

US Government Benchmark report 2026

A foundation of strength
and why reform should
target the system



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Definition of terms

US Government

The survey respondents for this report are from the US Federal Government, its agencies and departments, and the Government's suppliers.

Global Benchmark

Data for the Global Benchmark is from the private and public sectors worldwide, excluding the US Government (i.e. it includes the US private sector).

Respondent demographics

574 

Total respondents

50% 

US Government – Buy-side

50% 

Suppliers to Government – Sell-side

Respondents were evenly split between the two perspectives, with 50% representing US Government / public sector agencies and 50% representing suppliers to the Government. This even representation strengthens the comparative analysis between government and commerce views throughout the report.

Roles

Contract Management	68%
Procurement / Supply Management	31%
Project Management	14%
CCM	10%
Legal	6%
Finance	5%
Commercial Management	3%
Other	11%

The respondent mix is highly representative of the profession, weighted primarily toward Contract Management (68%) and Procurement / Supply Management (31%), with smaller representation from Project Management, Legal, Finance, and Commercial Management. This distribution aligns with expectations for a survey focused on contract and procurement practices.

Supplier sectors

Aerospace and defense	47%
Services, outsourcing and consulting	13%
Technology and software	11%
Engineering, construction and real estate	8%
Health and pharma	3%
Manufacturing and processing	2%
Telecomms	2%
Not-for-profit / charity	2%
Oil, gas, minerals and utilities	1%
Banking, insurance and financial	1%
Electronics	1%
Legal	1%
Transportation and logistics	1%
Other	8%

While the sector breakdown includes many sectors, the supplier data is effectively split into two groups, aerospace and defense (47%) and all other non-defense sectors combined.

Foreword

The US Government acquisition system rests on foundations that few others can match. Decades of investment in policy, workforce development, procedural discipline and professional standards have produced a system of exceptional sophistication and reach.

Most governments – and many corporations – would envy it. These foundations are an asset, and this report should be read not only as a study on their current state, but also how to build on them.

Building is necessary because the world has shifted. Old certainties have been replaced by ever-present uncertainty – geopolitical disruption, technological acceleration, supply volatility and fiscal pressure now define the operating environment. A discipline designed for stability must operate with a new level of adaptability and resilience. That is not a judgment – it is a recognition that the conditions the system was built for have changed.

This report identifies that part of the challenge lies in language. The call to be more ‘commercial’ now runs through policy, reform efforts and leadership messaging, yet the term is not consistently understood. For some, it refers to commercial item acquisition under the Federal Acquisition Regulation (FAR). For others, it means behaving more like the private sector. Sometimes it points to commercial terms and conditions. And sometimes it refers to commercial management as a discipline in its own right. When these meanings blur, both the destination and the path forward become unclear.

The distinction matters because acquisition and commercial capability are not the same thing. Acquisition is concerned with the act of buying. Commercial capability is concerned with the design, governance and performance of the wider system of commitments on which mission success depends –

connecting market opportunity, stakeholder need, supplier relationships, contractual commitments, operational delivery and outcomes over time. Acquisition is a transaction. Commercial capability is a system.

The most striking finding in this Benchmark concerns the people. US Government respondents show remarkable levels of personal resilience and adaptability – qualities the wider environment now demands. Yet the Benchmark repeatedly demonstrates that resilience is compensating for structural constraints rather than overcoming them. Review structures, governance arrangements and fragmented accountabilities continue to shape behavior more powerfully than individual capability.

The central question raised by this report is therefore not whether the workforce is capable of change, but whether the operating system within which it works is capable of supporting it.

This distinction has important consequences for reform. Systems rarely change because one component changes. Training negotiators, introducing AI, expanding commercial discretion or adopting new contracting models will each deliver only limited benefit if the surrounding operating model remains unchanged.

Indeed, isolated improvements may simply increase pressure on existing bottlenecks, or result in new ones. A review architecture already under strain from standardized contracting is unlikely to perform better if every agreement demands greater commercial judgment without corresponding changes to governance, authority and decision support.

The opportunity, therefore, is not simply to modernize US Government acquisition but to redesign the relationships between its component parts. The task is to preserve the strengths of discipline, transparency and accountability while creating an operating model capable of supporting adaptability, commercial judgment and continuous performance improvement.



Tim Cummins
Executive Director,
CCM Institute



Patrick Hughes
Senior Director,
Public Sector Industry Advisor,
Icertis

Executive summary

US Government contracting teams understand the need for fundamental change. The 2025/26 US Government Benchmark survey, set against the CCM Institute Global Benchmark covering the worldwide private sector and public sector outside the US, shows that the ambition to meet that need is present.

However, this report also shows that the conditions to convert ambition into impact are not yet in place. There are five findings from the data that make this clear:

1. Resilience is personal, not systemic. US Government respondents rate their resilience and adaptability higher than any other sector in the Global Benchmark. At the organizational level, the data does not support that confidence: approval structures remain slow, governance models rigid, and commercial frameworks narrow. The workforce has learned to endure, while the system has not learned to adapt. That must change.

2. Complexity is internally generated. US Government employees report materially higher contract complexity than the suppliers serving the same environment. It is not the nature of the work that explains this gap. It is the internal architecture, and it is evident in late engagement of contracting professionals, fragmented accountability across functions, and approval chains that add time without adding value. Complexity here is a product of the system, not the mission. The delay data confirms it from both sides of the table: buyers attribute three quarters of delay causes to their own internal review, workload and process; suppliers agree.

3. Strategic priorities are clear; the barriers remain in place. Respondents identify process improvement, cost savings, strategic relevance, and talent development as their leading priorities. This is the right agenda for a function under pressure. But the barriers they name, including late involvement, workload, uncertainty, and gaps in leadership quality, have been reported for years. They persist because they are features of how the system is designed, and it is design features that set the scene for performance.

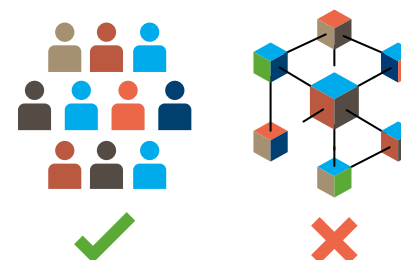
4. Commercial model diversity remains a major constraint. Performance-based contracting is genuinely embedded in government practice, partly because it maps naturally onto existing audit and measurement frameworks. Outcome-based, relational, alliance, and adaptive models remain marginal. The survey confirms that volatility is rising, and in a volatile environment a narrow commercial repertoire is a strategic liability. The real question is not whether these models suit US Government use, but whether the governance and capability exist to deploy them.

5. The intelligence layer is thin. US Government agencies have made real progress in digitizing operational and administrative processes. The gap lies in what comes after – automated post-award monitoring, portfolio analytics, dynamic playbooks, and the contract intelligence that turns data into decisions. Artificial Intelligence (AI) deployment follows the same pattern, concentrated on pre-award task management rather than on genuinely new commercial capability. Tools are being acquired faster than the infrastructure needed to exploit them.

Together, these five findings point to a single conclusion: this is a system problem, not a people problem. The path forward requires change in governance design, commercial model breadth, accountability structures, and the role contracting plays in mission delivery itself.

Key problems with the system

- The Benchmark identifies an operating model constraint rather than a workforce capability constraint.
- Greater commercial flexibility cannot simply be added to today's governance model. Without redesign it increases reviews, approvals and workload.
- Technology has digitized administration faster than commercial decision-making.
- Future reform depends less on changing procurement than on redesigning the commercial operating system surrounding it.



The report findings conclude that this is not a *people* problem, it is a *system* problem.

An American story

This is a *specifically* American story. It is shaped by the architecture of the Federal Acquisition Regulation (FAR) and the Defense Federal Acquisition Regulation Supplement (DFARS), by the scale of past investment in the acquisition workforce, and by the intensity of current political and fiscal pressure.

Other public agencies worldwide operate under procurement rules of varying weight, but none face conditions as extensive as those in the US Government environment.

