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Federal Artificial Intelligence Landscape, 2022

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About This Report

Deltek's Federal Artificial Intelligence Landscape, 2022 assesses the state of Artificial Intelligence (AI) and Machine Learning (ML) adoption within the federal government. The report takes an in-depth look at the factors shaping the strategic and budgetary priorities governing artificial intelligence procurement and use.

This report provides:

» Analysis of the legislation, policies and guidance directing the federal government's strategic direction for artificial intelligence.

» Insight into planned and requested budgets for AI initiatives.

» Analysis of AI contracting patterns to date.

» AI efforts and programs that are underway, as well as insight into potential opportunities.

» Recommendations to help contractors maximize business opportunities within the federal AI space.

Report Deliverables

» 131 Slide PowerPoint® Report
» 33 Slide PowerPoint® Executive Summary
» 1 Excel® Workbook Chart Data File

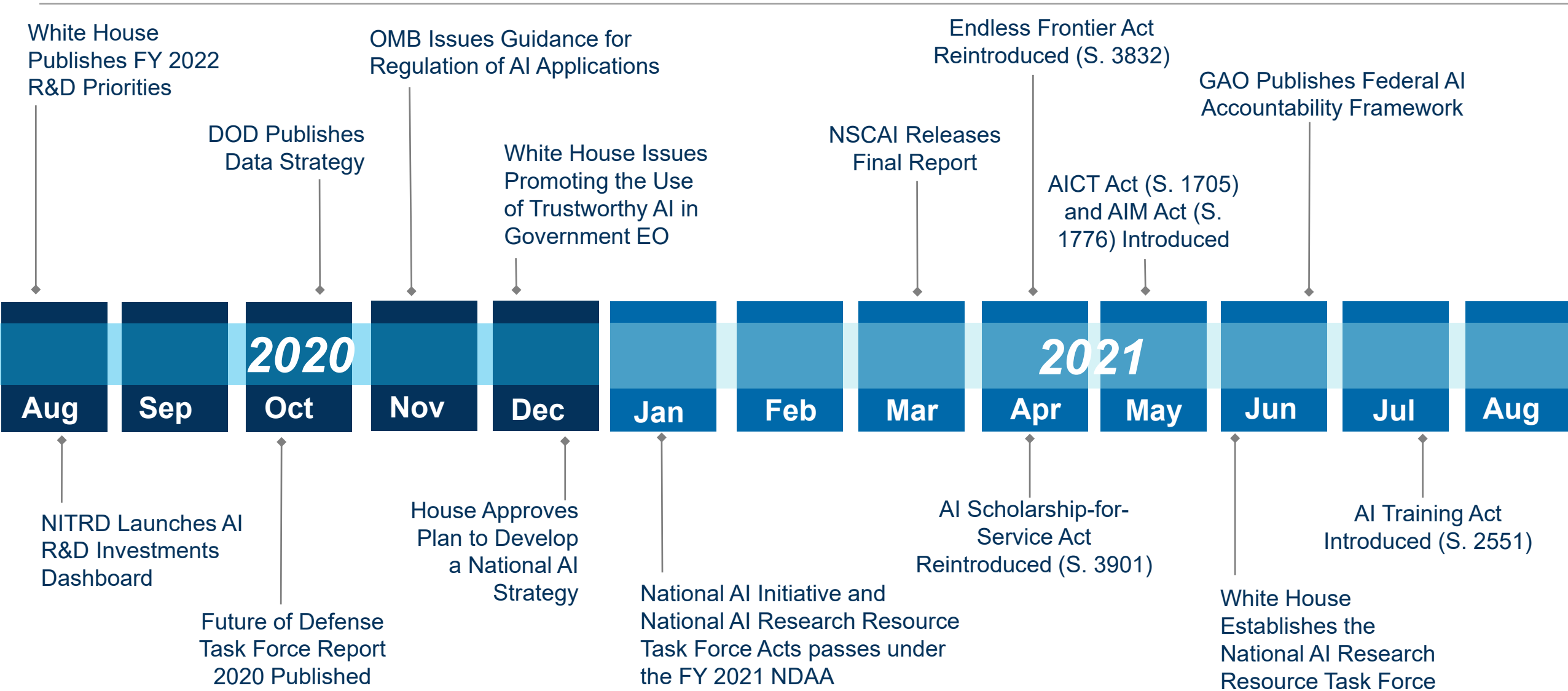**To purchase the full report visit GovWin.com**

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Key Findings

» Identifiable federal spending on artificial intelligence rose to nearly $1B in FY 2020, up 50% from FY 2018, making it one of the fastest growing emerging technology investment areas.

» The Department of Defense is spending nearly twice what the civilian sector is spending on artificial intelligence.

» Most federal spending on AI/ML is still dedicated to R&D, but AI-based Robotic Process Automation is rapidly transitioning the technology into real-world operational settings.

» Investment in artificial intelligence is growing at some agencies without a primarily scientific mission, such as the Departments of Justice, Transportation and State.

» Agencies are using GSA's Multiple-Award Schedule and NASA's SEWP V Government-Wide Acquisition Contract the most to purchase artificial intelligence products and services.

» Although federal customers still spend more on AI capabilities provided by large businesses, innovative small businesses are increasing their presence and influence in the market.

» Legislation and executive branch policies are key drivers of federal artificial intelligence investment.

» Limiting the regulatory burden on agencies hoping to leverage artificial intelligence will be a key factor shaping future investment.

Federal AI Legislation and Policy Landscape

White House Publishes FY 2022 R&D Priorities

OMB Issues Guidance for Regulation of AI Applications

DOD Publishes Data Strategy

White House Issues Promoting the Use of Trustworthy AI in Government EO

Endless Frontier Act Reintroduced (S. 3832)

GAO Publishes Federal AI Accountability Framework

NSCAI Releases Final Report

AICT Act (S. 1705) and AIM Act (S. 1776) Introduced

2020   **2021**

Aug   Sep   Oct   Nov   Dec   Jan   Feb   Mar   Apr   May   Jun   Jul   Aug

NITRD Launches AI R&D Investments Dashboard

House Approves Plan to Develop a National AI Strategy

AI Scholarship-for-Service Act Reintroduced (S. 3901)

AI Training Act Introduced (S. 2551)

Future of Defense Task Force Report 2020 Published

National AI Initiative and National AI Research Resource Task Force Acts passes under the FY 2021 NDAA

White House Establishes the National AI Research Resource Task Force

2021 Artificial Intelligence Legislation

Recognizing the U.S.' need to remain competitive in a rapidly changing technology landscape, several pieces of legislation appeared in the Senate and House of Representatives in 2020 and 2021 to encourage the development and dissemination of artificial intelligence and machine learning capabilities.

