6
ABOUT THE EXPERTS	8
KEY FINDING 1: THE DOUBLE THREAT POSED BY CHINA	9
KEY FINDING 2: THE U.S. MILITARY ADVANTAGE IS UNDER PRESSURE FROM KEY ADVERSARIES	13
KEY FINDING 3: THE U.S. DEFENSE INDUSTRIAL BASE IS VULNERABLE	17
KEY FINDING 4: MAINTAINING THE U.S. MILITARY'S ADVANTAGE	20
APPENDIX	27
THE EXPERTS	28
SURVEY QUESTIONS	35
AGGREGATED DATA	51

Executive Summary

This report is the culmination of a collaboration between the National Security Institute (NSI) and Duco, where more than 100 top national security experts at NSI and Duco shared their insights on the National Defense Authorization Act (NDAA), as well as the broader state of United States national security and its geopolitical standing. NSI and Duco experts were asked to contribute to this project via a survey. This report summarizes the findings, trends, and key takeaways that emerged from the expert responses. Specifically, this report breaks down the trends in four sections: I) the double threat posed by China, II) the U.S. military advantage is under pressure from adversaries, III) the U.S. defense industrial base is vulnerable, and IV) the U.S. must maintain its military advantage.

Key Takeaways

1

There is a greater threat perception of China vis-a-vis other adversaries, with a majority of survey respondents consistently supportive of defending against China even though doing so may have economic consequences.

China is viewed as a strategic competitor, and a plurality of survey respondents were accepting of placing constraints on China, even if there were economic costs to U.S. firms.

2

There is near consensus that the United States's military advantage is shrinking relative to key adversaries and one of the means of addressing this trend is by making it easier to procure domestic commercial technologies.

By and large, respondents were supportive of the government investing more in the defense industrial base, making it easier for the Defense Department to procure commercial technologies, and limiting the dependence on foreign suppliers.

3

There is broad acceptance that the U.S. defense industrial base is vulnerable and that the federal government bureaucracy makes it harder for commercial firms to do business in the federal market.

While experts differed on the approach, a majority favored "Buy American" regulations, reforming the acquisition process to make it easier for non-traditional suppliers, cutting regulations, and having the government pay more to increase competition.

4

There is broad consensus that the Department of Defense (DoD) budget, requirements, and contracting processes are unnecessarily burdensome and too bureaucratic.

Experts believe that it is in the long-term interest of DoD to engage in policy changes that make the process less bureaucratic in order to increase competition and foster a strong defense manufacturing base.

Introduction

In early Fall 2020, the National Security Institute (NSI), a leading think tank and academic center housed at George Mason University's Antonin Scalia Law School, partnered with Duco, one of the nation's premier geopolitical expert consulting organizations, to provide key national security insights to the policymaking community. Members of the NSI and Duco communities contributed to a joint survey that asked over 100 top national security experts to analyze critical national security and geopolitical issues and provide their analysis of key provisions of the House- and Senate-passed versions of the National Defense Authorization Act for Fiscal Year 2021 (NDAA), which were passed by their respective bodies in July 2020. If a combined version is agreed upon, as is likely in late 2020, such a bill would typically be approved by both chambers and sent to the White House for signature.

The NDAA provides general policy guidance to DoD across a range of areas, authorizes funding levels for the new fiscal year, and provides specific direction for how congressionally-allocated funds should be spent. Among other areas, the FY 21 NDAA, as passed by both the House and the Senate in different forms at the time of the survey, emphasizes how DoD can work with the commercial sector to protect supply chains and access dual-use technologies and innovation, which is a critical issue as the nation faces the longer-term threat from China.

The survey was composed of more than 50 subject matter questions and collected over 4,500 data points from the 100+ expert participants from July 31, 2020 to October 6, 2020. A team of policy analysts studied the survey results; this report features the key insights, recommendations, and analysis from the survey, including specific, focused analysis from key NSI and Duco experts, as well as the underlying survey questions and data itself and information on the survey respondents.





About NSI

The National Security Institute is a leading national security and foreign policy think tank and academic center housed within George Mason University's Antonin Scalia Law School. NSI is dedicated to finding real-world answers to some of the hardest national security law and policy questions facing policymakers. NSI is a platform for research, teaching, scholarship, and policy development that incorporates a realistic assessment of the threats facing the United States and its allies, as well as an appreciation of the legal and practical challenges facing U.S. intelligence, defense, law enforcement, homeland security, and cybersecurity communities. NSI also strives to educate future leaders and to shape the debate on critical issues by providing much needed balance to the public discourse by identifying solutions that both enable a strong national defense as well as safeguard American constitutional liberties.

NSI's diverse group of faculty members and experts bring dozens of decades of combined experience tackling national security challenges at the most senior levels of all three branches of the U.S. government as well as in key private sector institutions to their work at NSI. NSI's experts, including those that participated in this survey, include key U.S. military, defense, and intelligence officials and senior officers, as well as technology experts, business executives and startup funders, and venture capitalists from Washington, D.C. to Silicon Valley. NSI's experts are positioned to rapidly respond to the developing national security threat landscape and the immediate need of policymakers.

In the short three years since its founding, NSI's experts have appeared in over 5,500 print, television, radio, and other media appearances and have testified over 30 times before the United States Congress. Over the same time period, NSI experts have authored dozens of books, academic articles, op-eds, and analytic pieces, including nearly two dozen pieces published directly by NSI for consumption by senior policymakers in the legislative and executive branches. NSI continues to lead on critical national security issues and will remain at the forefront of these matters in the years ahead.



About Duco

Duco is reinventing the way organizations access and hire experts to help solve complex global challenges. With a global roster of hundreds of world-class experts and partner organizations in over 55 countries, Duco builds and manages project-specific teams to deliver innovative solutions.

Duco's clients have direct access to hundreds of vetted experts around the globe who serve as an extension of their team. Duco's roster includes former high-ranking government officials; international academia, technology, and security experts; and other industry executives. Duco's website platform features expert search, direct messaging, advanced surveying capabilities, rapid thought-leader advocacy mechanisms, and robust project management tools to quickly aggregate insights and produce comprehensive analytical reports and products that can support a strategic messaging campaign.

Duco's primary client base—including Fortune 500 companies—spans technology companies and nonprofits, as well as prominent consulting firms who use Duco as a secret weapon to service their corporate clients. Duco has deep experience as both a surveyor and a convener—from tech-focused roundtables, to discussions on China, to insider threats at American tech companies.

Duco is a women-owned small business headquartered in San Francisco, California. Duco's leadership and investors sit at the intersection of the technology industry in Silicon Valley, international business, and foreign policy.

About the Experts

NSI and Duco's experts have decades of combined experience in national security, defense, and intelligence across the U.S. government, including four-star military generals, Senate-confirmed directors of intelligence agencies, diplomats, political appointees across various presidential administrations, and business leaders and entrepreneurs.

The 111 survey respondents self-reported to have expertise and experience in:

85% National Security

67% Foreign Policy/Geopolitics

55% Intelligence

48% Cybersecurity

44% Emerging Technology

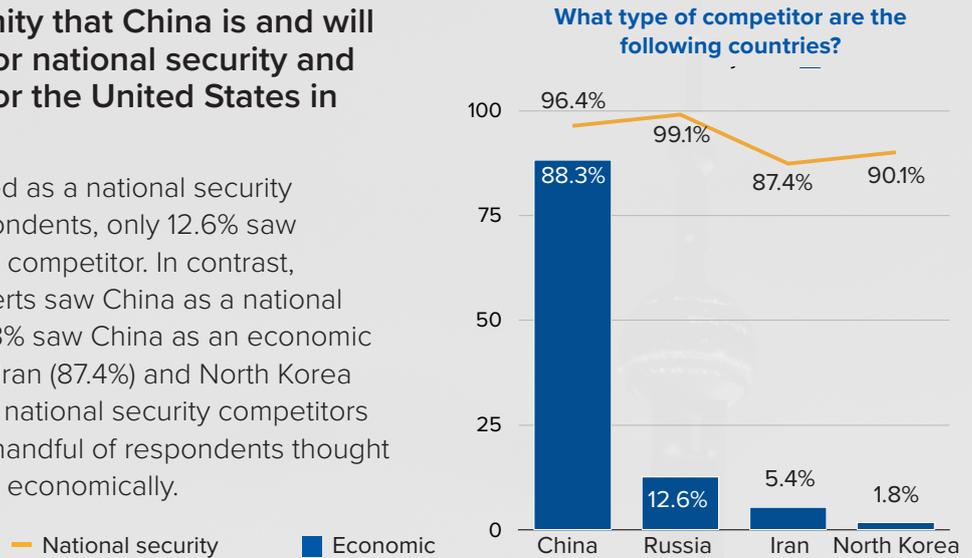
KEY FINDING 1

The Double Threat Posed By China

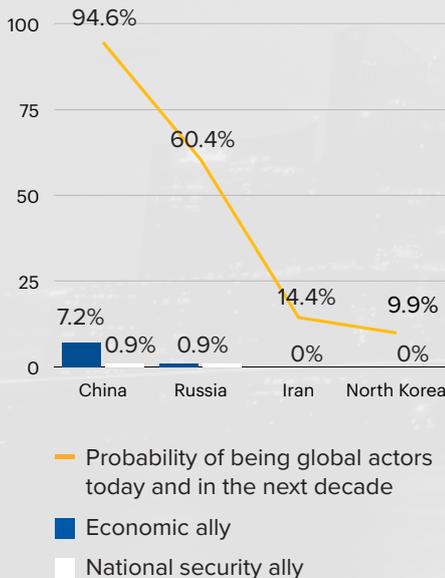
Compared to other nation-state adversaries, only China was viewed by a significant majority of experts as being both a national security and economic threat.

There was near unanimity that China is and will continue to be the major national security and economic competitor for the United States in years to come.

While Russia was also viewed as a national security competitor by 99.1% of respondents, only 12.6% saw it as a substantive economic competitor. In contrast, 96.4% of NSI and Duco experts saw China as a national security competitor and 88.3% saw China as an economic competitor. Likewise, while Iran (87.4%) and North Korea (90.1%) were both viewed as national security competitors to the United States, only a handful of respondents thought either compete with the U.S. economically.



What are the probabilities US adversaries today will be allies in the next decade, and how will their influence grow?



There was near unanimity that China is unlikely to be an economic or national security ally of the U.S.

While only 7.2% of respondents believed that China might be an economic ally to the United States, fewer than 1% of respondents thought it might be a national security ally. Fewer than 1% of respondents also took the same view on both fronts with respect to Russia. This is particularly important considering that there was near unanimity (94.6%) that China would remain or become a major global player within the next decade, while only 60.4% of respondents thought Russia would fit in this category. A separate contingent of respondents (36.9%) believed Russia is only a regional actor. Interestingly, significant majorities believe that both Iran (81.1%) and North Korea (86.5%) are regional actors and are likely to remain so over the next decade notwithstanding the fact that Iran may be actively pursuing nuclear weapons and ballistic missile capabilities and that North Korea currently possess both. Only small numbers of NSI and Duco experts surveyed believe that either Iran (14.4%) or North Korea (9.9%) are or might become global players in the near term.

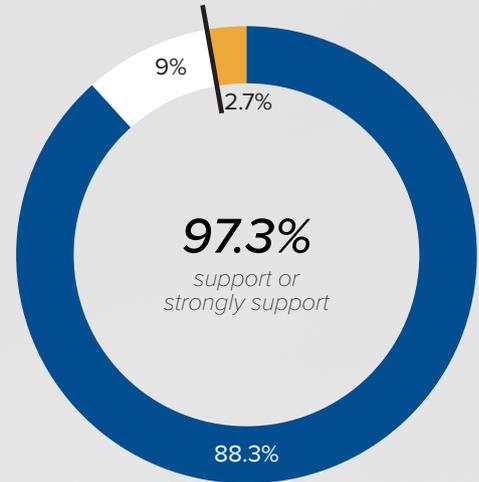
KEY FINDING 1

THE DOUBLE THREAT POSED BY CHINA

There was near unanimity among NSI and Duco experts - 97.3% - that the United States should not allow China to acquire defense-sensitive U.S. technology and data.

Indeed, when the question focused on the Senate-passed bill's provision seeking to restrict China's acquisition of American defense-sensitive technology, there were very strong views among respondents. Specifically, 88.3% of respondents strongly supported the provision protecting U.S. defense-sensitive technology and data from being acquired by China and there was no opposition whatsoever (0%) to such a provision.