The open text responses gathered through the Benchmark bring that context to life. Participants describe budget instability, regulatory frameworks that narrow their discretion to improve outcomes, the structural separation of contracting from program management, and requirement changes that arrive without adequate notice or support. They treat these as ongoing conditions, not temporary phenomena.

What makes the data distinctive is the tension it reveals. Both government employees and their suppliers rate the environment as highly uncertain and acknowledge they are not well equipped to manage its impact. Yet the same respondents rate their adaptability and resilience higher than almost any other sector in the Global Benchmark, and almost 50% above other public agencies. The most plausible reading is a workforce that has learned to absorb pressure but operates in conditions that prevent it from redirecting that pressure when priorities, budgets, or requirements shift. Endurance and agility are not the same capability, and a system built to absorb shocks is not necessarily one that can reconfigure when conditions change.

This distinction also explains why isolated reforms often prove disappointing, or even counter-productive. Throughout the Benchmark there are calls for greater commercial judgment, wider use of commercial practices and increased flexibility. Yet these capabilities do not operate independently. They depend upon governance structures, delegated authority, review mechanisms and access to commercial intelligence. Introducing greater discretion into a system whose approvals and workloads are already the principal causes of delay risks increasing friction rather than reducing it. Adaptive behavior requires an adaptive operating model.

The CCM Institute Global Benchmark 2025 shows that, across all sectors, organizations with higher contracting quality report lower perceived exposure to uncertainty. That appears to be because stronger commercial capability creates greater adaptability, but government agencies are not yet in that position. The uncertainties they describe (see Figure 1) feels direct and hard to manage, because the adaptive mechanisms and behaviors that would absorb them are not fully in place. Put simply, calls to be ‘more commercial’ do not instantly translate into commercial capability.

Continued over

Figure 1: Sources of uncertainty



An American story (*continued*)

Defining ‘commercial’: A critical disconnect in public procurement

The interviews suggest that the commercial challenge runs deeper than capability alone. The issue is not simply whether US Government teams are strong at commercial practice but whether they share a clear understanding of what ‘commercial’ actually means. In that sense, as described in the Foreword, this is not just a gap in skills but a vocabulary gap. If people use the same word to mean different things, they will naturally struggle to assess maturity, build common methods, or adopt more advanced models with consistency.

The interview evidence points to a persistent collision between everyday business language and the FAR’s narrower statutory meaning. Respondents describe a world in which acquisitions may be called ‘commercial’ in the practical or business-model sense while not qualifying as commercial under FAR Part 12, and vice versa. That ambiguity helps explain why calls to become ‘more commercial’ can feel directionally right but operationally unclear, especially in an environment already shaped by regulatory complexity and structural fragmentation.

That confusion has practical consequences throughout the acquisition lifecycle. It affects market engagement, shapes how requirements are framed, influences which procedures are seen as legitimate and narrows the space for innovation before any negotiation has even begun. Several interviewees point to a system where ‘commercial’ is alternately used to signal speed, flexibility, market alignment or simply non-traditional thinking, yet without a stable shared definition.

The deepest consequence of the vocabulary gap concerns the meaning that is largely absent from the conversation. As set out in the Foreword, ‘commercial’ can refer to a discipline in its own right – commercial management, concerned with the design, governance and performance of the wider system of commitments on which mission success depends. Where ‘commercial’ is heard only as a procurement category or a style of behavior, this fourth meaning never enters the discussion. Yet it is the meaning that is most important, because it is the one that would answer the questions US Government teams are asking: how to assess maturity, how to broaden the commercial repertoire, and how to connect contracting to mission delivery. The absence of the discipline from the vocabulary helps explain its absence from the system.

The result of this confusion is predictable: teams talk past one another, suppliers receive mixed signals and when a commercial approach is followed and succeeds, it is treated as an exception rather than adopted as a disciplined method. This is not a personnel problem, but a structural problem where the people are acting within a system that has not equipped them with a common language for judgment. Framed this way, the challenge is not only to build commercial capability but to establish commercial meaning.¹ Until that foundation is clear, efforts to modernize practice will continue to produce uneven results.

The four focus areas of this report

The findings that follow are organized around four focus areas which help to map the distance between where US Government contracting is now and where it needs to be.

Focus area 1: Baselining beliefs versus reality

The US Government contracting function’s belief about itself diverges from the structural evidence.

Focus area 2: Critical barriers to progress

Where the barriers are located, who actually owns them, and the move from administrative control to adaptive capability.

Focus area 3: Where buyers and suppliers diverge

The US Government and their private sector suppliers operate under completely different systems.

Focus area 4: Contracting versus program management

The evolving tensions between contract management and program management, and how they might best be resolved.

None of these focus areas have a simple solution, and there are very few ‘role models’ on which to base improvement. However, the Benchmark data, read alongside broader research on commercial excellence and public sector contracting, offers a diagnosis and provides a sense of direction.

1. The *CCM Institute Global Benchmark 2025* links stronger contracting quality with lower perceived exposure to uncertainty, suggesting that definitional clarity and capability together improve adaptability.

Baselining beliefs versus reality

The US Government contracting function's belief about itself diverges from the structural evidence.

The data highlights an apparent contradiction that sits at the heart of this report. US Government respondents report higher levels of perceived uncertainty than their global peers (see Figure 2), an average score of 4.8 against 4.4 globally on a 1–7 scale – yet simultaneously rate themselves as more adaptable (4.6 versus 4.2) and more resilient (5.0 versus 4.8) than almost any other sector in the Global Benchmark. Performance of contracting life-cycle is rated 4.9 versus 4.4. On the surface, this looks like a workforce that is both under greater pressure and better equipped to handle it than its global counterparts.

The structural evidence does not fully support that reading.

The more plausible interpretation is the one set out in the first section of this report (Setting the scene): endurance and agility are not the same capability. The self-assessment is not inaccurate – it is measuring the capacity to absorb pressure, not the capacity to reconfigure when conditions change. Government contracting teams have developed considerable institutional endurance. What the structural evidence suggests they have not yet developed is the commercial capability to redirect that endurance when the environment demands it.

One indicator of an organization’s ability to adapt is the extent to which it employs contract models designed to accommodate change, collaboration, performance accountability and evolving requirements. While traditional transactional agreements remain common across many sectors, alternative contracting approaches can provide greater flexibility in

responding to uncertainty and shifting operational demands. To better understand current practice, respondents were asked about their organization’s use of several contract models, including relational, agile, performance-based, outcome-based, as-a-service, and alliance agreements.

The findings (see Figure 3) suggest that Government organizations have prioritized performance accountability over contractual adaptability. While performance-based contracts are widely established, more collaborative and adaptive models remain relatively uncommon, indicating that commercial innovation has not kept pace with the growing need for flexibility. These findings are also directionally consistent with the report’s broader themes. Relational / collaborative and performance-based contracts continue to show the highest usage, while agile and alliance contracts remain the least utilized structures.

