

FREE SUMMARY

Federal Artificial Intelligence Landscape, 2023

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About This Report



Report Deliverables

- 114 slide PowerPoint® Report
- 31 slide PowerPoint®
 Executive Summary
- » Excel® Workbook

Deltek's Federal Artificial Intelligence Landscape, 2023 assesses the state of Artificial Intelligence (AI) and Machine Learning (ML) adoption within the federal government. The report takes an in-depth look at the factors shaping the strategic and budgetary priorities governing artificial intelligence procurement and use.

This report will provide federal contractors:

- » Analysis of the legislation, policies and guidance directing the federal government's strategic direction for artificial intelligence.
- » Insight into planned and requested budgets for AI initiatives.
- » Analysis of AI contracting patterns to date.
- » Al efforts and programs that are underway, as well as insight into potential opportunities.
- » Recommendations to help contractors maximize business opportunities within the federal AI space.

FULL REPORT TABLE OF CONTENTS Introduction

Report Purpose Scope and Methodology **Key Findings Policy and Leadership Technology Environment Sample Opportunities Historical Spending Agency Analysis and Contract Spending Conclusions and Recommendations** Appendix

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Scope and Methodology Federal Artificial Intelligence Landscape, 2023

SCOPE

- » Includes executive, legislative and judicial branch agencies
- » Includes the intelligence community
- » Includes government-owned corporations such as the U.S. Postal Service, where identifiable
- » Includes embedded IT (IT reported within non-IT budgets)
- » Includes unreported IT spending
- » Includes IT purchases below reporting thresholds
- » Excludes IT grants to state and local governments

METHODOLOGY

Analysis includes:

- » The President's budget requests
- » Agency budget documentation, reports and strategic plans
- » Economic forecasts
- » Congressional documents
- » Legislative and policy documents
- » Deltek GovWin IQ databases
- » Federal Procurement Data System (FPDS) data
- » Industry articles and publications
- » Interviews/surveys with agency officials and industry experts and thought leaders
- » Public statements of federal IT executives

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Key Findings

Federal Market Analysis

- The combination of artificial intelligence (AI) legislation, guidance and individual agency strategies will help to advance federal use of AI and accompanying technologies such as machine learning (ML).
- » Expansion of AI designated offices, government-wide bodies and leadership (i.e. Chief Artificial Intelligence Officer) throughout agencies will influence future AI guidance, funding and program increases.
- » Al's intersection with tech areas such as cloud, cyber and 5G help enable the transformative technology to expand across the federal spectrum.
- » Quality of data, cultural barriers, technology transparency, effective oversight and responsible AI remain challenges in federal AI adoption.
- » Federal agencies will continue to use AI and predictive analytics to address the Biden Administration's priorities in national security, climate change and social and economic inequalities.
- » AI federal spending remains rooted in R&D, however, areas of AI such as robotic processing automation (RPA) are gaining momentum as agencies automate mundane, repetitive tasks to augment the federal workforce and shift responsibilities to "high-value," cognitive work.
- » Federal agencies increasingly using acquisition methods such as Other Transaction Agreements (OTAs) to deploy AI technologies will pave the way for traditional as well as non-traditional contractors and small businesses to enter the federal AI market under simpler conditions.

NSCAI Report Recommendations Shape Agency AI Activities

Defending America in the AI Era

Defend against emerging Al-enabled threats to America's free and open society

Prepare for future warfare

Manage risks associated with Alenabled and autonomous weapons

Transform national intelligence

Scale up digital talent in government

Establish justified confidence in AI systems

Present a democratic model of AI use for national security

Federal Market Analysis

In a final report delivered by the former National Security Commission on Artificial Intelligence (NSCAI), the federal government is given a whole-of-nation approach in advancing AI development to address U.S. national security and defenses. The 756-page report provides over 90 recommendations to Congress, federal agencies and strategic partners to bolster AI capabilities. Major investment recommendations include doubling non-defense funding to \$32B per year by 2026 and investing at least 3.4% of DOD's annual budget in science and technology, including \$8B in Al **R&D**. Additional recommendations are centered on concepts parsed under two central themes.