The Senate NDAA would require DoD protect defense-sensitive technology and data from being acquired by China. You...

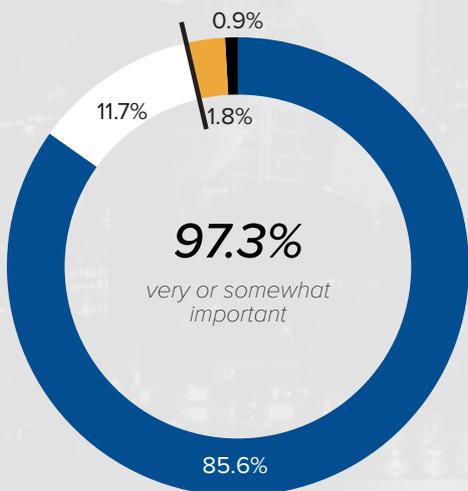


- strongly support this provision.
- somewhat support this provision.
- I don't know enough about this topic.
- No opinion
- somewhat oppose this provision.
- strongly oppose this provision.

The FY 2019 NDAA (section 889) generally prohibits the federal government from contracting entities that use certain Chinese telecommunications equipment or services at a significant scale. You believe that enforcement of this requirement is generally...

Likewise, there was also near unanimity amongst respondents - 97.3% - that the U.S. should not contract with firms that use certain Chinese telecommunications equipment or services at significant scale.

85.6% of NSI and Duco experts felt it was very important for the U.S government not to do business with contractors that use Chinese telecommunications equipment at significant scale. A very small number of respondents (<2%) thought restrictions on U.S. government contractors using Chinese telecommunications equipment at significant scale was not important.



- very important.
- somewhat important.
- not important.
- I don't know enough about this topic.
- No opinion

KEY FINDING 1

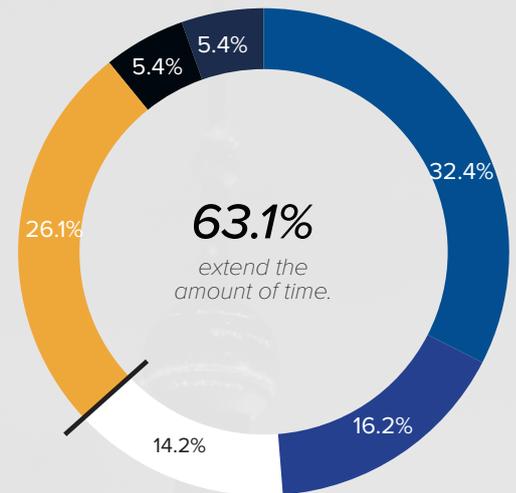
THE DOUBLE THREAT POSED BY CHINA

At the same time, there was significant support among NSI and Duco experts - 63.1% - to extend the amount of time U.S. government contractors have to meet the requirements needed to comply with the Chinese telecommunications restrictions.

While a plurality of respondents (46.6%) supported extending the time for compliance a year or less, significant minorities were also on opposite sides of an extension, with 26.1% believing the restriction ought to be enforced now and 16.2% taking the view that the compliance timeframe ought to be extended beyond a year.

- continue to extend the time available to comply for only one year.
- continue to extend the time available to comply for over a year.
- I don't know enough about this topic.
- enforce the restriction now.
- continue to extend the time available to comply for less than a year.
- No opinion

With respect to the Chinese telecommunications equipment or services provision from the Fiscal Year 2019 NDAA, the U.S. government has previously delayed implementation to give government contractors more time to comply. You would...



"At present and for the foreseeable future, China poses the single biggest threat to the U.S. and its allies. China's ruling Chinese Communist Party (CCP) will continue to use every possible instrument of national power at its disposal - economic, financial, military, technology, and intelligence - to undermine the U.S. at home and abroad and it is critical that the United States recognize the great power competition for what it is: a threat to America's long term security."



David Shedd

Fmr. Acting Director, Defense Intelligence Agency

KEY FINDING 1

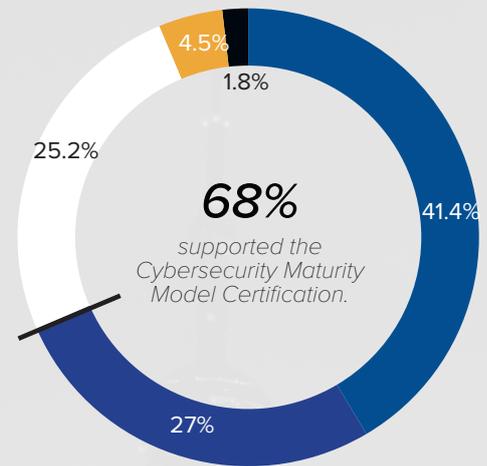
THE DOUBLE THREAT POSED BY CHINA

Over 68% supported the Cybersecurity Maturity Model Certification.

Though it did not gain the same support as Chinese telecommunications restrictions, the CMMC was deemed very important by 41.1% of respondents. Only 4.5% thought it was not important at all.

- very important.
- somewhat important.
- I don't know enough about this topic.
- not important.
- No opinion

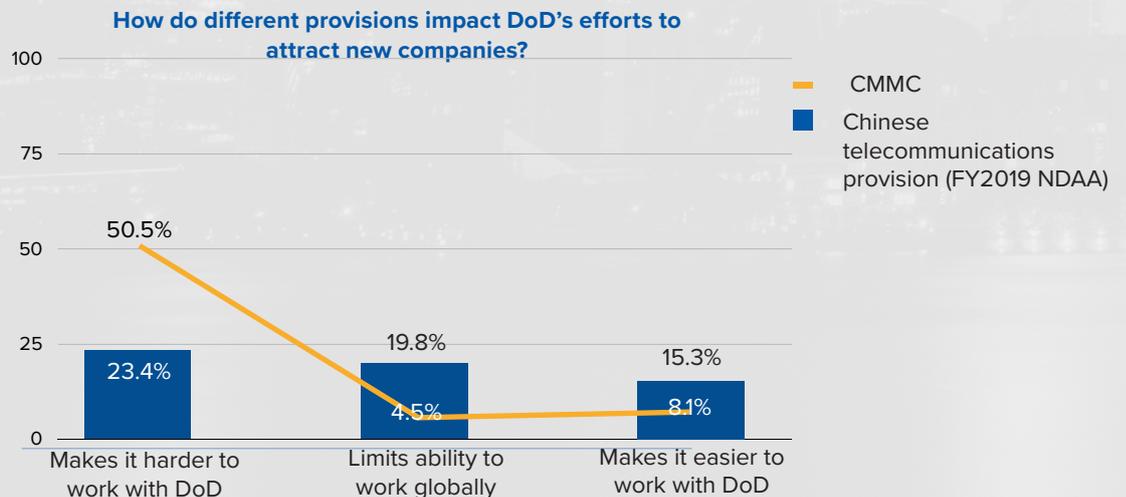
DoD is incorporating the Cybersecurity Maturity Model Certification (CMMC) as a prerequisite for defense contracting. You believe this provision is...



A number of experts expressed concerns that efforts to protect against cyber and telecommunication intrusion from China will lead to economic consequences against American companies, which may further dissuade such companies from working with DoD.

Regarding the use of Chinese telecommunications equipment or services, a plurality of respondents (43.2%) indicated that they thought such restrictions on U.S. government contractors would make it harder for American companies to work with DoD (23.4%) or to compete globally (19.8%). A minority of experts (28.8%) believed that such restrictions might not impact U.S. companies' work with DoD (13.5%) or actually make it easier to do so (15.3%).

As it relates to CMMC, similarly, 50.5% of respondents indicated that they believed these regulations would make it harder for American commercial companies to work with DoD; only 8.1% indicated that they believe the regulations will make it easier for American commercial companies to work with DoD. Perhaps indicating the complexity and challenges associated with CMMC, almost 30% did not offer an opinion.



KEY FINDING 2

The U.S. Military Advantage is Under Pressure from Key Adversaries

The U.S. maintains a comparative military advantage over its adversaries, but 97.3% of respondents believe America's key adversaries are closing the gap or that the gap has already closed.

"There is a direct correlation between national security, our military and our economy. We have to continue to invest heavily in basic and applied sciences, exploit the research and development of the private sector, and then operationalize that technology."



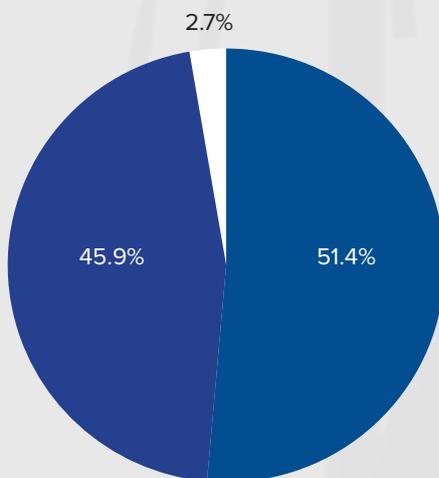
Maj. Gen. (Ret.) John Wharton

Ret. Commanding General of the Army Research, Development & Engineering Command, U.S. Army

While there were differences in opinion on the extent of U.S. military superiority, nearly every respondent felt that the U.S. military advantage is under pressure from key adversaries.

The majority of respondents (51.4%) agreed that the U.S. retains comparative military advantage in some areas today, but even those experts are concerned that in other key areas America's adversaries have closed the gap or surpassed America's long-standing military edge. An additional 45.9% of respondents felt the U.S. continues to maintain a dominant military advantage, but likewise recognized that adversaries are closing the gap. Only 2.7% of NSI and Duco experts surveyed felt the U.S. military advantage would be unchallenged in the future.

The U.S. is operating in a geopolitical and strategic environment where...

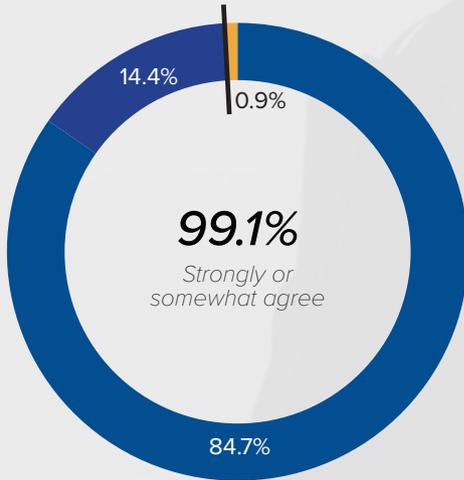


- it enjoys a comparative military advantage in some areas, but in others the gap has closed or the US has been surpassed.
- it enjoys a dominant military advantage but potential adversaries are closing the gap.
- it enjoys a dominant military advantage that will likely be unchallenged in the future.
- I don't know enough about this topic.
- No opinion

KEY FINDING 2

THE U.S. MILITARY ADVANTAGE IS UNDER PRESSURE FROM KEY ADVERSARIES

Consider this statement: "To maintain technological and operational superiority on the battlefield, the DoD must better leverage technologies and capabilities developed by commercial companies, including startups, that do not traditionally supply to DoD. Which of the following best represents your thoughts on that statement?"



There was near unanimity amongst NSI and Duco experts - 99.1% - that the U.S. must do a better job of accessing commercial technologies from non-traditional suppliers, including startups, to maintain military superiority.

A majority of respondents (84.7%) strongly agreed and 14.4% somewhat agreed that the Department of Defense should leverage commercial technologies from non-traditional suppliers, including start-ups. Fewer than 1% of respondents disagreed, to some extent, with this notion.

- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- No opinion
- I don't know enough about this topic.

"There is no question that the U.S. military must - and must be allowed to - buy and integrate technology quickly. There are two things standing in the way; the first is the proprietary frameworks used in weapons systems, which means that integrating new technology can be very hard. The second is the Congress, which has enacted laws in response to real and perceived errors in procurement over the years. In order to allow for the fast integration of technology, Congress must allow the military to take risks, some of which will not work out; Congress must resist the temptation to hold hearings and enact laws in reaction to these failures."



Richard Ledgett, Jr.