Continued over

Figure 2: Organizational environment scores (1–7 scale)

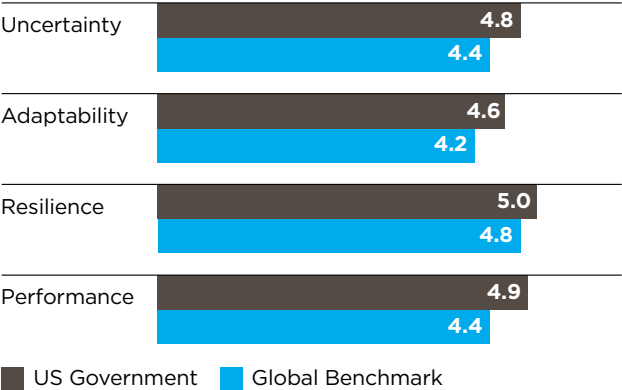
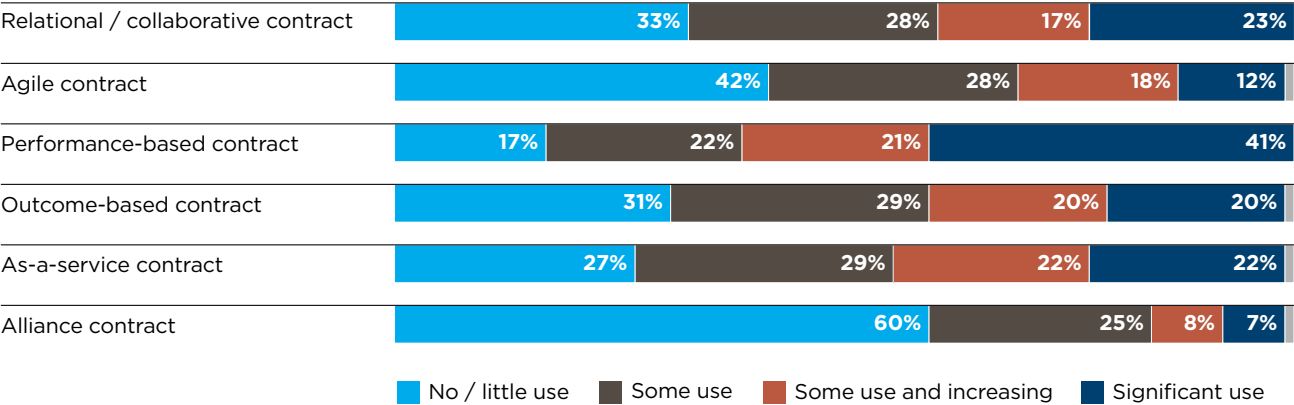


Figure 3: Adoption of different contract types (US Government)



Baselining beliefs versus reality (*continued*)

Where the divergence becomes visible

The strategic priorities data exposes the gap between government and other market sectors. Among US Government respondents, the top strategic priority was ‘improving internal processes’, ranked first by 73% of respondents (see Figure 4). Among global respondents, the leading priority was ‘increasing strategic relevance’, cited by 66%. That divergence is not simply a difference in emphasis. A function whose primary orientation is internal process improvement is, by definition, not yet making the case for strategic influence. It is ‘optimizing the engine’ rather than ‘asking where the vehicle should be going’. Global peers have moved, or are moving, to a different question. US Government contracting, the data suggests, has not yet made that transition and is more focused on the plumbing.

Figure 4: Top strategic priority



This matters because the barriers identified later in this report – late involvement in decision-making, operational workload, the technology and skills gap – are all downstream consequences of a function that is still primarily oriented toward process compliance rather than commercial contribution. The belief that internal process improvement is the priority is not wrong given where the function currently sits, but it is a description of the present state, not a strategy for changing it and re-setting direction.

Both government and private sector identify the deficit of trust between buyer and seller as a root cause of ‘systemic complexity’

According to both government and private sector interviews, sitting beneath this pattern is a deficit of trust between buyer and seller which has translated into systemic complexity. This emerges in many of the features described by this report, such as heavy emphasis on risk mitigation, limited use of relational and alliance models, approval-chain intensity, and the layering of government-unique requirements onto commercial items. These are clear symptoms of a system that does not assume trust and therefore defaults to control. The real issue this creates is that adaptive models depend on a baseline of confidence in the other party’s intent, capability and transparency. Where that baseline is weak the system falls back on oversight, prescription and procedural protection. That helps explain why performance-based structures have gained ground while more relational forms remain far less established.

Adaptability is aspirational

What the interviews add is that this lack of adaptability is not simply a matter of slow organizational change. It is being reinforced by the very legal and regulatory machinery intended to support reform. Government respondents consistently describe adaptability as an aspiration rather than an operating reality, with legal caution acting as a powerful brake on discretion and innovation. Several of those interviewed indicated a familiar pattern: reforms are announced to create greater speed or flexibility, yet broad drafting and conservative interpretation translate those reforms back into control mechanisms. A clear example of this is that the Revolutionary FAR Overhaul (RFO) was supposed to return the FAR to its statutory roots but has in practice added new constraints. For example, RFO FAR 12.201-1(a) limits Contracting Officer’s discretion rather than expanding it, by requiring a specific acquisition method for contracts up to US\$9 million.

In other words, the obstacle is not reform intent, but reform translation. That helps explain why more adaptive contract forms remain limited in practice. The system continues to reward procedural safety over commercial judgment, even when policy language appears to invite the opposite.

Continued over

Reform intent Reform translation

Adaptive contract forms remain limited in practice: the obstacle is not reform intent, but reform translation.

Baselining beliefs versus reality (continued)

Operational performance: Cycle times, bottlenecks, and measurement maturity

Consistent with global norms, contract cycle times increase with complexity, and international agreements take longer than domestic contracts at every complexity level. Greater stakeholder involvement, regulatory requirements, and higher levels of coordination extend timelines, especially when venturing into unfamiliar operating environments and beyond well-established contracting practices.

However, in a US Government context, the interviews suggest that much of the delay attributed to ‘complexity’ does not sit in the contract itself. It sits in the operating environment around it. Respondents on both sides describe a system where approval layers, fragmented ownership, late engagement, and disputes over decision rights create friction that is then labeled as contractual complexity. That is an important distinction. The real burden is often not the agreement, but the governance architecture surrounding it. Suppliers experience this as US Government-unique requirements and internal process drag being imposed onto otherwise familiar transactions, while public-sector teams experience it as constrained freedom to act. Framed this way, longer cycle times are not simply the natural price of more demanding contracts, they are also the visible symptom of internal complexity that the system has learned to treat as normal.

Figure 5 establishes the scale of the challenge. Across every category of agreement, US Government organizations report longer contract cycle times than the Global Benchmark. The difference is most pronounced for lower-complexity agreements, where US Government domestic contracts take an average of 8.3 weeks compared with a global average of 4.8 weeks, and international contracts take 11.4 weeks compared with 7.3 weeks globally.

The gap narrows as complexity increases, but it never disappears. Even for high-complexity agreements, US Government teams remain slower than their global peers. This suggests that the issue is not simply the inherent difficulty of major procurements. Rather, delay appears to be embedded throughout the contracting system, affecting routine transactions almost as much as strategically important ones.

The obvious question is why. Figure 6 provides a remarkably consistent answer.

Delay attribution differs sharply by perspective. US Government respondents point primarily to internal factors, time spent on internal review and approval (62%) and excessive workload within their own group or function (62%). Suppliers, by contrast, point mainly outward, citing time taken by the counter-party (66%), though they also report significant delay from internal review and approval (54%).

Taken together, these findings suggest that US Government review timelines, internal workload, and process inefficiency are the dominant drivers of delay from the US Government side, while suppliers place most delay attribution on US Government as well, even though they experience their own lengthy review cycles. Some of this may be an artifact of operating in highly auditable US Government markets, where extensive review and business clearance are built into the process rather than purely a sign of dysfunction.

This has implications for acquisition speed. Rapid acquisition instruments alone will not resolve the bottleneck if they only streamline contract signature. Unless the broader set of pre-award and post-award activities is also addressed, the overall system will continue to stall even when signature itself becomes easier.