Bill Title and Number	Objective(s)	Potential Investment Areas
The Endless Frontier Act (S. 3832)	Reintroduced in April 2021, S. 3832 would **create a new Directorate for Technology and Innovation** at the National Science Foundation focused on technology areas such as AI/ML, high performance computing, quantum computing and robotics. The bill **authorizes $100B over five years for the new directorate**. The directorate is envisioned to operate like DARPA, with program managers selecting awardees. Responsibilities include directing new programs to accelerate the transfer of technologies, coordinating with international, state and local stakeholders, and funding academic research, new scholarships, and equipment for test-bed and fabrication facilities. The bill also authorizes **$10B over five years at Commerce** to invest in regional technology and innovation and **creates the Supply Chain Resiliency and Crisis Response Program** at the department.	» Administrative support » Workforce training » Provision of computing resources » Provision of data sets » Program management » Testbed equipment, development and management » Software engineering » Engineering and technical support
AI Scholarship-for-Service Act (S. 1257)	Reintroduced in April 2021, S. 1257 would **provide scholarships to students studying AI and related fields**. In exchange for the scholarships, students are required to serve in an AI mission at a federal agency for the length of time equivalent to the scholarship term.	N/A

2021 Artificial Intelligence Legislation (Cont)

Bill Title and Number	Objective(s)	Potential Investment Areas
Artificial Intelligence Capabilities and Transparency (AICT) (S. 1705)	Introduced in May 2021, S. 1705 would **integrate an artificial intelligence-related curriculum into all levels of military education**, including bi-annual training for senior civilian and military leaders. Training materials will include the artificial intelligence lifecycle, data collection and management, probabilistic reasoning and data visualization and data-informed decision-making. The bill also calls for **emerging technology-coded positions in all echelons of the military**.	» Administrative support » Workforce training » Provision of computing resources » Provision of data sets » Program management
Artificial Intelligence for the Military (AIM) Act (S. 1776)	Introduced in May 2021, S. 1776 would establish a coordinated federal initiative to accelerate research and development, procurement and sustainment of AI for U.S. economic and national security interests. The legislation calls on **DOD, ODNI and Energy to designate a Chief Digital Recruiting Officer to identify, incentivize and recruit federal digital talent**. The AIM Act will **require NIST to create an accreditation assessment program** to certify an organization's ability to review AI systems used by DOD, Energy and the intelligence community. The bill also **directs NSF to form new, federally funded National AI Institutes** with a focus on AI safety and ethics.	» Administrative support » Workforce training » Provision of computing resources » Provision of data sets » Program management » Research support
Artificial Intelligence Training Act (S. 2551)	Introduced in July 2021, S.2551 would **establish an AI training program for federal acquisition personnel**. Training would instill knowledge of the capabilities and risks associated with AI.	» Administrative support » Workforce training » Program management

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The National Artificial Intelligence Research Resource Task Force

In June 2021, the White House Office of Science and Technology Policy (OSTP) and the National Science Foundation (NSF) announced the creation of a National AI Research Resource (NAIRR) Task Force to develop a roadmap for making AI resources available to private and public sector researchers. According to the OSTP, "the Task Force will provide recommendations for establishing and sustaining the NAIRR, including technical capabilities, governance, administration and assessment, as well as requirements for security, privacy, civil rights, and civil liberties. ***The Task Force will submit two reports to Congress that together will present a comprehensive strategy and implementation plan — an interim report in May 2022 and final report in November 2022.***" Public comment on the Federal Register closes on September 1, 2021.

Contractors should keep tabs on this initiative as related business opportunities may arise from it.

| Task Force Members	Subjects Open for Public Comment
» Lynne Parker, White House OSTP (Co-Chair)	» Goals for establishment and sustainment of the NAIRR and metrics for success
» Erwin Gianchandani, NSF (Co-Chair)	» A plan for ownership and administration of the NAIRR, including:
» Daniela Braga, DefinedCrowd	» Selecting an appropriate agency responsible for implementation, deployment and administration
» Mark Dean, retired (formerly IBM and Univ. of Tennessee/Knoxville)	» A governance structure, including oversight and decision-making authority
» Oren Etzioni, Allen Institute for AI	» Strategic direction and resource management
» Julia Lane, New York University	» Capabilities required to create and maintain a shared computing infrastructure, related data sets and a user interface
» Fei-Fei Li, Stanford University	» An assessment of the barriers to using government-provided data sets
» Andrew Moore, Google	» An assessment of security requirements and access controls
» Michael Norman, University of California, San Diego	» An assessment of privacy and civil rights requirements
» Dan Stanzione, University of Texas, Austin	» A plan for sustaining NAIRR funding
» Frederick Streitz, Department of Energy	» The parameters for establishing and sustaining the NAIRR
» Elham Tabassi, NIST	

AI/ML in FY 2022 R&D Budget Priorities

Published in August 2020, White House Memorandum M-20-29 outlined five R&D priorities for the 2022 fiscal year. Four of these priorities call for the incorporation of artificial intelligence and machine learning technology, providing guideposts for industry for where future federal investment may go.

Basic AI/ML Research

Research ethical issues related to AI; data-efficient and high performance machine learning techniques; cognitive AI; secure and trustworthy AI; scalable and robust AI; integrated and interactive AI; novel AI hardware; and AI testbeds and related infrastructure.

Artificial Intelligence

Biomedicine and Biotechnology

Accelerate the identification and selection of AI capabilities for the rapid development and manufacturing of vaccines and therapeutics for pathogens.
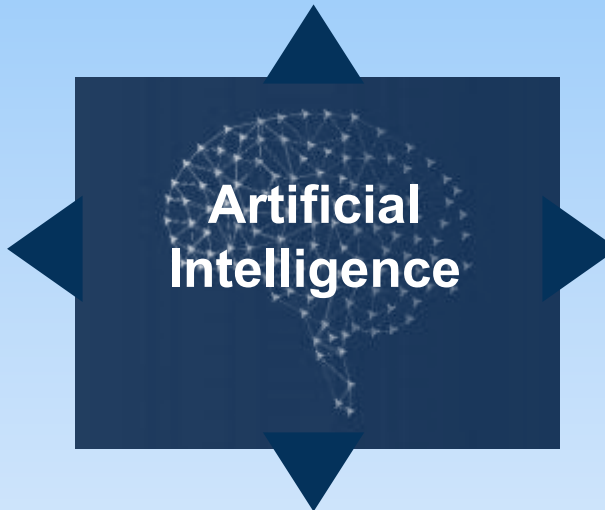
Advanced Communications Networks

Apply AI/ML to communications, including optimized wireless systems, smart communications and cyber security.