Fmr. Deputy Director, National Security Agency

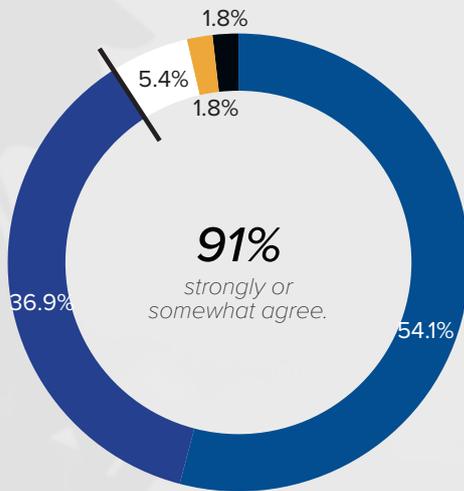
KEY FINDING 2

THE U.S. MILITARY ADVANTAGE IS UNDER PRESSURE FROM KEY ADVERSARIES

Likewise, there was near unanimity among respondents - 91% - that the Department of Defense should be allowed to acquire innovative commercial products through general solicitations with competitive peer review.

A majority of experts (54.1%) strongly supported this provision (contained in the Senate-passed version of the NDAA at the time of the survey) and only a small minority (1.8%) showed any level of opposition to such a proposal.

The Senate NDAA bill would permanently allow DoD to acquire innovative commercial products and services through general solicitations if there is a competitive peer review of proposals. You...



- strongly support this provision.
- somewhat support this provision.
- I don't know enough about this topic.
- No opinion
- somewhat oppose this provision.
- strongly oppose this provision.

"Although the U.S. military advantage is in decline, especially in relation to Chinese military capabilities, it is not too late to reverse the trend...the U.S. must strengthen its R&D prowess and leverage commercial innovation to maintain uncompromising technological dominance on the battlefield."



Brig.-Gen. (Ret.) John Adams

Ret. Brigadier General, U.S. Army;
President, Guardian Six Consulting LLC

KEY FINDING 2

THE U.S. MILITARY ADVANTAGE IS UNDER PRESSURE FROM KEY ADVERSARIES

"There is a direct correlation between national security, our military and our economy. We have to continue to invest heavily in basic and applied sciences, exploit the research and development of the private sector, and then operationalize that technology."



Maj. Gen. (Ret.) John Wharton

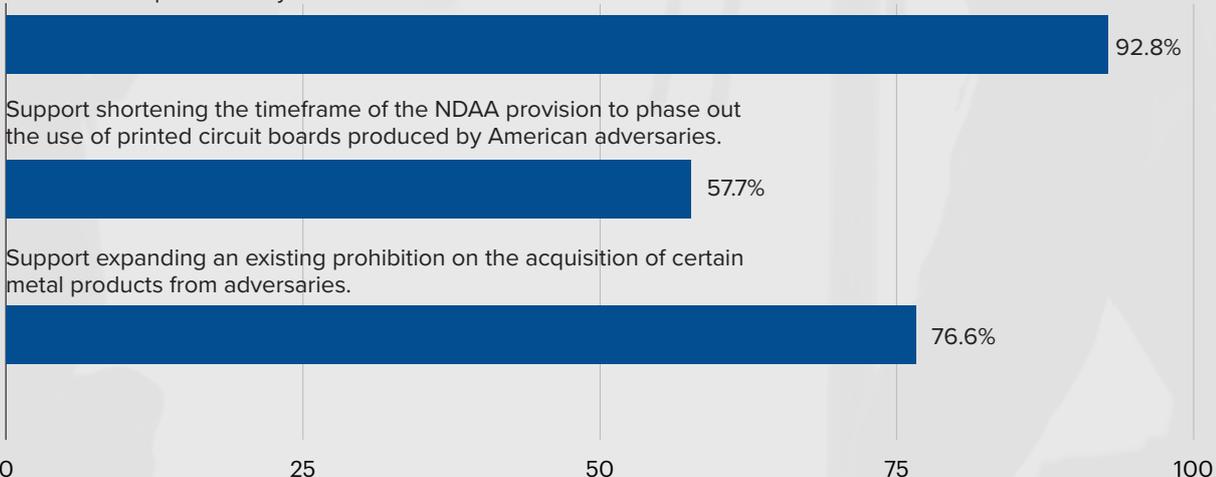
Ret. Commanding General of the Army Research, Development & Engineering Command, U.S. Army

A majority of experts felt the U.S. should limit its dependence on certain key defense-related technologies produced by foreign adversaries.

A significant majority of respondents (92.8%) support provisions in the NDAA requiring the United States to phase out the use of printed circuit boards produced by American adversaries within the next decade, and a majority (57.7%) believed that this issue is important enough that the provisions ought to be modified to shorten this timeframe. Only 2.7% of respondents opposed this provision or thought the timeframe ought to be extended. Likewise, 76.6% of experts supported expanding an existing prohibition on the acquisition of certain metal products from adversaries and tightening restrictions on the acquisitions of such metals, with only a small minority (9%) showing some amount of opposition to such a provision.

Experts support limiting U.S. dependency on foreign adversaries for critical military components.

Support provisions in the NDAA requiring the United States to phase out the use of printed circuit boards produced by American adversaries.



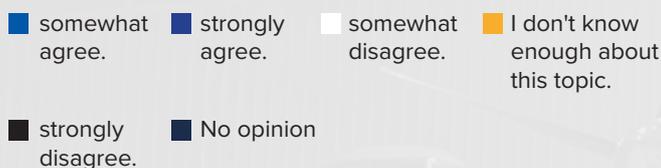
KEY FINDING 3

The U.S. Defense Industrial Base is Vulnerable

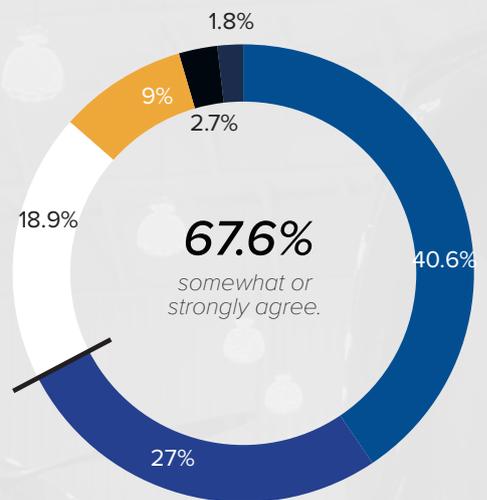
A clear majority of experts expressed concern that America no longer has the manufacturing capabilities to protect the nation and that the defense industrial base is underfunded.

A clear majority of NSI and Duco experts - 67.6% - agree to some extent that the United States no longer has the necessary manufacturing capabilities to support DoD systems at the rate necessary to protect our national security, though there were variations on the extent of expert concerns.

Of this 67.6%, a plurality (40.5%) somewhat agreed with the notion that the United States lacks the necessary manufacturing and an additional 27% only strongly agreed. A total of 21.6% of respondents disagreed with this concern, with 18.9% somewhat disagreeing and 2.7% strongly disagreeing.



The U.S. no longer possesses the necessary manufacturing capabilities to support DoD systems at the rate required to protect our national security. You...



"The majority of large defense procurements take years to award. The cumulative effect of all those lengthy acquisitions is the United States' industrial base and its corresponding military capabilities losing ground to near-peer competitors."



Nick Tsiopanas

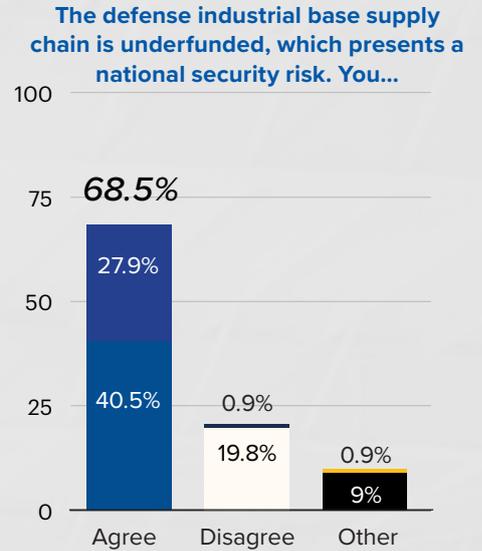
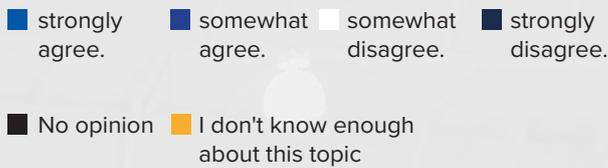
Lead Researcher, Section 809 Panel;
Founder & President, ZYGOS Consulting

KEY FINDING 3

THE U.S. DEFENSE INDUSTRIAL BASE IS VULNERABLE

A clear majority of respondents - 68.5% - agreed that the defense industrial base is underfunded and that this presented a national security risk, but respondents were divided on the extent of the problem.

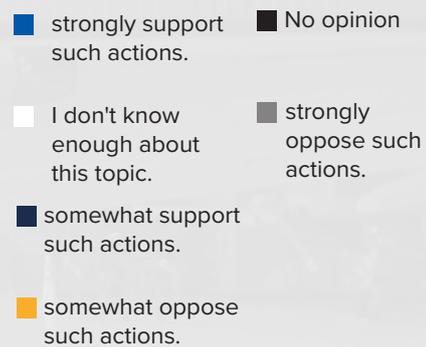
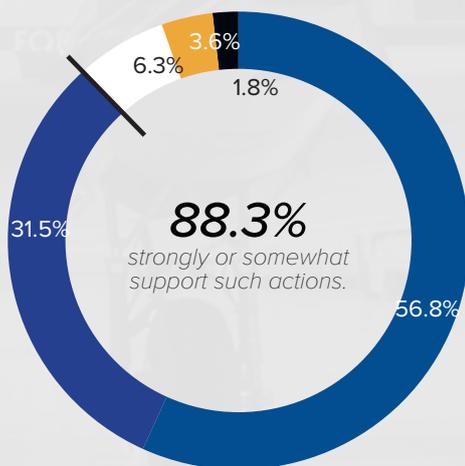
40.5% of experts strongly agreed that the defense industrial base is underfunded, thereby presenting security risks, while 27.9% somewhat agreed. A significant minority (20.7%) did not believe this was a problem (19.8% somewhat disagreed while 0.9% strongly disagreed).



An overwhelming majority of NSI and Duco experts - 88.3% - agreed with the Defense Department's recent initiative to provide funds to fragile critical manufacturers to help sustain and strengthen essential domestic industrial base capabilities and the defense critical workforce.

The majority of respondents (56.8%) strongly supported this action, while 31.5% somewhat supported it. Only 3.6% had some level of opposition to such support for fragile critical manufacturers.

DoD recently announced that it would provide funds to fragile critical manufacturers to help sustain and strengthen essential domestic industrial base capabilities and defense critical workforce. You...



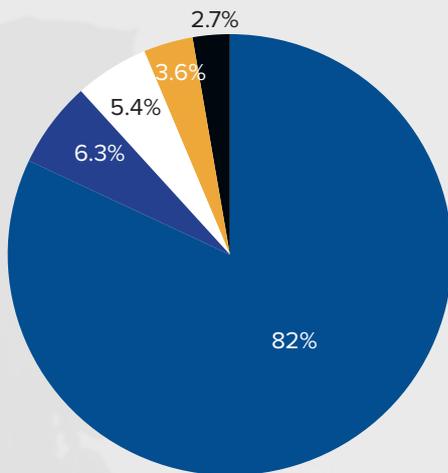
KEY FINDING 3

THE U.S. DEFENSE INDUSTRIAL BASE IS VULNERABLE

When assessing the process for how the U.S. government procures commercial technologies, there was widespread agreement that the Defense Department's contracting process is unnecessarily burdensome (82%), and a majority felt that cost and pricing requirements are too bureaucratic.

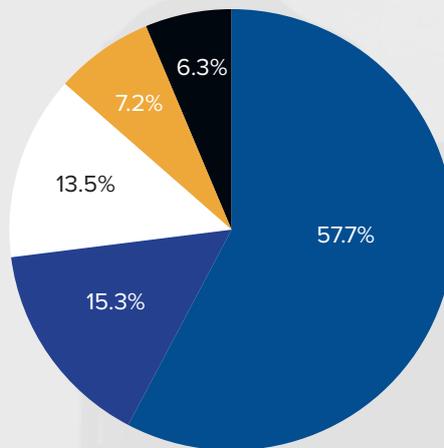
82% of respondents felt that the defense department's contracting process was too burdensome, and 57.7% agreed that cost and pricing requirements are too bureaucratic.

The DoD contracting process is..



- unnecessarily burdensome.
- I don't know enough about this topic.
- No opinion
- adds value.
- is just right.