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Figure 5: Contract cycle times (weeks)

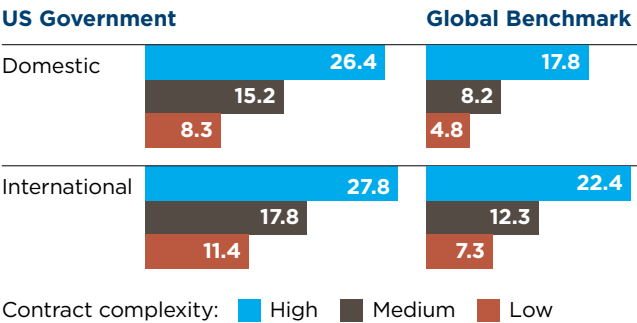
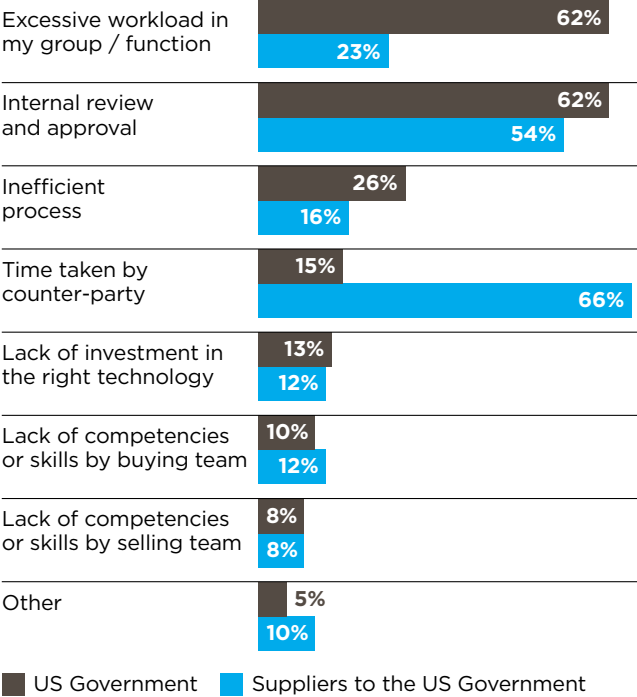


Figure 6: Primary causes of contract delay



Baselining beliefs versus reality (*continued*)

Equally important is what the data does not show. Neither side identifies lack of commercial skills or inadequate technology as major contributors to delay. Competency gaps are cited by around one respondent in ten, while technology attracts similarly low scores. Delay is therefore not principally a capability problem. It is – again – an operating model problem.

Government contracting has created a system in which demand consistently exceeds the capacity of the review and approval process. More people or better training may provide incremental improvement, but they will not remove the structural bottlenecks that the data exposes.

There is a further – and massively significant – implication that deserves attention. Government contracting achieves these cycle times despite relying on highly standardized terms and relatively limited negotiation compared with many commercial markets. The review and approval infrastructure has therefore evolved around a process designed to minimize variation. Even under those conditions, workload and internal approvals have become the dominant sources of delay.

This is crucial as many current reform proposals advocate greater flexibility, increased commercial judgment and wider use of commercial practices. Those ambitions are understandable, but they cannot simply be layered onto today's operating model. If every departure from standard practice requires additional reviews, approvals and oversight, the existing bottlenecks will become even more severe. The result would be longer cycle times, not shorter ones.

In other words, greater commercial freedom demands a different system, not simply different rules. Delegated authority, clearer decision rights, risk-based governance, better commercial intelligence and digitally enabled workflows become prerequisites for reform, rather than optional enhancements.

Without those changes, flexibility risks overwhelming a system that is already operating close to its processing limits.

The technology data also adds to the explanation of why bottlenecks are proving so persistent. Government organizations have invested heavily in digitizing contracting and, in several foundational capabilities, now exceed the levels reported by suppliers. Yet that investment has focused overwhelmingly on improving administrative efficiency and procedural control-repositories, workflow, templates, monitoring approvals and compliance.

Much less attention has been given to technologies that improve commercial performance either before or during delivery: requirements governance, flexibility of templates, performance management, obligation tracking, commercial intelligence and execution analytics. In other words, the government acquisition system has become increasingly effective at processing contracts, but much less effective at adjusting to or managing the commercial outcomes those contracts are intended to achieve.

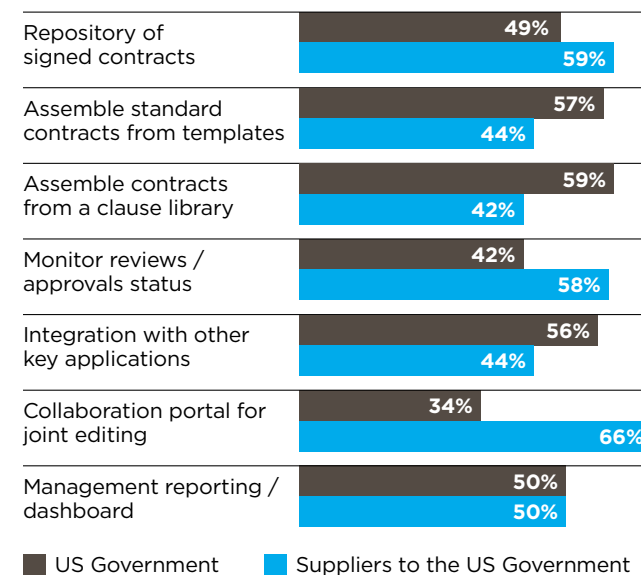
The gaps are particularly notable because respondents report that a substantial proportion of functional effort is concentrated in requirements-related activity and post-award performance management – precisely the areas where technology deployment remains weakest. Investment has flowed to where the controls are, not to where the work is.

This is the operational outcome of traditional priorities and measurements. A function oriented toward process compliance naturally invests in the tools that support compliance. The tools that would generate commercial insight – obligation extraction, performance analytics, risk scoring – remain underdeveloped because the function has not been asked to deliver the outcomes

those tools would support – and if it did ask, the request for funding would be turned down. The technology profile is not a cause of the current state, it is a reflection of it.

There is also a question of trajectory. The government investment that built today's deployment advantage has slowed at a time when the supply side is accelerating and directing its spending toward more advanced, intelligence-oriented systems. The efficiency-and-control systems that agencies have built is aging; the effectiveness-and-performance capability the environment now demands is being built on the other side of the table. The implications of that become clear when we compare the two populations directly. Of the software capabilities that are generally available less than half are used to any significant extent. Figure 7 shows the functionality that is most commonly deployed.

Figure 7: Extent of software deployment



Critical barriers to progress

Where the barriers are located, who actually owns them, and the move from administrative control to adaptive capability.

Levels of uncertainty and constant change are the leading barriers among US Government respondents, cited by 66% (see Figure 8). When contracting functions operate in an environment of high uncertainty and constant change, every subsequent challenge becomes harder: workload rises, technology is deployed reactively, and the function’s contribution is measured against execution rather than outcomes. Operational workload ranks second among US respondents at 64%, above the global figure of 51%, where it is the leading barrier. The proximity of those figures suggests workload pressure is significant in both contexts. The difference is that US Government respondents place greater weight on the strategic access problem, indicating a stronger concern about influence and timing than about volume alone.

These two barriers have different owners. Late involvement is not within the contracting function’s control to resolve unilaterally – though it must take responsibility for the value it offers and which earns the contracting function a place at the table. Timing of engagement requires a leadership mandate, a deliberate decision by agency or program leadership to involve contracting expertise earlier in the acquisition and decision-making cycle. Without that mandate, the function can advocate for earlier involvement but cannot compel it. Arguably, this is also what ‘becoming commercial’ is all about. If the focus is on compliance, early engagement brings no measurable value. If the focus is market insight and alternative contracting models, there is a clear and valuable contribution to the conversation.

Operational workload, by contrast, sits closer to the function itself: it is shaped by role clarity, process design, and the degree to which technology is absorbing routine activity. Both barriers are real and removing them requires coordinated action between leadership and the practitioner community.

Figure 8: Top barrier to value delivery

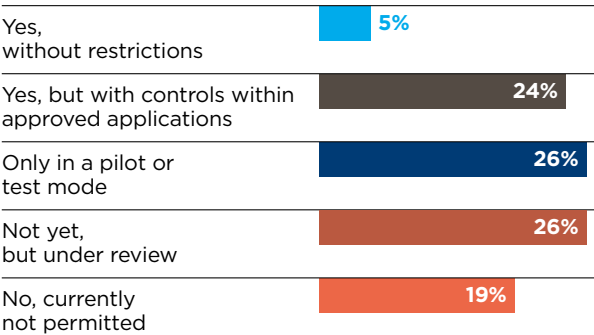


The technology gap as an ownership problem

Both US Government and global respondents identified technology and digital capability as the skill expected to grow most in importance, both cited by 65% of respondents. The consistency of that finding across both groups reflects a genuine shift in what the profession requires. As organizations adopt data-driven processes and AI-enabled tools, technology fluency is becoming a core capability for contract and commercial professionals, regardless of sector or geographic location.