Winning the Technology Competition

- Organize with a White House-led strategy for technology competition
- Win the global talent competition
- Accelerate AI innovation at home
- Implement comprehensive intellectual property policies and regimes
- Build a resilient domestic base for designing and fabricating microelectronics
- Protect America's technology advantages

Build favorable international technology order

Win international technology competitions

Government Bodies Leading Federal AI Adoption

Several agencies have centralized AI offices and executive leadership positions to influence budgetary and program decisions on AI implementation throughout their respective organizations. Likewise, several government-wide AI bodies, many created by the National AI Initiative Act, continue to impact the federal government's roadmap to AI adoption with specific roles and responsibilities.



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2022-2021 AI Legislation

Congress continues to introduce legislation and push for AI implementation in the federal space.

Bill Title and Number	Objective(s)	Potential Investment Areas		
AI Training Act (H.R.7683) and AI Training Act (S.2551)	Passed in the Senate in December 2021 and introduced in the House in May 2022, the legislation directs OMB to establish an AI training program for the acquisition workforce to ensure understanding in the capabilities and risks of AI.	 » Administrative support » Workforce training » Provision of computing resources » Provision of data sets 		
AI JOBS Act of 2022 (H.R.6553)	Introduced in April 2022 and requires a report on AI and its impact on the workforce, including data to analyze the growth of AI and identification of the industries with the fastest AI growth.	N/A		
GOOD AI Act of 2022 (H.R.7296) and GOOD AI Act of 2021 (S.3035)	Introduced in March 2022 and directs OMB to develop an updated guidance for federal agency use of AI and establish an AI Hygiene Working Group.	 » Administrative support » Program management » Provision of data sets » Research support 		
Advancing American Artificial Intelligence Innovation Act of 2021 (S.3175)	Introduced in November 2021 and fulfilling a NSCAI recommendation, the legislation requires DOD to establish a pilot program to assess the feasibility of establishing data libraries to enhance AI capabilities and ensure DOD can procure premium AI and ML software capabilities.	 » Provision of computing resources » Provision of data sets » Software engineering » Engineering and technical support 		

AI Provisions in the Draft FY 2023 National Defense Authorization Act (NDAA)

The U.S. Congress has regularly used the annual Defense authorization bill to address technology provisions that impact policy, operations and acquisitions at the Department of Defense. The FY 2023 NDAA includes multiple provisions addressing the development and use of artificial intelligence, machine learning and related emerging technologies. Time will tell if these provisions, or additional ones, will endure the amendment process to become law.

Artificial Intelligence/Machine Learning/Autonomy Provisions

- » Authorizes \$50M more for artificial intelligence systems and applications development for U.S. Cyber Command.
- » Requires the DOD to produce a five-year roadmap and implementation plan for rapidly adopting artificial intelligence for warfighter cyber missions.
- » Provides \$30M for DARPA to apply artificial intelligence and autonomy technologies to cybersecurity and cyberspace operations.
- » Requires a briefing on artificial intelligence, machine learning and other autonomy efforts across the Army enterprise.
- » Authorizes an increase of \$75M for DARPA to execute the recommendations of the National Security Commission on Artificial Intelligence.

NIST Initial Draft of AI Risk Management Framework

Al has the capability to transform every aspect of the economy and society. However, Al is based on inputted data and algorithms and therefore subject to unintended consequences and output. Due to this risk, there is a lack of trust by federal agencies to utilize Al to inform high impact decisions. The National Al Initiative Act calls on NIST to create an Al Risk Management Framework (Al RMF) to improve the trustworthiness of Al by providing considerations and characteristics in the design, development and deployment of Al technologies. NIST released an initial draft of the Al RMF, with a final framework expected in January 2023. The final RMF is expected to have three parts: context of Al risk management; process to minimize Al risk and a practical guide with use cases and sample practices. The initial draft provides an outline for the first two parts.

Part 1: AI Risks and Characteristics

Technical	 » Accuracy » Reliability » Robustness » Resilience or Security
Socio Technical	 » Explicability » Interpretability » Privacy » Safety » Management Bias
Guiding Principles	 » Fairness » Accountability » Transparency

Part 2: AI Risk Management Activities



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DOD's Responsible AI Strategy and Implementation Pathway

In June 2022, the DOD released its "Responsible Artificial Intelligence Strategy and Implementation Pathway" (RAI S&I Pathway), the department's way forward for ensuring ethics in AI development and acceleration. The plan seeks to further operationalize DOD's AI Ethical Principles adopted in February 2020 that AI use be responsible, equitable, traceable, reliable and governable. The RAI S&I Pathway is organized around the following six tenets and lines of effort.