The DoD cost and pricing requirements..



- are too bureaucratic.
- I don't know enough about this topic.
- are sufficiently rigorous.
- are about right.
- No opinion

"In order to maintain-and ideally expand-the U.S. military's long-standing capability advantage over our adversaries, it is critical that the Department of Defense continue and expand its ongoing efforts to leverage commercial sector innovation and provide for faster and easier acquisition of cutting-edge technology from new and non-traditional providers."



Gen. (Ret.) Keith Alexander

Fmr. Director, National Security Agency; Fmr. Founding Commander, U.S. Cyber Command

KEY FINDING 4

Maintaining the U.S. Military's Advantage

DoD must do more to support the defense industrial base, expedite the acquisition process, and protect against China.

“There are significant vulnerabilities in our defense industrial base. We need to invest in our industrial base, particularly focusing on those areas of greatest vulnerability to adversary nations such as China.”



Dr. Jerry McGinn

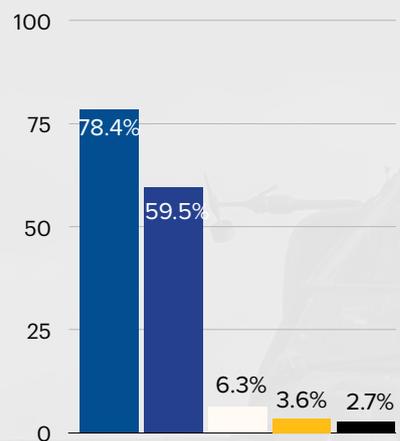
Fmr. Senior Official in the Office of Manufacturing & Industrial Base Policy, DoD; Executive Director, Center for Government Contracting, George Mason University School of Business

A significant majority of NSI and Duco experts surveyed - **78.4%** - believed that it is in the long-term interest of DoD to engage in policy changes that will increase competition and foster a strong defense manufacturing base.

A majority of experts surveyed (59.5%) also took the view that DoD ought to cut regulations and be willing to pay more to achieve these goals. Only 6.3% of respondents believed that DoD ought to maintain current cost-minimizing regulations if they lack the ability to sustain the current defense manufacturing base.

- Implement policy changes to increase competition and foster a strong defense manufacturing base.
- Cut regulations and be willing to pay more to increase competition and foster a stronger defense manufacturing base.
- Maintain current regulations that seek to minimize costs to the government but may not sustain the current defense manufacturing base.
- No opinion
- I don't know enough about this topic
- None of the above

Which is in the long-term interest of U.S. national security?



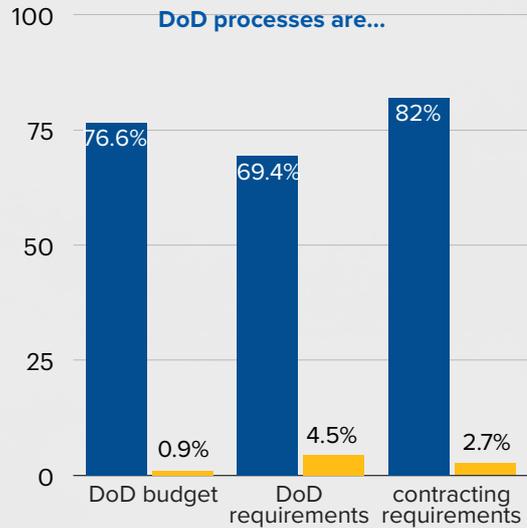
KEY FINDING 4

MAINTAINING THE U.S. MILITARY'S ADVANTAGE

Strong majorities of NSI and Duco experts believed that the DoD budget, requirements, and contracting processes are unnecessarily burdensome (76.6% for budget, 69.4% for requirements, and 82% for contracting).

Only 8.1% believe the current DoD budget process adds value (12.6% for the requirements process and 3.6% for contracting) and only 0.9% of respondents think the budget process is just right (4.5% for the requirements process and 2.7% for contracting).

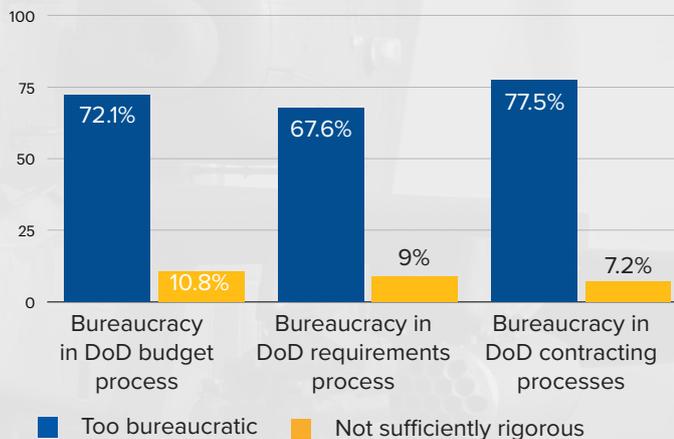
■ unnecessarily burdensome. ■ is just right.



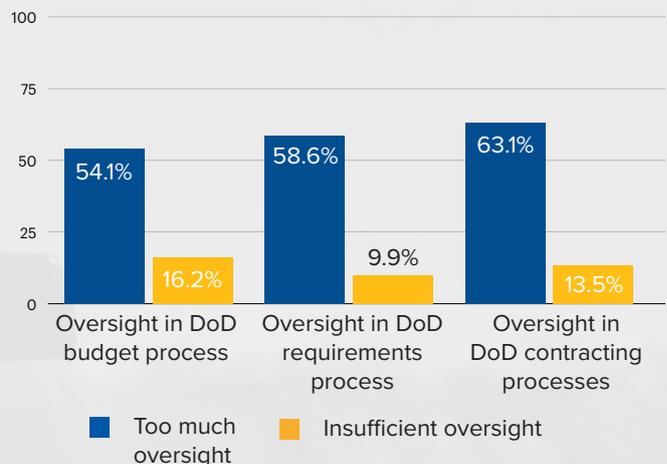
Likewise, significant majorities of experts found the DoD budget, requirements, and contracting processes to be too bureaucratic (72.1% for budget, 67.6% for requirements, and 77.5% for contracting).

Majorities of the experts surveyed also believed that the DoD budget, requirements, and contracting processes have too much oversight or too many layers of review (54.1% for budget, 58.6% for requirements, and 63.1% for contracting). Minorities of those surveyed believed that the budget, requirements, and contracting processes were not sufficiently rigorous (10.8% for budget, 9% for requirements, and 7.2% for contracting) or had insufficient oversight (16.2% for budget, 9.9% for requirements, and 13.5% for contracting). Slightly smaller minorities of those surveyed found the budget, requirements, and contracting processes to be just right on bureaucracy (6.3% on budget, 9% on requirements, and 1.8% on contracting) as well as on oversight or layers of review (11.7% on budget, 11.7% on requirements, and 5.4% on contracting).

Perceived Bureaucracy in Different DoD Processes



Perceived Oversight in Different DoD Processes

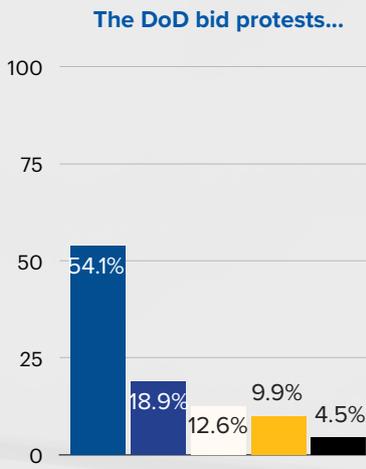


KEY FINDING 4

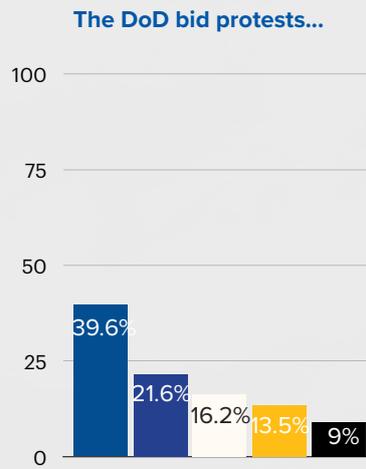
MAINTAINING THE U.S. MILITARY'S ADVANTAGE

Experts also viewed the DoD bid protest process as too bureaucratic, but not as bureaucratic as the contracting, budgeting, or requirements process.

54.1% of experts considered the bid protest process to be too bureaucratic and 39.6% felt protests added to excessive layers of oversight and review. Bid protests do have some support. A small minority of our experts considered the level of bureaucracy and the amount of oversight to be just right (12.6% and 16.2%, respectively).



- are too bureaucratic.
- I don't know enough about this topic
- are about right.
- are not sufficiently rigorous.
- No opinion



- have too much oversight/layers of review.
- I don't know enough about this topic
- are just right.
- No opinion
- have insufficient oversight.

"The next Administration needs to get serious about reducing bureaucratic burdens in the acquisition process regarding budget, requirements, and contracting."



Bryan Smith

Fmr. Senior Executive, Office of Management & Budget; Fmr. Budget Director, House Permanent Select Committee on Intelligence

KEY FINDING 4

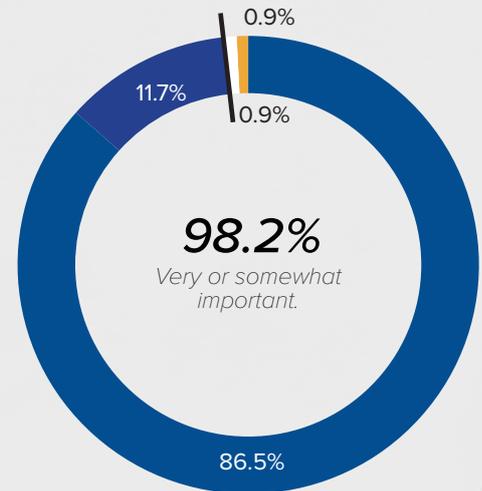
MAINTAINING THE U.S. MILITARY'S ADVANTAGE

There was near unanimity - 98.2% - among experts that the U.S. government should support the U.S. national security industrial base to ensure access to critical components.

Views on this were quite strongly held, with 86.5% of respondents agreeing that this was a very important issue, while 11.7% felt it was somewhat important and fewer than 1% of respondents indicated that the issue wasn't very important.

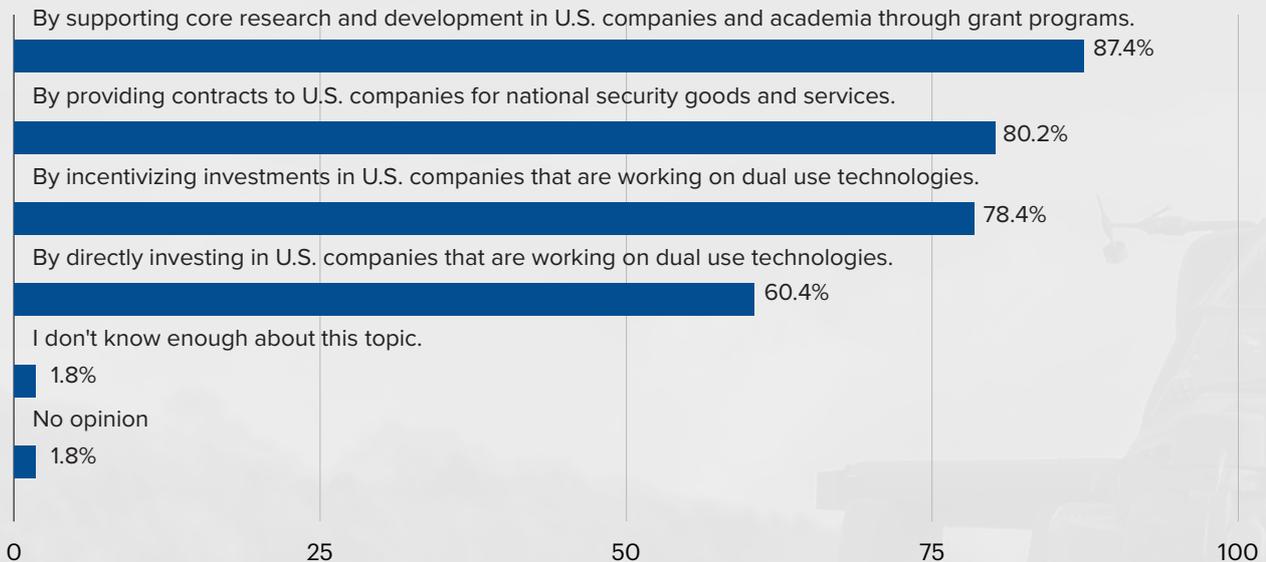


How important is it for the U.S. government to support the U.S. national security industrial base to ensure access to critical components?