Autonomous and Remotely Piloted Vehicles

Leverage AL/ML to enable surface, air and maritime autonomous and remotely piloted vehicles, as well as optionally piloted electric vertical-takeoff-and-landing aircraft.

AI-Related Provisions in the FY 2021 NDAA

The National Defense Authorization Act (NDAA) for Fiscal Year 2021 became Public Law No: 116-283 on January 1, 2021.

Sec. 233: Board of Advisors for the Joint Artificial Intelligence Center	Establishes a board of advisors for the Joint Artificial Intelligence Center (JAIC). Responsibilities include: » Advising the Secretary of Defense and JAIC Director on the development of, ethics of and studies related to AI use at the department. » Providing recommendations for developing a robust AI workforce. » Developing guidance for AI procurements and supply chain requirements.
Sec. 235: Acquisition of Ethically and Responsibly Developed Artificial Intelligence Technology	Directs the Secretary of Defense to conduct an assessment of DOD's ability and expertise to acquire ethical and responsibly-developed AI technology, and how the department can implement ethical AI standards in the acquisition process.
Sec. 808: Acquisition Authority of the Director of the Joint Artificial Intelligence Center	Grants authority to the Director of the Joint Artificial Intelligence Center to use budgetary appropriations for the Center's activities.
Sec. 1751: Guidance and Direction on Use of Direct Hiring Processes for Artificial Intelligence Professionals and Other Data Science and Software Development Personnel	Directs the Secretary of Defense to review and issue guidance to all military departments on improving the use of direct hiring processes for AI, data science and software development professionals. Guidance will include hiring incentives, authorize use of ePortfolio reviews and prompt use of SMEs over HR professionals in applicant determination.

The National Artificial Intelligence (AI) Initiative Act

Passed within the FY 2021 NDAA, the National AI Initiative Act provides a framework for coordinating AI research and policy across federal departments. The bill creates the National AI Initiative Office and a network of institutes at NSF, DOE and Commerce to propel focused AI research related to mission-driven applications.

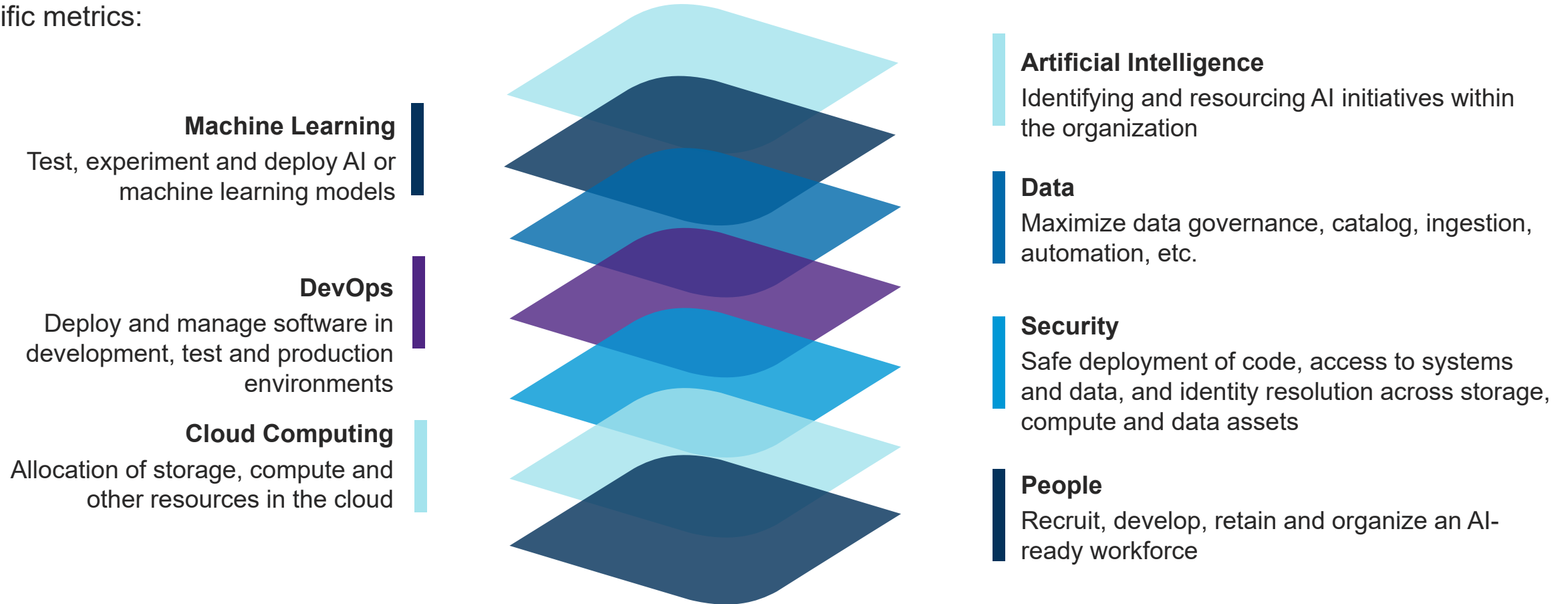## Initiative Activities

» R&D support through grants, cooperative agreements, testbeds, and access to data and computing resources

» AI system education and workforce training

» Interdisciplinary research, education and workforce training

» Interagency and international planning of AI R&D

» Outreach to stakeholders

» Leverage existing federal investments to advance mission

National AI Research Institutes

National Science Foundation (NSF)
Research of trustworthy AI systems; access to research and education programs; guidance on AI standards; conducting prize competitions

Department of Energy (DOE)
Application of AI to large-scale simulations; applied disciplinary studies; application of large-scale datasets; development of hardware, computer architecture and control systems

Commerce
Advance frameworks; technical standards and guidelines on AI risk mitigation and bias