However, the AI adoption data reveals a gap between aspiration and reality. Figure 9 shows that the largest share of respondents report restricted AI use. Only 5% use AI without restrictions, while 24% use it with controls, such as within approved applications only. A further 26% report use limited to pilot or test mode, and 26% say they are not yet using AI but have it under review.

Figure 9: Use of AI by US Government CCM staff for business purposes



Combined, over 70% of respondents either have no current AI use or remain in piloting and review phases. This is a notable finding given how far AI capabilities have advanced and how much attention the technology has received, and it suggests actual organizational adoption is lagging well behind the surrounding hype.

That constraint is in many cases a governance and mandate problem. The question of whether AI can be used, in what contexts, and to what end, is a decision that sits above the contracting function. A particular concern with this is the transformational impact that planned AI adoption and use could have in uplifting the value and contribution of contract management. As the CCM Institute’s reports have explained, AI in contracting can address many of the data and authority fragmentation issues highlighted in this report – but only if its development and deployment are undertaken through a lifecycle strategy. If AI use cases reflect today’s distributed and often confused roles and responsibilities, they will further entrench the problems we are highlighting.

Continued over

Critical barriers to progress (*continued*)

Different boundaries, different pace

The interviews suggest that US Government AI adoption is constrained not simply by caution, but by a different accountability boundary. AI appears broadly acceptable for market research, drafting support, summarization, and document preparation, yet not for evaluations, source selection or other inherently governmental decisions. That distinction reframes the issue. US Government agencies are not merely behind the market, they are operating within a constitutional and public-accountability model that places tighter limits on where judgment can be delegated or even visibly assisted. The result is that digitization can advance at the operational edge while stopping short of the decision

layer – not because the technology is absent but because the mandate to use it is narrower.

The contrast with the private sector makes that boundary even clearer. Commercial respondents describe more mature and structured deployment, including differentiated control models and materially higher levels of technology-enabled operations. That divergence reinforces a pattern we see in our broader benchmarking: capability gaps often reflect differences in investment environment and decision rights as much as differences in intent.

The interviews also offer an important corrective to some of the louder claims around automation.

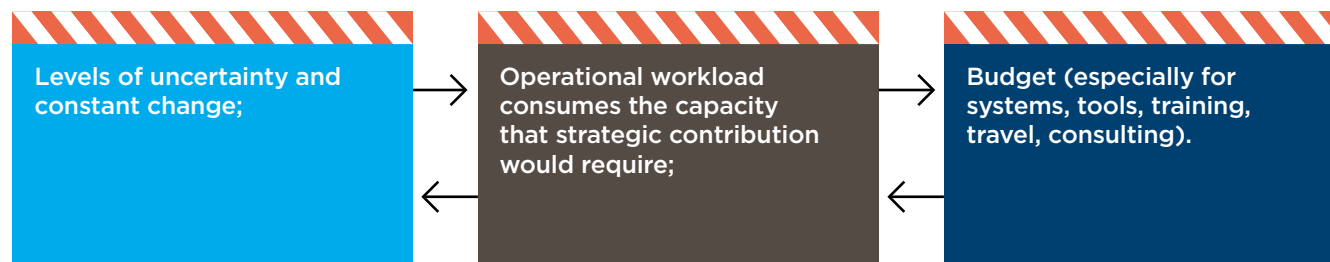
As one respondent put it:

“Contract management is about a relationship between buyer and seller. AI and technology will enable that relationship, never replace it.”

That is exactly the right lens. The real question is not whether AI substitutes for commercial judgment, but where it can strengthen human judgment without crossing the accountability lines that define public sector legitimacy.

The hierarchy that matters

Taken together, these barriers represent a sequence rather than a list:



Each barrier contributes to and reinforces the others, which means addressing them in isolation produces limited results.

The ownership question follows the same logic. Leadership owns the mandate for earlier involvement and the governance framework for technology adoption. The contracting function must become far more active in making the case for both, built on measurement, demonstrated capability, and a clear articulation of what changes when the barriers are removed. It is through reports like this that the case can be made.

Critical barriers to progress (*continued*)

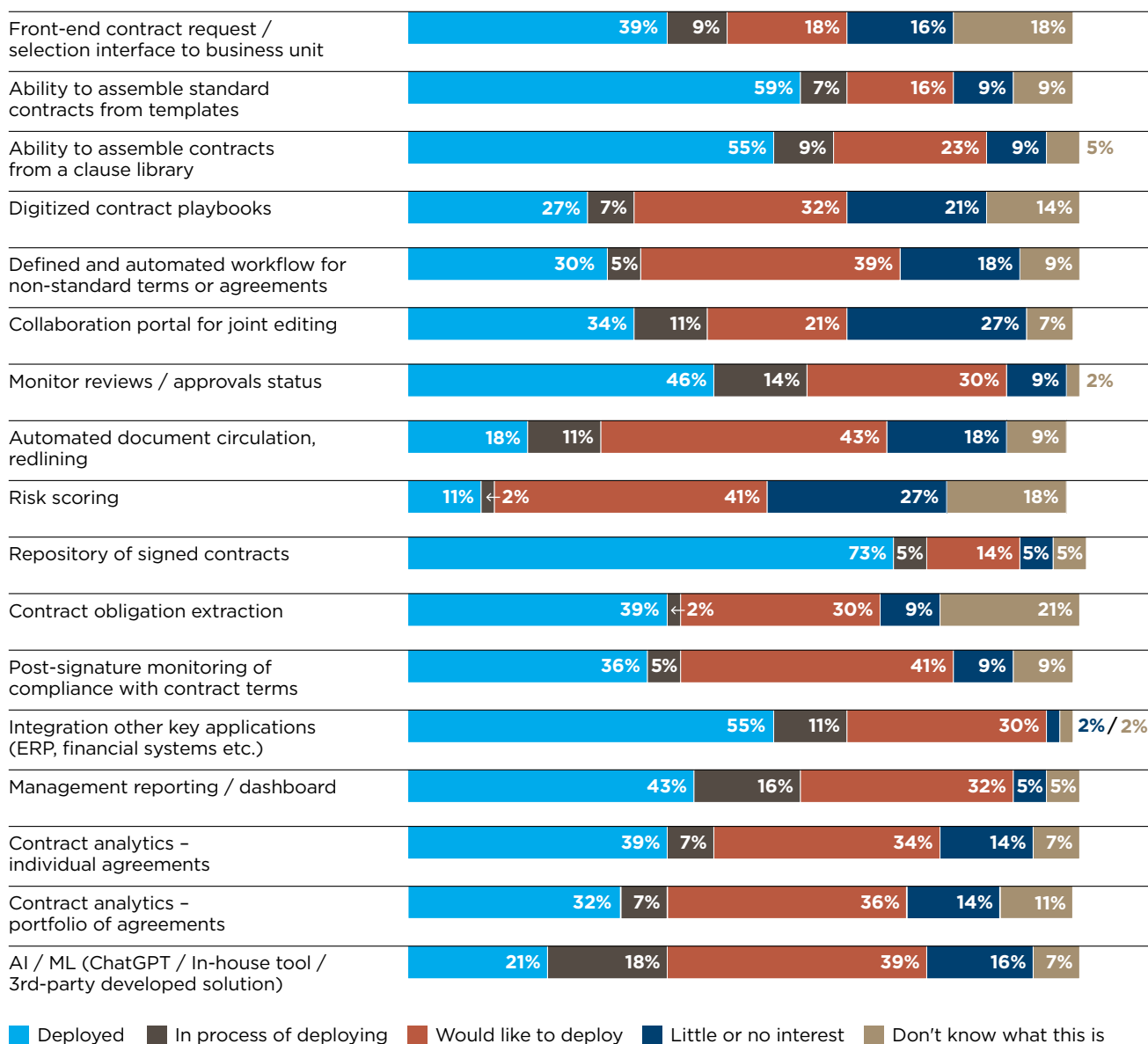
The technology adoption profile reveals a two-speed system (see Figure 10).