There was overwhelming support among respondents for the government to undertake significant initiatives to strengthen the defense industrial base, and a variety of different approaches received significant support from experts.

How can the U.S. government support the U.S. national security industrial base?



KEY FINDING 4

MAINTAINING THE U.S. MILITARY'S ADVANTAGE

"A fact of contemporary life is that the U.S. is in a state of constant warfare, primarily in the digital information domain. Our budgeting, contracting and acquisition processes are woefully unprepared to confront the constantly evolving conflict we face. A new paradigm for profound and intimate public-private partnerships, particularly with the commercial sector, is an imperative we must grasp to achieve advantage in this revolutionary digital battlespace."



Charles Alsup

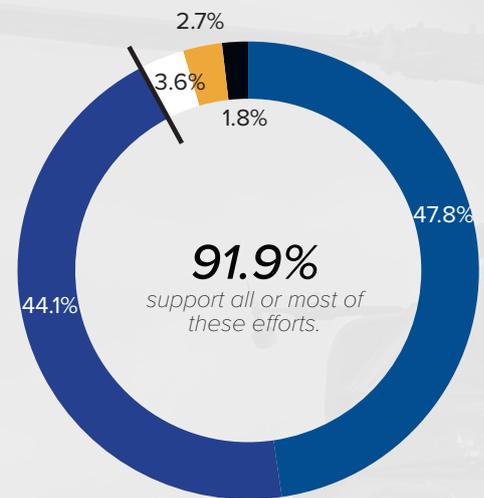
Fmr. Associate Deputy Director of National Intelligence for Policy, Plans, and Requirements (ADDNI/PPR), Office of the Director of National Intelligence

A strong majority of experts - 91.9% - agreed with Congress' decisions to delegate acquisition authorities to military services, SOCOM, and Cyber Command.

Only 1.8% of respondents opposed these efforts. In addition, significant majorities also supported new acquisition authorities with 81.1% of respondents supporting new acquisition authorities for the Joint Artificial Intelligence Center and 70.3% supporting DoD's request to grant independent acquisition authority to the newly-created U.S. Space Force. While only 6.3% of respondents somewhat opposed the new JAIC authorities, it is worth noting that a significant minority of respondents (19.8%) had some level of opposition to the new Space Force authorities (with 8.1% being strongly opposed).

- support all of these efforts.
- support most of these efforts.
- I don't know enough about this topic
- No opinion
- oppose most of these efforts.
- oppose all of these efforts.

In recent years, Congress has delegated more acquisition authority to military services, SOCOM, and Cyber Command. You..

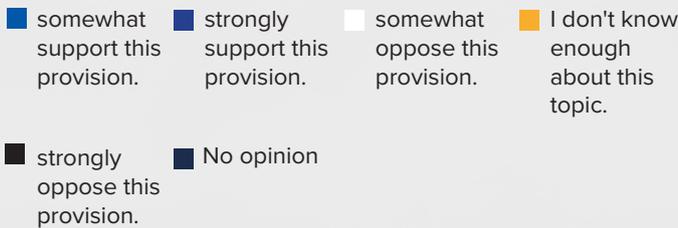


KEY FINDING 4

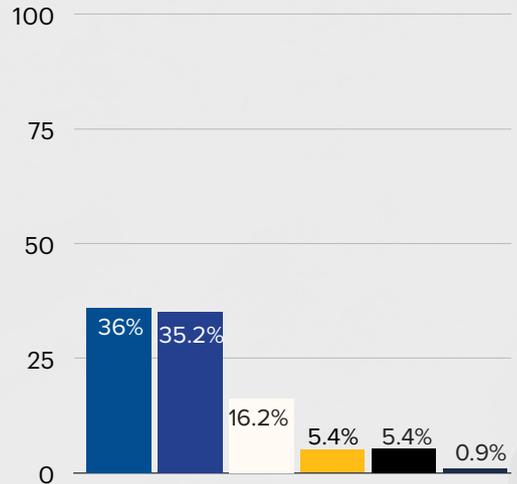
MAINTAINING THE U.S. MILITARY'S ADVANTAGE

A majority of respondents favored strengthening existing "Buy American" requirements as proposed in the House-passed NDAA.

71.2% of experts supported the House-passed provision requiring every component in major defense programs to be American-made by 2026, with 35.2% strongly holding this view, and 36% somewhat supporting this provision. At the same time, a significant minority (21.6%) indicated some measure of opposition to such a provision (16.2% being somewhat opposed and 5.4% being strongly opposed).

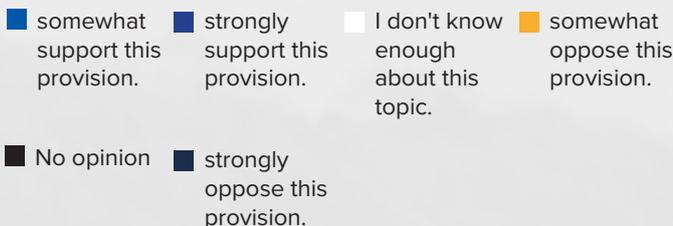


The House NDAA would tighten "Buy American" requirements for major defense program components by 75% of the content to be domestic by Oct. 2021 and 100% by Oct. 2026. You...

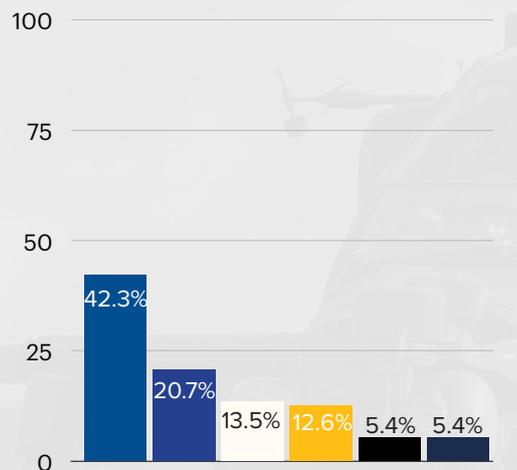


Likewise, a majority of respondents - 63.1% - supported a Senate-passed NDAA provision that would lower the dollar threshold required for DoD to buy domestic parts (from \$250,000 to \$150,000).

The breakdown of support for this provision was somewhat weaker than for the House "Buy American" provision, with 20.7% of experts strongly supporting the Senate-passed provision, and 42.3% somewhat supporting it. At the same time, overall opposition to the Senate-passed provision was also lower with 18% opposed (12.6% somewhat opposed and 5.4% strongly opposed).



Today, there is a requirement to buy certain domestic items when the acquisition is more than \$250,000. The Senate NDAA bill would lower that dollar threshold to \$150,000, accounting for inflation adjustments made every 5 years. You...



Conclusion

The National Defense Authorization Act plays a critical role in promoting national defense and crafting defense policy. The NDAA authorizes funding for DoD (and defense-related activities at other federal agencies), establishes defense policies and restrictions, and addresses organizational issues within the Department. The FY 2021 NDAA is expected to weigh in on a number of important issues, including restoring military readiness, implementing policies addressing the threats posed by Russia, China, and other adversaries, and reforming the defense acquisition process.

As the House and Senate conference the bill to resolve their differences, our top national security experts are contributing to the debate, providing insight into the complex challenges facing DoD, offering their take on the House and Senate version of the NDAA, and offering advice on how to best promote national security.

As the world we live in continues to evolve and the U.S.'s long-held position as the world's sole superpower is increasingly challenged, Duco and NSI experts have a two-fold message: protect against external competitors and foster internal collaboration and innovation. Duco and NSI experts believe that China will pose a unique economic and national security threat for the foreseeable future. A significant majority of experts support focusing efforts on defending against China. Almost unanimously, experts support NDAA provisions that would require DoD to protect defense-sensitive technology and data from China and provisions that would prohibit the federal government from contracting with entities that use Chinese telecommunications equipment or services at a significant scale.

Our experts broadly believe that addressing a vulnerable U.S. defense industrial base should be a top priority for DoD. Experts generally supported reforming the defense acquisition process to facilitate government access to non-traditional suppliers, cutting back on regulation, and increasing how much the government pays with the goal of increasing competition and fostering innovation.

Our experts recommend that DoD take meaningful steps to protect its defense-sensitive technology and data from competitors, primarily China, and simultaneously, focus internally on growing a better partnership with its industrial base through an expedited acquisition process to ensure DoD future access to the latest and most innovative technology - access that has been the foundation of U.S. military superiority for more than 80 years.

Appendix

The Experts

The Experts

Brig. Gen. (Ret.) John Adams

President, Guardian Six Consulting LLC

Mike Barrett

Fmr. Director of Strategy, White House Homeland Security Council; Fmr. Intelligence Officer, Office of the Secretary of Defense

Dr. Christopher Bright

Fmr. Oversight Subcommittee Staff Leader, House Committee on Armed Services

Gen. (Ret.) Keith Alexander

Fmr. Director, National Security Agency; Fmr. Founding Commander, U.S. Cyber Command

Dr. Nora Bensahel

Visiting Professor of Strategic Studies & Senior Fellow of the Merrill Center, Johns Hopkins School of Advanced International Studies

Megan Brown

Fmr. Counsel to the Attorney General, DoJ; Partner, Wiley Rein LLP

Dmitri Alperovitch

Co-Founder & Fmr. CTO, CrowdStrike

Mark Bitterman

Ret. Intelligence Officer, U.S. Navy Reserve; Fmr. Special Assistant for Legislative Affairs, Office of the Secretary of Defense

Jamal Byrd

Ret. Acquisition Officer, U.S. Air Force

Charles Alsup

Fmr. Associate Deputy Director of National Intelligence for Policy, Plans, and Requirements, Office of the Director of National Intelligence

Darrell M. Blocker

Fmr. Senior Executive within the Directorate of Operations, CIA

Elisa Catalano Ewers

Fmr. Director for the Middle East & North Africa, National Security Council; Faculty, Johns Hopkins University

Kari Amelung

Fmr. Operations Officer within the Directorate of Operations, CIA

Charles Bobbish

Fmr. Founder & CEO, CMX Technologies

Jennifer Cafarella

Research Director, Institute for the Study of War

Lawrence Asch

Ret. Contracting Officer, U.S. Army; Principal, ZYGOS Consulting LLC

Andrew Borene

Program Director for Homeland Security, NSI

Dr. Welton Chang

Fmr. Intelligence Officer, Defense Intelligence Agency; Ret. Intelligence Officer, U.S. Army

Tom Atkin

Fmr. Acting Assistant Secretary of Defense for Homeland Defense and Global Security, DoD

Bryson Bort

Ret. Officer, U.S. Army; Founder & CEO, SCYTHE

Giovanna Cinelli

Partner & Practice Lead for International Trade & National Security, Morgan Lewis and Bockius LLP

The Experts

Luke Coffey

Director of the Allison Center for Foreign Policy Studies, The Heritage Foundation

Shawnee Delaney

Fmr. Intelligence Officer, CIA

Matthew Ferraro

Fmr. Intelligence Officer, CIA; Senior Associate, Wilmer Cutler Pickering Hale & Dorr

David Coher

Principal of Strategic Planning and Power Supply, Southern California Edison

Paula Doyle

Fmr. Associate Deputy Director for Operations Technology, CIA

Brandon Friedman

Fmr. Deputy Assistant Secretary for Public Affairs, Department of Housing and Urban Development

Joe Costa

Fmr. Vice President, Cohen Group

David Drabkin, Esq.