Potential Investment Areas

» Administrative support
» Workforce training
» Curriculum development
» Interdisciplinary research
» Provision of computing resources
» Provision of data sets
» Program management
» Conducting impact studies
» Testbed development and management
» Software engineering
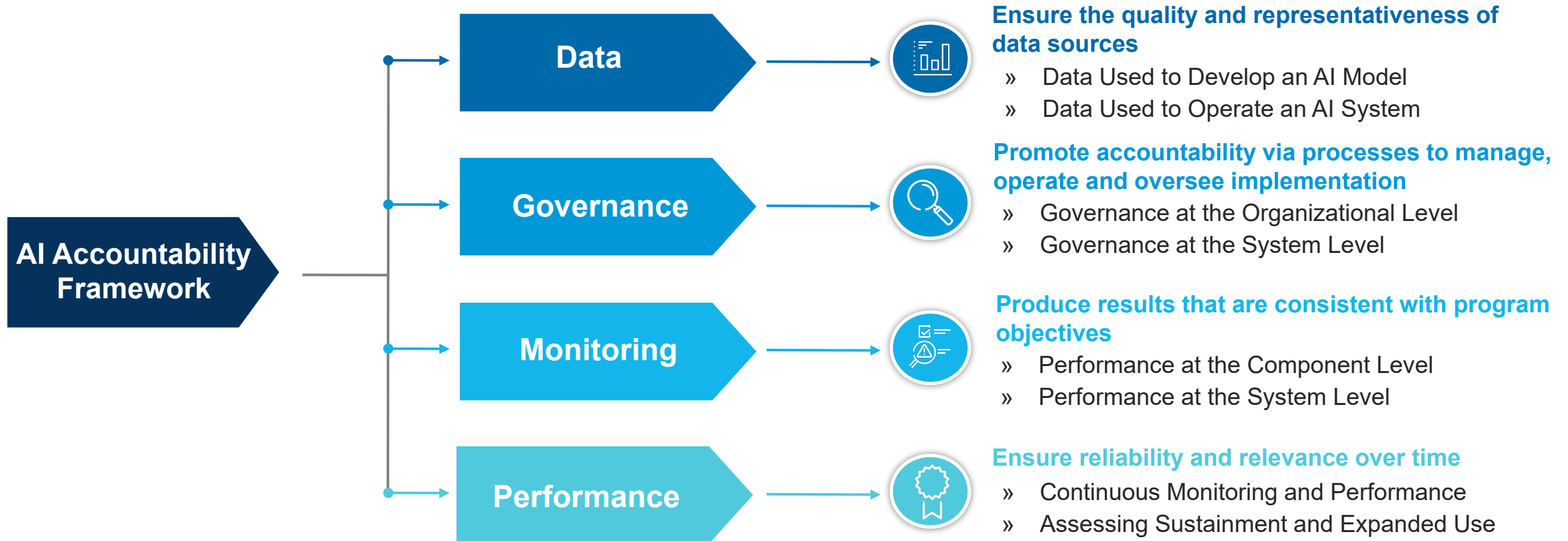» Engineering and technical support

AI Center of Excellence Capability Maturity Model

GSA's Technology Transformation Service's sixth Center of Excellence (CoE) helps agency partners deploy AI technologies. The AI CoE enables agencies by "leveraging private sector innovation and government services while centralizing best practices and expertise for holistic transformation." The CoE's catalog of services* includes observing the organizational maturity of agencies to identify gaps and opportunities in AI initiatives. The AI CoE-designed approach encompasses seven layers to maturity, each with specific metrics:

Machine Learning
Test, experiment and deploy AI or machine learning models

DevOps
Deploy and manage software in development, test and production environments

Cloud Computing
Allocation of storage, compute and other resources in the cloud

Artificial Intelligence
Identifying and resourcing AI initiatives within the organization

Data
Maximize data governance, catalog, ingestion, automation, etc.

Security
Safe deployment of code, access to systems and data, and identity resolution across storage, compute and data assets

People
Recruit, develop, retain and organize an AI-ready workforce

*See slide notes   **To purchase the full report visit GovWin.com**
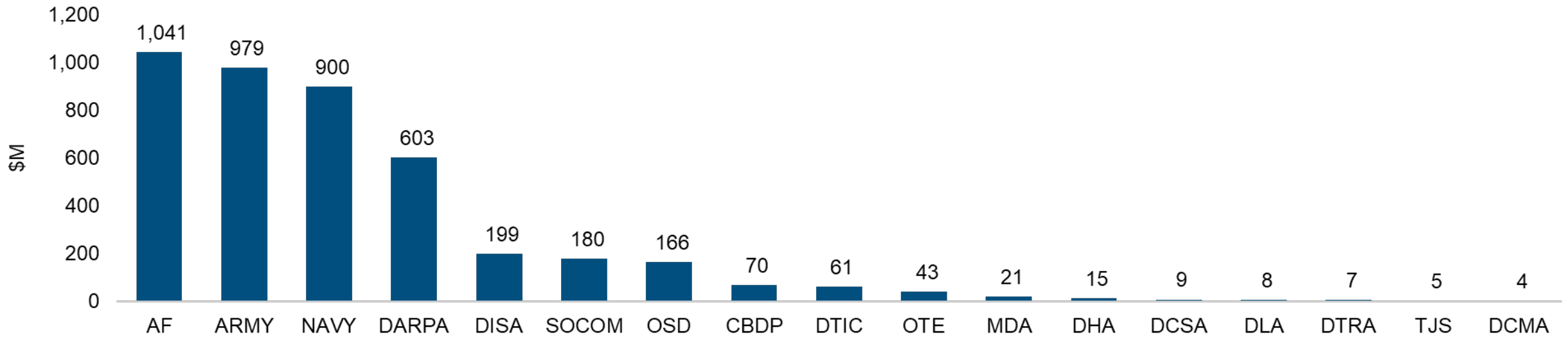
AI Systems Accountability Framework

In a June 2021 report, the GAO published a framework to ensure accountability of the AI system lifecycle. Due to the lack of transparency of some proprietary vendor systems, or a lack of understanding of the software, the framework helps to ensure proper auditing of AI technologies to avoid unintended system consequences. The framework provides federal agencies with four central principles, each with a set of key practices:

AI Accountability Framework

Data

Ensure the quality and representativeness of data sources
» Data Used to Develop an AI Model
» Data Used to Operate an AI System

Governance

Promote accountability via processes to manage, operate and oversee implementation
» Governance at the Organizational Level
» Governance at the System Level

Monitoring

Produce results that are consistent with program objectives
» Performance at the Component Level
» Performance at the System Level

Performance

Ensure reliability and relevance over time
» Continuous Monitoring and Performance
» Assessing Sustainment and Expanded Use

AI in DOD's FY 2022 RDT&E and Procurement Budget Requests

Bar chart — $M (millions):

Agency	$M
AF	1,041
ARMY	979
NAVY	900
DARPA	603
DISA	199
SOCOM	180
OSD	166
CBDP	70
DTIC	61
OTE	43
MDA	21
DHA	15
DCSA	9
DLA	8
DTRA	7
TJS	5
DCMA	4

Observations

Sources: FY 2022 DOD Budget Request, Deltek

» DOD requested $4.3B in its FY 2022 RDT&E and Procurement budgets for programs with an AI and ML component, up 0.8% from its FY 2021 request of $3.6B.

