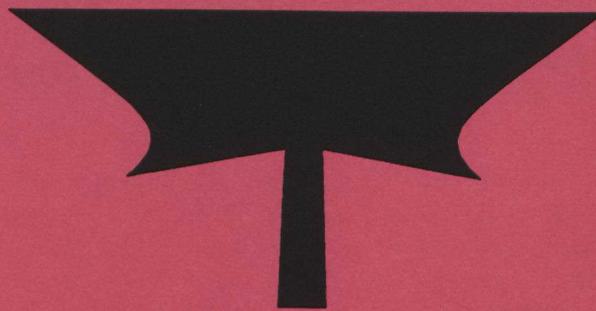


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MARKET REPORT



U.S. Federal Information Technology: 1996 - 97

Embassy Contact: Judy Bradt

March, 1996



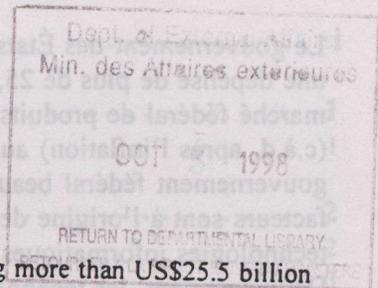
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This report was edited by J. Bradt, Commercial Officer, who remains solely responsible for its content.
Embassy of Canada, Washington DC

Executive Summary



The United States federal government is the largest IT customer in the world, spending more than US\$25.5 billion on information technology in 1994. Despite tightening federal purse strings, the federal IT market is forecasted to modestly grow in real terms (adjusted for inflation) at least until 1999. In addition, federal government IT contracts are expected to increase at a significantly faster rate than the total federal IT budget. A number of factors will drive the proposed growth. First, federal agencies are using IT solutions to deal with reduced workforces and budgets. Second, IT is considered a vital component of the continuing process of health care reform. And third, innovative IT solutions will have to be implemented to deal with the *millenium bug* - the inability of most software to deal with calculations involving the year 2000. The leading technologies in the federal IT market are: computer telephone integration (internet), electronic data interchange (EDI), document management systems, data security, business process reengineering, intelligent transportation, data compression/storage, multimedia, client/server computing, and mobile computing.

This report is designed to help you take advantage of the opportunities in the federal IT market. First, it provides an overview of the market, highlighting its size and significant trends. Second, the report explains the composition and essential elements of an effective federal business strategy. Third, it explains how to create government demand for your products or services using an end-user strategy. And fourth, the report explains how to develop and implement a channel strategy to make the most effective use of government sales channels. Reading this report and using the sources of information, assistance, networking, and marketing that it provides will greatly improve your chances of success in the federal marketplace.

The information technology industry is large, complex, and diverse. Individual IT firms have unique and specialised contracting needs. For this reason, the report does not identify specific federal contracting opportunities. Instead, the report provides you with the tools that are needed to find specific contracting opportunities that closely match your firm's capabilities. In addition, the Canadian Embassy in Washington, DC will, at your request, conduct an in-depth and tailored search to locate up-to-date federal contracting opportunities that meet your firm's needs.

Historical government budget amounts and budget forecasts used in this report were taken from the "EIA Five Year Forecast of Federal Systems Information Opportunities," published by the Electronic Industries Association (EIA). In addition, this report could not have been written without the expert advice and insightful input of Terry Kelly of Terry Kelly Associates and Tim Karney of Washington Technology. The Canadian Embassy gratefully acknowledges their contributions to the report.

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Sommaire

Le gouvernement des États-Unis est le plus gros acheteur de produits informatiques au monde avec une dépense de plus de 25,5 milliards de dollars US en 1994. Malgré les coupures budgétaires, le marché fédéral de produits informatiques devrait connaître une croissance modeste en termes réels (c.à.d. après l'inflation) au moins jusqu'en 1999. De plus, on prévoit une augmentation des contrats du gouvernement fédéral beaucoup plus rapide que celle du budget total fédéral dans ce secteur. Plusieurs facteurs sont à l'origine de cette croissance. Premièrement, les agences fédérales se servent des technologies informatiques pour compenser les coupures de budgets et d'effectifs en personnel. Deuxièmement, les technologies informatiques sont perçues comme élément essentiel du processus de réforme du secteur de la santé. Et troisièmement, des solutions innovatrices seront nécessaires pour résoudre le problème du *virus millénium* - ou millenium bug - c'est-à-dire, l'incapacité de la plupart des logiciels de faire des opérations de calcul en utilisant l'année 2000. Les technologies les plus demandées dans le marché fédéral de l'informatique sont : l'intégration des ordinateurs et le système téléphonique (Internet), l'échange de données informatisé (EDI), les systèmes de gestion de documents, la sécurité des données, la restructuration des activités commerciales, les transports intelligents, la compression et la conservation de données, le multimédia, le tandem informatique client/serveur et l'informatique mobile.

Ce rapport est conçu pour aider à cibler judicieusement le marché fédéral de la technologie de l'information. En premier lieu, il donne un aperçu du marché, en soulignant sa taille et ses tendances significatives. Deuxièmement, il définit la composition et les éléments essentiels d'une stratégie commerciale efficace avec le Gouvernement fédéral. Troisièmement, il montre la façon de créer la demande pour les produits ou les services en ayant recours à une stratégie de l'utilisateur final. Et en dernier lieu, le rapport explique comment développer et mettre en oeuvre une stratégie commune pour exploiter au maximum les canaux de vente fédéraux. La lecture de ce rapport et l'utilisation des données offertes, sources d'information, d'assistance, de mise en réseau et de marketing augmenteront beaucoup vos chances de réussite dans le marché fédéral.

L'industrie de la technologie de l'information est vaste, complexe et diverse. Chaque entreprise dans le secteur informatique a ses propres besoins en matière de contrats. C'est pour cette raison que le rapport n'identifie pas de marchés spécifiques en vue d'établir des contrats avec le gouvernement fédéral. Par contre, il procure les outils nécessaires pour trouver des opportunités de contrats qui répondent aux capacités de votre entreprise. De plus, à votre demande, l'ambassade du Canada à Washington fera les recherches nécessaires pour trouver des marchés qui répondent le mieux aux besoins de l'entreprise.

Les données historiques du budget fédéral ainsi que les prévisions budgétaires utilisées dans ce rapport proviennent du EIA Five Year Forecast of Federal Systems Information Opportunities", qui est publié par le Electronic Industries Association (EIA). De plus, sans l'aide et l'expertise de Terry Kelly de Terry Kelly Associates et de Tim Karney de Washington Technology, nous n'aurions pu mettre à jour cette publication. L'ambassade du Canada les remercie pour leur contribution.

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The Market

The federal information technology (IT) market grew consistently during fiscal years (FY) 1989-1993. In FY1994, the U.S. federal government represented the largest IT customer in the world, purchasing over US\$25.5 billion worth of IT products and services. During the next five years, FY1995-1999, the federal IT market is forecasted to experience modest growth. Before examining the IT market in detail, however, the report will identify the factors that are significantly affecting its direction.

The Factors

As the nation progresses, the U.S. federal government is becoming more and more concerned with the country's budget deficit and the growing public debt. To bring the deficit under control, the government has mandated strict budget cuts and has significantly reduced the number of full-time federal employees. Now, the government is finding it difficult to justify why it is committed to defense and, consequently, must

Overview

To be successful in the U.S. federal information technology (IT) market, Canadian companies must develop a sound federal business strategy. However, an effective business strategy cannot be developed without first collecting a great deal of accurate and vital information. This report was created to accomplish three tasks: i) to provide you with market intelligence and a general understanding of the federal IT market, ii) to direct you to other valuable sources of information, and iii) to explain how to develop an effective federal business strategy. The report is divided into four sections. The first section, "The Market," offers a number of statistics to describe the size of the federal IT market and to highlight important trends. The second section, "The Federal Business Strategy," briefly explains the composition of the strategy, its fundamental elements, and how to get started. The third section, "The End-User Strategy," explains how to develop a strategy to create demand for your products or services among government end-users. The fourth section, "The Channel Strategy," explains how to develop a strategy to make the most effective use of government sales channels.

How To Use This Report

One of the main objectives of this report is to provide you with descriptions and points of contact for excellent sources of information, assistance, marketing, and networking in the federal IT market. The report refers to many of these sources and explains the context in which they should be used. When a reference is made in the report, it is accented in **bold italics** for easy identification. To obtain a brief description and point of contact information for these sources, refer to Appendix A. Appendix A consists of a master list of all the sources of information, assistance, marketing, and networking referenced in this report and is organized into six categories of information; "Miscellaneous Assistance," "Publications," "Professional Associations," "Consulting Firms and Course Providers," "Trade Shows," and "User Groups."

Positive Affect on Federal IT Budget

- IT Manpower Shortages
- Health Care Reform
- Millennium Bug
- End of Cold War (shrinks agency IT budgets)

Negative Affect on Federal IT Budget

- Cuts to Discretionary Budgets
- End of Cold War (DOD IT budget)

The Market

The federal information technology (IT) market grew consistently during fiscal years (FY) 1989-1993. In FY1994, the U.S. federal government represented the largest IT customer in the world, purchasing over US\$25.5 billion worth of IT products and services. During the next five years, FY1995-1999, the federal IT market is forecasted to experience modest growth. Before examining the IT market in detail, however, the report will identify the factors that are significantly affecting its direction.

The Factors

As the nineties progress, the U.S. federal government is becoming more and more concerned with the country's structural deficit and ballooning public debt. To bring the deficit under control, the government has mandated strict budget cuts on discretionary spending and has significantly reduced the number of full-time federal employees. Now that the Cold War has ended, it is difficult to justify as large a commitment to defense and, consequently, most budget cuts have been targeted at the DOD (Department of Defense) in favour of the civilian agencies. IT competes for resources within discretionary spending and, therefore, is deeply affected by the cuts. On one hand, there are fewer resources to devote to procuring IT products and services. On the other hand, however, agencies are increasingly relying on IT solutions to deal with less labour, time, and money. The federal IT budget, then, is both negatively and positively affected by federal budget cuts.

While discretionary spending appears to have stabilised, mandatory spending has spiralled out of control, due in large part to the dramatic increase in the cost of medicare and medicaid. Despite the Clinton Administration's failure to achieve broad-based health care reform the HMOs (Health Management Organisations) will reform themselves, with or without government legislation. The HMOs are moving from the traditional fee-for-service system to a *managed-care* system. Managed-care relies heavily on information to deliver the most inexpensive treatments to patients, while still providing quality health care. This system requires the integration of hospital administrations, insurance companies, doctors, and patients from across the country. Clearly, IT will play a vital role in the evolution to managed-care.

Recently, another factor has surfaced: *the Millennium Bug*. The Millennium Bug refers to the problem with the year 2000. Until recently, computer software has not been designed to handle the year 2000. Normally, computers indicate years in two digit groups. For example, the two digit group "96" represents the year 1996 and the two digit group "98" represents the year 1998. However, except for the most recent software, the two digit group "00" is not understood or is translated to mean the year 1900. Any software that relies on date-based calculations produces an error when faced with the year 2000. The implications in government are enormous. If the government does not correct the situation by the year 2000, people will not receive their social security cheques or other government cheques on time, the government finance and accounting system will fail, and many of the Department of Defence's (DOD) automatic weapons systems will malfunction. As a result, billions of dollars must be spent to correct millions of lines of government software code. It is estimated that the effort will cost in the area of US\$30 billion. This presents an excellent opportunity to firms that develop inexpensive and flawless methods to correct the problem with the year 2000. During the next four years, the Millennium Bug will be one of the major drivers in government IT spending.

Positive Affect on Federal IT Budget

- IT Manpower Multiplier
- Health Care Reform
- Millennium Bug
- End of Cold War (civilian agency IT budgets)

Negative Affect on Federal IT Budget

- Cuts to Discretionary Budgets
- End of Cold War (DOD IT budget)

Top Technologies

Due to the vagueness of federal procurement data, it is very difficult to determine the top technologies in the federal IT market. However, the hottest ten technologies in the NetPlex (the Washington, DC area technology centre) provide a fairly good indication of the top technologies in the federal market as a whole. In no particular order, they are:

- Computer Telephone Integration (Internet)
- Electronic Data Interchange (EDI)
- Document Management Systems
- Data Security
- Business Process Reengineering
- Intelligent Transportation
- Data Compression/Storage
- Multimedia
- Client/Server Computing
- Mobile Computing

The Trends

As noted above, the federal IT market is projected to experience modest growth during FY1995-1999. The growth that is forecasted here is real growth; it has been corrected for inflation. All dollar figures used in the analysis, both past and present, are quoted in millions of constant 1994 U.S. dollars. If the analysis had used current dollars, the forecasted growth would have been significantly higher.

Each of the following tables compares a different element of the FY1989, FY1994, and FY1999 (forecast) IT budgets. The tables highlight a number of important trends in the IT market. Each trend is outlined below the table.

Table 1: Breakdown of Federal IT Budget -- FY1989 to FY1994
(in millions of constant 1994 US\$)

Fiscal Year	In-House	% of Total	Contracted-Out	% of Total	Total	% Change
1989	\$6,988	27.8%	\$18,128	72.2%	\$25,116	N/A
1994	\$7,061	27.6%	\$18,521	72.4%	\$25,582	1.9%
1999	\$6,440	25.0%	\$19,296	75.0%	\$25,736	0.6%

- **Federal IT budget experiences modest growth.**

Between FY1989 and FY1994, the federal IT budget grew by US\$466 million, representing a moderate increase of almost 2%. During the next five years, the budget is forecasted to continue to grow, but at a much slower pace. In FY1999, the budget will have grown by only 0.6% since FY1994, to over US\$25.7 billion.

- **Federal IT procurement grows seven times faster than the federal IT budget!**

Of most interest in Table 1 is the distribution of the total budget between in-house obligations (i.e. personnel, space, supplies) and contracting obligations (i.e. federal purchases of hardware, software, operation and maintenance services, professional services, studies, etc.). In-house obligations are forecasted to be significantly reduced by FY1999, severely limiting the growth of the federal IT budget. On the other hand, contracting obligations are forecasted to increase quite significantly. **For companies that are interested in doing business with the U.S.**

Information Technology: Selling to the U.S. Federal Government

federal government, the contracting obligations are the federal IT market. Between FY1989 and FY1994, federal government IT contracts increased by almost US\$400 million, or 2.2%. During this period, contracting obligations increased at approximately the same rate as the total federal IT budget. However, between FY1994 and FY1999, contracting obligations are forecasted to increase by US\$775 million, or 4.2%. This is seven times faster than the rate of growth of the total federal IT budget (0.6%). As a result, the contracting obligations' share of the federal IT budget will increase from 72.4% in FY1994 to 75.0% in FY1999.

Table 2: Breakdown of Federal Contracting Obligations -- FY1989 to FY1994
(in millions of constant 1994 US\$)

Fiscal Year	Capital Investment	% of Total	Commercial Services	% of Total	Equipment Lease	% of Total	Total	% Change
1989	\$5,046	27.8%	\$12,334	68.0%	\$748	4.1%	\$18,128	N/A
1994	\$5,846	31.6%	\$12,274	66.3%	\$401	2.2%	\$18,521	2.2%
1999	\$5,993	31.1%	\$12,944	67.1%	\$359	1.9%	\$19,296	4.2%

Table 2 breaks down the total federal contracting obligations into three categories: capital investment, commercial services, and equipment lease. Capital investment consists of hardware and software purchases. Commercial services are professional services, operation and maintenance services, studies, and communications services. Equipment lease is, of course, the leasing of hardware and software.