Fmr. Chairman of the Section 809 Panel

Dr. Alex Gallo

Executive Director, Common Mission Project; Principal, BMNT

Scott Cullinane

Executive Director, US-Europe Alliance

Robin Dreeke

Fmr. Special Agent, FBI; Fmr. Chief of Counterintelligence Behavioral Analysis Program, FBI

Bishop Garrison

Fmr. Advisor to the Science & Technology Directorate, DHS

Jim Danoy

Fmr. Executive Representative to the FBI, DIA; President's Daily Briefing briefer to President Barack Obama

Dr. Nicholas Dujmovic

Fmr. Analyst, CIA; Director of the Intelligence Studies Program, Catholic University of America

Kevin Gluba

Fmr. Senior Advisor to the U.S. Department of Commerce; Fmr. Executive Director, Alliance for Innovation & Infrastructure

Brett Davis

Fmr. Federal Executive, CIA; Ret. Special Operations Officer, U.S. Navy

Dr. Brent Eastwood

Fmr. CEO & Founder, GovBrain; Fmr. Intelligence Analyst, The Langley Intelligence Group Network

Zach Graves

Head of Policy, Lincoln Network

Loren Dealy Mahler

Fmr. Director of Legislative Affairs, National Security Council; Fmr. Communications Director for the Office of Legislative Affairs, DoD

Robert Eatinger

Fmr. Senior Deputy General Counsel, CIA; Principal, Spylaw Consulting

Andrew Grotto

Fmr. Senior Director for Cyber Policy, National Security Council

The Experts

Steven Hall

Fmr. Chief of Central Eurasia Division, CIA

Andrew Keiser

Fmr. Senior Advisor, House Intelligence Committee

Dr. Andrea Little Limbago

Vice President of Research & Analysis, Interos

Stephanie Hartell

Fmr. Group Chief of Counterterrorism Center's Technical Targeting, CIA

Klon Kitchen

Director, Center of Technology Policy, The Heritage Foundation

Lach Litwer

Principal, Wōden, Ilc; Ret. Senior Advisor to Assistant Secretary, U.S. Air Force

JC Herz

Co-Founder & COO, Ion Channel

Gentry Lane

CEO & Founder, ANOVA Intelligence

Eric Lofgren

Research Fellow, Center for Government Contracting, George Mason University School of Business; Fmr. Consultant, Pentagon

Daniel Hoffman

Fmr. Senior Executive Clandestine Service Officer, CIA

Richard Ledgett

Fmr. Deputy Director, National Security Agency

Mark Lumer

Fmr. Contracting Executive, Space & Missile Defense Command, U.S. Army

Evanna Hu

CEO & Partner, Omelas; Nonresident Senior Fellow at the Scowcroft Center for Security & Strategy, Atlantic Council

Doowan Lee

Senior Director of Research & Strategy, Signal Labs

Dr. Adrian Mayers

Vice President & CISO, Premera Blue Cross

Jamil Jaffer

Founder, NSI; Fmr. Senior Counsel, House Intelligence Committee

Bruce Lemkin

Ret. Deputy Under Secretary, U.S. Air Force

Andrew McClure

Ret. Intelligence Officer, U.S. Marine Corps; Principal, ForcePoint Capital

Lisa Kaplan

Founder, Alethea Group

Dr. Christopher Lew

Major, U.S. Army Reserve; Fmr. Senior Intelligence Analyst, DoD

Dr. Jerry McGinn

Fmr. Senior Official in the Office of Manufacturing & Industrial Base Policy, DoD; Executive Director, Center for Government Contracting, George Mason University School of Business

The Experts

Dr. Barry McManus

Fmr. Clandestine Services Officer, CIA

Lt. Col. (Ret.) Michael Nelson

Professor of Military Science & Chair of the Military Science Department, George Mason University

Adam Pearlman

Founder & Managing Director, Lexpat Global Services

Benjamin McMartin

Ret. Chief of Acquisition Management Office for the Combat Capabilities Development Command – Ground Vehicle Systems Center, U.S. Army

Robert Nugent

Ret. Officer, U.S. Navy; Fmr. Head of Advisory Services, AMI

Briana Petyo Frisone

Fmr. Counselor to Acting Secretary McAleenan & Acting Deputy Secretary Pecoske, DHS

Dr. Gregory McNeal

Co-Founder, AirMap; Professor of Law & Public Policy, Pepperdine Law School

Kenneth Nunnenkamp

Partner, Morgan, Lewis and Bockius LLP

Dr. Yleem Poblete

Fmr. Assistant Secretary of State for Arms Control, Verification, and Compliance, U.S. DoS

Jenny Menna

Senior Vice President & Cybersecurity Partnership Executive, U.S. Bank; Fmr. Senior Executive, DHS

Justin Oberman

Fmr. Senior Executive, DHS; Vice President for New Markets, Cubic Corporation

Philip Reiner

Fmr. Senior Director for South Asia, U.S. National Security Council

Lt. Col. Joseph Moreno

General Counsel & Chief Compliance Officer, SAP National Security Services, Inc.

Sidney Olinyk

Fmr. Chief of Staff for Middle East Policy, Office of the Secretary of Defense; Founder & CEO, Duco

Dr. Arthur Rizer

Director of Criminal Justice & Civil Liberties Policy, The R Street Institute

Dr. Sarah Morningstar

Fmr. Analyst & Manager, Directorate of Intelligence, CIA; Senior Advisor, Threat Pattern

Ankit Panda

Adjunct Senior Fellow in the Defense Posture Project, Federation of American Scientists; Senior Editor, The Diplomat

Lindsay Rodman

Fmr. Director for Defense Policy & Strategy, National Security Council

Harold Moss

CEO, Grey Elk Enterprises

Col. (Ret.) Jane Ellen Paschall

Fmr. Foreign Service Officer, USAID

Stephen Rodriguez

Founder, One Defense

The Experts

Col. (Ret.) Edward Rothstein

President & Owner, ERA Advisors

David Shedd

Fmr. Acting Director, Defense Intelligence Agency

William Tobey

Fmr. Deputy Administrator for Defense Nuclear Nonproliferation, National Nuclear Security Administration

Dr. Michael Rubin

Fmr. Staff Advisor for Iran & Iraq, Office of the Secretary of Defense; Resident Scholar, American Enterprise Institute

Dr. Peter Singer

Founder & Fmr. Director at the Center for 21st Century Security and Intelligence, Brookings Institution

Joseph Trella

Senior Level Consultant, DoD & DHS

Stephen Ryan

Fmr. Intelligence Analyst, National Geospatial Intelligence Agency; Senior Technical Leader & Manager of the Aerospace Systems Sector, Northrop Grumman Corporation

Dr. Stanley Sloan

Fmr. Senior Specialist in International Security Policy, Congressional Research Service

Nick Tsiopanas

Lead Researcher, Section 809 Panel; Founder & President, ZYGOS Consulting

Faissal Salamey

Fmr. Clandestine Services Officer, CIA; Ret. Counterintelligence Officer, U.S. Marine Corps

Bryan Smith

Fmr. Senior Executive, Office of Management & Budget; Fmr. Budget Director, House Permanent Select Committee on Intelligence

Bryana Tucci

Fmr. Foreign Service Officer, U.S. DoS; Program Manager, In-Q-Tel

Tony Samp

Fmr. Founding Director, Senate Artificial Intelligence Caucus; Policy Advisor, DLA Piper

Jeremy Strozer

Fmr. Presidential Management Fellow, U.S. DoS

Karl Wagner

Fmr. Directorate of Operations Expert Manager, CIA; CEO, Eastern Sky Technologies

David Sauer

Fmr. Senior Executive Clandestine Service Officer, CIA

Hector Tavera

Fmr. Senior Operations Officer & Field Manager, CIA

Dr. Richard Weitz

Senior Fellow & Director of The Center for Political-Military Analysis, Hudson Institute

Lucas Schleusener

Director of Public Policy, Fractal Industries

John Thorne

Partner, One Defense

Maj. Gen. (Ret.) John Wharton

Ret. Commanding General of the Army Research, Development & Engineering Command, U.S. Army

Dr. Joseph Williams

Fmr. ICT Sector Lead, Governor Jay Inslee; Seattle Director, Pacific Northwest National Laboratory

Survey Questions

SURVEY QUESTIONS

1. In which of the following areas do you have strong expertise?

- A. Aerospace/Aviation
- B. Contracting/Acquisition Policy
- C. Cybersecurity
- D. Defense Procurement
- E. Economics
- F. Emerging Technology
- G. Entrepreneurship
- H. Finance
- I. Foreign Policy/Geopolitics
- J. Homeland Security
- K. Intellectual Property
- L. Intelligence
- M. Manufacturing and Industrial Base Policy
- N. National security
- O. Private Sector Business Practices
- P. Private Equity
- Q. Startups
- R. Telecommunications
- S. Venture Capital

2. If you have regional expertise, please select accordingly.

- A. Africa (sub-Saharan) Region
- B. East Asia and Pacific Region
- C. Europe and Eurasia Region
- D. Near East (North African and Middle East) Region
- E. South and Central Asia Region
- F. Western Hemisphere Region
- G. International Organizations
- H. Others

SURVEY QUESTIONS (CONT.)

3. If you have country expertise, please select accordingly.

- A. Israel
- B. Iran
- C. India
- D. North Korea
- E. Pakistan
- F. China
- G. Russia
- H. NATO Countries
- I. Others

4. The U.S. is operating in a geopolitical and strategic environment where...

- A. it enjoys a dominant military advantage that will likely be unchallenged in the future.
- B. it enjoys a dominant military advantage but potential adversaries are closing the gap.
- C. the U.S. enjoys a comparative military advantage in some areas, but in others the gap has closed or the US has been surpassed.
- D. No opinion
- E. I don't know enough about this topic.

5. China is a major...

- A. economic competitor to the U.S.
- B. national security competitor to the U.S.
- C. economic ally to the U.S.
- D. national security ally to the U.S.
- E. No opinion
- F. I don't know enough about this topic.

6. China is currently a...

- A. regional actor and likely to remain so in the next decade.
- B. regional actor and likely to become a global actor in the next decade.
- C. global actor and likely to remain so in the next decade.
- D. global actor and likely to become a regional actor in the next decade.
- E. No opinion
- F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

7. Russia is a major...

- A. economic competitor to the U.S.
- B. national security competitor to the U.S.
- C. economic ally to the U.S.
- D. national security ally to the U.S.
- E. No opinion
- F. I don't know enough about this topic.

8. Russia is currently a...

- A. regional actor and likely to remain so in the next decade.
- B. regional actor and likely to become a global actor in the next decade.
- C. global actor and likely to remain so in the next decade.
- D. global actor and likely to become a regional actor in the next decade.
- E. No opinion
- F. I don't know enough about this topic.

9. Iran is a major...

- A. economic competitor to the U.S.
- B. national security competitor to the U.S.
- C. economic ally to the U.S.
- D. national security ally to the U.S.
- E. No opinion
- F. I don't know enough about this topic.

10. Iran is currently a...

- A. regional actor and likely to remain so in the next decade.
- B. regional actor and likely to become a global actor in the next decade.
- C. global actor and likely to remain so in the next decade.
- D. global actor and likely to become a regional actor in the next decade.
- E. No opinion
- F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

11. North Korea is a major...

- A. economic competitor to the U.S.
- B. national security competitor to the U.S.
- C. economic ally to the U.S.
- D. national security ally to the U.S.
- E. No opinion
- F. I don't know enough about this topic.

12. North Korea is currently a...

- A. regional actor and likely to remain so in the next decade.
- B. regional actor and likely to become a global actor in the next decade.
- C. global actor and likely to remain so in the next decade.
- D. global actor and likely to become a regional actor in the next decade.
- E. No opinion
- F. I don't know enough about this topic.

13. Consider this statement: "To maintain technological and operational superiority on the battlefield, the DoD must better leverage technologies and capabilities developed by commercial companies, including startups, that do not traditionally supply to DoD." there is a space between statement and question on typeform Which of the following best represents your thoughts on that statement?

- A. Strongly agree
- B. Somewhat agree
- C. Somewhat disagree
- D. Strongly disagree
- E. No opinion
- F. I don't know enough about this topic.

14. How important is it for the U.S. government to support the U.S. national security industrial base to ensure access to critical components?