  » FY 2022 Procurement: AI/ML-related funding is $296M, with the Air Force and Army requesting $162M and $134M, respectively. No identifiable AI/ML in the Navy or Defense Agencies request.

  » FY 2022 RDT&E: AI/ML-related funding is $4B. Funding for Defense Agencies, Navy, Air Force and Army are $1.4B, $900M, $880M and $844M respectively.

» Totaling $1.1B, Applied Research continues to attract the highest AI/ML-related funding in FY 2022.

» DOD requested $192M for related Software and Digital Technology Pilot Programs, a massive increase from the $5M it received in FY 2021. The following organizations requested the increase

  » DISA - $187M

  » Army - $5.5M

Sample AI Procurement Opportunities

Agency	Name	Status	Value ($K)	Est. RFP Date	Est. Award Date	Opp ID
AIR FORCE	C4ISR Technical and Engineering Research and Sustainment Support	Pre-RFP	79,001	03/2022	06/2022	178856
AIR FORCE	Health Care Information Management Information Technology Support Services for HQ PACAF SG	Forecast Pre-RFP	17,349	07/2021	08/2021	165418
ARMY	USACE Development and Application of Predictive Mathematical Models	Forecast Pre-RFP	7,000	08/2021	09/2021	161006
ARMY	Artificial Intelligence Systems for Innovative Manufacturing	Pre-RFP	TBD	09/2021	11/2021	189892
ARMY	Field Information Communications System	Pre-RFP	TBD	09/2021	01/2022	179297
NAVY	C4I Software Applications and Database Engineering Support to SSC Pacific DOD Code 532	Forecast Pre-RFP	50,000	03/2022	03/2023	170654
NAVY	USFF Communications and Information Systems Division N6 Division Support (SEAPORT NXG)	Forecast Pre-RFP	997	09/2023	03/2024	185641
NAVY	Information Technology Service Management Solutions (ITSM)	Pre-RFP	50,000	10/2021	03/2022	164174
NAVY	Taiwan Life Cycle Support LCS (SEAPORT NXG)	Pre-RFP	50,000	08/2021	11/2021	171223

Sample AI Procurement Opportunities (Cont.)

Agency	Name	Status	Value ($K)	Est. RFP Date	Est. Award Date	Opp ID
NAVY	Software, Hardware and Network Engineering Support (SEAPORT NXG)	Pre-RFP	24,062	10/2021	04/2022	184813
DARPA	Identifying Artificial Intelligence (IAI)	Pre-RFP	TBD	09/2021	03/2022	190622
NSF	Business Intelligence and Automation Services	Forecast Pre-RFP	5,000	09/2021	11/2021	186458
EDUC	Robotics Process Automation Artificial Intelligence Initiative (RPA AI)	Pre-RFP	TBD	09/2021	12/2021	199932
VA	Office Of Information Security Digital Transformation Artificial Intelligence AI Robotic Process Automation (OIS)(RPA)	Pre-RFP	TBD	08/2021	11/2021	208742
DOT	Artificial Intelligence for Intelligent Transportation Systems Program (AI)(ITS)	Pre-RFP	TBD	09/2021	12/2021	209288
DHS	Intelligence Automation	Pre-RFP	1,000	10/2021	01/2022	201804

Source: Deltek

Observations:

» The DOD's commitment to AI is outstripping that of the civilian sector, increasing 109% from FY 2018 to FY 2020, compared to an 11% decrease in spending by civilian agencies over the same period.

» AI-related service obligations outpaced that of products, totaling $1.9B. Service obligations also increased nearly 70% over the three-year period from FY 2018-2020.

» R&D spending remains strong, totaling 54% ($1.2B) of related federal AI obligations from FY 2018 to 2020.

» Spending on autonomy totaled $520M from FY 2018-2020, followed by intelligent systems ($122M), machine learning ($114M), augmented reality ($39M), deep learning ($26M) and virtual reality ($24M).

Total AI Contract Obligations, FY 2018−2020

Strong growth of AI/ML spending in the federal technology marketplace

The 50% increase in AI spending from FY 2018 to FY 2020 indicates the federal government's continued commitment to the technology. Annually rising AI obligations are being driven by the growth of dedicated budget dollars, programs, training, legislation and policies.
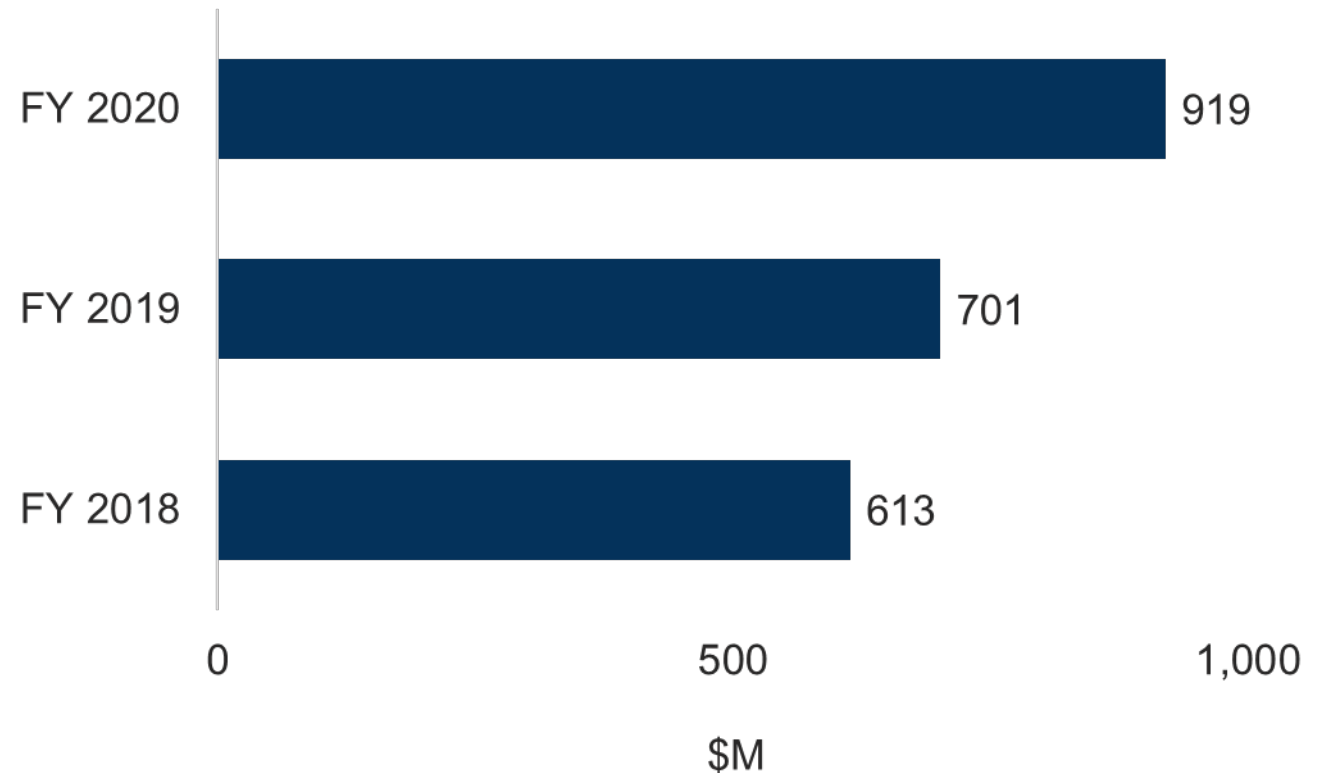
FY 2020 — 919
FY 2019 — 701
FY 2018 — 613