- **Capital investment growth slows, while commercial services rebound.**

Between FY1989 and FY1994, capital investment experienced significant growth of 15.9%. Commercial services, on the other hand, declined slightly by 0.5%. However, during the next five years commercial services are forecasted to grow much faster than capital investment. In FY1999, federal purchases of commercial services will be over US\$12.9 billion, an increase of 5.5%. Federal purchases of capital investment will total almost US\$6 billion, a five year increase of only 2.5%. **The federal commercial services market will remain over twice the size of the capital investment market.**

- **Decline of equipment leasing slows, but continues.**

During fiscal years 1989-1994, equipment leasing declined by almost half. In 1994, it accounted for only 2.2% of all federal contracting obligations. During the next five years, equipment leasing will continue to decline. In FY1999, it will only total US\$359 million, representing 1.9% of federal contracting obligations.

Table 3: Comparison of DOD and Civil Agency IT Budgets -- FY1989 to FY1994
(in millions of constant 1994 US\$)

Fiscal Year	Defense	% of Total	Civil	% of Total	Total	% Change
1989	\$11,782	46.9%	\$13,334	53.1%	\$25,116	N/A
1994	\$9,862	38.5%	\$15,722	61.5%	\$25,582	1.9%
1999	\$9,560	37.1%	\$16,176	62.9%	\$25,736	0.6%

Information Technology: Selling to the U.S. Federal Government

As noted above, the end of the Cold War resulted in a reduced financial commitment to the Department of Defense (DOD) and an increased commitment to the civilian agencies. Effectively, the DOD and civilian agencies act as two separate markets for IT and, for this reason, they are treated separately in the analysis.

- **Decline in the DOD IT budget continues, but slows significantly.**

Between FY1989 and FY1994, the DOD IT budget decreased by almost US\$2 billion, or 16.3%. In FY1999, the DOD IT budget is forecasted to be almost US\$9.6 billion, down from US\$9.9 billion in FY1994. This represents a decrease of only 3.1%, significantly less than the decline during the previous five year period.

- **The federal IT budget continues to shift to the civilian agencies.**

Between FY1989 and FY1994, civilian agency IT budgets dramatically increased by almost US\$2.4 billion, or 17.9%. During the next five year period, the civilian agency IT budgets are expected to increase to almost US\$16.2 billion, a 2.9% increase.

Although the growth in the civilian agency IT budgets will slow down significantly during the next five years, the civilian agencies are still expected to account for almost 63% of the total federal IT budget in FY1999. Therefore, the civilian agencies' share of the federal IT budget will have increased by almost 10 percentage points in just ten years.

Table 4: Breakdown of DOD IT Budget -- FY1989 to FY1994

(in millions of constant 1994 US\$)

Fiscal Year	In-House	% of Total	Contracted-Out	% of Total	Total	% Change
1989	\$3,789	32.2%	\$7,993	67.8%	\$11,782	N/A
1994	\$3,169	32.1%	\$6,693	67.9%	\$9,862	-16.3%
1999	\$2,685	28.1%	\$6,875	71.9%	\$9,560	-3.1%

- **Despite continued cuts to the DOD IT budget, contracting opportunities actually increase!**

Between FY1989 and FY1994, when the DOD experienced the most dramatic cuts to its IT budget, the in-house obligations and contracting obligations were cut virtually across the board at 16.3%. Although the IT budget is forecasted to decrease again between FY1994 and FY1999, the in-house obligations and contracting obligations are expected to be cut at different rates. The in-house obligations are again forecasted to be cut hard; by 15.3%. The contracting obligations, on the other hand, are actually forecasted to increase from almost US\$6.7 billion in FY1994 to almost US\$6.9 billion in FY1999, an increase of 2.7%. Still, the DOD's procurement of IT in FY1999 will not be anywhere close to its level ten years earlier, in FY1989.

Table 5: Breakdown of DOD Contracting Obligations -- FY1989 to FY1994

(in millions of constant 1994 US\$)

Fiscal Year	Capital Investment	% of Total	Commercial Services	% of Total	Equipment Lease	% of Total	Total	% Change
1989	\$1,964	24.6%	\$5,841	73.1%	\$188	2.3%	\$7,993	N/A
1994	\$1,855	27.7%	\$4,785	71.5%	\$53	0.8%	\$6,693	-16.3%
1999	\$1,867	27.2%	\$4,970	72.3%	\$38	0.5%	\$6,875	2.7%

Information Technology: Selling to the U.S. Federal Government

- **DOD spending on commercial services to remain over 2 1/2 times DOD hardware and software spending!** Between FY1989 and FY1994, spending on hardware and software (capital investment) and spending on commercial services declined, but at very different rates. Hardware and software purchases declined by 5.5% while commercial services spending declined by over US\$1 billion, a decrease of 18.1%. During the next five years, both markets are expected to increase slightly. In FY1999, DOD purchases of commercial services are forecasted to total almost US\$5 billion, over two and a half times greater than DOD total spending of US\$1.9 billion on hardware and software.

- **Equipment leasing no longer considered an option by DOD.**

In FY1989, the DOD leased US\$188 million worth of hardware and software, representing 2.3% of all DOD contracting obligations. In FY1999, however, the equipment leasing is forecasted to be only US\$38 million or half a percent of all contracting obligations. It seems clear that the DOD no longer considers equipment leasing to be an option.

Table 6: Breakdown of Civil Agency IT Budgets -- FY1989 to FY1994

(in millions of constant 1994 US\$)

Fiscal Year	In-House	% of Total	Contracted-Out	% of Total	Total	% Change
1989	\$3,199	24.0%	\$10,135	76.0%	\$13,334	N/A
1994	\$3,894	24.8%	\$11,828	75.2%	\$15,722	17.9%
1999	\$3,755	23.2%	\$12,421	76.8%	\$16,176	2.9%

- **Growth in civil agency contracting opportunities to exceed the growth in their budgets.**

As noted above, the growth in the civil agency IT budgets is forecasted to slow significantly to only 2.9% during the next five years. During that period the in-house obligations are actually expected to decrease. However, contracting obligations are expected to increase faster than the IT budgets, to over US\$12.4 billion in FY1999, an increase of 5.0%.

Table 7: Breakdown of Civil Agency Contracting Obligations -- FY1989 to FY1999

(in millions of constant 1994 US\$)

Fiscal Year	Capital Investment	% of Total	Commercial Services	% of Total	Equipment Lease	% of Total	Total	% Change
1989	\$3,082	30.4%	\$6,493	64.1%	\$560	5.5%	\$10,135	N/A
1994	\$3,991	33.7%	\$7,489	63.3%	\$348	2.9%	\$11,827	16.7%
1999	\$4,126	33.2%	\$7,974	64.2%	\$321	2.6%	\$12,421	5.0%

- **Capital IT acquisition strongest in the civilian agencies.**

During fiscal years 1989-1994, civilian hardware and software purchases (capital investment) gained significantly on the civilian commercial services market, gaining 4.1 percentage points. While the forecast for FY1999 suggests that spending on hardware and software will lose some of the gains it made during the previous five year period, it will still account for 33.2% of all civilian agency contract obligations. This compares to the DOD hardware and software spending which, in FY1999, will only account for 27.2% of all DOD contract obligations.

The Federal Business Strategy

Success in the federal IT market depends on the development of an effective federal business strategy. To be effective, a federal business strategy should be divided into two equal and complementary sub-strategies: an *end-user strategy* and a *channel strategy*. The implementation of each sub-strategy should accomplish one of two essential objectives. The end-user strategy should create demand among government end-users. The channel strategy should make the most effective use of available government sales channels. Obviously, both objectives are essential and complementary. Creating government demand ensures that government end-users want to purchase your company's products or services. Making the most effective use of government sales channels ensures that all those that wish to buy your products or services can easily do so. The end-user and channel sub-strategies should be closely coordinated. The two strategies should be implemented simultaneously and information collected as a result of one strategy should be used to evaluate and fine tune the other. If the two strategies are closely integrated, the overall effectiveness of your federal business strategy will be significantly improved.

Elements for Success

Building an effective federal business strategy depends on three general elements: resources, patience, and information.

Resources

The first element, *resources*, refers to your investment of time, a capable staff, and money into the development and implementation of your federal business strategy. Generally, the more resources you can invest, the more successful you will be in the federal IT market. Many companies fail in the IT market simply because they do not fully commit to it.

New companies to the federal IT market often try to reduce their risks by severely limiting the amount of time, labour, and money they invest into developing and implementing their federal business strategy. Unfortunately, the only way to succeed in the federal arena is to take the necessary time to learn the market yourself, collect the information you need, and develop strong and useful business relationships. This simply cannot be done without a significant and **well-planned** investment of time, labour, and money. Companies that severely limit their investment, have already decided to fail. If you are confident in the product or service your company offers and in your ability to build a strong federal business plan, invest your available resources into the effort.

A Note on Marketing and Sales Representation: To minimise risks, many companies new to the federal IT market hire an experienced marketing firm to represent them in the federal market. Most observers of the federal IT market, however, warn companies against this. When a firm with limited federal experience hires a marketing and sales firm, it often pays for services that it does not need. Without experience in the federal market, Canadian firms find it difficult to determine which marketing services are absolutely essential and which are not. Secondly, a Canadian company's own staff will always be the most committed to and knowledgeable about the company's needs, products, and position in the market. Third, and most important, success in the federal market hinges on a firm's ability to build strong, mutually beneficial business relationships. Over time, relationships must be developed with large prime contractors, resellers, other potential teaming partners, and, of course, government end-users. Marketing firms cannot afford to take the time that is necessary to develop strong business relationships for their clients. Canadian companies must locate their own staff in the DC area for this purpose. Regardless of the experience that many marketing firms can offer, companies simply receive the best value for their time and money from their own competent staff.

Patience

Many companies new to the federal IT market expect immediate or near immediate results and conclude that they have failed when they simply have not given the market enough time. New firms to the market must learn how it is structured, who the major players are, and how the government procurement process works. Learning the market takes time. As noted above, success in the federal IT market also depends on a firm's ability to develop strong business relationships with its potential teaming partners and government end-users. In both social and business environments, relationships are built on trust and, again, gaining trust takes time. Carefully collecting the needed information and developing an effective federal business strategy also takes time. Observers of the federal IT market estimate that learning the market takes approximately 6-12 months and that firms should not expect a significant return on their investment for 1 to 2 years. Companies that invest the resources necessary to develop and implement an effective federal business strategy often find their returns to be well worth the wait.

Market Intelligence

The third element, information, is closely related to the first two elements. An effective federal business strategy cannot be developed without collecting a large quantity of accurate and timely information. New firms to the federal IT market must invest the resources (money, a capable staff, and time) that are needed to collect intelligence that can be used to develop an effective strategy.

Getting Started

There are a number of initial steps you should take when entering the federal IT market:

Read Publications

The *Canadian Embassy* provides a basic kit called "Selling to the United States Federal Government" to Canadian companies that are interested in entering the U.S. federal market. The publication is designed specifically for Canadian companies and it provides an excellent overview of the federal procurement process.

An *Office of Small and Disadvantaged Business Utilization (OSDBU)* is located in every U.S. federal agency. OSDBUs provide a publication called "Doing Business With (Agency Name)" that lists the products and services purchased by the agency and explains the specific procurement procedures of the agency. To obtain an agency's "Doing Business with..." handbook, contact that agency's OSDBU (see Appendix A under "Miscellaneous Assistance").

Attend Courses and Seminars

There are many companies and universities that offer courses and seminars on a wide variety of topics related to the federal market, including: government marketing strategies, government sales channels, selling from a GSA schedule, electronic commerce, and federal procurement regulations. Attending the courses is one of the fastest ways to become familiarised with how the federal market works. Refer to the *Consulting Firms and Course Providers* section in Appendix A to help you determine the course provider that best meets your needs (this list is not exhaustive).

Attend a Personal Introductory Briefing at the Canadian Embassy

At the *Canadian Embassy, Washington, DC*, the Commercial Officer will hold a personal introductory briefing with you to help you assess your competitiveness in the federal IT market, identify your best federal prospects, and discuss your first steps in penetrating the federal market. Call (202) 682-7746 (see "Miscellaneous Assistance," Appendix A).

Contact the Canadian Commercial Corporation (CCC)

The *Canadian Commercial Corporation (CCC)*, a Canadian Crown Corporation, provides many services to Canadian companies that do business with the U.S. federal government. It acts as a prime contractor for the sale of Canadian products and services to the U.S. government. Canadian firms contracting through the CCC are given instant credibility because the Corporation's participation in an export sale constitutes the commitment of the Government of Canada that the contract will be performed. Using its Bid Matching Service, the CCC locates contracting opportunities that match the specific capabilities of its clients. The Corporation's expertise and reputation in the U.S. federal procurement market can greatly improve the chances of your success. In fact, the U.S. Department of Defence (DOD) and NASA require that Canadian firms contract through the CCC. Call (613) 996-0034 (see "Miscellaneous Assistance," Appendix A).

Contact the National Contract Management Association (NCMA)

The *National Contract Management Association (NCMA)* is an excellent source of information. The association was created to train and educate its members on how to win and manage U.S. federal government contracts. Joining the NCMA is a good way for a firm new to the federal market to learn how to do business with the federal government. Call (703) 448-9231 (see "Professional Associations," Appendix A).

Consider Meeting With a Consulting Firm

There are four major federal IT consulting firms and many smaller *boutique* firms in the Washington, DC area that provide customised market research, personal consulting, some marketing support, and federal opportunity tracking. Their services can be used to make an informed market-entry decision, to develop an effective federal business strategy, to track federal contracting opportunities, to identify and profile competitors and potential teaming partners, and to locate potential federal customers. Essentially, the big consulting firms can provide you with any information you might need - at a price. Their services cost thousands or even tens of thousands of dollars. However, the market intelligence that they provide can result in a payoff that more than makes up for the initial investment. Consider meeting with each of the consulting firms listed in the "Consulting Firms and Course Providers" section in Appendix A.

Source: Information Technology Source Inc. maintains a similar database for State and Local government opportunities. Call (703) 997-7700 (see "Consulting Firms and Course Providers," Appendix A).

Expert Eye Publications, Inc. provides "Federal Prime Contracts," a database that tracks and details awarded federal prime contracts. The database can really be used to determine long-term agency buying patterns and to identify the federal agencies with the largest IT budgets. A one-year subscription to the database costs US\$2,495. Call (703) 242-4201 (see "Miscellaneous Assistance," Appendix A).

Reports

*The Electronic Industries Association (EIA) holds an annual conference and publishes a report called *EIA Five Year Forecast of Federal Information Systems Opportunities* that provide in-depth analysis of the federal IT market and agency IT budgets, current trends, and the latest technologies. The report can be purchased from the EIA for US\$249. Call (703) 997-7500.*

*The Federal Procurement Data Center, operated by the General Services Administration (GSA), publishes a free annual *Federal Procurement Report* containing newspaper articles on the procurement activities of over 60 federal agencies. The report breaks down the federal agencies' budgets into major product and service areas. The information is useful for identifying major federal purchasing agencies of IT. Contact the Federal Procurement Data Center for a copy of the report. Call (302) 401-1529 (see "Publications," Appendix A).*

End-User Strategy

The objective of the end-user strategy is to create government demand for your company's products and services. This report presents four steps in developing an end-user strategy:

- target your top federal agency customers;
- locate main points of contacts within targeted agencies;
- identify federal contracting opportunities; and
- implement your end-user marketing strategy.