Several capabilities stand out as mature, with deployment rates above 50%, repository of signed contracts (73%), template assembly (59%), clause library assembly (55%), and integration with other key applications (55%). Contract obligation extraction, at 39% deployed, is closer to this mature group than to the least-developed capabilities and should not be characterized as immature.

By contrast, analytics (individual and portfolio), risk scoring, process automation (including document circulation and redlining), and AI / ML tools all show a similar pattern, relatively low current deployment paired with high stated interest in deploying. This combination marks them as the clearest near-term investment priorities.

Continued over

Figure 10: Extent of software tool deployment (US Government)



Note: Some responses are + or - 100% as multiple responses were permitted.

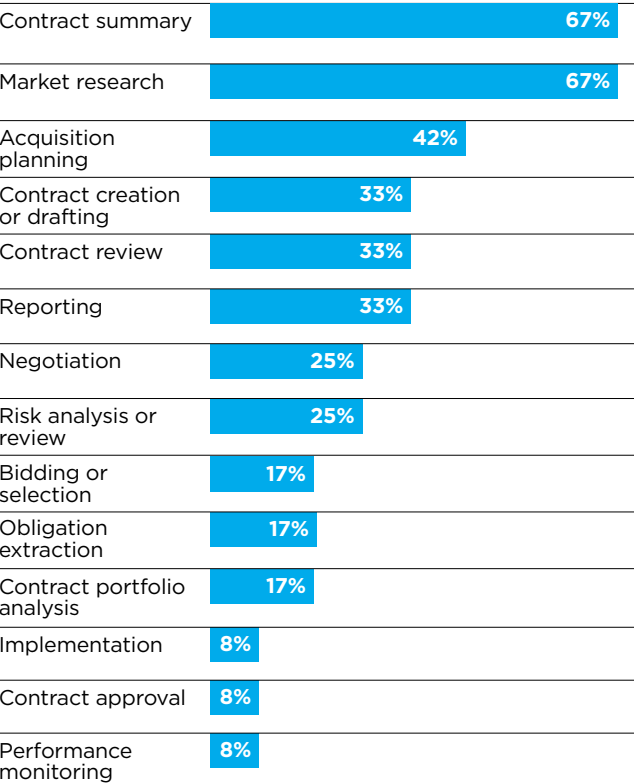
Critical barriers to progress *(continued)*

AI adoption is real but heavily controlled; the dominant model is AI as a drafting and review assistant, not as an operational system. The productivity and insight gains that AI can deliver in contracting environments are still largely unrealized.

As Figure 11 shows, the most common current uses of AI are contract summary and market research, tied at 67%, followed by acquisition planning at 42%. The prominence of acquisition planning complicates the view that AI use is concentrated solely in low-value, administrative tasks. The data shows that the majority of reported use, spanning summarization, drafting, and review, remains administrative in nature. At the same time, the emerging shift toward higher-value strategic applications such as market research and acquisition planning, point to greater potential value creation as adoption matures.

Notably, AI use remains limited in more complex award and post-award functions such as negotiation (25%) and performance monitoring (8%). These are areas where data aggregation and information synthesis through AI could yield substantial benefit, suggesting meaningful room for growth as tools and organizational comfort develop.

Figure 11: Use of AI across contract lifecycle phases (US Government)



Why the current state persists

The technology gap is real, but it is not the root cause. The most recent WorldCC public sector Benchmark finds that 48% of public sector resources sit in decentralized or variable structures, a configuration that creates persistent concerns about leadership, investment, and accountability. Without a focal point for ownership, contracting activity risks being perceived as administrative and fragmented, regardless of what tools are available.

US Government data does not show organizational structure as a leading complaint, but the combination of leadership concerns, role ambiguity, and late involvement suggests the same underlying pattern is present in softer form. This also reflects into operational workload. Where roles are unclear, where ownership is fragmented, and where contracting enters too late, workload rises regardless of how many tools are deployed.

Our Benchmarks also show that when contract management is viewed primarily as a post-award activity, it tends to report to Operations or Program Management and in those cases, it is most likely to be seen as an administrative activity, focused on individual projects or programs, operating through a decentralized model. The US Government Contracting Officer's Representative (COR) and Project Manager (PM) pattern visible throughout this data confirms that the lifecycle is being managed through program execution rather than through a commercial function. That framing is the single biggest structural constraint on the commercial dimension of the role developing in US Government agencies. It also reinforces the fragmentation of data and experience which stands in the way of planned reform, driven by intelligence.

Where buyers and suppliers diverge

The US Government and their private sector suppliers operate under completely different systems.

This report's findings highlight two sides of the same table. The survey respondents are split evenly between the *buyers* from the US Government (50%) and their private sector *suppliers* (50%).

When we segment their input, the key finding is simple. They are not describing two perspectives on one system, but in many ways two different systems – operating with different vocabularies, different structures, different counterparts, and different technology trajectories.



1. 'Commercial' is widely used but inconsistently understood on the buy-side

As this report has highlighted, the word 'commercial' has several distinct meanings to those within government. The word does not feature meaningfully in job titles – the buy-side is predominantly Contract Management (71%) and Procurement (40%).

This carries through into the understanding of the term 'commercial function' and what it is for. Buyers perceive it as a narrow role covering risk mitigation, business controls, and financial impact. Suppliers see 'commercial' as overseeing change management, balancing business objectives with customer needs, and improving business productivity.

When it comes to reporting lines, 24% of supplier contract / commercial functions report to Legal against 3% of buyers; buyer functions report predominantly to Operations, Finance and Project Management. However, while suppliers may appreciate that commercial functions exist, it does not mean that they have that role, title or reporting line for their US Government contracting teams. There are no buyer or supplier functions of any scale reporting to a commercial line.

The buy-side treats contracting as an administrative and compliance discipline. The sell-side treats it as a business integration discipline. This gap in understanding is significant since a buyer who has no concept of a commercial role cannot recognize, engage or reward commercial behavior in a supplier. The consequences of this surface repeatedly in the sections that follow.



2. Complexity is in the eye of the buyer

US Government respondents classify 43% of their spend as high-complexity. Suppliers classify only 37% of their revenue the same way. The likeliest explanation returns to the point that much of the complexity buyers experience is procedural rather than inherent: regulatory compliance, approval chains, oversight requirements. The deal may be relatively routine, but the process is demanding.

The workload data sharpens the contrast. Buyers manage larger portfolios, a mean of roughly 43 high-complexity contracts under management, against roughly 37 for suppliers. Buyers consider it reasonable for one experienced professional to handle 11 high-complexity contracts post-award; suppliers say 6. US Government contract management is being run at throughput levels at which meaningful value management is implausible and the data suggests that this is accepted as normal rather than recognized as a constraint.

Continued over

Where buyers and suppliers diverge (*continued*)



3. Negotiation is largely a fiction

Buyers report that 52% of their contracts are signed on their standard terms without amendment, and less than 8% on counterparty terms in any form. Suppliers corroborate from the other side: only 28% of their contracts are signed on their own terms without amendment (with that largely being pass-through sub-contracts), while 36% are signed on the counterparty's terms.

Both sides agree on the reality, which is that the US Government dictates, and time allocation to a degree shows the consequence – yet it also surfaces an interesting question. Buyers spend 9% of their time negotiating while suppliers spend 15%. While this difference is explained by the effort associated with sub-contracting and supply network coordination, it also begs the question of whether buyers and suppliers interpret the term 'negotiation' in different ways. As the 2024 study on Most Negotiated Terms revealed, if terms are effectively non-negotiable, it generates increased costs. And without negotiation, where is value supposed to be created, and who is accountable for creating it?