$M

Source: Deltek, FPDS   *See appendix for keywords used to identify relevant contract obligations.*

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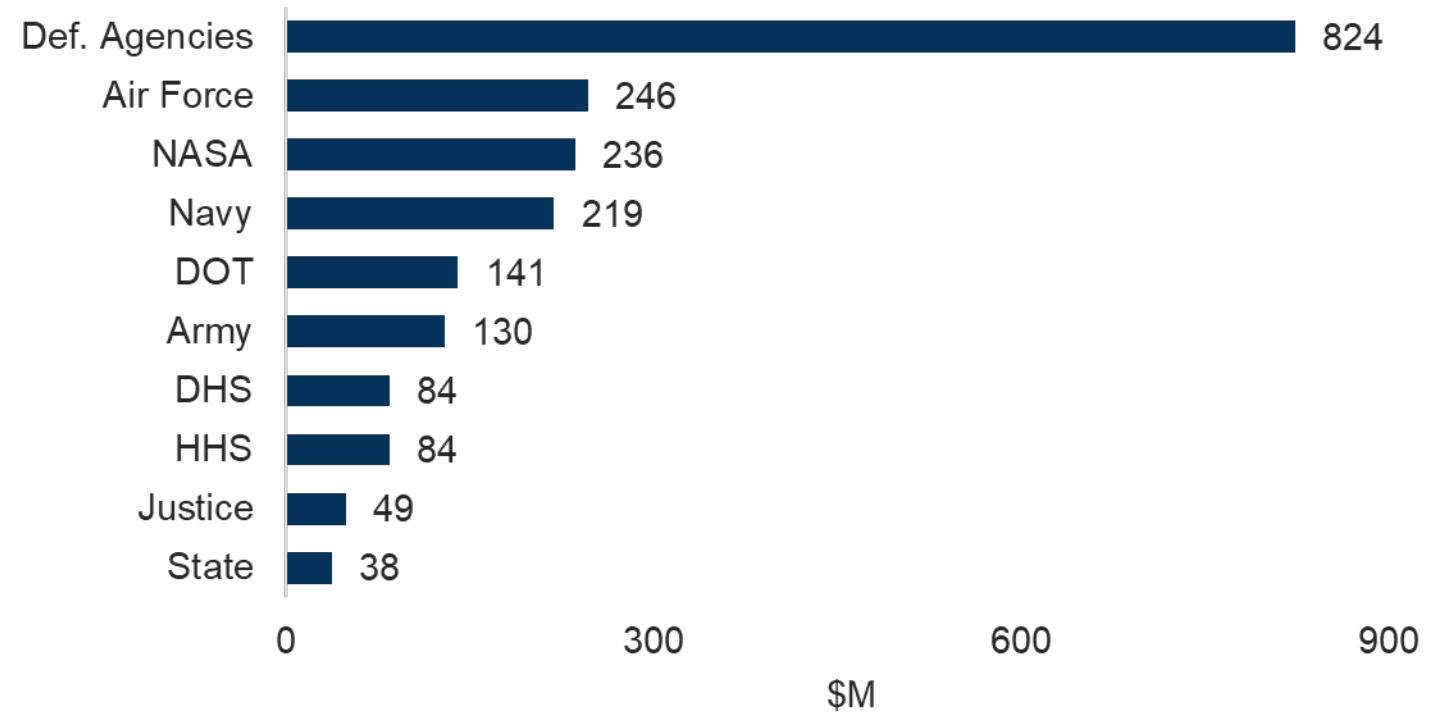# AI Contract Obligations – Top Ten Agencies, FY 2018–2020

Observations:

» Spending at **ten agencies dominates** AI investment, representing 92% of obligations from FY 2018 to 2020.

» **Defense Agencies accounted for 37%** of total AI spending, with several key programs* leading defense investment.

» **Additional agencies** with substantial AI spending outside the top ten include the VA ($38M), Commerce ($37M), USDA ($28M) and SSA ($26M).

» **R&D obligations** led total spending in five of the top ten agencies: Defense Agencies, Air Force, NASA, Navy and Army.

» Spending on AI at **three of the top ten agencies decreased** from FY 2018 to FY 2020, including DOT (-$60M), DHS (-$13M) and NASA (-$8M).