Targeting Your Top Federal Agency Customers

There are a number of sources that can help you identify your top federal agency customers:

Databases

The *Canadian Embassy, Washington, DC* can use its "Federal Prime Contracts" database from Eagle Eye Publishing Inc. to generate free reports detailing historical agency IT budgets. The information is particularly useful for identifying the top purchasing agencies of IT in the federal government. Call (202) 682-7746 (see "Miscellaneous Assistance," Appendix A).

Federal Sources Inc. produces a federal database called "Fed-Mark Federal" that tracks and reports contracting opportunities emerging from the top 500 federal IT programs. Each contract is tracked from the initial point of Agency Procurement Request (APR) to the final point of contract award or protest. The database can be used to identify the federal agencies that offer the most contracting opportunities. A full one-year subscription to the database costs US\$9,750 for small businesses (US\$13,000 for large businesses) and can be immensely valuable to firms that are committed to the U.S. federal IT market. Federal Sources Inc. produces a similar database for State and Local government opportunities. Call (703) 610-8700 (see "Consulting Firms and Course Providers," Appendix A).

Eagle Eye Publishers, Inc. produces "Federal Prime Contracts," a database that tracks and details awarded federal prime contracts. The database can easily be used to determine long-term agency buying patterns and to identify the federal agencies with the largest IT budgets. A one-year subscription to the database costs US\$2,495. Call (703) 242-4201 (see "Miscellaneous Assistance," Appendix A).

Reports

The Electronic Industries Association (EIA), holds an annual conference and publishes a report called *EIA Five Year Forecast of Federal Information Systems Opportunities* that provide in depth analysis of the federal IT market size, agency IT budgets, current trends, and the hottest technologies. The report can be purchased from the EIA for US\$280. Call (703) 907-7500.

The *Federal Procurement Data Centre*, operated by the General Services Administration (GSA), publishes a free annual "Federal Procurement Report" containing *snap-shot* statistics on the procurement activities of over 60 federal agencies. The report breaks down the federal agencies' budgets into major product and service areas. The information is useful for identifying the top federal purchasing agencies of IT. Contact the Federal Procurement Data Centre for a free copy of the report. Call (202) 401-1529 (see "Publications," Appendix A).

Professional Associations

The professional associations, *IAC (Industry Advisory Council)*, *ITAA (Information Technology Association of America)*, and *AFCEA (Armed Forces Communications and Electronics Association)*, hold many meetings to inform their members of the changing information technology needs of federal agencies. Federal agencies are often invited to association meetings and conferences to express their IT requirements. The Canadian Embassy strongly recommends that you join one or more of these associations (see "Professional Associations," Appendix A).

Offices of Small and Disadvantaged Business Utilisation (OSDBU)

The *Office of Small and Disadvantaged Business Utilisation (OSDBU)* at each federal agency can tell you whether the agency purchases the products or services your company provides (see "Miscellaneous Assistance," Appendix A). Although OSDBUs are only required to help U.S. small businesses, in practice, they will provide information to any companies that request it, including Canadians.

Business Service Centres (BSCs)

The *Business Service Centres (BSCs)*, operated by the GSA, can, in many cases, identify the top federal purchasing agencies of your company's products and services (see "Miscellaneous Assistance," Appendix A).

Consulting Firms

IT consulting firms in the Washington area can conduct a customised and extremely accurate search to identify the top federal agency purchasers of your company's products or services - at a price. For a sample list of consulting firms, refer to the "Consulting Firms and Course Providers" section in Appendix A.

Analysis: Federal Agency IT Budgets -- FY1989 to FY1999

(see Table 8 on page 13)

Table 8 on page 13, compares federal agency IT budgets in fiscal year (FY) 1989, FY1994, and the forecasted IT budgets for FY1999. All dollar amounts are in millions of constant 1994 U.S. dollars. Below, is an analysis of the figures presented in the table; identifying important trends and the best federal agency prospects for IT firms.

- **The Federal IT Market is Experiencing a Shift from the Department of Defence (DOD) to the Civilian Agencies.**

The *Big Three* in FY1989 were Army, Navy/Marines, and Air Force; all DOD agencies. In FY1994, they were Health and Human Services, Navy/Marines, and Army. In FY1999, the big three are forecasted to be Health and Human Services, Department of Treasury, and Army. Clearly, federal purchasing of IT is shifting away from the DOD agencies and towards the civilian agencies.

- **Federal IT Purchasing is Becoming Less Concentrated.**

In FY1989, the top three purchasing agencies of IT; Army, Navy/Marines, and Air Force; accounted for almost US\$10 billion and over 40% of total federal IT spending. In sharp contrast, the top three in FY1999; Health and Human Services, Department of Treasury, and Army; are forecasted to represent US\$7.8 billion and only 29.5% of total federal IT spending. As the federal IT market shifts from the Department of Defence (DOD) to the civilian agencies, federal purchasing is becoming less concentrated.

- **Health and Human Services (HHS) IT Spending is Dramatically Increasing.**

As noted at the beginning of the report, one of the major factors driving IT spending is health care reform. This is confirmed by the figures presented in table 8. In FY1989, HHS IT spending was US\$1.8 billion. In FY1994, HHS was the top federal IT spender with a budget of US\$2.7 billion, an increase of 50% over FY1989. In FY1999, HHS IT spending is forecasted to be US\$3.5 billion, representing a significant five year increase of almost 28%.

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- **Department of Treasury (TREAS) is also Becoming a Major Purchasing Agency**
TREAS was the eighth largest federal purchaser of IT in FY 1989, spending US\$1.4 billion. In FY1999, TREAS is forecasted to be the second largest purchaser of IT, spending US\$2.2 billion, a ten year increase of 56%.

Top Federal Agency Prospects

You should market to and track contracting opportunities from all fifteen of the top purchasing agencies. However, based on the figures presented in table 8, the Canadian Embassy recommends concentrating your efforts on the following nine agencies. Together, they are forecasted to spend over US\$17.5 billion in FY1999, accounting for two-thirds of total federal IT spending.

- | | |
|-----------------------------------|--------------------------------------|
| • Health and Human Services (HHS) | • Department of Transportation (DOT) |
| • Department of Treasury (TREAS) | • Air Force |
| • Army | • NASA |
| • Navy/Marines | • Department of Agriculture (USDA) |
| • Department of Energy (DOE) | |

Table 8: Top Federal Agency IT Budgets -- FY1989 to FY1999
(in millions of constant 1994 US\$)

Agency	FY1999 (Forecast)			FY1994			FY1989		
	Rank	Amount (constant US\$M)	% of Total	Rank	Amount (constant US\$M)	% of Total	Rank	Amount (constant US\$M)	% of Total
Health and Human Services (HHS)	1	\$3,495	13.2%	1	\$2,735	10.6%	4	\$1,805	7.4%
Department of Treasury (TREAS)	2	\$2,213	8.4%	7	\$1,796	6.9%	8	\$1,420	5.8%
Army	3	\$2,100	7.9%	3	\$2,154	8.3%	1	\$3,349	13.6%
Navy/Marines	4	\$1,950	7.4%	2	\$2,232	8.6%	2	\$3,321	13.5%
Department of Energy (DOE)	5	\$1,726	6.5%	6	\$1,881	7.3%	7	\$1,606	6.5%
Department of Transportation (DOT)	6	\$1,712	6.5%	4	\$1,958	7.6%	5	\$1,695	6.9%
Air Force (USAF)	7	\$1,600	6.1%	5	\$1,957	7.6%	3	\$3,225	13.1%
NASA	8	\$1,508	5.7%	8	\$1,764	6.8%	6	\$1,622	6.6%
Department of Agriculture (USDA)	9	\$1,322	5.0%	9	\$1,086	4.2%	9	\$898	3.7%
Department of Commerce (DOC)	10	\$844	3.2%	12	\$630	2.4%	11	\$578	2.4%
Department of Justice (DOJ)	11	\$736	2.8%	10	\$885	3.4%	12	\$572	2.3%
Veterans' Affairs (VA)	12	\$660	2.5%	11	\$661	2.6%	10	\$594	2.4%
Defence Finance and Accounting Service (DFAS)	13	\$604	2.3%	13	\$559	2.2%	N/A	N/A	N/A
Department of Interior (DOI)	14	\$565	2.1%	15	\$535	2.1%	13	\$430	1.8%
Department of Education (DOE)	15	\$417	1.6%	23	\$216	0.8%	23	\$80	0.3%
Total	29	\$25,736	100%	28	\$25,582	100%	24	\$25,116	100%

Locating Main Points of Contact Within Targeted Agencies

Once you have identified the federal agencies that represent your potential federal customers, you must locate the individuals within those agencies that you will market and sell to. There are two groups of government decision-makers that you should target. They are the government *users* (i.e. Program Managers, Information Resource Managers or IRMs, and end-users) and the government *purchasers* (i.e. Contracting Officers) of your company's products and services. The *users* are responsible for determining when there is a need for a certain product or service. They are also responsible for determining the exact specifications that a purchased product or service should have. The *purchasers* are responsible for managing the actual purchase; ensuring that the government receives products and services of a satisfactory quality at a reasonable price. This usually involves managing an open competition for the government contract, but not always. Special cases, including contracts that are set-aside for 8(a) firms, GSA schedule purchases, and contracts that are sole-sourced (all explained below) do not involve a competitive procurement.

By effectively marketing to government users, you can:

- find out about upcoming contracting opportunities;
- convince the users of their need for your product or service; and
- influence the stated specifications of required products or services to match the specifications of your company's products or services.

By effectively marketing to government purchasers, you can:

- find out about upcoming contracting opportunities;
- locate government users of your company's products or services; and
- ensure that the government purchasers are familiar with your company and the products or services it provides.

There are many resources that can help you locate the government users and purchasers of your company's products or services.

Directories

The *Canadian Embassy, Washington, DC* can provide you with a "Federal IRM Directory" that lists point of contact information for every Information Resource Manager in the U.S. federal government. This is an excellent resource for locating important government personnel that make decisions regarding the procurement of IT. Call (202) 682-7746 (see "Miscellaneous Assistance," Appendix A).

The *U.S. Government Purchasing and Sales Directory*, available from the Government Printing Office for only about US\$24, lists the address and phone number for every purchasing office in the federal government. The directory is organised so that you can easily find all the purchasing agencies that procure a certain good or service (i.e. "Personal Computers," "Workstations," "Software," "Programming"). No other resource is as inexpensive and effective at locating government purchasers. Call (202) 512-1800 (see "Publications," Appendix A).

The *Federal Yellow Book* is a directory that provides point of contact information for the more than 39,000 top personnel in the Executive Branch of the federal government. The directory costs about US\$250 and is very useful for locating key government decision-makers that use and purchase your company's products or services. Call (212) 627-4140 (see "Publications," Appendix A).

Offices of Small and Disadvantaged Business (OSDBUs)

The *Office of Small and Disadvantaged Business Utilisation (OSDBU)* at each federal agency can help you locate government users and purchasers of your company's products and services within their respective agency. As noted

above, the official mission of OSDBUs is to help U.S. small and disadvantaged businesses. Still, in practice they will provide information to any companies that request it, including Canadians (see "Miscellaneous Assistance," Appendix A).

Consulting Firms

IT consulting firms can conduct customised searches to locate important government users and purchasers of your company's products and services. As usual, using consultants is expensive, but can be worth it. For a sample list of consulting companies, refer to the "Consulting Firms and Course Providers" section in Appendix A.

Identifying Federal Contracting Opportunities

On average, successful firms in the federal IT market track over 150 federal IT programs each year, resulting in 3 or 4 wins (i.e. contract awards or subcontracting agreements). 3 or 4 wins may not sound that impressive, but in the federal IT market, 3 or 4 wins often represents millions or even tens of millions of dollars. To successfully track 150+ programs each year, you must rely on many resources:

Customer Calls

Customer calls provide the best way to identify and track federal contracting opportunities. In-person and over-the-phone calls to the government users and purchasers of your company's products and services allow you to develop relationships with your government customers, create government demand for your product or service, find out about upcoming contracting opportunities, and influence contract specifications. No other information-gathering or marketing technique is as effective as customer calls.

Fed-Mark Federal

Federal Sources' "Fed-Mark Federal" database tracks and reports contracting opportunities emerging from the top 500 federal IT programs. The database lists a description of the contract, the contract requirements, the estimated value of the contract, the prospective bidders (and winners), and the likely subcontractors. A full one-year subscription to the database costs US\$9,750 for small businesses (US\$13,000 for large businesses) and can be immensely valuable to firms that are committed to the U.S. federal IT market. Call (703) 610-8700 (see "Consulting Firms and Course Providers," Appendix A).

Note: The Canadian Embassy can search this database for your company. Call (202) 682-7746.

Publications

The *Office of Small and Disadvantaged Business Utilization (OSDBU)* at each federal agency publishes a handbook called "Forecast of Upcoming Contract Opportunities." The forecast lists anticipated agency contracting opportunities for the forthcoming three to five years. It is an excellent resource. You can use the forecast to identify contracting opportunities far in advance, giving you plenty of time to market to the appropriate end-users and purchasers; creating government demand for your product or service and influencing the contract's specifications. (see "Miscellaneous Assistance, Appendix A). However, many other agency contracts are likely to arise as-needed and will not be listed in the forecast. Therefore, only frequent customer calls can ensure that you do not miss any federal business opportunities.

The *Commerce Business Daily (CBD)* is issued Monday to Friday by the Department of Commerce and lists a synopsis of all U.S. federal government proposed procurement, sales, and contract awards above US\$25,000. This publication is essential. However, if the first time you hear of a contracting opportunity is through the CBD, then you are at a disadvantage to your competitors. You can be sure that some of your federal competitors already knew about the opportunity. Frequent customer calls will ensure that you know about contracting opportunities far before

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their publication in the CBD. The Commerce Business Daily can also be obtained in electronic form from many companies, including Canada's Open Bidding System, providing on-line and fax services. Appendix D lists point of contact information for thirteen such companies.

Note: As the federal government struggles to become more efficient, government use of the internet is dramatically increasing. RFPs (Requests for Proposals), RFQs (Requests for Quotes), and IFBs (Invitation for Bids) are increasingly transmitted to companies electronically. Similarly, in many cases, companies can submit their proposals and invoices to government and receive their payments from government over the internet. For more information on electronic commerce, contact the Canadian Embassy (202-682-7746) and request the report called "Electronic Commerce with the U.S. Federal Government."

Bid Matching Service

The *Canadian Commercial Corporation* (call 613-996-0034) and Canada's *Open Bidding Service* (call 800-361-4637) both provide the Bid Matching Service. The Bid Matching Service matches contracting opportunities listed in the Commerce Business Daily (CBD) to the specific capabilities of individual companies. When a match is found, a fax that lists the opportunity and the necessary contact information is immediately sent to the Canadian firm or firms that can provide the required good or service. As above, if the first time you hear of a contracting opportunity is via the Bid Matching Service, then you will have to play catch-up to some of your federal competitors.

Bidders' Mailing Lists

To ensure that you receive the federal solicitation packages (required to prepare proposals) for contracting opportunities of interest to your firm, you should submit a "Solicitation Mailing List Application," known as Standard Form 129 (SF129) to each purchasing office that is responsible for acquiring the products or services that your company provides. To obtain SF129, to receive assistance filling out the application, or to be informed of any agency-specific requirements, contact the appropriate *Offices of Small and Disadvantaged Business Utilisation (OSDBUs)*. To receive the solicitation package necessary to be placed on a GSA schedule (explained below), you must register on the GSA's Centralised Mailing List. The GSA *Business Service Centre (BSC)* nearest you can help you register.