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GSA Artificial Intelligence (AI) Center of Excellence (CoE)

GSA's Technology **Transformation Service** (TTS) launched their Artificial Intelligence (AI) Center of Excellence (CoE) to centralize AI best practices and expertise; spur the innovation of AI and related technologies; and assist federal agencies with Al adoption to address challenges, improve processes and enhance service delivery.

Applied Al Challenge: In April 2022, the AI CoE launched the Applied AI Challenge, a prize competition allowing participants to propose creative AI applications across a variety of use cases that support complex decision making, improve response times, increase access to services and other high-value opportunities. Eligible U.S.-based companies and organizations submit insights that addresses one or more of the following four market segments.

Unified Platforms – Al platforms providing a multi-functional Al solution that enable integration with a broad spectrum of data sources, AI / ML models and Al application development, as well as provide analytics capabilities.

Computer Vision Engines – Al tools capable of acquiring, processing and understanding digital images to return data for further analysis. Examples include satellite drought analysis, object detection, event detection and image restoration.

Natural Language Processing Engines – AI tools capable of analyzing and processing natural language communications to assess content. Examples include optical character recognition, speech recognition, automated summarization, document AI analysis, translation and language understanding.

General Al Functions – Al tools capable of assessing market risk, historical simulations and operational risks. Examples include systems with automatic detection of anomalies and recommendations associated with projections/forecasting, business value, underwriting, leasing, compliance and purchasing.

Up to four finalists from each market segment will be selected to demonstrate prototypes at the Applied AI Challenge Industry Day in July, with one winner from each segment to receive a \$12,500 prize award.

Example AI/ML Uses



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Challenges in AI Adoption

Federal agencies remain hesitant to utilize the AI, particularly for decision making efforts that may affect citizens and services. Despite AI's benefits to government missions and operations, implementation of the technology faces several obstacles.

Challenge	Description	Potential Investment Areas
Poor Data Quality	Data is the raw material for AI and thus data quality, completeness and reliability is essential during collection and curation before it can be used in AI systems. Investment in sound data management practices sets the foundation for good AI.	 » Data management support » Program management » Provision of sound data sets » Testbed equipment, development and management
Lack of Data Culture	Many agencies lack a data-driven culture, where evidence and reason are valued and decisions are largely based on data. A lack of data culture affects data and network authorizations and influences service budgets, significantly slowing agency AI adoption. An absence of data scientists and AI experts at agencies also adds to the cultural barrier.	 » Workforce training » Software engineering » Program management » Data management support
Risk in Al Responsibility	Al technologies run the risk of unintended inferences, bias and outcomes largely due to inadequate data and algorithm development. Risk management frameworks with practices such as AI model inventories, ethical and fairness checks and risk mitigation processes help to ensure AI fairness and equity.	» Engineering and technical support» Provision of computing resources
AI Auditability	Al models must be audited for ethics in the same sense people undergo background checks. Al systems that are explainable and reproduceable ensure their auditability.	 » Software solutions with transparent requirements and licensing rights » Engineering and technical support

Federal Artificial Intelligence R&D Budget

The Networking and Information Technology Research and Development (NITRD) Program is responsible for coordinating federal R&D efforts to identify, develop and operationalize the use of advanced IT, computing, networking and software capabilities. Artificial intelligence is a key Program Component Area (PCA), guided by NITRD's Artificial Intelligence R&D (AI R&D) Interagency Working Group (IWG).

NITRD does not provide details for defense AI R&D budgets, however, DOD's FY 2023 budget request includes \$1.1B for core AI. Federal Budget for Nondefense AI R&D, FY 2019-2022 (Req.)



Core AI - investments with a primary emphasis on AI R&D. Crosscutting AI - investments for which the primary emphasis is in areas other than AI R&D. NITRD's FY 2023 budget is not yet publicly available.



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Federal AI R&D Testbeds

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Several federal agencies oversee 40 physical and virtual testbeds across the U.S. to support development of real-world Al applications across a number of domains, such as computing, robotics and communications.