- A. Very important
- B. Somewhat important
- C. Not very important
- D. Not at all important
- E. No opinion
- F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

15. **How can the U.S. government best support the U.S. national security industrial base?**
- A. By providing contracts to U.S. companies for national security goods and services
 - B. By supporting core research and development in U.S. companies and academia through grant programs
 - C. By directly investing in U.S. companies that are working on dual use technologies
 - D. By incentivizing investments in U.S. companies that are working on dual use technologies
 - E. I don't know enough about this topic.
 - F. No opinion
 - G. Other (tool allows respondents to answer when choosing Other)
16. **The Senate and House NDAA bills contain a provision phasing out U.S. purchases of printed circuit boards produced in China, Russia, Iran, North Korea, and other designated countries over the next 10 years. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
17. **With respect to the NDAA provision phasing out U.S. purchases of printed circuit boards produced in China, Russia, Iran, North Korea, and other designated countries over the next 10 years. You would...**
- A. shorten the timeframe to less than 10 years
 - B. lengthen the timeframe to more than 10 years
 - C. keep the current timeframe of 10 years
 - D. No opinion
 - E. I don't know enough about this topic.
18. **The Senate NDAA would require DoD protect defense-sensitive technology and data from being acquired by China. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

19. **The House NDAA would expand an existing prohibition on acquiring certain metal products from Russia, North Korea, China, or Iran, to include tungsten and would also tighten existing restrictions on the acquisition of such metals. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
20. **The House NDAA would tighten "Buy America" requirements for major defense program components by 75% of the content to be domestic by Oct. 2021 and 100% by Oct. 2026. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
21. **Today, there is a requirement to buy certain domestic items on any program that is more than \$250,000. The Senate NDAA bill would lower that dollar threshold to \$150,000, accounting for inflation adjustments made every 5 years. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

22. **Through a specific authority, the Senate NDAA bill would permanently allow DoD to acquire innovative commercial products and services through general solicitations if there is a competitive peer review of proposals. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
23. **The House NDAA bill would require the National Defense Strategy to put more of a priority on sustainment of major defense acquisition programs. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
24. **The House NDAA bill requires the DoD to develop metrics for readiness and availability of weapons systems, and to submit sustainment plans and cost estimates prior to production. You...**
- A. strongly support this provision.
 - B. somewhat support this provision.
 - C. somewhat oppose this provision.
 - D. strongly oppose this provision.
 - E. No opinion
 - F. I don't know enough about this topic.
25. **The U.S. no longer possesses the necessary manufacturing capabilities to support DoD systems at the rate required to protect our national security. You...**
- A. strongly agree.
 - B. somewhat agree.
 - C. somewhat disagree.
 - D. strongly disagree.
 - E. No opinion
 - F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

26. **The defense industrial base supply chain is underfunded, which presents a national security risk. You...**
- A. strongly agree.
 - B. somewhat agree.
 - C. somewhat disagree.
 - D. strongly disagree.
 - E. No opinion
 - F. I don't know enough about this topic.
27. **Which is in the long-term interest of U.S. national security?**
- A. Maintain current regulations that seek to minimize costs to the government but may not sustain the current defense manufacturing base.
 - B. Cut regulations and be willing to pay more to increase competition and foster a stronger defense manufacturing base.
 - C. Engage in other policy changes to increase competition and foster a strong defense manufacturing base.
 - D. None of the above
 - E. No opinion
 - F. I don't know enough about this topic
28. **The FY 2019 NDAA (section 889) generally prohibits the federal government from contracting entities that use certain Chinese telecommunications equipment or services at a significant scale. You believe that enforcement of this requirement is generally...**
- A. very important.
 - B. somewhat important.
 - C. not important.
 - D. No opinion
 - E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

29. **With respect to the Chinese telecommunications equipment or services provision from the Fiscal Year 2019 NDAA, the U.S. government has previously delayed implementation to give government contractors more time to comply. You would...**
- A. continue to extend the time available to comply for over a year.
 - B. continue to extend the time available to comply for only one year.
 - C. continue to extend the time available to comply for less than a year.
 - D. enforce the restriction now.
 - E. No opinion
 - F. I don't know enough about this topic.
30. **How does the Chinese telecommunications equipment or services provision from the FY2019 NDAA impact DoD's efforts to attract new companies to work with DoD?**
- A. It makes it easier for American commercial companies to work with DoD.
 - B. It makes it harder for American commercial companies to work with DoD.
 - C. It limits the ability of American companies who comply to compete globally.
 - D. It does not impact American commercial companies working with DoD.
 - E. No opinion
 - F. I don't know enough about this topic.
31. **DoD is incorporating the Cybersecurity Maturity Model Certification (CMMC) as a requirement for defense contracting. You believe this provision is...**
- A. very important.
 - B. somewhat important.
 - C. not important.
 - D. No opinion
 - E. I don't know enough about this topic.
32. **How would the CMMC requirement impact DoD's efforts to attract new companies to work with DoD?**
- A. It makes it easier for American commercial companies to work with DoD.
 - B. It makes it harder for American commercial companies to work with DoD.
 - C. It does not impact American commercial companies working with DoD.
 - D. No opinion
 - E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

33. **In recent years, Congress has delegated more acquisition authority to military services, SOCOM, and Cyber Command. You..**
- A. support all of these efforts.
 - B. support most of these efforts.
 - C. oppose most of these efforts.
 - D. oppose all of these efforts.
 - E. No opinion
 - F. I don't know enough about this topic.
34. **Do you support the Defense Department's request to grant the newly-established U.S. Space Force independent acquisition authorities?**
- A. Strongly support
 - B. Somewhat support
 - C. Somewhat oppose
 - D. Strongly oppose
 - E. No opinion
 - F. I don't know enough about this topic.
35. **Do you support the House NDAA provision which would give the Director of Joint Artificial Intelligence Center (JAIC) acquisition authorities that are equivalent to the head of an agency?**
- A. Strongly support
 - B. Somewhat support
 - C. Somewhat oppose
 - D. Strongly oppose
 - E. No opinion
 - F. I don't know enough about this topic.
36. **DoD recently announced that it would provide funds to fragile critical manufacturers to help sustain and strengthen essential domestic industrial base capabilities and defense critical workforce. You...**
- A. strongly support such actions.
 - B. somewhat support such actions.
 - C. somewhat oppose such actions.
 - D. strongly oppose such actions.
 - E. No opinion
 - F. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

37. Should DoD maintain a cadre of experts to help contracting officers in navigating commercial item determinations, intellectual property issues and a range of contracting approaches?

- A. Yes
- B. No
- C. Not sure
- D. No opinion
- E. I don't know enough about this topic.

For the following questions, please provide your opinion on if each component of the government acquisition process...

- 1) adds value.
- 2) is unnecessarily burdensome.
- 3) is just right.
- 4) No opinion
- 5) I don't know enough about this topic.

38. The current DoD budget process...

- A. adds value.
- B. is unnecessarily burdensome.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

39. The DoD requirements process...

- A. adds value.
- B. is unnecessarily burdensome.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

40. The DoD contracting process...

- A. adds value.
- B. is unnecessarily burdensome.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

41. DoD small business set-asides...

- A. add value.
- B. are unnecessarily burdensome.
- C. are just right.
- D. No opinion
- E. I don't know enough about this topic.

42. Other DoD set-asides...

- A. add value.
- B. are unnecessarily burdensome.
- C. are just right.
- D. No opinion
- E. I don't know enough about this topic.

For the following questions, please provide your opinion on if each component of the government acquisition process...

- 1) is too bureaucratic/slow the process down too much.
- 2) is not sufficiently rigorous.
- 3) is about right.
- 4) No opinion
- 5) I don't know enough about this topic.

43. The DoD budget process...

- A. is too bureaucratic.
- B. is not sufficiently rigorous.
- C. is about right.
- D. No opinion
- E. I don't know enough about this topic.

44. The DoD requirements process...

- A. is too bureaucratic.
- B. is not sufficiently rigorous.
- C. is about right.
- D. No opinion
- E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

45. The DoD contracting process...

- A. is too bureaucratic.
- B. is not sufficiently rigorous.
- C. is about right.
- D. No opinion
- E. I don't know enough about this topic.

46. DoD commercial items regulations...

- A. are too bureaucratic.
- B. are not sufficiently rigorous.
- C. are about right.
- D. No opinion
- E. I don't know enough about this topic.

47. DoD cost and pricing requirements...

- A. are too bureaucratic.
- B. are not sufficiently rigorous.
- C. are about right.
- D. No opinion
- E. I don't know enough about this topic.

48. DoD bid protests...

- A. are too bureaucratic.
- B. are not sufficiently rigorous.
- C. are about right.
- D. No opinion
- E. I don't know enough about this topic.

49. DoD small business set-asides...

- A. are too bureaucratic.
- B. are not sufficiently rigorous.
- C. are about right.
- D. No opinion
- E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

50. Other DoD set-asides...

- A. are too bureaucratic.
- B. are not sufficiently rigorous.
- C. are about right.
- D. No opinion
- E. I don't know enough about this topic.

For the following questions, please provide your opinion on if each component of the government acquisition process...

- 1) has too much oversight/layers of review.
- 2) has insufficient oversight.
- 3) is just right.
- 4) No opinion
- 5) I don't know enough about this topic.

51. The DoD budget process...

- A. has too much oversight/layers of review.
- B. has insufficient oversight.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

52. The DoD requirements process...

- A. has too much oversight/layers of review.
- B. has insufficient oversight.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

53. The DoD contracting process...

- A. has too much oversight/layers of review.
- B. has insufficient oversight.
- C. is just right.
- D. No opinion
- E. I don't know enough about this topic.

SURVEY QUESTIONS (CONT.)

54. The DoD bid protests...

- A. have too much oversight/layers of review.
- B. have insufficient oversight.
- C. are just right.
- D. No opinion
- E. I don't know enough about this topic.

55. Are you interested in being more active on any of these topics? If so, what is of particular interest to you?

Duco will be in touch after the survey with future opportunities.

Multiple selection allowed.

- A. Speaking on panels or at events
- B. Writing policy papers
- C. Writing op-eds
- D. Contributing to surveys like this
- E. Advising companies
- F. Educating policy-makers
- G. None of the above
- H. Other (fill in)

Aggregated Data

AGGREGATED DATA

NDAAs EXPERT SURVEY

111 RESPONSES

1 The U.S. is operating in a geopolitical and strategic environment where...

The U.S. enjoys a comparative military advantage in some areas, but in others the gap has closed or the US has been surpassed.



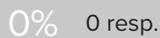
It enjoys a dominant military advantage that will likely be unchallenged in the future.



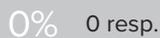
it enjoys a dominant military advantage that will likely be unchallenged in the future.



I don't know enough about this topic.



No opinion



2 China is a major...

national security competitor to the U.S.



economic competitor to the U.S.



economic ally to the U.S.



No opinion



national security ally to the U.S.



I don't know enough about this topic.

0 resp.

AGGREGATED DATA CONT.

3 China is currently a...

global actor and likely to remain so in the next decade.

73% 81 resp.

regional actor and likely to become a global actor in the next decade.

21.6% 24 resp.

regional actor and likely to remain so in the next decade.

2.7% 3 resp.

global actor and likely to become a regional actor in the next decade.

1.8% 2 resp.

No opinion

0.9% 1 resp.

I don't know enough about this topic.

0%

4 Russia is a major...

national security competitor to the U.S.

99.1% 110 resp.

economic competitor to the U.S.

12.6% 14 resp.

economic ally to the U.S.

0.9% 1 resp.

I don't know enough about this topic.

0.9% 1 resp.

national security ally to the U.S.

0.9% 1 resp.

No opinion

0%

AGGREGATED DATA CONT.

5 Russia is currently a...

global actor and likely to remain so in the next decade.



regional actor and likely to remain so in the next decade.



global actor and likely to become a regional actor in the next decade.



global actor and likely to become a regional actor in the next decade.



regional actor and likely to become a global actor in the next decade.



I don't know enough about this topic.



6 Iran is a major...

national security competitor to the U.S.



No opinion



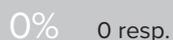
economic competitor to the U.S.



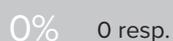
I don't know enough about this topic.



economic ally to the U.S.



national security ally to the U.S.



AGGREGATED DATA CONT.

7 Iran is currently a...

regional actor and likely to remain so in the next decade.



regional actor and likely to become a global actor in the next decade.



global actor and likely to remain so in the next decade.



I don't know enough about this topic.



No opinion



global actor and likely to become a regional actor in the next decade.



8 North Korea is a major...

national security competitor to the U.S.



No opinion



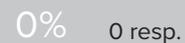
economic competitor to the U.S.



I don't know enough about this topic.



economic ally to the U.S.



national security ally to the U.S.



AGGREGATED DATA CONT.

9 North Korea is currently a...

regional actor and likely to remain so in the next decade.

86.5% 96 resp.

regional actor and likely to become a global actor in the next decade.

6.3% 7 resp.

global actor and likely to remain so in the next decade.

3.6% 4 resp.

No opinion

1.8% 2 resp.

global actor and likely to become a regional actor in the next decade.

0.9% 1 resp.

I don't know enough about this topic.

0.9% 1 resp.