Note: The *Canadian Commercial Corporation* (call 613-996-0034) can register your firm on the mailing lists that you specify. This service can save you enormous amounts of time and effort!

Implementing Your End-User Marketing Strategy

As noted above, there are two types of government decision-makers that you should market to: the users and the purchasers of your company's products and services.

By effectively marketing to government users, you can:

- find out about upcoming contracting opportunities;
- convince the users of their need for your product or service; and
- influence the stated specifications of required products or services to match the specifications of your company's products or services.

By effectively marketing to government purchasers, you can:

- find out about upcoming contracting opportunities;
- locate government users of your company's products or services; and
- ensure that the government purchasers are familiar with your company and the products or services it provides.

This is, by far, the most important step in your end-user strategy. It is at this stage that you actually create government demand for your company's products and services. Remember, without government demand, your channel strategy will be useless. Listed below, are many resources that you can utilise to create government demand:

Customer Calls

Once you have identified specific contracting opportunities, customer calls are the best method of marketing. No other method is as effective at creating government demand. When making in-person and over-the-phone calls to your government end-users, determine their role in government, assess their needs, identify their current information systems, and then, explain to them how your products or services will help them do their job better, faster, easier, and/or cheaper. If you have marketed effectively, the contract specifications that are set should match the specifications of your products or services and the contracting officer should be familiar with your company.

Direct Mail

Direct mail can be an effective and relatively inexpensive way to reach government end-users and is widely used. The *Amtower Database* (call 301-924-0058 and see "Miscellaneous Assistance" in Appendix A) is just one example of a federal personnel database that can help you accurately target your mail at the appropriate government end-users; avoiding the wasted expense of mail that never reaches its destination. However, direct mail is not an effective marketing tool unless it is followed up by customer calls.

Seminars

The *Canadian Embassy, Washington, DC* (call 202-682-7746) will work with you to host carefully targeted capability seminars, product demonstrations, small meetings, and related marketing promotion at the Embassy. The seminars are an excellent way to create government demand for your company's products and services, establish contacts with government personnel, and meet with potential teaming partners. To benefit most from seminars, be sure to use direct mail, telemarketing, and advertising to promote the event and then, follow-up on leads.

Trade Shows

Trade shows provide an excellent venue to get the attention of government end-users and potential teaming partners. Be sure to bring enough people to the show to both work the exhibit and the show (i.e. network). Also, similar to seminars, companies that benefit the most from trade shows invest in pre-show marketing and intensive follow-up, as on-site sales are rare. The following five trade shows are the most popular and are targeted directly at federal government IT end-users: *Federal Imaging*, *Fed-Unix*, *FITS (Federal Information Technology Showcases)*, *FOSE (Federal Office Systems Exposition)*, and *Tech Net*. To decide which show or shows best meet your needs, read the descriptions and use the point of contact information in the "Trade Shows" section of Appendix A for more information.

Trade Press

Government Computer News (call 301-650-2000) and *Federal Computer Week* (call 703-876-5100) are the two most popular publications for federal IT decision-makers. Advertising in these two publications is an effective way to catch the attention of government end-users (see "Publications," Appendix A).

User Groups

User groups in the Washington, DC area have many government members. Generally, they are not high-level decision-makers. Still, an effective marketing strategy must obtain the support of the technical users (*techies*) in the government. Three significant user groups in the DC area are the *Capital PC User Group* (PC users), *Washington Apple Pi* (Apple and Mac users), and the *Washington Area Computer User Group* (Amiga, and PC users). Direct mail or product demonstrations to their members can be used to gain the acceptance and support of government *techies*. The World Wide Web page of the *Melbourne PC User Group* (<http://koala.melbpc.org.au>) lists hundreds of user groups located across the United States. The WWW site provides an excellent way to target American user groups that use your company's products or services.

The Channel Strategy

Government sales channels are channels through which firms deliver their products and services to government end-users. The objective of the channel strategy is to make the most effective use of government sales channels; ensuring that all those that wish to purchase your products or services can easily do so. There are primarily six government channels that you can use to sell your company's products or services to the U.S. federal government. They are:

- prime contracts,
- subcontracts,
- GSA schedule contracts,
- 8(a) firms,
- U.S. small businesses, and
- resellers.

The Channels

Table 9 and 10, below, will be used to explain the merits of each government channel. Table 9 breaks down the FY1994 federal IT market by contractor group. Table 10 identifies the relative share of the federal IT market by procurement vehicle.

Table 9: Federal IT Spending by Contractor Group -- FY1994
(in millions of constant 1994 US\$)

Contractor Group	Amount	% of 1994 IT Procurement
Top 15 Firms	\$10,745	42%
Next 85 Firms	\$7,930	31%
Rest (2500 firms)	\$5,116	20%
8(a) Firms	\$1,791	7%

Table 10: Federal IT Spending by Procurement Vehicle -- FY1994
(in millions of constant 1994 US\$)

Procurement Vehicle	Amount	% of Total 1994 IT Procurement
Prime Contracts	\$21,489	84%
8(a) Set-Aside	\$1,791	7%
GSA Schedule	\$1,023	4%
Other	\$1,279	5%

Prime Contracts

Many firms new to the federal IT market assume that their success will hinge solely on their ability to win prime contracts. Table 9 proves that this is, in most cases, incorrect. The top 15 federal IT companies won 42% of the federal IT market in FY1994. The next 85 firms enjoyed a market share of 31%. Therefore, the top 100 IT firms control almost 75% of federal IT prime contracts (subcontracting provides an excellent opportunity to develop significant federal business - see below). They are huge firms, usually systems integrators, collecting revenues in the billions of dollars. Their advantage is size. They are able to devote the extensive resources (labour, time, and money) that are needed to win and deliver on huge, complex, multi-million dollar government contracts. The contracts often involve developing and implementing complete information systems on a giant scale. Very few firms can compete with the size and resources of the top 100. Unless you team with the top 100 (see "Subcontracts," below), you should expect to enter the federal IT market in the *middle class* (sandwiched by the top 100 prime contractors and the 8(a) firms). For most firms, then, the prime contracting government sales channel provides access to the middle class portion of the market; 2500 small to medium-sized businesses competing fiercely for the remaining US\$5 billion worth of prime contracts or 20% of the federal IT market.

Pros

- This channel represents 20% of the market.
- A well developed marketing strategy and a sufficient investment of resources into procurement proposals can result in a substantial payoff.

Cons

- Fierce competition means that winning prime contracts involves investing lots of time, labour, and money into the effort.

Subcontracts

Fortunately, the 75% of the market controlled by the top 100 is accessible to smaller companies. The large size and complex nature of the federal contracts won by the top 100 requires that a substantial portion of the work be subcontracted. Subcontracting, then, provides a channel for smaller companies to gain access to the almost US\$20 billion controlled by the top 100 firms. In addition, teaming with *middle class* firms with complimentary needs can increase your firm's share of the over US\$5 billion controlled by the *middle class* (2500 firms).

The prime is ultimately responsible for ensuring that the contracted work meets certain minimum standards and is delivered on time. However, since subcontracting provides access to such a large portion of the market (84% market-coverage) and can offer substantial dividends, competition is just as fierce among subcontractors as it is among primes. Winning a subcontracting agreement involves investing considerable resources into marketing to the prime contractor and government end-users and often requires making huge concessions to the prime. Since the prime contractor has already invested extensive resources into winning the contract, it will usually pass many of its responsibilities and risks to the subs. In addition, and maybe most important, since a subcontracting agreement is not entirely binding, since it is only a *gentlemen's* commercial agreement, primes often *swap-out* one or more of their subcontractors for a better offer; a process called *technology refresh* (explained on page 28). Obviously, subcontracting involves as many, if not more risks, than any other government sales channel, but it also offers the highest potential returns.

Pros

- This channel provides 84% market coverage.
- Subcontracting provides access to the big government contracts that large primes know how to win.
- The potential payoff is huge.

Cons

- Building the necessary relationships to win subcontracting agreements, involves a lot of time and effort.
- The prime will attempt to pass on many of its responsibilities and risks; learn which ones to accept and which to negotiate.
- The prime may swap you out through a *technology refresh*.

GSA Schedule Contracts

As shown in table 9, GSA schedule sales only accounted for US\$1 billion or 4% of the federal IT market in FY1994. Therefore, while GSA schedule contracts are an important government sales channel, they should not be considered the only channel.

The General Services Administration (GSA) is one of the federal government's largest contracting agencies and has responsibilities similar to Public Works and Government Services Canada. Each year, it negotiates and administers schedule contracts for over US\$1 billion worth of IT products and services for all U.S. government agencies. Schedule contracts are indefinite quantity, no-guarantee-of-business contracts to provide supplies and some services at stated prices for given periods of time. They give all federal agencies the option of ordering directly from the contractor on an as-needed basis at favourable prices associated with volume buying. A schedule contract does not guarantee sales to any agencies. It is merely an additional procurement vehicle from which to sell.

The ease of purchasing from GSA schedule contracts has made them very popular with government purchasers. The Federal Acquisition Regulation (FAR - the bureaucratic rules governing the federal procurement of goods and services) normally requires agencies to manage a competitive procurement to ensure that the government receives goods and services of a satisfactory quality at a reasonable price. GSA schedule contracts, however, provide an exception. Since the quality and price of the goods and services that are listed on schedules have already been negotiated and accepted by the GSA, government purchasers can simply buy directly off the schedule without expending the time and effort to conduct a competitive procurement.

Until recently, however, there were two procurement rules that significantly limited the use of GSA schedules. They were the maximum order limitation (MOL) and the requirement to advertise any government purchase made from a GSA schedule in the Commerce Business Daily (CBD). The maximum order limitation (MOL) limited purchases made from schedules by prohibiting government buyers from placing orders worth more than the value of the MOL. For example, a schedule that had a MOL of US\$100,000 assigned to it, restricted government buyers to orders of this size. If an agency needed to purchase over US\$100,000 of the given product or service, it could not use a GSA schedule, but would instead have to conduct a competitive procurement. The requirement to advertise in the CBD, indirectly limited the use of GSA schedules by notifying competitors of the purchase. For example, when a schedule purchase was advertised in the CBD, competitors, now aware of the impending sale, would lobby the government buyers to have the schedule sale stopped and instead, *broken out* into an open competition.

These barriers to schedule sales have now been removed! The Federal Acquisition Streamlining Act (FASA) eliminated both the maximum order limitation and the requirement to advertise schedule purchases in the CBD. Now, government buyers can place orders of any size up to US\$100 million (the new MOL applied across the board) without advertising in the CBD. Some contractors with schedule contracts have experienced a 500% increase in business since the change and there are reports of orders being placed as high as US\$14 million. Observers of the market expect that the GSA schedules' share of the federal market will be higher in FY1995. However, they also expect that the current *free for all* will not last forever. To control the situation, the government will likely place some kind of new limitation on GSA schedules to ensure that schedule contracts are not used for giant procurements.

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Although GSA schedule contracts are an important channel, many firms new to the federal IT market concentrate too heavily on them. Even with the recent changes, the market-coverage of GSA contracts will never approach the coverage provided by prime and subcontracting. In addition, a schedule contract does not guarantee sales to any agencies. To make this channel worthwhile, you must still market aggressively to your potential government customers.

Pros

- Government buyers prefer the ease of purchasing goods and services off GSA schedule contracts to the time-consuming and complicated task of conducting a competitive procurement.
- The elimination of the maximum order limitation and the requirement to advertise in the CBD have made GSA schedules increasingly popular.
- Obtaining a GSA schedule contract gives added credibility to firms new to the federal market by establishing them as government customers.

Cons

- GSA schedules only accounted for 4% of the federal IT market in FY1994.
- The market-coverage of schedule contracts will never approach the coverage provided by prime and subcontracting.
- Aggressive sales and marketing to potential government customers is still needed.
- The government is expected to place new limitations on GSA schedules to ensure that schedule contracts are not used for giant procurements.

GSA Schedules For Information Technology Firms

Below is a brief description of the five GSA schedules available to IT firms. All five schedules are managed by the Federal Supply Service's Automatic Data Processing (ADP) Acquisition Centre. To win a schedule contract on any of the following schedules you must respond to an advertised solicitation during either an *open competition* or an *open season* by submitting a proposal to the appropriate contracting office. Open competitions are held at the end of a contract period to award schedule contracts to new vendors. Open seasons are regularly held during the contract period to award schedule contracts to additional firms. Proposals are judged on strict technical and price standards and on the bidding firm's financial capability to deliver on the contract. The specific standards and requirements for each schedule are fully explained in the solicitation document. To ensure that you receive the solicitation document for the schedule you are interested in as soon as it is available, you should register on the GSA's Centralised Mailing List, in addition to having your firm put on the schedule's *hand-list*. To register on the GSA's Centralised Mailing List, contact the Business Service Centre (BSC) nearest you (see point of contact information in Appendix C). To have your firm placed on a schedule's hand-list, refer to the contact information for the appropriate schedule below.

Note: The *Canadian Commercial Corporation (CCC)* (call 613-996-0034) can register you on the Bidders' Mailing Lists that you specify. This service can save you enormous amounts of time and effort.

GSA Schedule 58 VI & VII (Commercial Telecommunications Equipment)

GSA Schedule 58 VI & VII is used by federal agencies to purchase a wide range of telecommunications equipment, including: telephone equipment; voice message systems; video teleconferencing equipment; facsimile equipment, pagers and public address systems; non-tactical two-way radio systems; broadcast band, microwave, airborne and radio navigation transmitters and receivers. There are currently over 125 contractors on the schedule and the current contract period is from February 1, 1996 until September 30, 2000. The value of a schedule contract varies from tens of thousands to millions depending on the effectiveness of the contract-holders marketing strategy. There will be an open season held beginning in late spring of 1996 to provide schedule contracts to interested firms that meet the schedule's technical and price requirements. Remember, open season's are conducted to allow interested firms

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to compete for a schedule contract before the end of the contract period. To receive a copy of the solicitation document as soon as it is available, a copy of the schedule, or an up-to-date list of the contractors on the schedule, fax your request on company letterhead to (703) 305-3057.

GSA Schedule 70 I A (General Purpose Commercial Automatic Data Processing Equipment)

GSA schedule 70 I A is used by federal agencies to purchase large scale computer systems, including: mainframe and minicomputer systems, central processing units, peripheral devices, software, and maintenance. Required training and maintenance is also purchased. There are currently over 125 contractors on the schedule and the current contract period is from October 1, 1995 until September 30, 1996. The value of a schedule contract varies widely depending on the contract holder. At the time of publication, there was no plan for an open season, open competition, or contract extension. Expect the current schedule contracts to be extended and an open season to be scheduled for before 1997. To receive a copy of the solicitation document as soon as it is available, a copy of the schedule, or an up-to-date list of the contractors on the schedule, fax your request on company letterhead to (703) 305-5586.

GSA Schedule 70 I B & C (General Purpose Commercial Automatic Data Processing Equipment)

GSA schedule 70 I B & C is used by the federal government to purchase microcomputer systems: including microcomputers, laptop and portable computers, optical disk systems, and computer controlled devices, as well as peripheral devices, software, maintenance, and training. The GSA is preparing to add a wide range of systems and network integration services to this schedule. The addition of these services will allow government buyers to purchase product packages, service packages, or combined product-service packages, significantly increasing the use of this already heavily used schedule. There are currently between 500 and 600 vendors on the schedule and the current contract period is from April 1, 1996 until March 31, 1999. The value of the schedule contracts varies widely depending on the effectiveness of the contract-holder's marketing efforts. At the time of publication, an open season was already underway to allow additional firms meeting strict technical and price requirements to win schedule contracts. The ADP Acquisition Centre will accept proposals until August 1996. To receive the solicitation document, a copy of the schedule, or an up-to-date list of the contractors on the schedule, fax your request on company letterhead to (703) 305-5588.