Virtual Testbeds

- NSF: Chameleon; CloudLab;
- FABRIC; GENI; Robotarium; Truman Platform
- NIST: Facial Recognition Vendor Test; Minutiae Interoperability Exchange (MINEX) III; Open Media Forensics; Open Speech Analytic Technology; Secure AI Test Bed; Text Retrieval Conference; Textual Analysis Conference; TREC Video Retrieval Evaluation
- **DOE:** CyberNET Testbed; Innovation Community Center Testbed for AI/ML and Advanced Data Analytics
- **DARPA:** Guaranteeing AI Robustness Against Deception (GARD)
- Collaboration: Assured Autonomy Tools Portal (DARPA/NSF)

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Lessons Learned: Using Cloud to Advance Federally Funded AI R&D

Executive Order 13859, published in February 2019, directed the Select Committee on AI, a part of the White House National Science and Technology Council (NSTC), to issue recommendations for leveraging commercial cloud computing for federally-funded AI R&D. In July 2022, the NSTC's Machine Learning and AI Sub-Committee published a list of the best practices and challenges learned from early agency AI R&D initiatives.

Select Committee Recommendations

- » Launch pilot projects to explore the advantages and challenges of using commercial clouds for AI R&D.
- » Improve the training of researchers to help them better leverage commercial cloud for AI R&D.
- » Establish identity management best practices to optimize the use of commercial cloud for AI R&D.
- » Publish best practices documenting how to use multiple commercial cloud platforms for AI R&D seamlessly.

Sub-Committee Best Practices

- » Establish dedicated teams to manage training and access to cloud computing resources and services.
- » Require 2FA to establish baseline security and create user-based access.
- » Offer **training and education** to address skill gaps, advance access and build expertise among users.
- » Provide pre-computed resources for mission-focused research to reduce duplicative work and create baseline analytical starting points.

Common Challenges

- » Setting appropriate levels of governance and administration.
- » Authoritative, government-wide guidance on approved cloud services is lacking.
- » Costs for storage and services can limit access to shared data for multiple-party teams.
- » Determining the best way to host data while providing for privacy and security.
- » Integrating cloud and non-cloud services.

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Sample AI Procurement Opportunities

Agency	Name	Status	Value (\$K)	Est. RFP Date	Est. Award Date	Opp ID
Air Force	Advanced Tracking Architectures Using AI	Open BAA*	99000	9/2020	9/2025	197427
Army	Transformative AI Research and Applications	Open BAA*	TBD	08/2021	07/2026	209397
Air Force	Robust and Efficient Computing Architectures, Algorithms and Applications for Embedded Deep Learning	Open BAA*	99000	04/2019	9/2023	178875
Air Force	Predictive Consequence Modeling and Analysis	Open BAA*	49900	3/2019	2/2023	177770
Air Force	Operationalizing Machine Learning for Command Control Program	Open BAA*	24900	7/2019	9/2022	172954
Air Force	Applying State of the Art Artificial Intelligence and Machine Learning Approaches to Air Battle Management	Open BAA*	9900	10/2019	9/2023	185320
Transportation	Unmanned Aircraft Systems Integration Office	Open BAA*	TBD	06/2019	6/2024	180499
USTRANSCOM	Enterprise Data Environment and Big Data Analytics Capability	Forecast Pre-RFP	19551	04/2024	09/2024	209652
Army	Artificial Intelligence/ Machine Learning Software Development and Integration	Forecast Pre-RFP	TBD	10/2022	02/2023	214738
Source: Deltek						*see notes
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Sample AI Procurement Opportunities (Cont)