4. Roles do not map across the table

Asked who holds primary responsibility at each phase of the lifecycle, the two populations describe structurally different counterparts. A note on terminology is needed first, and it is itself revealing: the survey offered respondents standard functional categories – Procurement, Contract Management, Finance, Business Unit – drawn from general commercial practice. US Government respondents selecting 'Procurement' are describing what the government system knows as the Contracting Officer. That the standard vocabulary of commercial organization requires translation before it can describe the US Government structure is an early indicator of the architectural gap this section explores.

With that translation made, there is a clear pattern of disconnects. In negotiation, to the extent it occurs, over half of buyers place leadership with the contracting function (reported as 'Procurement'); suppliers place it with Contract Management (50%) or the Business Unit (33%). On cost and price, buyers again point to the contracting function, with no mention of Finance; suppliers point to Finance and the Business Unit. On post-award performance, buyers say Contract Management (50%); suppliers say Project Management (49%), the Business Unit (21%) or Contract Management (24%).

Both sides are internally fragmented – responsibility is distributed differently across functions at each phase – and when the two fragmented structures are placed side by side, the misalignment compounds. A Contracting Officer negotiating price may sit opposite a supplier finance team; a US Government contract manager overseeing performance may sit opposite a supplier project manager. At every phase, each side fields a function with a different perspective, different data sources and a different vocabulary, and coherent communication across the table depends on a consistency that neither side possesses.

This misalignment goes a long way to explaining two frustrations that both populations report at high levels: late involvement in the process (52% of all respondents rate it a significant constraint) and lack of role clarity (33%). Both sides report the symptoms and demonstrate frustration with the structural cause, which is that there is no common commercial architecture. Building this is a precondition for the shared goals and data on which better contract outcomes depend.



5. Technology: buyers have more software tools deployed; suppliers are moving faster

The data behind the pattern described earlier is worth setting out, because it contradicts the prevailing narrative of a technologically backward public sector. Agencies report higher deployment than suppliers across several core capabilities: clause libraries (55% against 27%), digitized playbooks (27% against 11%), contract obligation extraction (39% against 25%), and post-signature compliance monitoring (36% against 18%). Suppliers lead meaningfully only on collaboration portals. Consistent with the investment pattern already described, the buyer advantage is strongest in the tools of efficiency and control. Where agencies do hold deployed capability with commercial potential – obligation extraction is the clearest case – the earlier finding suggests it is used to support compliance rather than to generate insight. Deployment is not the same as exploitation.

The direction of travel reverses the picture. Suppliers dominate every 'in process of deploying' category, frequently by ratios of three or four to one. The US Government holds legacy infrastructure it lacks the budget to replace; suppliers hold current investment, directed at newer systems with substantially greater functionality. This is the trajectory gap identified earlier, now visible in the raw figures – and its consequences sharpen further when we turn to AI.

Continued over

Where buyers and suppliers diverge (*continued*)



6. AI: The sharpest divergence in the dataset

Half of supplier respondents report active AI use by their contracts and commercial staff (with or without controls), against 29% of buyers. Conversely, 45% of buyers remain at ‘under review’ or ‘not permitted,’ against 30% of suppliers.

Where and how AI is used matters more than whether. Suppliers are deploying it in substantive contract work, such as contract review (66% of supplier AI users), drafting (59%), bidding and selection (48%), risk analysis (48%), negotiation (35%). Buyer use concentrates on peripheral and preparatory tasks, such as generating contract summaries (67%), market research (67%), acquisition planning (42%).

Suppliers are using AI to aid productivity at a transactional level; US Government is using it to improve understanding. The free-text responses indicate a motivational difference, where suppliers see AI as a workaround for capacity constraints, while agencies appear to see it as another compliance issue. If these trajectories hold, the capability gap between the two sides will widen quickly.



7. The same dysfunction, experienced differently

64% of buyers see ‘operational workload’ as a significant constraint (versus 49% of suppliers) and view ‘levels of uncertainty and constant change’ as their highest barriers (66% versus 38%). Buyer free text speaks of reductions in workforce, bureaucratic and operational hurdles, morale being damaged by change, and ‘mounting procedural burdens’.

Supplier free text points to a different set of constraints, particularly around regulation, funding uncertainty, changing requirements and communication, with respondents citing ‘regulatory strangulation’, ‘continuing resolution in lieu of a real budget’, and ‘lack of clear definition of customer objectives or outcomes’.

Both populations locate the dysfunction in the system rather than in themselves. The difference is that buyers experience it internally, as institutional churn, while suppliers experience it externally, as counterparty behavior. Neither framing produces accountability, because each side’s diagnosis places the remedy outside its own control.



8. Priorities versus resources: the growing gap

Looking at their highest strategic priorities, improving internal processes ranks first for both buyers and suppliers, at 73% for each. The second-highest priority for buyers is ‘raising skills of current staff / attracting and retaining talent’ at 70% (versus 66% for suppliers). For suppliers, the second-highest priority is ‘increasing strategic relevance / demonstrating value’ at 68% (versus 59% for buyers). Lastly, the third-highest priority for both buyers and suppliers is ‘cost savings / efficiencies’, at 70% for buyers and 64% for suppliers.

Yet resources do not always appear aligned with these ambitions. Budget visibility varies significantly, and only 53% of buyers and 49% of suppliers report dedicated funding for contract management technology. For buyers, this may constrain efforts to improve processes and skills; for suppliers, it may limit their ability to increase strategic value and efficiency. In both cases, the challenge is turning strategic ambition into funded action.

Three implications follow for the Benchmark as a whole:

1 The government market lacks a shared commercial architecture. The two sides use different vocabularies, deploy different functions at each lifecycle phase, and hold different theories of what contracting is for. Interoperability of roles, not merely of systems, should be treated as a reform objective in its own right. Without this, there is little hope of the parties working towards shared goals and objectives – which are fundamental to better contract outcomes.

2 The government’s structural power to dictate terms has largely eliminated its capacity to negotiate value, while suppliers over-invest in negotiation against a counterparty that cannot respond. Both are wasting capability.

3 AI adoption is opening a gap that regulation will not close. Suppliers are automating the substance of contract work while agencies focus on the periphery. The question for government acquisition leadership is not whether to permit AI, but whether it can afford a supply base that is systematically better equipped than its own workforce.

Contracting versus program management

The evolving tensions between contract management and program management, and how they might best be resolved.

The US Government reporting pattern with 31% of contract management resources reporting to Operations represents the visible expression of a deeply embedded institutional theory about what contract management is for. When the function reports to Operations, it exists to serve program execution. The WorldCC public sector Benchmark also noted this and was direct about the consequences. When contract management is treated as a post-award activity, it 'tends to report to Operations or Program Management... it is also most likely to be seen as an administrative activity, focused on individual projects or programs.' This narrowness of vision means that by nature the role is focused on compliance and performance oversight, rather than bringing broader knowledge and intelligence to bear. The COR / PM model is the institutional expression of that logic. It is also, the data suggests, the single biggest structural constraint on the commercial dimension of the role that needs to develop in US Government agencies.

The 2025 Benchmark report shows the need for a fundamentally different theory of what the function is supposed to achieve, one in which contracting is a commercial discipline with a mandate to shape outcomes, not a compliance activity that follows and reinforces decisions already made elsewhere.

What the interviews make clear is that the contest over ownership and authority is born of frustration, not ambition. When contracting cannot be responsive at the moments programs need it – constrained by workload, approval chains and late engagement – program managers reach for commercial authority themselves. Given the barriers this report has documented, that response is easy to understand, but it is mistaken. Commercial management is a discipline of judgment: market engagement, risk allocation, negotiation design, the structuring of incentives and remedies over the life of an agreement. Like most judgment disciplines, it is largely invisible to those who have not practiced it – the work looks like common sense until the moment it is needed, which is precisely why its absence is discovered in disputes, cost overruns and failed outcomes. A program manager assuming the commercial role is not filling a gap, they are relocating it to a place which is not trained or equipped to manage it.