GSA Schedule 70 I D (Used or Refurbished General Purpose Commercial Automatic Data Processing Equipment)

GSA schedule 70 I D is used by federal agencies to purchase used computer hardware. There are currently 26 contractors on the schedule and the current contract period is from October 1, 1995 until September 30, 1996. Depending on your marketing efforts, a schedule contract could be worth between US\$50 thousand and US\$5 million. Due to the wide price-fluctuations in this market, schedule contracts are not firm-fixed price (unlike all other GSA schedules). Generally, used equipment must be sold for a lower price than its value when it is new. The current schedule contracts are set to expire on September 30, 1996. Expect the current contracts to be extended (maybe one year) and an open season to begin in late summer 1996 (maybe August) to allow additional firms to be placed on the schedule. To receive the solicitation document as soon as it is released, a copy of the schedule, or an up-to-date list of the contractors currently on the schedule, fax your request on company letterhead to (703) 305-5586.

GSA Schedule 70 I E (Electronic Commerce and Automated Procurement Systems)

GSA schedule 70 I E is used by the federal government to purchase electronic commerce, translation, and mapping software, automated procurement systems, enhanced mail, and internet access. There are currently over 25 contractors on the schedule and the current contract period is from March 1, 1995 until September 30, 1996. The value of a schedule contract varies widely. At the time of publication, an open competition was already underway for new contractors to be placed on the schedule. New proposals will be accepted until July 1, 1996. To receive the solicitation document, a copy of the schedule, or an up-to-date list of contractors on the schedule, fax your request on company letterhead to (703) 305-5588.

Small Business Preferences

8(a) Firms

The federal government reserves many contracts (*8(a) set-asides*) for 8(a) firms. To be eligible for the 8(a) programme, a company must be at least 51% owned by one or more members of a group considered to be socially and economically disadvantaged and must be certified by the Small Business Administration (SBA) as eligible and competent to receive these contracts. Unfortunately, Canadian companies are not eligible as prime contractors to receive 8(a) set-asides (or any set-asides for that matter). However, this does not mean that the 8(a) government sales channel, representing US\$1.8 billion or 7% of the federal IT market in FY1994, is inaccessible to Canadian firms. By subcontracting, Canadian companies can gain access to the significant 8(a) market.

For the same reason that GSA schedule contracts have been a popular channel with government buyers, so too have 8(a) firms. When purchasing products or services from 8(a) firms, government buyers do not have to conduct a competitive procurement. In fact, they can *sole source*. If a government buyer is confronted with just one 8(a) firm that can provide a required product or service of a satisfactory quality at a reasonable price, the buyer can, and usually will, avoid the time and effort of conducting a competitive procurement by simply deeming the contract a 8(a) set-aside and purchasing the good or service from the 8(a) firm -- **without any competition**.

8(a) firms tend to need their subcontractors far more than the top 100 do and, therefore, are far less likely to *swap them out*. Furthermore, since 8(a) firms often require capable subcontractors to fulfill their contract requirements, it is possible to build long-term business relationships with them. By building a strong teaming arrangement with 8(a) firms, you can benefit from the same competitive advantages that they enjoy. However, teaming with 8(a) firms is not without its risks. Within the federal IT industry, there is a concern that some 8(a) firms may not always be financially capable of meeting their contract obligations. Except for a handful of firms, this concern is unwarranted. Remember, to be eligible for the 8(a) programme, firms must be certified by the SBA as eligible and competent to receive 8(a) set-asides.

Pros

- This channel provides 7% market coverage.
- Unlike the top 100, 8(a) firms rarely swap-out their subcontractors for a better offer.
- Teaming with 8(a) firms provides the real possibility of building long-term business relationships.
- Teaming with 8(a) firms allows you to benefit from the competitive advantages that they enjoy.

Cons

- In rare cases, 8(a) firms may not have the financial capacity to meet their contract obligations, so choose wisely.

U.S. Small Businesses

The U.S. federal government reserves two broad groups of contracts for U.S. small businesses: small business set-asides and all contracts valued at less than US\$100,000. Canadian companies (except in very unique circumstances) do not qualify as U.S. small businesses and, therefore, are not eligible to receive these contracts. The exact percentage of the federal IT market that these contracts comprise is not known, however, a modest estimate would be 10-15%, significantly more than 8(a) set-asides at 7%.

By subcontracting for U.S. small businesses, Canadian firms can gain access to the significant market that small business set-asides and contracts valued at less than US\$100,000 represent. Although the potential returns are high, this is not an easy market to penetrate. Due to the large number of competent U.S. small businesses, the competition for these contracts tends to be fierce; unlike the 8(a) market where contracts are often sole-sourced without competition. Canadian firms must carefully choose teaming partners with complimentary needs and must be fully prepared and capable to actively help the small businesses win federal contracts. This market is also complicated

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by American content rules. To receive contracts reserved for American small businesses, the U.S. prime contractor must meet certain American content obligations. A Canadian subcontractor can make it hard for U.S. small business primes to meet American content rules. Therefore, it is important that Canadian firms strategically structure their partnerships with U.S. small businesses so that American content rules are observed. For more information on American content rules, contact the *Canadian Embassy*.

Pros

- This channel provides 10-15% market coverage.
- Potential returns are high.

Cons

- Strong competition among small businesses makes locating the best teaming partners and winning contracts more difficult in this channel than in the 8(a) channel.
- Firms must ensure that the products and services they supply to the government obey American content rules.

Resellers

Resellers help contractors sell their products to the government by acting as a sort of *middle man* between the two parties. They provide a number of different services depending on the situation. Generally, all resellers work to market and sell the products they carry. Firms often use resellers to sell their products off a GSA schedule contract. Some resellers, called value-added resellers (VARs), bundle products by combining them with other products and services in a way that increases their utility. Using the services of a reseller can be an excellent way to increase your firm's government sales, especially if you cannot commit a large sales force of your own to market and sell your company's products.

Many firms often mistake resellers as a substitute for their own advertising, their own marketing and sales team, and their own business development. This is not the case! Your firm's advertising, marketing, sales, and business development efforts are needed to compliment the marketing and sales efforts of the reseller. Your firm and the reseller must work together, not only to build a complimentary business relationship, but to design and continually refine a marketing strategy that works.

There are a couple of possible arrangements that a contractor can have with a reseller. A firm can offer one reseller rights to its products in favour of exclusivity (some resellers may even demand exclusivity) or it can offer many resellers rights to its products in favour of increased distribution. There are a couple of issues to keep in mind here. The first issue is your relationship with the reseller or resellers. As noted above, you must build a strong relationship with each reseller by complimenting its efforts with your own advertising, marketing, sales, and business development. Obviously, it would take a wealth of resources to develop strong relationships with more than one reseller. The second issue is *mind-share*. Mind-share refers to a reseller's commitment to marketing and selling your products over the other product-lines it carries. Having more than one reseller is not an advantage unless you have the resources necessary to ensure that they will devote enough mind-share in marketing and selling your products. In some cases, it may make more sense to offer exclusive rights to one capable reseller and work in partnership to develop a marketing strategy that works.

Developing a Channel Strategy

There are five elements in a channel strategy. To develop a successful channel strategy you must balance the needs and the limitations of each element:

- resources;
- products/services;
- opportunities;
- pricing/margins; and
- the customer.

Resources

The amount of staff, money, and time you can invest into developing your business in the federal marketplace will greatly affect the shape of your channel strategy. The more limited your resources are, the fewer government channels you will be able to utilize effectively. Obviously, it makes more sense to use your limited resources to make two or three government sales channels pay off than it does to spread your resources out, rendering your federal business strategy ineffective. The more resources you can invest into your channel strategy, the more sales channels you will be able to take advantage of and the more significant will be your government business.

Products/Services

It is important to match your company's products or services to the appropriate government sales channels. Generally, if your product or service is sold as is, if it does not need value-added or is not usually integrated into an IT system, then the GSA schedule, reseller, and prime contract channels are most appropriate. However, if your product or service is usually integrated with other products and services into a larger IT system, then the subcontracting channel (to large systems integrators) is the most appropriate and most profitable channel. The effectiveness of your channel strategy depends on your ability to match your company's products or services to the most appropriate government sales channels.

Opportunities

In addition to matching your products or services to government sales channels, you must also match contracting opportunities to the appropriate channels. For example, regardless of your product or service, if you locate an upcoming federal contracting opportunity with requirements that your firm can fulfill and win on its own without a partnership with another company, then you should pursue the prime contract channel. If your company can meet some, but not all of the contract requirements on a particular opportunity (i.e. a large systems integration contract), then you should pursue the subcontracting channel. If you identify a government requirement for products or services that could be purchased off your GSA schedule contract, then you should market to the government end-users to influence them to buy the needed products or services off your contract rather than another company's. If you find federal contracting opportunities that you are ineligible for because they are set-aside for 8(a) firms or U.S. small businesses, then you should initiate a teaming arrangement with an 8(a) firm, in the first case, or an American small business, in the second case.

Pricing/Margins

Regardless of the government sales channels you use, government end-users and potential teaming partners demand competitive pricing. Even if your product or service is superior to your competitors', you cannot win contracts in the government marketplace without competitive pricing. Notwithstanding competitive pricing, do not sell yourself out. Be sure to price your company's products and services so that you receive some return on your investment.

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Note: By obtaining some historical pricing information on the same or similar contracts, you can make an informed go or no-go decision and develop a highly competitive procurement proposal. This information is extremely valuable, but difficult to find. The *Canadian Commercial Corporation (CCC)*, and the large consulting firms; *CMA(Computer Marketing Associates)*, *Federal Sources Inc*, *IDC Government Market Services*, and *Input*; all offer services to help you find competitive pricing information.

The Customer

Know your customer. Depending on the government sales channel you are using, your customer changes and so too, must your marketing strategy. For example, if you are using the prime contract or GSA schedule channel, your customer is the government end-user. You must explain how your company's products or services can help them do their job better, faster, easier, and/or cheaper. If you are using the subcontract channel, your customer is the large systems integrator or prime contractor. You must be able to prove to them that there is government demand for your products or services (i.e. the end-user strategy) and you must offer competitive pricing and considerable support in the bid to win the contract. Similarly, resellers, 8(a) firms, and U.S. small businesses all require competitive pricing and support to win government contracts.

Identifying Teaming Partners

Databases

To help you get started in the federal marketplace, the *Canadian Embassy, Washington, DC* will conduct a customised search of its "FedMark Federal" database, its "Federal Prime Contracts" database, and its reseller database to identify potential teaming partners and leading resellers that may be appropriate for your company's products. Call (202) 682-7746.

Eagle Eye Publishers, Inc produces a "Federal Prime Contracts" database that can be used to search previously awarded contracts. By searching for the winners of previous contracts in a certain product or service area, you can identify potential teaming partners. A one-year subscription to the database costs US\$2,495. Call (703) 242-4201.

Federal Sources, Inc sells a database called "FedMark Federal" that tracks contracting opportunities that emerge from the top 500 federal IT programs. In addition to other valuable information, the database identifies prospective bidders and expected subcontractors on each opportunity. In your search to find teaming partners, it can provide many leads. A one-year subscription to the database costs US\$9,750 for small businesses and US\$13,000 for large businesses. Call (703) 883-0728.

Publications

The *Office of Small and Disadvantaged Business Utilisation (OSDBU)* at each federal agency distributes a "Subcontracting Directory." The directory lists the agency's top prime contractors by product and service. It can be used to identify many potential teaming partners; systems integrators and other large primes. Most agency OSDBUs also maintain a "List of 8(a) Firms, Small Disadvantaged Businesses, and Women-Owned Businesses." The publication is an excellent resource.

The "Washington Technology Almanac," published by *Washington Technology*, lists the top 100 federal prime contractors each year; many represent potential teaming partners. The Almanac also profiles many systems integrators and other IT firms, providing a description of the companies and point of contact information. Call (703) 848-2800.

Consulting Firms

Consulting firms can conduct custom and very accurate research to identify your best potential teaming partners; systems integrators, 8(a) firms, U.S. small businesses, and other IT firms. For a sample list of firms, refer to the "Consulting Firms and Course Providers" section in Appendix A.

Teaming Strategies

Marketing to Potential Teaming Partners

Identifying contracting opportunities is an essential part of an effective channel strategy. This is especially true when approaching a potential teaming partner; whether it be a systems integrator or another large IT firm, a 8(a) firm, or a U.S. small business. It is not enough to offer expertise, a good reputation, a 1-800 number, or attractive promotional material. These items do not set you apart from other firms. To successfully market to prospective teaming partners you must bring a piece of business with you. Use the resources identified in the report to research upcoming contract opportunities that provide a situation where it makes strategic sense to for your company and another firm to compete for a contract as business partners (see "Identifying Federal Contracting Opportunities" on page 15).

It is at least as important, however, to have government demand reflected by your end-user strategy, on your side. Large systems integrators, 8(a) firms, and U.S. small businesses are not going to team with you on a particular opportunity, unless you have the support of the government end-users. In fact, government demand for your company's product or service can often pressure prime contractors into teaming with your firm. After all, the government is the customer.

Also, remember, when you are approaching a teaming partner, be prepared to offer support in the contract bid. The more incentives you can offer a potential teaming partner, without selling yourself out, the better.

Identifying Bidders

You will often locate opportunities, such as complex systems integration contracts or 8(a) and small business set-asides, where it makes strategic sense for you to partner with another firm. In fact, in the case of set-asides, you must team with another firm to take advantage of those opportunities. One of the most successful methods of establishing teaming arrangements is to locate and market to the firm or firms planning to bid on a particular contracting opportunity. Obviously, since this information is closely guarded, finding bidders who are planning to bid on a specific contract is difficult. Still, it is possible.

The *FedMark Federal* database, available from *Federal Sources Inc*, can also be used to identify the bidders on particular contracting opportunities. The database tracks contracting opportunities emerging from the top 500 federal IT programs from the initial point of APR (Agency Procurement Request) to the final point of contract award. One of the many valuable pieces of information that it provides is the prospective bidders on each opportunity. The database costs US\$9,750 for small businesses and US\$13,000 for large businesses. If you are committed to the federal market, the database is well worth the investment.

In addition, consulting firms offer services to help you find out who the bidders are on particular contracting opportunities.

Tech Refresh

Many firms in the federal IT market make their living off a strategy called *technology refresh* or simply, *tech refresh*. This strategy is used specifically when approaching systems integrators. Tech refreshes are implemented after a contract has been awarded. When you locate an attractive contracting opportunity that has been recently awarded, all is not lost. Effective marketing to the contract winner may result in your winning a piece of that contract. Of course, as you win a piece of the contract, another firm is *swapped-out*. As noted above, this is a risk you always run when teaming with a large prime.

To market successfully in a tech refresh, you must prove three things to the prime contractor. First, you must prove that the products or services your company provides are superior to similar products or services in the contract. Second, you must be able to prove that you have government demand for your product or service. And third, you must prove, through concessions to the prime, that a teaming partnership with you will be economically advantageous.

A great advantage of this strategy is that it is easy to identify contract winners. Every contract award above US\$25,000 is advertised in the *Commerce Business Daily (CBD)*. In addition, the CBD can be accessed electronically from one of the companies listed in Appendix D, including Canada's *Open Bidding Service*. "FedMark Federal," the database available from *Federal Sources Inc.*, also tracks contract winners.