Agency	Name	Status	Value (\$K)	Est. RFP Date	Est. Award Date	Opp ID
Homeland Security	Enterprise Platform for Integrated Citizen Development Support	Pre-RFP	100000	11/2022	3/2023	209079
Homeland Security	Research Engineering and Development and Developmental Test and Evaluation Technical Support Services	Pre-RFP	100000	10/2022	3/2023	214703
Navy	Ocean Dynamics and Prediction Engineering and Software Development	Pre-RFP	29620	10/2022	2/2023	222152
Army	Joint Tactical Autonomous Aerial Resupply System Autonomous Aerial Resupply Concept	Pre-RFP	TBD	08/2022	11/2022	199931
DLA	DLA Shipment Data Management Service Tool	Pre-RFP	TBD	08/2022	01/2023	202051
DARPA	Machine Learning Applied to Radiofrequency Signals	Pre-RFP	TBD	10/2022	03/2023	211759
Commerce	Robotic Process Automation Pilot	Pre-RFP	TBD	08/2022	10/2022	216260
Army	Artificial Intelligence Radar Enhancement	Pre-RFP	TBD	08/2022	10/2022	216851
Navy	Artificial Intelligence and Machine Learning	Pre-RFP	TBD	09/2022	02/2023	220714
Homeland Security	Robotic Process Automation Operation and Maintenance and Change Management Support	Pre-RFP	10000	08/2022	09/2022	220317

Source: Deltek

GovWin Federal Market Analysis from Deltek

- » AI obligations increased \$319M from FY 2019-2021, driven by growth in machine learning (+\$92M), automation (+\$70M), augmented reality (+\$49M) and virtual reality (+\$34M) requirements.
- » Al-related services led spending with a total of \$1.4B, followed by \$378M in equipment in the three-year time frame.
- » Research and development (R&D) represented 65% (\$1.1B) of total obligations from FY 2019-2021, indicating that AI remains an early stage technology lacking large scale implementation in the federal space.
- » Agencies spent over \$37M on COVID-19 related requirements in FY 2020 and \$11M in FY 2021. The Air Force led COVID spending with \$34M in FY 2020 for AI R&D at the Air Force Research Laboratory.

Federal Market Analysis

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Total AI Contract Obligations, FY 2019– 2021

AI/ML spending expanding across the federal market landscape

Propelled by several policies and legislation, budgets and agency strategies, federal AI spending grew 68% from FY 2019 to 2021. Though many AI contract obligations resided in research and development, spending expanded among a variety of AI disciplines and at smaller agencies and additional AI-centered software providers entered the federal market in the three-year period.



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- » Nearly all top ten agencies increased their Al contract spend over the three year period. VA led in growth from \$4M in FY 2019 to \$28M in FY 2021, followed by Army with \$16M in FY 2019 to \$108M in FY 2021.
- » R&D obligations led spending at the top five agencies, however, IT obligations led spending at DHS, HHS and Treasury, signifying AI use to generate business efficiencies is growing among agencies.
- » Spending peaked at \$23M under DHS in FY 2019 due to a \$10M task order with CBP for autonomous border surveillance towers and \$2M at ICE for software development of automated undercover operations.
- » Treasury grew 116% over the three-year period, driven by chatbot, machine learning, natural language processing and robotic process automation initiatives in 2021 at the IRS.
- » Additional agencies with considerable Al spending outside the top ten include DOT (\$22M), USDA (\$18M), SSA (\$13M) and Justice (\$12M).

Gov Win Federal Market Analysis from Deltek

AI Contract Obligations – Top Ten Agencies, FY 2019–2021

New agencies enter the AI market in the FY 2019 to 2021 period

The top ten agencies represented 95% of total AI market from FY 2019 to 2021. Despite this, the three-year period saw the entry of several new government entities with reported obligations, including Congress, U.S. Courts, HUD and the Commodity Future Trading Commission, signaling a steady expansion of AI across the public sector.



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- » ECS Federal largely provided R&D support at DOD to develop novel approaches to Al algorithms, as well as R&D support for initiatives such as Project Maven and the Kubera Al effort.
- » NASA represented 66% of AI obligations at KBR for work related to the Ames Research Center's Intelligence Research and Development Support-2 (ISRDS-2) contract.
- » Tuknik Government Services largely provided IT, AI and ML programmatic support services to DOD's former Joint Artificial Intelligence Center in the three year period.
- » The majority of Palantir's obligations took place in FY 2020 to perform testing on an endto-end approach to AI for Defense use cases at DOD's Washington Headquarters Service.
- » General Atomics primarily provided autonomous system-related services from FY 2019-2021 to DOD, NASA and the Air Force.
- » Top clients at Raytheon in AI spend from FY 2019 to 2021 include DOD (\$17M), Navy (\$15M) and the Air Force (\$2.0M).