Resolving the tension

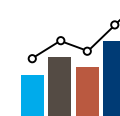
Resolution begins with the evidence base. The first requirement is measurement, building the data infrastructure to track commercial outcomes rather than compliance events. The focus shifts towards capture of cost variance, scope change frequency, dispute rates, supplier performance trends. With that evidence, the case for change can be made credibly to leadership, and the function is increasingly defined not by what it processes, but by what it delivers.

The second requirement is skills investment. The gap between legal compliance and program execution is a commercial judgment gap and it does not close through process improvement alone. It requires deliberate investment in the capabilities that sit in that space, with career pathways that recognize and reward commercial contribution rather than administrative throughput.

Structure is the third requirement. Once the evidence base exists and the capability is developing, the case for a more centralized, commercially-oriented function with a genuine mandate becomes arguable on its own terms. Attempted in the reverse order, structural change tends to produce reorganization without transformation: the same administrative framing, housed in a different reporting line.

Continued over

Three requirements to resolve the tensions between contract management and program management:



Data measurement

Capture of cost variance, scope change frequency, dispute rates, and supplier performance trends.



Skills investment

Deliberate investment in the capabilities that sit in the commercial judgment gap.



Centralized structure

Following on from measurement and skills, a more central, commercially-oriented function with a genuine mandate.

Contracting versus program management (*continued*)

The US Government data does not suggest that program management and contract management are inherently in conflict. They are in tension because the current system assigns contracting a role that begins after commercial decisions have been shaped – and because the function’s constrained responsiveness invites others to claim the space.

The logical mandate for the commercial role sits with contract management: it is the discipline trained for it, and the wider profession’s transition confirms it. But that mandate is conditional. It will be held only by a function that tackles the barriers described in this report – one that is more responsive, more creative, and more visible in supporting the quality of program performance from inception through to close-out. A mandate asserted on grounds of jurisdiction will not survive; one demonstrated through contribution will not need asserting.

One final point deserves sharper emphasis:

The move from episodic training to workforce strategy will not happen unless formal training is treated as core infrastructure, not as optional development.

The interviews are clear on this. Respondents do not describe a profession that merely needs more learning opportunities. They describe one that needs structured, recognized, and sustained formation in commercial judgment, market engagement, business models and post-award management. That is an important distinction.

Training is often discussed as though it were a support activity. In reality, it is one of the main ways a system signals what kind of decisions it expects people to make. If US Government contracting is to evolve beyond its current state then formal training must build the confidence and shared language needed to exercise discretion, engage earlier and operate credibly in the space between compliance and mission delivery.



Formal training in US Government contract management must build confidence and shared language, needed to operate credibly in the space between compliance and mission delivery.

The need for system foundations

US Government contracting teams are caught in a difficult middle ground. Strategic intent is clearly present, executive recognition is rising, risk awareness is established and AI experimentation is visible in the data. But the operational and technological foundations needed to act on that ambition remain underdeveloped.

Manual workloads, staff shortages, fragmented governance and immature analytics continue to dominate day-to-day reality, while performance measurement stays focused on compliance rather than commercial value. The deeper issue is not lack of intent but the mismatch between future ambition and the operating model designed to deliver it. The picture in 2026 is of organizations that understand the direction of travel but have yet to build the systems, capabilities and infrastructure required to reliably get there.

The four focus areas of this report set out to provide solutions for the same underlying diagnosis. US Government contracting teams do not lack awareness; they lack the authority, trust and enabling conditions that would allow awareness to translate into action. Their self-assessment reflects real resilience – but resilience here means the ability to absorb pressure within existing constraints, not the freedom to adapt the system itself. A system can become highly competent at coping with friction without becoming any better at removing it.

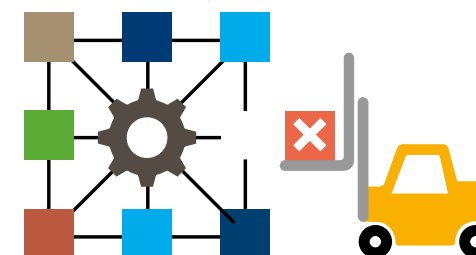
The barriers, moreover, are not simply a list. They form a sequence and a self-reinforcing cycle, where pressure in one area intensifies constraints in another. Levels of uncertainty and constant change increase operational demands, while operational workload consumes the capacity that strategic contribution would require. Budget constraints limit the function's ability to reduce that workload and respond effectively to change.

Each barrier therefore feeds the others, which means addressing them in isolation may fail to resolve the underlying problem and could make the system less effective. This has practical consequences for reform.

Greater commercial discretion, wider use of commercial models, investment in AI, or improved negotiation capability are all desirable developments. But introduced independently they risk increasing rather than reducing pressure on a system whose principal constraints already lie in review, approval and workload. Systems cannot be transformed by changing individual components in isolation. The relationships between those components must change as well.

The trust deficit described in the interviews sits underneath the whole pattern – it helps explain the dominance of risk mitigation, the limited use of relational and alliance models, the layering of US Government-unique requirements onto commercial items and the persistence of approval-chain complexity. This is not simply a process problem. It is a system designed around caution, where legal and regulatory translation often turns reform intent back into control. The tools that would break the sequence exist. The missing piece is the mandate and governance environment that would allow those tools, and the people using them, to operate to full effect.

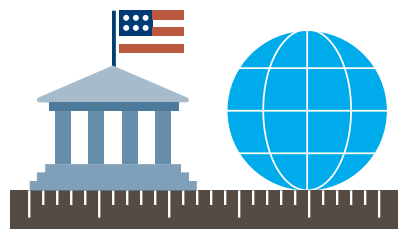
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Systems cannot be transformed by changing individual components. The relationships between components must also change.

The need for system foundations (*continued*)

The ownership question follows directly, and the sequence logic dictates the answer: because the barriers reinforce one another, change must be initiated at the level where the sequence can be broken. Leadership owns two things the contracting function cannot immediately provide for itself. First of these is the mandate for earlier commercial involvement, and the governance framework for technology adoption. Second, it also owns the conditions under which trust can begin to grow – clearer authority, better aligned incentives, and reform that expands judgment rather than narrowing it. Until both are established, any skills investment will outpace the environments in which those skills can be applied. The function will continue optimizing a role that is structurally constrained from delivering its full value. But this does not absolve the contracting function from taking control of its own destiny.



This report provides the US Government contracting function with comparative Global Benchmark data on which a credible case for change can be built.

Its positioning – and its desire to be seen as a profession – depend on it becoming far more active in making the case:

Built on the measurement of commercial outcomes rather than compliance events; supported by formal training that develops commercial judgment rather than procedural knowledge alone; and expressed as a clear articulation of what changes when the barriers are removed.

That case cannot rest on internal data alone – as this survey shows, the function does not yet generate it. Benchmark evidence of this kind exists precisely to close that gap: to give the function the comparative data, quantified barriers and external reference points on which a credible case for change can be built.

The encouraging message from this Benchmark is that the foundations for change already exist. US Government acquisition possesses an experienced workforce, strong professional standards, mature governance disciplines and growing executive recognition of the need for reform. These are significant assets.

The challenge is therefore not to replace today's system but to evolve it. The next generation of US Government acquisition will not emerge through isolated improvements to acquisition policy, negotiation practice, technology or training. It will emerge by redesigning how these elements work together, aligning governance with judgement, technology with decision-making, commercial capability with mission delivery, and accountability with outcomes rather than process alone.

Every operating system produces the behaviors it is designed to produce. If US Government acquisition now requires different behaviors – the greater adaptability, stronger commercial judgment and more effective collaboration that have been highlighted by the Administration – the operating system itself must evolve. That, ultimately, is the principal finding of this Benchmark report.

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Tim Cummins, Executive Director
t.cummins@ccm.institute

General or media enquiries
info@ccm.institute

www.ccm.institute



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Patrick Hughes,
Senior Director, Public Sector Industry Advisor,
patrick.hughes@icertis.com

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