*See Notes

Federal AI spending rose consistently from FY 2018 to 2020

Familiarity with and trust in AI continues to expand across the federal space. Smaller agencies are also now entering the AI market as USAID, PBGC and OPM all reported their first AI spending. Although spending on R&D continues to lead investment, a growing number of agencies are using AI to generate business efficiencies.
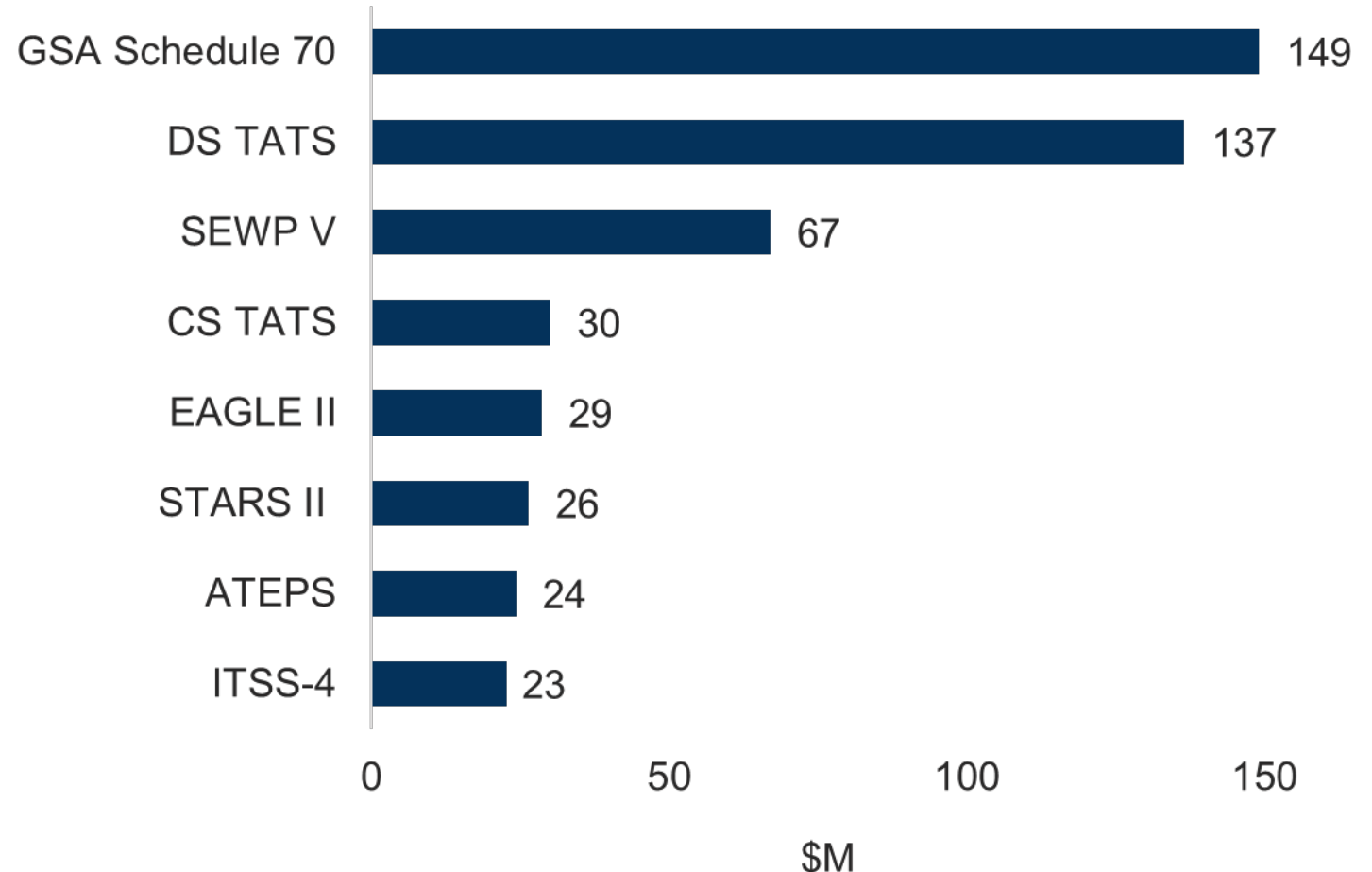

Agency	$M
Def. Agencies	824
Air Force	246
NASA	236
Navy	219
DOT	141
Army	130
DHS	84
HHS	84
Justice	49
State	38

Source: Deltek, FPDS

See appendix for keywords used to identify relevant contract obligations.

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Observations:

» Top agency customers of **GSA Schedule 70** in AI-related spending from FY 2018 to 2020 included: HHS ($28M), SSA ($23M) and DOD ($21M).

» Defense Agencies and the Navy primarily utilized the **DS TATS** vehicle to fund R&D of autonomous weapon system designs.

» **SEWP V** purchases included AI-software products, such as Pega ($26M), NVIDIA ($7.2M), UiPath ($4.9M) and Kofax ($3.5M).

» Defense Agencies and the Air Force obligated $27M under the **CS TATS** vehicle from FY 2018 to 2020 for Explainable AI Applications at the Air Force Research Laboratory.

» Obligations for Robotic Process Automation, AI services and business automation solutions led orders under **STARS II** between FY 2018 and 2020.