10 Consider this statement: "To maintain technological and operational superiority on the battlefield, the DoD must better leverage technologies and capabilities developed by commercial companies, including startups, that do not traditionally supply to DoD." Which of the following best represents your thoughts on that statement?

Strongly agree

84.7% 94 resp.

Somewhat agree

14.4% 16 resp.

Somewhat disagree

0.9% 1 resp.

I don't know enough about this topic.

0% 0 resp.

No opinion

0% 0 resp.

Strongly disagree

0% 0 resp.

AGGREGATED DATA CONT.

11 How important is it for the U.S. government to support the U.S. national security industrial base to ensure access to critical components?

Very important



Somewhat important



No opinion



Not very important



I don't know enough about this topic.



Not at all important



12 How can the U.S. government best support the U.S. national security industrial base?

By supporting core research and development in U.S. companies and academia through grant programs.



By providing contracts to U.S. companies for national security goods and services.



By incentivizing investments in U.S. companies that are working on dual use technologies.



By directly investing in U.S. companies that are working on dual use technologies.



I don't know enough about this topic.



Other



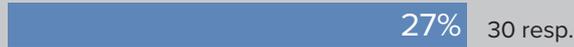
AGGREGATED DATA CONT.

- 13 The Senate and House NDAA bills contain a provision phasing out U.S. purchases of printed circuit boards produced in China, Russia, Iran, North Korea, and other designated countries over the next 10 years. You...

strongly support this provision.



somewhat support this provision.



I don't know enough about this topic.



somewhat oppose this provision.



No opinion



strongly oppose this provision.



-
- 14 With respect to the NDAA provision phasing out U.S. purchases of printed circuit boards produced in China, Russia, Iran, North Korea, and other designated countries over the next 10 years. You would...

shorten the timeframe to less than 10 years.



keep the current timeframe of 10 years.



I don't know enough about this topic.



No opinion



lengthen the timeframe to more than 10 years.



AGGREGATED DATA CONT.

15 The Senate NDAA would require DoD protect defense-sensitive technology and data from being acquired by China. You..

strongly support this provision.



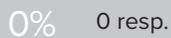
somewhat support this provision.



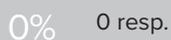
I don't know enough about this topic.



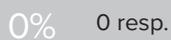
No opinion



somewhat oppose this provision.



strongly oppose this provision.



16 The House NDAA would expand an existing prohibition on acquiring certain metal products from Russia, North Korea, China, or Iran, to include tungsten and would also tighten existing restrictions on the acquisition of such metals. You...

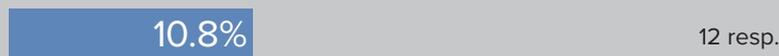
strongly support this provision.



somewhat support this provision.



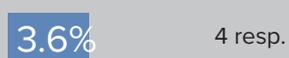
I don't know enough about this topic.



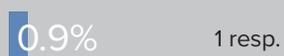
somewhat oppose this provision.



No opinion



strongly oppose this provision.



AGGREGATED DATA CONT.

17 The House NDAA would tighten "Buy America" requirements for major defense program components by 75% of the content to be domestic by Oct. 2021 and 100% by Oct. 2026. You...

somewhat support this provision.



strongly support this provision.



somewhat oppose this provision.



I don't know enough about this topic.



strongly oppose this provision.



No opinion



18 Today, there is a requirement to buy certain domestic items on any program that is more than \$250,000. The Senate NDAA bill would lower that dollar threshold to \$150,000, accounting for inflation adjustments made every 5 years. You...

somewhat support this provision.



strongly support this provision.



I don't know enough about this topic.



somewhat oppose this provision.



No opinion



strongly oppose this provision.



AGGREGATED DATA CONT.

19 Through a specific authority, the Senate NDAA bill would permanently allow DoD to acquire innovative commercial products and services through general solicitations if there is a competitive peer review of proposals. You...

strongly support this provision.



somewhat support this provision.



I don't know enough about this topic.



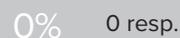
No opinion



somewhat oppose this provision.



strongly oppose this provision.



20 The House NDAA bill would require the National Defense Strategy to put more of a priority on sustainment of major defense acquisition programs. You...

strongly support this provision.



somewhat support this provision.



I don't know enough about this topic.



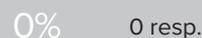
somewhat oppose this provision.



No opinion



strongly oppose this provision.



AGGREGATED DATA CONT.

21 The House NDAA bill requires the DoD to develop metrics for readiness and availability of weapons systems, and to submit sustainment plans and cost estimates prior to production. You...

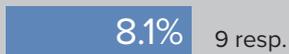
strongly support this provision.



somewhat support this provision.



I don't know enough about this topic.



somewhat oppose this provision.



No opinion



strongly oppose this provision.



22 The U.S. no longer possesses the necessary manufacturing capabilities to support DoD systems at the rate required to protect our national security. You...

somewhat agree.



strongly agree.



somewhat disagree.



I don't know enough about this topic.



strongly disagree.



No opinion



AGGREGATED DATA CONT.

23 The defense industrial base supply chain is underfunded, which presents a national security risk. You...

strongly agree.



somewhat agree.



somewhat disagree.



I don't know enough about this topic.



No opinion



strongly disagree.



24 Which is in the long-term interest of U.S. national security?

Engage in other policy changes to increase competition and foster a strong defense manufacturing base.



Cut regulations and be willing to pay more to increase competition and foster a stronger defense manufacturing base.



Maintain current regulations that seek to minimize costs to the government but may not sustain the current defense manufacturing base.



No opinion



I don't know enough about this topic



None of the above.



AGGREGATED DATA CONT.

25 The FY 2019 NDAA (section 889) generally prohibits the federal government from contracting entities that use certain Chinese telecommunications equipment or services at a significant scale. You believe that enforcement of this requirement is generally...

very important.



somewhat important.



not important.



I don't know enough about this topic.



No opinion



26 With respect to the Chinese telecommunications equipment or services provision from the Fiscal Year 2019 NDAA, the U.S. government has previously delayed implementation to give government contractors more time to comply. You would...

continue to extend the time available to comply for only one year.



enforce the restriction now.



continue to extend the time available to comply for over a year.



continue to extend the time available to comply for less than a year.



I don't know enough about this topic.



No opinion



AGGREGATED DATA CONT.

27 How does the Chinese telecommunications equipment or services provision from the Fiscal Year 2019 NDAA impact DoD's efforts to attract new companies to work with DoD?

It makes it harder for American commercial companies to work with DoD.

23.4% 26 resp.

It limits the ability of American companies who comply to compete globally.

19.8% 22 resp.

I don't know enough about this topic.

15.3% 17 resp.

It makes it easier for American commercial companies to work with DoD.

15.3% 17 resp.

It does not impact American commercial companies working with DoD.

13.5% 15 resp.

No opinion

12.6% 14 resp.

28 DoD is incorporating the Cybersecurity Maturity Model Certification (CMMC) as a requirement for defense contracting. You believe this provision is...

very important.

41.4% 46 resp.

somewhat important..

27% 30 resp.

I don't know enough about this topic..

25.2% 28 resp.

not important..

4.5% 5 resp.

No opinion

1.8% 2 resp.

AGGREGATED DATA CONT.

29 How would the CMMC requirement impact DoD's efforts to attract new companies to work with DoD?

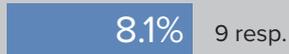
It makes it harder for American commercial companies to work with DoD.



I don't know enough about this topic.



It makes it easier for American commercial companies to work with DoD.



It does not impact American commercial companies working with DoD.



It limits the ability of American companies who comply to compete globally.



No opinion



30 In recent years, Congress has delegated more acquisition authority to military services, SOCOM, and Cyber Command. You..

support all of these efforts.



support most of these efforts.



I don't know enough about this topic.



No opinion



oppose most of these efforts.



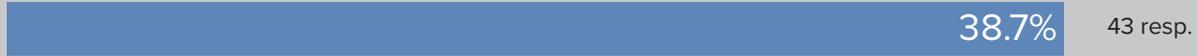
oppose all of these efforts.



AGGREGATED DATA CONT.

31 Do you support the Defense Department's request to grant the newly-established U.S. Space Force independent acquisition authorities?

Somewhat support



Strongly support



Somewhat oppose



Strongly oppose



I don't know enough about this topic.



No opinion



32 Do you support the House NDAA provision which would give the Director of Joint Artificial Intelligence Center (JAIC) acquisition authorities that are equivalent to the head of an agency?

Somewhat support



Strongly support



I don't know enough about this topic.



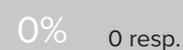
Somewhat oppose



No opinion



Strongly oppose



AGGREGATED DATA CONT.

33 DoD recently announced that it would provide funds to fragile critical manufacturers to help sustain and strengthen essential domestic industrial base capabilities and defense critical workforce. You...

strongly support such actions.

56.8% 63 resp.

somewhat support such actions.

31.5% 63 resp.

I don't know enough about this topic.

6.3% 7 resp.

somewhat oppose such actions.

3.6% 4 resp.

No opinion

1.8% 2 resp.

strongly oppose such actions.

0% 0 resp.

34 Should DoD maintain a cadre of experts to help contracting officers in navigating commercial item determinations, intellectual property issues and a range of contracting approaches?

Yes

80.1% 89 resp.

Not sure

8.1% 10 resp.

I don't know enough about this topic.

6.3% 7 resp.

No

3.6% 4 resp.

No opinion

0.9% 1 resp.

AGGREGATED DATA CONT.

35 The current DoD budget process...

is unnecessarily burdensome.



adds value.



I don't know enough about this topic.



No opinion



is just right.



36 The DoD requirements process...

is unnecessarily burdensome.



adds value.



No opinion



I don't know enough about this topic.



is just right.



AGGREGATED DATA CONT.

37 The DoD contracting process...

is unnecessarily burdensome.



I don't know enough about this topic.



No opinion



adds value.



is just right.



38 DoD small business set-asides...

add value.



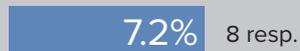
are unnecessarily burdensome.



I don't know enough about this topic.



No opinion



are just right.



AGGREGATED DATA CONT.

39 Other DoD set-asides...

add value.



are unnecessarily burdensome.



I don't know enough about this topic.



No opinion



is just right.



40 The DoD budget process...

is too bureaucratic.



is not sufficiently rigorous.



I don't know enough about this topic.



is about right.



No opinion



AGGREGATED DATA CONT.

41 The DoD requirements process...

is too bureaucratic.



is about right.



is not sufficiently rigorous.



I don't know enough about this topic.



No opinion



42 The DoD contracting process...

is too bureaucratic.



I don't know enough about this topic.



is not sufficiently rigorous.



No opinion



is about right.



AGGREGATED DATA CONT.

43 DoD commercial items regulations...

are too bureaucratic.

45.9% 51 resp.

I don't know enough about this topic.

20.7% 23 resp.

are about right.

14.4% 16 resp.

are not sufficiently rigorous.

11.7% 13 resp.

No opinion

7.2% 8 resp.

44 DoD cost and pricing requirements...

are too bureaucratic.

57.7% 64 resp.

I don't know enough about this topic.

15.3% 17 resp.

are not sufficiently rigorous.

13.5% 15 resp.

are about right.

7.2% 8 resp.

No opinion

6.3% 7 resp.

AGGREGATED DATA CONT.

45 DoD bid protests...

are too bureaucratic.



I don't know enough about this topic.



are about right.



are not sufficiently rigorous.



No opinion



46 DoD small business set-asides...

are about right.



are too bureaucratic.



I don't know enough about this topic.



No opinion



are not sufficiently rigorous.



AGGREGATED DATA CONT.

47 Other DoD set-asides...

are too bureaucratic.



I don't know enough about this topic.



are about right.



No opinion



are not sufficiently rigorous.



48 The DoD budget process...

has too much oversight/layers of review.



has insufficient oversight.



is just right.



No opinion



I don't know enough about this topic.



AGGREGATED DATA CONT.

49 The DoD requirements process...

has too much oversight/layers of review.



is just right.



I don't know enough about this topic.



has insufficient oversight.



No opinion



50 The DoD contracting process...

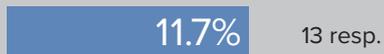
has too much oversight/layers of review.



has insufficient oversight.



I don't know enough about this topic.



No opinion



is just right.



AGGREGATED DATA CONT.

51 The DoD bid protests...

have too much oversight/layers of review.



I don't know enough about this topic.



are just right.



No opinion



have insufficient oversight.