Networking

Government channels marketing is about building relationships; with government end-users, systems integrators, 8(a) firms, U.S. small businesses, and other IT firms. The best opportunity to build relationships is by networking at professional association meetings, trade shows, and other events.

Professional Associations

The following five associations; *AFCEA (Armed Forces Communications and Electronics Association)*, *IAC (Industry Advisory Council)*, *ITAA (Information Technology Association of America)*, *Northern Virginia Technology Council*, and the *Suburban Maryland High Technology Council*; offer excellent networking opportunities at association meetings, workshops, and conferences. They are great venues to build relationships with systems integrators, 8(a) firms, U.S. small businesses, and other IT firms. To determine the association or associations that best meet your needs, refer to their descriptions and point of contact information in Appendix A for more information. Generally, AFCEA, IAC, and ITAA are the best associations for companies that are primarily interested in the federal marketplace. The Northern Virginia Technology Council and the Suburban Maryland High Technology Council are concerned with local commercial market issues and, therefore, are most appropriate for firms that plan on having a commercial presence.

Executive Breakfast Meetings

Washington Technology sponsors monthly executive breakfast meetings that cover a wide variety of topics related to the federal IT market. The meetings are designed to be information sessions and networking venues. The executive breakfast meetings provide opportunities to network primarily with systems integrators, but also with resellers and other IT firms. Call (703) 848-2800 (see "Publications," Appendix A).

Trade Shows

Tech Expo and the *Small Business Technology Showcase* are two trade shows that were created, primarily, to provide companies with opportunities for networking. Tech Expo is designed to give IT firms many opportunities to network with systems integrators. The Small Business Technology Showcase is designed to showcase small

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businesses and 8(a) firms to systems integrators, providing one of the best networking venues for systems integrators, 8(a) firms, small businesses and other IT firms (see "Trade Shows," Appendix A).

Advertising

Washington Technology publishes a newspaper, "Washington Technology," that deals with many issues that affect federal systems integrators. It also publishes the annual "Washington Technology Almanac" that lists and profiles systems integrators, other IT firms, marketing firms, consulting firms, and professional associations. The almanac is designed to help all the players in the federal IT market locate each other. Advertising in the newspaper and/or listing your company profile in the almanac provide much needed marketing exposure to systems integrators and the other market players.

Conclusion

Implementing a federal business strategy is a balancing act. Your success in the federal IT market will depend on your ability to balance:

On one hand,

- your end-user strategy
- your need for unlimited information
- your commitment to the federal IT market

On the other hand,

- your channel strategy
- your limited resources
- your commitments elsewhere.

If you have confidence in the product or service your company provides, if you are committed to developing a federal business strategy that works, and if you are willing to invest the resources necessary to make it work, then do not hesitate to proceed. The United States federal government is the world's largest IT customer. There is a lot of money to be made in this market.

Sources of...

Information, Assistance, Marketing, and Networking

Listed below are descriptions and point of contact information for the associations, companies, government institutions, and documents that are cited in the report as important sources of assistance, information, marketing, or networking. The sources are organized into the following six categories: "Miscellaneous Assistance," "Publications," "Professional Associations," "Consulting Firms and Course Providers," "Trade Shows," and "User Groups."

Miscellaneous Assistance

Answer Database

Mark Answer specializes in managing and customizing federal direct-mailings using an up-to-date database of federal personnel. A direct mailing is an excellent way to get the attention of government officials. For more information, contact:

Mark Answer
P.O. Box 379

Appendix A: Contact Information

Descriptions and point of contact information for sources of information, assistance, networking, and marketing.

Business Service Centres (BSCs), General Services Administration (GSA)

The General Services Administration (GSA), under the Public Works and Government Services Canada, is a central procurement agency responsible for purchasing many common and products and services for the federal government. The GSA maintains 12 Business Service Centres (BSCs) across the U.S. to provide companies with information on how to do business with the federal government through the GSA. The BSC allows you to:

- identify the top purchasing agencies of your company's products or services;
- identify the specific GSA schedule (the GSA's primary procurement vehicle) that provides your company's products or services to other federal agencies and the explain how to win a schedule contract;
- provide a "Doing Business with the GSA" handbook that explains the procurement procedures of the GSA and lists the products and services purchased by the GSA;
- provide a "Forecast of GSA Contracting Opportunities" handbook that outlines anticipated GSA contracting opportunities during the forthcoming 5 years; and
- provide a "GSA Subcontracting Directory" that lists the top prime contractors with the GSA by product or service that may be interested in finding subcontractors.

To obtain any or all of the above information contact the BSC nearest you. The point of contact information for all the BSCs are listed in Appendix C.

Canadian Commercial Corporation (CCC)

The CCC is a Crown Corporation, established in 1946 by the Government of Canada to assist in the development of trade between Canada and other nations. The Corporation acts as a prime contractor for the sale of Canadian goods and services to the U.S. and other foreign countries. Canadian firms contracting through the CCC are given instant credibility because the CCC's participation in an export sale constitutes the commitment of the Government of Canada that the contract will be performed. In fact, the U.S. Department of Defense (DOD) and NASA require that Canadian firms contract through the CCC. The CCC's services include:

Sources of... Information, Assistance, Marketing, and Networking

Listed below are descriptions and point of contact information for the associations, companies, government institutions, and documents that are cited in the report as important sources of assistance, information, marketing, or networking. The sources are organised into the following six categories: "Miscellaneous Assistance," "Publications," "Professional Associations," "Consulting Firms and Course Providers," "Trade Shows," and "User Groups."

Miscellaneous Assistance

Amtower Database

Mark Amtower specialises in managing and customising federal direct-mailings using an up-to-date database of federal personnel. A direct mailing is an excellent way to get the attention of government end-users. For more information, contact:

Mark Amtower
P.O. Box 339
Ashton, MD 20861
(301) 924-0058

Business Service Centres (BSCs), General Services Administration (GSA)

The General Services Administration (GSA), similar to Public Works and Government Services Canada, is a central procurement agency responsible for purchasing many common-use products and services for the federal government. The GSA maintains 12 Business Service Centres (BSCs) across the U.S. to provide companies with information on how to do business with the federal government through the GSA. The BSC nearest you can:

- identify the top purchasing agencies of your company's products or services;
- identify the specific GSA schedule (the GSA's primary procurement vehicle) that provides your company's products or services to other federal agencies and can explain how to win a schedule contract;
- provide a "Doing Business with the GSA" handbook that explains the procurement procedures of the GSA and lists the products and services purchased by the GSA;
- provide a "Forecast of GSA Contracting Opportunities" handbook that outlines anticipated GSA contracting opportunities during the forthcoming 5 years; and
- provide a "GSA Subcontracting Directory" that lists the top prime contractors with the GSA by product or service that may be interested in finding subcontractors.

To obtain any or all of the above information contact the BSC nearest you. The point of contact information for all the BSCs are listed in Appendix C.

Canadian Commercial Corporation (CCC)

The CCC is a Crown Corporation, established in 1946 by the Government of Canada to assist in the development of trade between Canada and other nations. The Corporation acts as a prime contractor for the sale of Canadian goods and services to the U.S. and other foreign countries. Canadian firms contracting through the CCC are given instant credibility because the CCC's participation in an export sale constitutes the commitment of the Government of Canada that the contract will be performed. In fact, the U.S. Department of Defense (DOD) and NASA require that Canadian firms contract through the CCC. The CCC's services include:

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- reviewing prospects identified by Canadian exporters and assessing CCC's capacity to assist in each case;
- matching leads to the specific capabilities of individual firms using the Bid Matching Service;
- transmitting invitations for bid (IFB), requests for proposals (RFP), and requests for quote (RFQ) from client governments and agencies to Canadian suppliers;
- evaluating the technical and financial aspects of the product, service, or project package required and analysing the risks;
- reviewing the technical and financial capability of Canadian suppliers;
- registering Canadian companies on the U.S. Bidders' Mailing Lists;
- participating in negotiations: the final contract is subject to acceptance by both the CCC and its suppliers;
- executing prime and back-to-back contracts;
- following through on all aspects of the sale; and
- facilitating contracts at appropriate government levels in Canada and abroad.

The CCC's expertise and reputation in the U.S. federal market can greatly improve your chances of success. For more information, contact:

Canadian Commercial Corporation
Metropolitan Centre, 11th Floor
50 O'Connor St.
Ottawa, ON K1A 0S6
Tel: (613) 996-0034 Fax: (613) 995-2121

Canadian Embassy, Washington, DC

The Canadian Embassy provides information and assistance to Canadian firms wishing to enter the U.S. federal IT market. However, the Embassy also provides firms with a marketing venue (i.e. the Embassy's theatre and the Canada Room) for capability seminars and exhibits. The Embassy's services include:

- holding a personal introductory briefing to identify the best federal prospects and the first steps for Canadian firms;
- providing firms with information and market reports on the U.S. federal procurement process and federal contracting opportunities;
- assisting firms in the development of a federal business strategy;
- conducting customised searches of the *Fedmark Fed-500* database (Federal Sources, Inc.) for Canadian companies to identify and track upcoming contracting opportunities from the top 500 federal IT programmes;
- conducting customised searches of the *Federal Prime Contracts* database (Eagle Eye Publishers, Inc.) for Canadian companies and generating reports that detail key purchasing agencies, potential competitors, potential teaming partners, and more (the Canadian Embassy offers this service free-of-charge, while the U.S. government's Federal Procurement Data Centre offers the same service at a cost of several hundred dollars for each generated report);
- helping firms locate key purchasing agencies and points of contact within the U.S. federal government;
- working with firms to host capability presentations, small meetings, and related marketing promotion at the Embassy;
- explaining how various laws and regulations such as the Federal Acquisition Regulation (FAR), NAFTA, and the Defence Development and Defence Production Sharing Agreements (DDSA/DPISA) affect Canadian firms; and
- helping Canadian companies solve any problems they encounter in their efforts to win contracts in the federal procurement market.

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To take advantage of the Canadian Embassy's services, contact:

Commercial Officer
Canadian Embassy
501 Pennsylvania Ave, NW,
Washington, DC 20001
Tel: (202) 682-7746 Fax: (202) 682-7619

Eagle Eye Publishers, Inc.

Eagle Eye Publishers produces *Federal Prime Contracts*; a historical database that tracks and details awarded federal prime contracts. A one-year subscription to the database costs US\$2,495. It is useful for:

- early re-compete contract identification;
- generating long-term agency buying patterns;
- generating competitor profiles;
- market-share analysis;
- 8(a) and SDB teaming partner reports; and
- purchase office mailing lists.

For more information or to subscribe, contact:

Eagle Eye Publishers, Inc.
115 Park St, SE, Suite 300
Vienna, VA 22180
Tel: (703) 242-4201 Fax: (703) 242-4204

Offices of Small and Disadvantaged Business Utilisation (OSDBUs)

Every federal agency is required by law to maintain an Office of Small and Disadvantaged Business Utilisation (OSDBU - pronounced Oss-De-Boo). OSDBUs were established to ensure the participation of small and disadvantaged American businesses in federal procurement. OSDBUs are essentially information centres, providing a wide variety of useful information to firms interested in winning federal contracts. Although they are only required to help U.S. small and disadvantaged businesses, in practice they will provide information to any company that requests it, including Canadians. OSDBUs provide the following free information:

- a "Doing Business with..." handbook that explains the specific procurement procedures of the agency and lists the products and services that the agency buys;
- a "Forecast of Contracting Opportunities" handbook that lists *anticipated* upcoming contracting opportunities within the agency for the forthcoming three to five years;
- a "Subcontracting Directory" that lists the agency's top prime contractors by product or service that may be interested in finding subcontractors;
- a "List of 8(a) Firms, Small Disadvantaged Businesses, and Women-Owned Businesses" that identifies firms that may be interested in teaming with other companies to compete for agency contracts that are specifically set-aside for U.S. small and disadvantaged firms or women-owned businesses;
- an electronic bulletin board system (BBS) or World Wide Web (WWW) site providing electronic access to the most up-to-date versions of the publications listed above; and
- key points of contact within the agency for government users and purchasers of your company's products and services.

To obtain any or all of the above information, contact the OSDBUs of the agencies you have targeted as potential federal customers. The point of contact information for all agency OSDBUs is listed in Appendix B.

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Open Bidding Service (OBS)

Canada's Open Bidding Service (OBS), an electronic bulletin board system (BBS) and World Wide Web (WWW) site, provides a number of valuable services to Canadian firms that are interested in doing business with the Canadian, American, or Mexican governments. For firms that wish to contract with the U.S. federal government the OBS provide the following services:

- electronic access to all of the contracting opportunities that are listed in the Commerce Business Daily (the CBD is published by the Department of Commerce and lists a synopsis of all U.S. federal government proposed procurement, sales, and contract awards above US\$25,000) excluding those not covered by NAFTA; and
- the Bid Matching Service; it matches contracting opportunities to the specific capabilities of individual firms.

For more information or to subscribe to the OBS, contact:

Open Bidding Service
P.O. Box 22011
Ottawa, ON K1V 0W2
(800) 361-4637

Publications

Commerce Business Daily (CBD)

The Commerce Business Daily (CBD) is issued Monday to Friday by the Department of Commerce and lists a synopsis of all U.S. federal government proposed procurement, sales, and contract awards above US\$25,000. This publication is a must-have. Be sure to note, however, that if the first time you hear of a contracting opportunity is through the CBD, then it is probably too late to successfully fulfil all the requirements that are listed in the solicitation document or to set-up a teaming arrangement with another firm. Effective marketing to government end-users will ensure that you identify contracting opportunities far in advance of their publication in the CBD. To order a one or two year subscription of the CBD, contact:

Superintendent of Documents
PO Box 371954
Pittsburgh, PA 15250
Tel: (202) 512-1800 Fax: (202) 512-2250

The Commerce Business Daily can also be obtained in electronic form from many companies, including Canada's Open Bidding System, providing on-line and fax services. Appendix D lists point of contact information for thirteen such companies.