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AI Contract Obligations – Top Ten Contractors, FY 2019-2021

Top ten contractors by AI spend represented 37% of total obligations from FY 2019 to 2021 and totaled \$670M



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- » Defense sector small business obligations totaled \$505M vs. the civilian sector's \$259M in the three-year period.
- » Defense's growing utilization of contracting mechanisms with limited regulatory burden for AI use cases – such as Other Transaction Agreements – allowed more room for small businesses to compete.
- » Air Force led in small business contract spending from FY 2019 to 2021 with \$239M, followed by DOD (\$179M), NASA (\$88M) and Army (\$48M).
- » Small Business AI obligations grew exponentially at the VA, from \$4.0M in FY 2019 to \$28M in FY2021, driven by an increase in task orders for the Science Logic AI Operations Solutions with Swish Data Corporation and machine learning capabilities for COVID-19 deferred care with Thunder Technology.

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AI Contract Obligations – Small Business Size, FY 2019–2021

Small business AI obligations grew 113%, from \$172M in FY 2019 to \$365M in FY 2021, revealing federal agencies' continued commitment to small businesses with innovative AI capabilities



Sources: Deltek, FPDS

See appendix for keywords used to identify relevant contract obligations.

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Conclusions

ederal Market Analysis

- » The combination of AI legislation, guidance and individual agency strategies will help to advance federal use of AI and accompanying technologies such as machine learning.
- » Urgency in advancing federal AI adoption is driven by the global race to adopt faster and more sophisticated AI/ML in the defense and intelligence arenas.
- » Federal agencies will continue to use AI and predictive analytics to address the Biden Administration's priorities in national security, climate change and social and economic inequalities.
- » Expansion of AI designated offices, government-wide bodies and leadership (i.e. Chief Artificial Intelligence Officer) throughout agencies will influence future AI guidance, funding and program increases.
- » Al's intersection with tech areas such as cloud, cyber and 5G help enable the transformative technology to expand across the federal spectrum.
- » Quality of data, cultural barriers, technology transparency, effective oversight and responsible AI remain challenges in federal AI adoption.
- » Data from recent events such as the COVID-19 pandemic, Russia/Ukraine conflict and natural disasters will help fuel future AI systems in multiple research disciplines.

Conclusions (Cont)

- » Al federal spending remains rooted in R&D, however, areas of Al such as robotic processing automation (RPA) are gaining momentum as agencies automate mundane, repetitive tasks to augment the federal workforce and shift responsibilities to "high-value," cognitive work.
- Though AI spending remains centralized at a few top departments, particularly in the Defense sector, the number of agencies using AI continues to grow each year in reported contract obligations, revealing the technology's expansion in the federal space.
- » Agencies continue to procure AI-related services at an accelerated rate over AI-related equipment.
- » Spending growth among contract vehicles such as GSA's Multiple Award Schedule and NASA's SEWP V signify agencies' increasing AI use in mission and operational capacities.
- » Federal agencies increasingly using acquisition methods such as Other Transaction Agreements (OTAs) to deploy AI technologies will pave the way for traditional as well as non-traditional contractors and small businesses to enter the federal AI market under simpler conditions.

Recommendations

Federal Market Analvsis

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- » Identify top AI research applications in disciplines such as national security, transportation, healthcare, business support, weather forecasting and public safety to position federal AI offerings.
- » Offer engineering, technical or program support to aid in agency AI adoption challenges such as poor data quality and lack of data-driven culture.
- » Contribute to ongoing federal efforts to strengthen AI workforce development via training and education.
- » Offer AI solutions to augment federal oversight of AI, such as software with transparent requirements and licensing rights.
- » Identify unique acquisition methods, such as Other Transaction Agreements, that seek innovative AI prototypes to fulfill agency R&D efforts, particularly at DOD and DHS.
- » Though risks in AI prevent many agencies from scaling pilot projects, look for automation opportunities federal entities are increasingly using to support business operations.
- » Keep pace with forthcoming guidance, such as NIST's AI Risk Management Framework, that will reduce agency hesitation in adoption of responsible AI.
- » Position company offerings on top AI contract vehicles such a GSA's Multiple Award Schedule and NASA's SEWP V.
- » Seek small business partners that offer the latest AI capabilities.

Program Components

Budget Assessment

Annual analysis of the President's Budget Request

Annual IT Market Forecast Forecast of Total Federal IT Market

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