AI Contract Obligations – Top Contract Vehicles, FY 2018–2020

Agency spending on GSA's Schedule 70 and the SEWP V GWAC illustrates the growing use of AI capabilities for real-world challenges
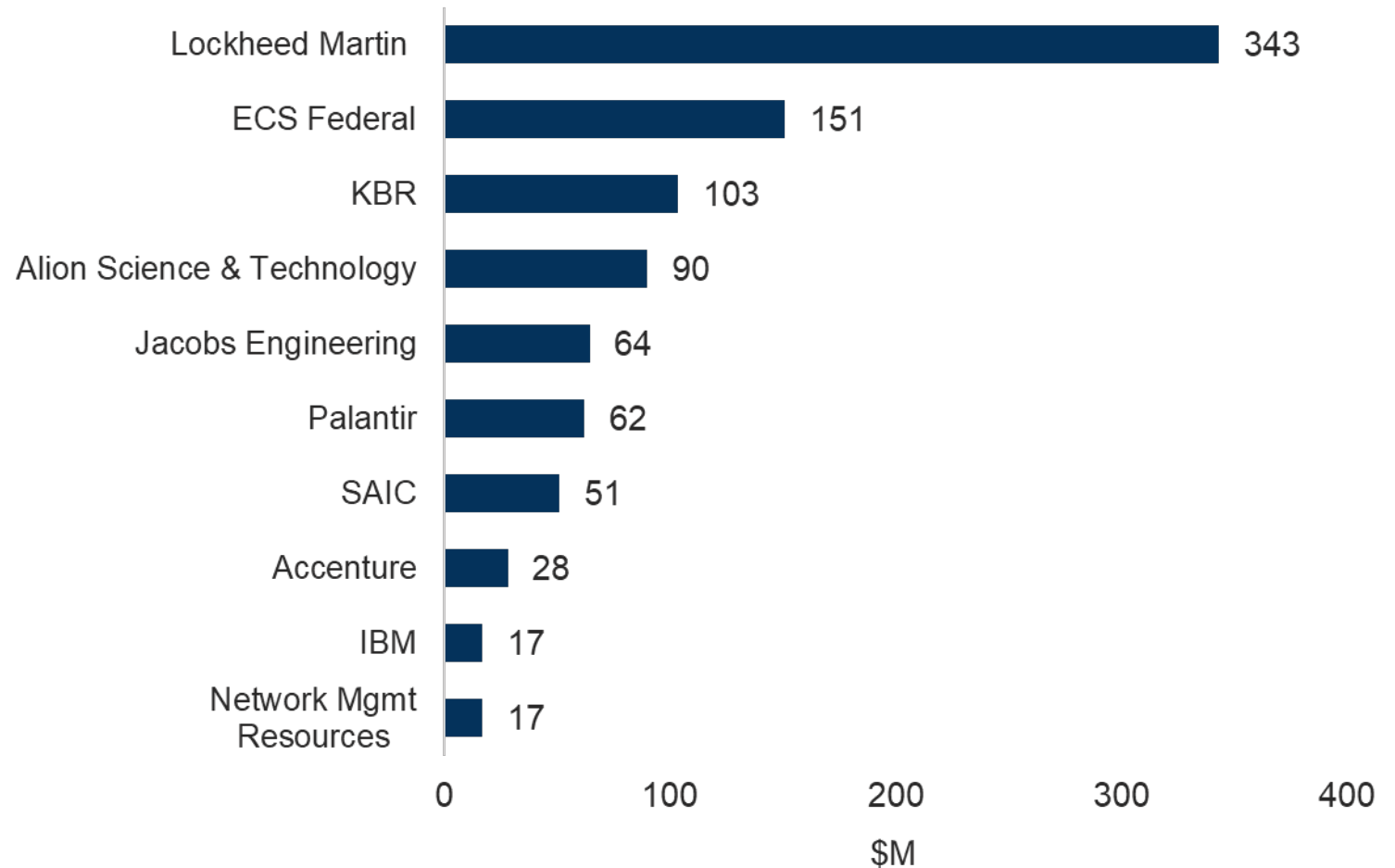

Source: Deltek, FPDS   *See appendix for keywords used to identify relevant contract obligations.*

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Observations:

» The percentage of total AI obligations by the top ten contractors fell from 56% in FY 2018 to 36% in FY 2020, suggesting **increasing competition** from small and medium-sized companies.

» **DOD** accounted for 56% ($550M) of AI obligations awarded to the top ten contractors from FY 2018-2020.

» **Lockheed Martin's** AI earnings totaled $106M in FY 2019 due to task orders awarded by the Missile Defense Agency for a cyber radar to enhance BMDS capabilities.

» **ECS Federal** primarily provided R&D support for various DOD AI programs, including Project Maven.

» The majority of **KBR's** obligations stemmed from support at NASA Ames Research Center under the ISRDS-2 contract.

» **Accenture's** largest AI federal customers from FY 2018 to 2020 include DHS/TSA ($29M) and Commerce/USPTO ($6.2M).

AI Contract Obligations – Top Ten Contractors, FY 2018–2020

Large companies offering AI capabilities are facing stiffening competition from small and medium-sized businesses

Horizontal bar chart ($M):
- Lockheed Martin: 343
- ECS Federal: 151
- KBR: 103
- Alion Science & Technology: 90
- Jacobs Engineering: 64
- Palantir: 62
- SAIC: 51
- Accenture: 28
- IBM: 17
- Network Mgmt Resources: 17

Source: Deltek, FPDS   *See appendix for keywords used to identify relevant contract obligations.*

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Conclusions

» Identifiable federal spending on artificial intelligence rose to nearly $1B in FY 2020, up 50% from FY 2018, making it one of the fastest growing emerging technology investment areas.

» AI/ML capabilities are being used for research, surveillance, trend analysis and vaccine development to strengthen the government's response to the COVID-19 public health crisis.

» Robotic Process Automation is providing federal agencies with an easy-to-use capability that offers immediate business value and introduction to AI/ML technology.

» Most federal spending on AI/ML is still going to R&D, but AI-enabled Robotic Process Automation is rapidly transitioning the technology into real-world operational settings.

» Improving the trust in and the security of AI/ML, as well as developing additional standards for use of the technology, are currently challenges to wider federal adoption.

» Investing in AI/ML has become necessary for the United States to remain globally competitive.

» Legislation and executive branch policy are key drivers of federal AI/ML investment.

» Limiting the regulatory burden on agencies hoping to leverage AI/ML will be a key factor shaping future investment.

» Historical spending analysis shows that the Department of Defense is spending nearly twice the civilian sector on AI/ML capabilities.

Conclusions (Cont)

» Large companies offering AI capabilities are facing stiffening competition from small and medium-sized businesses.

 » Federal spending on AI/ML with large businesses totaled $1.5B in FY 2020, approximately twice that of spending with small businesses. However, agency spending with small businesses is growing faster, rising 177% from FY 2018 to 2020 compared to 16% for other businesses.

» Agencies are using GSA's Multiple-Award Schedule and NASA's SEWP V Government-Wide Acquisition Contract to purchase AI/ML goods and services more than any other contract vehicles.

» FY 2020 DOD and DHS spending on AI/ML using Other Transaction Authority contracts totaled $542M.

Recommendations

» Track the new regulations and policies to which agencies must comply as they implement AI/ML capabilities.

» Contribute to ongoing working federal AI working groups to help shape future agency standards and regulations.

» Identify and meet federal AI leaders at agencies creating dedicated AI positions, such as the Chief Artificial Intelligence Officer at HHS.

» Keep pace with AI-related research projects that agencies may want to scale in the near future.

» Large businesses should seek out small business partners offering cutting-edge AI capabilities.

» Look for opportunities to implement Robotic Process Automation tools as these are becoming the first step toward agency AI adoption.

» Position your company's AI offerings on GSA's Multiple-Award Schedule (MAS) and NASA's SEWP V GWAC, which have been the preferred vehicles for most for AI acquisitions.

» Offer SaaS-based AI capabilities to customers seeking cloud solutions.

» Position AI offerings as labor and time saving capabilities that support agency business operations.

» Do not overlook DOD and DHS requirements they plan to meet using Other Transaction Agreements; these are perfect vehicles for prototype projects that could transition into production contracts.

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