EIA Five Year Forecast of Federal Information Systems Opportunities

The Electronic Industries Association holds an annual conference and publishes an annual report called "EIA Five-Year Forecast of Federal Information Systems Opportunities." Both the conference and the report provide in-depth analysis of the IT market size, federal agency IT budgets, current trends, and hot technologies. The report costs US\$280. For more information, contact:

Electronic Industries Association
2500 Wilson Blvd.
Arlington, VA 22201
Tel: (703) 907-7500 Fax: (703) 907-7501

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Federal Computer Week

Federal Computer Week is a government newspaper aimed at federal IT decision-makers. Advertising in the newspaper is an excellent way to influence government end-users. To subscribe or advertise, contact:

Federal Computer Week
3110 Fairview Park Dr, Suite 1040
Falls Church, VA 22042
(703) 876-5100

Federal Procurement Report

The Federal Procurement Data Centre, maintained by the GSA, publishes an annual "Federal Procurement Report" containing *snapshot* statistics on the procurement activities of over 60 federal agencies. The report also lists the top 100 federal contractors overall and the top 10 federal contractors in each product/service category. To receive a free copy of the report, contact:

Federal Procurement Data Centre
7th St. and D St, SW, Rm 5652
Washington, DC 20407
(202) 401-1529

Federal Yellow Book

The Federal Yellow Book provides its users with point of contact information on the more than 39,000 top people in the Executive Branch of the U.S. federal government. If you purchase this directory, and the Embassy strongly recommends that you do, it will prove very useful in your quest to locate key government personnel who use and purchase your company's products or services. The directory is available as an annual subscription of four editions for US\$250. To purchase the Federal Yellow Book, contact:

Leadership Directories, Inc.
104 Fifth Avenue
New York, NY 10011
Tel: (212) 627-4140 Fax: (212) 645-0931

Government Computer News

Federal Computer Week is a government newspaper aimed at federal IT decision-makers. Advertising in the newspaper is an excellent way to influence government end-users. To subscribe or advertise, contact:

Government Computer News
8601 Georgia Ave, Suite 300
Silver Spring, MD 20910
(301) 650-2000

U.S. Government Purchasing and Sales Directory

The "U.S. Government Purchasing and Sales Directory" is an excellent and inexpensive (about US\$24) resource. It can be used to easily obtain the address and phone number of every purchasing/procuring office within the U.S. federal government that purchases the services (or products) your company provides. No other resource is as effective at locating the government purchasers of your company's services. In addition, once you have located the government purchasers of your company's services, you can have them direct you to the users of your company's services. To purchase the directory, contact:

Information Technology: Selling to the U.S. Federal Government

Superintendent of Documents
PO Box 371954
Pittsburgh, PA 15250
Tel: (202) 512-1800 Fax: (202) 512-2250

Washington Technology

Washington Technology provides a number of services aimed at systems integrators. They include:

- the annual Washington Technology Almanac which lists and profiles systems integrators and other IT firms, consulting firms, marketing firms, and technology associations;
- the Washington Technology Newspaper which deals with federal IT market issues that affect systems integrators;
- monthly executive breakfast meetings that cover a wide variety of topics related to the federal IT market and are attended by federal systems integrators, resellers, and other IT firms; and
- Tech Expo, an event where federal systems integrators and other IT firms exhibit their technology to the government and to each other.

Getting listed in the Almanac, advertising in the newspaper, attending the executive breakfast meetings, and exhibiting at Tech Expo are excellent methods of marketing to and networking with systems integrators. For more information, contact:

Washington Technology
8500 Leesburg Pike, Suite 7500
Vienna, VA 22182
Tel: (703) 848-2800 Fax: (703) 848-2353

Professional Associations

AFCEA, Armed Forces Communications and Electronics Association

As its name indicates, AFCEA and its members originally concentrated on Department of Defence (DOD) procurement of IT. However, since most of the information systems sold to the DOD have many applications, AFCEA has expanded its scope to include all federal IT procurement. Federal agencies are regularly invited to conferences to express their IT needs. In addition, the conferences are designed to provide excellent venues for networking among AFCEA's members. For more information or to join, contact:

AFCEA, Armed Forces Communications and Electronics Association
4400 Fair Lakes Court
Fairfax, VA 22033
Tel: (703) 631-6153 Fax: (703) 631-4693

IAC, Industry Advisory Council

The Industry Advisory Council represents almost 125 IT firms that participate in the federal IT market. The association provides information to its members with information about issues affecting federal procurement. Through its membership meetings and seminars, IAC also provides its members (i.e. systems integrators, VARS, and other firms) with an excellent networking venue. For more information, contact:

IAC, Industry Advisory Council
7777 Leesburg Pike, Suite 309 N
Falls Church, VA 22043
Tel: (703) 506-9340 Fax: (703) 506-9309

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ITAA, Information Technology Association of America

ITAA represents the IT industry at both the federal and the state and local levels. The ITAA has 250 corporate members: enterprise software firms, professional services contractors, electronic commerce and services companies, and systems integrators; representing the convergence of the federal IT industry. The association provides its members with the following:

- up-to-date information about the trends and issues affecting federal procurement;
- *meet and greets* with various members of Congress; and
- prime business networking opportunities at association meetings and conferences.

For more information or to join, contact:

ITAA, Information Technology Association of America

1616 North Fort Meyer Dr.

Arlington, VA 22209

Tel: (703) 284-5307 Fax: (703) 525-2279

National Contract Management Association (NCMA)

The National Contract Information Association's reason for being is to train and educate its members on how to do business with the federal government; specifically on how to win and manage federal contracts. Join this association to learn about the federal marketplace, not to network. For more information or to join, contact:

National Contract Management Association (NCMA)

1912 Woodford Rd.

Vienna, VA 22182

Tel: (703) 448-9231 Fax: (703) 448-0939

Northern Virginia Technology Council

The Northern Virginia Technology Council's members are primarily information technology firms; over 200 members. The association works with officials at all levels of government to further the prosperity of the technology business in northern Virginia. The association is primarily concerned with local commercial issues, not issues involving federal procurement. Still, since many of the Northern Virginia Technology Council's members participate in the federal IT market, there are many opportunities to network. Also, members receive *The Northern Virginia Technology Directory*, a compilation of more than 1,100 businesses in the region with industry sectors and contacts. For more information, contact:

Northern Virginia Technology Council

CIT Tower, Suite 601

2214 Rock Hill Rd.

Hearndon, VA 22070

(703) 904-7878

Suburban Maryland High Technology Council

The Suburban Maryland Technology Council's membership is primarily comprised of aerospace and bio-technology firms; over 525 members. The council works with all levels of government to improve the technology business environment in the region. Although the council is more concerned with local commercial issues than with issues dealing with federal procurement, it still provides opportunities to network with many of its members that participate in the federal IT market. In addition, the council publishes a directory of high-tech firms. For more information, contact:

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Suburban Maryland Technology Council
2092 Gaither Rd, Suite 220A
Rockville, MD 20850
Tel: (301) 258-5005 Fax: (301) 258-9148

Consulting Firms and Course Providers

CMA, Computer Marketing Associates, Inc.

CMA is a large consulting firm serving the federal IT market that specialises in **customised consulting**. CMA's services include:

- business development support through strategy development, market analysis, opportunity qualification analysis, and marketing support;
- support in developing a federal channel strategy; and
- marketing training workshops for management, sales, marketing, business development, and contracts personnel.

For more information, contact:

CMA, Computer Marketing Associates, Inc.
1900 Gallows Road, Suite 200
Vienna, VA 22182
Tel: (703) 883-0728 Fax: (703) 917-7733

Federal Sources, Inc.

Federal Sources is a large consulting firm serving both the federal and the state and local IT markets. Federal Sources specialises in **opportunity tracking and customised consulting**. Its services include:

- the *Fed-500* federal database (annual subscription costs US\$9,750 for small businesses and US\$13,000 for large businesses) that can be used to identify contracting and subcontracting opportunities, competitors and potential teaming partners for specific opportunities, and the winners of recently awarded contracts that may represent technology refresh opportunities.
- custom consulting to provide firms with competitive strategies for specific contracting opportunities, market studies for firms that are just entering the federal IT market or seeking to increase their market penetration, and management advisory services that provide firms with timely information and advice on a daily basis; and
- a two-day course that provides new firms to the federal IT market with a broad overview of the federal marketplace and strategies for developing an overall plan of attack.

For more information, contact:

Federal Sources, Inc.
8400 Westpark Drive,
McLean, VA 22102
Tel: (703) 610-8700 Fax: (703) 883-9067

George Washington University

As part of its professional development programme, George Washington University offers over 50 courses covering a wide range of topics on federal procurement. The programme is aimed at both government and industry. The average cost of the courses is about US\$800 per person; ranging between US\$375 and \$1400. The programme covers the following areas:

- the federal contracting marketplace;
- contract accounting;

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- contract management; and
- automatic data processing (ADP) and telecommunications acquisition.

For more information or to receive a course catalogue, contact:

Educational Services Institute
2775 S. Quincy Street, Suite 500
Arlington, VA 22206
Tel: (703) 578-8810 Fax: (703) 578-8801

Government Sales Consultants, Inc.

Government Sales Consultants provides one, two, and three-day public and on-site training seminars and private consulting on a variety of federal IT procurement topics. The cost of attending the seminars ranges between US\$200 and US\$675 per person. Seminar topics include:

- computer and communications procurement in the federal government;
- strategic channel marketing to federal agencies and prime contractors;
- selling from a GSA schedule under the new rules; and
- understanding and using FACNET (electronic commerce).

For more information, contact:

Government Sales Consultants, Inc.
1144 B Walker Road,
Great Falls, VA 22066
Tel: (703) 759-7216 Fax: (703) 759-7388

IDC, Government Market Services

IDC is a large consulting firm serving the federal IT market that specialises in **market research**. IDC's services include:

- specialised federal market research reports that highlight market history, trends, and future opportunities;
- customised consulting to support firms in their development of strategic federal business plans; and
- direct access to a designated analyst at IDC that can provide timely strategic and tactical advice.

For more information, contact:

Steve LeCompte, Vice President, Research
IDC, Government Market Services
3110 Fairview Park Drive, Suite 260
Falls Church, VA 22042
Tel: (703) 876-5072 Fax: (703) 876-5185

Input

Input is a large consulting firm serving the federal and commercial information technology industry that specialises in **market research and opportunity tracking**. Input's services include:

- off-the-shelf and customised market research reports providing IT sector and federal agency forecasts, strategic perspective reports that examine new and emerging issues, and agency profiles;
- a client hotline that can provide customised services to identify the fastest growing federal markets, the top-purchasing agencies, prime teaming partners for specific contracting opportunities, and other market intelligence;

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- database services that identify agency procurement requests (APR), contract opportunities, contract awards, agency profiles, vendor profiles, and more;
- customised consulting to provide primary research and analysis of the federal IT market; and
- an annual conference and bi-monthly meetings to provide valuable up-to-date market information a venue for networking.

For more information, contact:

Input

1921 Gallows Rd., Suite 250
Vienna, VA 22182
Tel: (703) 847-6870 Fax: (703) 847-6872

Terry Kelly Associates, Inc.

Terry Kelly Associates, Inc. conducts two-day public and on-site training seminars on "Information Technology Procurement in the Federal Government," in addition to private consulting. The two-day seminar costs US\$675 per person. Terry Kelly's two-day seminars cover:

- acquisition reform
 - best value awards
 - alternate dispute resolutions
 - simplified acquisition thresholds
 - electronic commerce
 - past performance issues
 - debriefing
 - government/industry communication
- Source Selection

For more information, contact:

Terry Kelly Associates, Inc.
10701 Sycamore Springs Lane
Great Falls, VA 22066
Tel: (703) 450-6048 Fax: (703) 450-4767

Trade Shows

Federal Imaging

Federal Imaging is an exhibition of imaging and document management software for the federal government. The event is normally held at the end of October. The cost of exhibiting is US\$26 per square foot. For more information or to exhibit, contact:

Reed Exhibition Companies
8601 Georgia Ave, Suite 503
Silver Spring, MD 20903
Tel: (301) 495-7100 Fax: (301) 495-7148

Fed-Unix

Fed-Unix is an exhibition of Unix-based and other advanced operating system software. The event is normally held in November or December. The cost to exhibit is US\$30 per square foot. For more information or to exhibit, contact:

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Open Systems World, Inc.
10440 Shaker Dr.
Columbia, MD
(301) 596-8800

FITS, Federal Information Technology Showcases

FITS is a series of 200 showcases held on-site at 200 different federal agency facilities each year. At each showcase there are about 20-25 IT exhibitors. The cost of exhibiting ranges between US\$345 and US\$595 (table). For more information or to exhibit, contact:

IT-Direct
11501 Sunset Hills Rd, Suite 250
Reston, VA 22109
Tel: (703) 471-8520 Fax: (703) 471-8515

FOSE, Federal Office Systems Exposition

FOSE is the largest exhibition of IT aimed at the federal government with 500 exhibitors and 75,000 attendees (primarily government employees). The event is normally held around the end of March. The cost of exhibiting is US\$39 per square foot. For more information or to exhibit, contact:

Reed Exhibition Companies
8601 Georgia Ave, Suite 503
Silver Spring, MD 20903
Tel: (301) 495-7100 Fax: (301) 495-7148

Small Business Technology Showcase

The Small Business Technology Showcase is sponsored by large IT companies and systems integrators that are looking for teaming partners for some of their current projects. The exhibitors at the showcase are small businesses, 8(a) firms, and women-owned firms. The event provides a prime opportunity to network and possibly initiate teaming arrangements with other exhibitors and attendees. The event is normally held at the end of May. The cost of exhibiting is US\$750 (booth). To exhibit at the event, firms must apply and be accepted after an evaluation procedure. For more information, contact:

Small Business Technology Showcase
The Century Club of George Mason University, Inc.
8618 Westwood Centre Drive, Suite 400
Vienna, VA 22182
Tel: (703) 277-7749 Fax: (703) 352-8195

Tech Expo

Tech Expo is an information technology show aimed at both the federal and commercial markets. Many exhibitors are large federal systems integrators and the event is designed to offer many opportunities for networking. The event is normally held at the end of September or in early November. The cost of exhibiting is US\$1000 (booth). For more information, contact:

Washington Technology
8500 Leesburg Pike, Suite 7500
Vienna, VA 22182
Tel: (703) 848-2800 Fax: (703) 848-2353

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Tech Net

Tech Net is an exhibition of a wide variety of information technology aimed at the federal government and the commercial sector. The event is usually held at the beginning of June. The cost to exhibit varies between US\$16 and US\$31 per square foot. For more information or to exhibit, contact:

AFCEA, Armed Forces Communications and Electronics Association
4400 Fair Lakes Court
Fairfax, VA 22033
Tel: (703) 631-6200 Fax: (703) 631-4693

User Groups

Capital PC User Group

The Capital PC User Group is the second largest user group in the United States and the largest group in the DC area with over 5600 government and non-government members. The group has 30 special interest groups covering a wide range of application software, operating systems, and programming languages for PCs. Seminars, software demonstrations, and direct-mailings to group members provide excellent opportunities to market to government end-users. Contact:

Capital PC User Group, Inc.
Plaza East Two
51 Monroe Street
Rockville, MD 20850
Tel: (301) 762-9372 Fax: (301) 762-9375

Melbourne PC User Group

The Melbourne PC User Group out of Melbourne, Australia maintains a World Wide Web site that identifies user groups from around the world by country and in the United States by state. To make use of this service, go to:

<http://koala.melbpc.org.au>

Washington Apple Pi

Washington Apple Pi is a group for users of Apple and Mac computers with over 4000 government and non-government members. Seminars, software demonstrations, and direct-mailings to group members provide excellent opportunities to market to government end-users. Contact:

Washington Apple Pi, Ltd.
12022 Parklawn Dr.
Rockville, MD 20852
(301) 984-0300

Washington Area Computer User Group

The Washington Area Computer User Group is for users of Commodore, Amiga, and PC computers. Seminars, software demonstrations, and direct mailings to group members provide excellent opportunities to market to government end-users. Contact:

WAC User Group
30 Fendall Ave.
Alexandria, VA 22304
(703) 406-9007

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OSDBU, Agency for International Development
1100 Wilson Blvd. (SA-14), Rm 1200A
Arlington, VA 22202
Tel: (703) 575-1551
Fax: (703) 575-1827

OSDBU, Department of Education
400 Maryland Avenue, Rm 3120 (ROB#3)
Washington, DC 20202
Tel: (202) 708-9820
Fax: (202) 708-6956

OSDBU, Department of Agriculture
14th & Independence Ave. SW, Rm 1323, South Side
Washington, DC 20250
Tel: (202) 725-7177
Fax: (202) 725-3091

OSDBU, Department of Energy
1707 H St. NW, Rm 904
Washington, DC 20585
Tel: (202) 456-7377
Fax: (202) 456-5458

OSDBU, Air Force
The Pentagon - Rm 5E771
Washington, DC 20330
Tel: (703) 697-4126
Fax: (703) 614-9266

OSDBU, Environmental Protection Agency
404 M Street, SW, 1230C
Washington, DC 20460
Tel: (703) 305-7777
Fax: (703) 305-6606

OSDBU, Army
The Pentagon - Rm 2A712
Washington, DC 20315
Tel: (703) 697-3295
Fax: (703) 693-3295

Appendix B: OSDBUs

Point of contact information for agency Offices of Small and Disadvantaged Business Utilization (OSDBUs)

OSDBU, Employment Opportunity Council
1300 K St. NW, Rm 3050
Washington, DC 20007
Tel: (202) 643-4178
Fax: (202) 643-4178

OSDBU, Department of Commerce
14th & Constitution Ave. NW, 146511
Washington, DC 20230
Tel: (202) 482-1472
Fax: (202) 482-6501

OSDBU, General Services Administration
1300 St. & 1 St. NW, Rm 6029
Washington, DC 20405
Tel: (202) 391-1021
Fax: (202) 395-9938

OSDBU, Corporation For National Service
1100 Vermont Ave. NW
Washington, DC 20525
Tel: (202) 696-5000 ext. 320
Fax: (202) 263-2777

OSDBU, Department of Health & Human Services
200 Independence Ave. SW, Rm 517D
Washington, DC 20201
Tel: (202) 690-7300
Fax: (202) 690-8770

OSDBU, Department of Defense
The Pentagon - Rm 2A340
Washington, DC 20301
Tel: (703) 697-4912
Fax: (703) 693-7614

OSDBU, Dept. of Housing and Urban Development
451 7th St. SW, Rm 3130
Washington, DC 20410
Tel: (202) 708-1428
Fax: (202) 708-7642

OSDBU, Defense Logistics Agency
Compton Station, 3010 Duke St, Rm 4E110
Alexandria, VA 22304
Tel: (703) 767-1661
Fax: (703) 767-1670

OSDBU, Department of the Interior
1849 C Street, NW, Rm 2725
Washington, DC 20240
Tel: (202) 205-3493
Fax: (202) 205-5048

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OSDBU, Agency for International Development

1100 Wilson Blvd, (SA-14), Rm 1200A
Arlington, VA 20523
Tel: (703) 875-1551
Fax: (703) 875-1827

OSDBU, Department of Agriculture

14th & Independence Ave, SW, Rm 1323, South Bldg
Washington, DC 20250
Tel: (202) 720-7117
Fax: (202) 720-3001

OSDBU, Air Force

The Pentagon - Rm 5E271
Washington, DC 20330
Tel: (703) 697-4126
Fax: (703) 614-9266

OSDBU, Army

The Pentagon - Rm 2A712
Washington, DC 20310
Tel: (703) 695-9800
Fax: (703) 693-3898

OSDBU, Department of Commerce

14th & Constitution Ave, NW, H6411
Washington, DC 20230
Tel: (202) 482-1472
Fax: (202) 482-0501

OSDBU, Corporation For National Service

1100 Vermont Ave, NW
Washington, DC 20525
Tel: (202) 606-5000 ext. 320
Fax: (202) 565-2777

OSDBU, Department of Defense

The Pentagon - Rm 2A340
Washington, DC 20301
Tel: (703) 697-4912
Fax: (703) 693-7014

OSDBU, Defense Logistics Agency

Cameron Station, 5010 Duke St, Rm 4B110
Alexandria, VA 22304
Tel: (703) 767-1661
Fax: (703) 767-1670

OSDBU, Department of Education

400 Maryland Avenue, Rm 3120 (ROB#3)
Washington, DC 20202
Tel: (202) 708-9820
Fax: (202) 708-8956

OSDBU, Department of Energy

1707 H St, NW, Rm 904
Washington, DC 20585
Tel: (202) 586-7377
Fax: (202) 586-5488

OSDBU, Environmental Protection Agency

401 M Street, SW, 1230C
Washington, DC 20460
Tel: (703) 305-7777
Fax: (703) 305-6606

OSDBU, Equal Employment Opportunity Comm.

1801 L St, NW
Washington, DC 20507
Tel: (202) 663-4222
Fax: (202) 663-4178

OSDBU, General Services Administration

18th St & F St, NW, Rm 6029
Washington, DC 20405
Tel: (202) 501-1021
Fax: (202) 208-5938

OSDBU, Department of Health & Human Services

200 Independence Ave, SW, Rm 517D
Washington, DC 20201
Tel: (202) 690-7300
Fax: (202) 690-8770

OSDBU, Dept. of Housing and Urban Development

451 7th St, SW, Rm 3130
Washington, DC 20410
Tel: (202) 708-1428
Fax: (202) 708-7642

OSDBU, Department of the Interior

1849 C Street, NW, Rm 2725
Washington, DC 20240
Tel: (202) 208-3493
Fax: (202) 208-5048

Information Technology: Selling to the U.S. Federal Government

OSDBU, Department of Justice

12th & Penn. Ave, NW, Rm 3235, Ariel Rios Bldg
Washington, DC 20530
Tel: (202) 616-0521
Fax: (202) 616-1717

OSDBU, Department of State

1700 North Lynn St, Rm 633 (SA-6)
Rosslyn, VA 22209
Tel: (703) 875-6824
Fax: (703) 875-6825

OSDBU, Department of Labor

200 Constitution Ave, NW, Rm C2318
Washington, DC 20210
Tel: (202) 219-9148
Fax: (202) 219-9167

OSDBU, Department of Transportation

400 7th Street, SW, Rm 9414
Washington, DC 20590
Tel: (202) 366-1930
Fax: (202) 366-7228

OSDBU, National Aeronautics and Space Admin.

300 E St, SW, Rm 1T70, FB-108, Code K
Washington, DC 20546
Tel: (202) 358-2088
Fax: (202) 358-3261

OSDBU, Department of the Treasury

15th & Penn. Ave, NW, Rm 6101 - The Annex
Washington, DC 20220
Tel: (202) 622-0530
Fax: (202) 622-2273

OSDBU, Navy

2211 Jefferson Davis Highway
Crystal Plaza Building 5, Rm 120
Arlington, VA 22244
Tel: (703) 602-2695
Fax: (703) 602-8569

OSDBU, Department of Veterans Affairs

810 Vermont Ave, NW, OSDBU 005SB
Washington, DC 20420
Tel: (202) 565-8124
Fax: (202) 565-8156

OSDBU, Office of Personnel Management

1900 E St, NW, Rm SB-427
Washington, DC 20415
Tel: (202) 606-2240
Fax: (202) 606-1464

OSDBU, Peace Corps

1990 K St, NW, Rm 6388
Washington, DC 20526
Tel: (202) 606-3515
Fax: (202) 606-3009

OSDBU, Postal Service

475 L'Enfant Plaza West, SW, Rm 1140
Washington, DC 20260
Tel: (202) 268-4633
Fax: (202) 268-4027

OSDBU, Securities and Exchange Commission

450 Fifth St, NW, Rm 7201, Mail Stop 7-8
Washington, DC 20549
Tel: (202) 942-2950
Fax: (202) 942-9525

BSC, Region 1 (CT, ME, MA, NH, RI, VT)
16 Cambridge Street
Boston, MA 02222
(617) 545-2162

BSC, Region 9 (K. CA, IL, NY-excl. Clark County)
325 Market St.
San Francisco, CA 94105
(415) 744-5060

BSC, Region 2 (NY, NJ, PR, VE)
26 Federal Plaza
New York, NY 10278
(212) 264-1234

BSC, Region 9 (AZ, S. CA, Clark County NV)
300 W Los Angeles St, Rm 3259
Los Angeles, CA 90012
(213) 894-3210

BSC, National Capitol Region (DC Metro Area)
7th St. & D St, SW, Rm 1030
Washington, DC 20407
(202) 708-5804

BSC, Region 10 (WA, OR, ID, AK)
15th St. & C St, SW
Astoria, WA 97103
(206) 921-7926

BSC, Region 3 (PA, DE, MD, VA, WV)
Wanamaker Bldg, Rm 819
100 Penn Square East
Philadelphia, PA 19107
(215) 456-5525

Appendix C: BSCs

Point of contact information for the GSA's Business Service Centres (BSCs)

BSC, Region 4
KY
75 Spring Street, SW
Atlanta, GA 30303
(404) 331-5103

BSC, Region 5 (IL, WI, MI, IN, OH, MN)
330 S. Dearborn St
Chicago, IL 60604
(312) 313-5383

BSC, Region 6 (KS, IA, MO, NE)
1500 E. Bannister Rd
Kansas City, MO 64123
(816) 926-7203

BSC, Region 7 (AR, LA, NM, OK, TX)
319 Taylor St, Rm 6406
Fort Worth, TX 76102
(817) 334-3284

BSC, Region 8 (CO, WY, MT, UT, ND, SD)
Denver Federal Centre
Building 41
Denver, CO 80225
(303) 236-7408

Information Technology: Selling to the U.S. Federal Government

BSC, Region 1 (CT, ME, MA, NH, RI, VT)
10 Causeway Street
Boston, MA 02222
(617) 565-8100

BSC, Region 9 (N. CA, HI, NV-excl. Clark County)
525 Market St,
San Francisco, CA 94105
(415) 744-5050

BSC, Region 2 (NY, NJ, PR, VI)
26 Federal Plaza
New York, NY 10278
(212) 264-1234

BSC, Region 9 (AZ, S. CA, Clark County NV)
300 N Los Angeles St, Rm 3259
Los Angeles, CA 90012
(213) 894-3210

BSC, National Capitol Region (DC Metro Area)
7th St. & D St, SW, Rm 1050
Washington, DC 20407
(202) 708-5804

BSC, Region 10 (WA, OR, ID, AK)
15th St. & C St, SW
Auburn, WA 98001
(206) 931-7956

BSC, Region 3 (PA, DE, MD, VA, WV)
Wanamaker Bldg, Rm 810
100 Penn Square East
Philadelphia, PA 19107
(215) 656-5525

BSC, Region 4 (NC, SC, TN, MS, AL, GA, FL, KY)
75 Spring Street, SW
Atlanta, GA 30303
(404) 331-5103

BSC, Region 5 (IL, WI, MI, IN, OH, MN)
230 S. Dearborn St.
Chicago, IL 60604
(312) 353-5383

BSC, Region 6 (KS, IA, MO, NE)
1500 E Bannister Rd
Kansas City, MO 64131
(816) 926-7203

BSC, Region 7 (AR, LA, NM, OK, TX)
819 Taylor St, Rm 6A04
Fort Worth, TX 76102
(817) 334-3284

BSC, Region 8 (CO, WY, MT, UT, ND, SD)
Denver Federal Centre
Building 41
Denver, CO 80225
(303) 236-7408

Information Technology Selling to the U.S. Federal Government

CBD Access/CBD Express
11300 Rockville Pike, Ste 1100
Rockville, MD 20852
Tel: (800) 929-3524

GRC International, Inc.
1900 Galloway Rd.
Vienna, VA 22182
Tel: (800) 479-3462
Fax: (703) 596-0585

Information Systems and Services
8403 Coleville Rd, Ste 750
Silver Spring, MD 20910
Tel: (301) 585-3800

Janz's Information Group
1340 Braddock Place, Ste 300
Alexandria, VA
Tel: (703) 683-1100

Kbera Communications
2400 Research Blvd, Ste 250
Rockville, MD 20850
Tel: (301) 253-8252

Knight-Ridder Information, Inc.
2440 El Camino Real
Mountain View, CA 94040
Tel: (800) 334-2864

Lenta-Neis
3442 Springboro Pike
Mansfield, OH 45342
Tel: (800) 327-4956
Fax: (614) 346-2689

Loren Data Corp.
Tel: (800) 745-8726

Mercury Electronic Publishing
222 South Market St, Ste 104
Elizabethtown, PA 17022
Tel: (800) 669-2441

NETAC, Inc.
One Technology Dr.
Tolland, CT 06081
Tel: (203) 472-7800

Oym Bidding Service
P.O. Box 22811
Ottawa, ON K1V 0W2
Tel: (800) 361-4637

Sales Opportunity Services
PO Box 951
Allentown, PA 18603
Tel: (610) 225-6833

Solitary
110 West Green Road, Ste C

Appendix D: The CBD in Electronic Form

Point of contact information for 13 companies that distribute the Commerce Business Daily in electronic form

Information Technology: Selling to the U.S. Federal Government

CBD Access/CBD Express

11300 Rockville Pike, Ste 1100
Rockville, MD 20852
Tel: (800) 929-4824

GRC International, Inc.

1900 Gallows Rd.
Vienna, VA 22182
Tel: (800) 479-5462
Fax: (703) 506-0585

Information Systems and Services

8403 Colesville Rd, Ste 750
Silver Spring, MD 20910
Tel: (301) 588-3800

Jane's Information Group

1340 Braddock Place, Ste 300
Alexandria, VA 22314
Tel: (703) 683-3700
Fax: (703) 836-0029

Khera Communications

2400 Research Blvd, Ste 250
Rockville, MD 20850
Tel: (301) 258-8292

Knight-Ridder Information, Inc.

2440 El Cammino Real
Mountain View, CA 94040
Tel: (800) 334-2564

Lexis-Nexis

9443 Springboro Pike
Miamisburg, OH 45342
Tel: (800) 227-4908
Fax: (800) 348-2609

Loren Data Corp.

Tel: (800) 745-6736

Mercury Electronic Publishing

222 South Market St, Ste 104
Elizabethtown, PA 17022
Tel: (800) 669-2441

NERAC, Inc.

One Technology Dr.
Tolland, CT 06084
Tel: (203) 872-7000

Open Bidding Service

P.O. Box 22011
Ottawa, ON K1V 0W2
Tel: (800) 361-4637

Sales Opportunity Services

PO Box 951
Altoona, PA 16603
Tel: (800) 225-6853

Softshare

136 West Canon Perdido, Ste C
Santa Barbara, CA 93101
Tel: (800) 346-6703
Fax: (805) 882-2599

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Open Bidding Service
P.O. Box 32011
Orlando, FL 32832
Tel: (800) 351-4633

State Opportunity Services
PO Box 951
Altoona, PA 16803
Tel: (800) 333-8833

Software
138 West Canon Parkway, Ste C
Santa Barbara, CA 93101
Tel: (800) 346-6702
Fax: (805) 883-2392

Storage
CA1 EA982 96U72 ENG
Bradt, Judy
U.S. federal information technolog:
: 1996 - 97
54551163

GRD AccountCD Systems
11300 Rockville Pike, Ste 1100
Rockville, MD 20852
Tel: (800) 923-4834

GRD International, Inc.
1900 Gallows Rd.
Vienna, VA 22182
Tel: (800) 479-3452
Fax: (703) 806-0382

Information Systems and Services
8403 Columbia Rd, Ste 750
Silver Spring, MD 20910
Tel: (301) 588-3800

John's Information Group
1340 Braddock Place, Ste 200
Alexandria, VA 22314
Tel: (703) 683-3700
Fax: (703) 834-6029

Libra Communications
2400 Research Blvd, Ste 250
Rockville, MD 20850
Tel: (301) 328-8202

Knight-Ridder Information
2440 El Camino Real
Mountain View, CA 94039
Tel: (800) 334-2364

Lexis-Nexis
9447 Springboro Pike
Mansfield, OH 43220
Tel: (800) 327-4908
Fax: (800) 348-2609

Loves Data Corp.
Tel: (800) 742-6736

Mercy Electronics
233 South Market St.
Elizabeth, PA 15001
Tel: (800) 669-2441

