DEPARTMENT OF THE TREASURY
SF 1014 - JUSTIFICATION FOR AN EXCEPTION TO FAIR OPPORTUNITY
ACQUISITION TITLE: *HCL BigFix Software Maintenance Support*

1. Identification of the requiring activity and the contracting activity:
The requiring activity is the Internal Revenue Service (IRS) / Office of the Chief Procurement Officer (OCPO), Information Technology Operation Division, Enterprise Operations Branch (EOps).

2.a Nature and/or description of the action being approved:
The purpose of this JEFO is to obtain approval to award a Firm Fixed Price to procure HCL BigFix Software Maintenance of IRS owned perpetual HCL BigFix licenses that provides endpoint management services (client and server components), including asset inventory/discovery, security vulnerability detection and remediation, security policy enforcement, software distribution, Information Technology (IT) compliance reporting, patch management and software license management. This requirement is for maintenance only.

BigFix software licenses are mandatory endpoints required for each IRS laptop to support system operations and support and are also required for scanning of mandatory endpoints for usage and license tracking. BigFix software is critical to filing season readiness of IRS, CSIRC, & CI systems.
The anticipated period of performance is:
Base Period: 7/14/2026-7/13/2027
Option Period 1: 7/14/2027-7/13/2028
Option Period 2: 7/14/2028-7/13/2029
Option Period 3: 7/14/2029-7/13/2030
Option Period 4: 7/14/2030-7/30/2031

2.b Name of the vendor. TBD

2.c Requisition No.: 5000225694

2.d Bridge contract: ☐ Yes ☒ No

2.e Brand name: ☒ Yes ☐ No

3.a A description of the supplies or services required to meet the agency's needs:
The Infrastructure Support Section has a need to purchase HCL BigFix software support and maintenance.

CLIN	Item	Part Number	Quantity
CLIN 0001	HCL BigFix Inventory, 12 Month S&S Renewal, Client Device	E0BDFLL	104740
CLIN 0002	HCL BigFix Inventory, 12 Month S&S Renewal, Resource Value Unit	E0BDELL	43300
CLIN 0003	HCL BigFix Compliance, 12 Month S&S Renewal, Resource Value Unit	E0BDKLL	43300
CLIN 0004	HCL BigFix Compliance, 12 Month S&S Renewal, Client Device	E0BDLLL	9300
CLIN 0005	HCL BigFix Lifecycle, 12 Month S&S Renewal, Resource Value Unit	E0BDCLL	42100

CLIN 0006	HCL BigFix Lifecycle, 12 Month S&S Renewal, Client Device + with HCL BigFix Known Exploited Vulnerabilities Catalog Add-On, 12 Month Term License & S&S, Endpoint (TN100974Y01 up to 35,885 end points)	E0BDDLL/TN100974Y01	111800
CLIN 1001	HCL BigFix Inventory, 12 Month S&S Renewal, Client Device	E0BDFLL	104740
CLIN 1002	HCL BigFix Inventory, 12 Month S&S Renewal, Resource Value Unit	E0BDELL	43300
CLIN 1003	HCL BigFix Compliance, 12 Month S&S Renewal, Resource Value Unit	E0BDKLL	43300
CLIN 1004	HCL BigFix Compliance, 12 Month S&S Renewal, Client Device	E0BDLLL	9300
CLIN 1005	HCL BigFix Lifecycle, 12 Month S&S Renewal, Resource Value Unit	E0BDCLL	42100
CLIN 1006	HCL BigFix Lifecycle, 12 Month S&S Renewal, Client Device + with HCL BigFix Known Exploited Vulnerabilities Catalog Add-On, 12 Month Term License & S&S, Endpoint (TN100974Y01 up to 35,885 end points)	E0BDDLL/TN100974Y01	111800
CLIN 2001	HCL BigFix Inventory, 12 Month S&S Renewal, Client Device	E0BDFLL	104740
CLIN 2002	HCL BigFix Inventory, 12 Month S&S Renewal, Resource Value Unit	E0BDELL	43300
CLIN 2003	HCL BigFix Compliance, 12 Month S&S Renewal, Resource Value Unit	E0BDKLL	43300
CLIN 2004	HCL BigFix Compliance, 12 Month S&S Renewal, Client Device	E0BDLLL	9300
CLIN 2005	HCL BigFix Lifecycle, 12 Month S&S Renewal, Resource Value Unit	E0BDCLL	42100
CLIN 2006	HCL BigFix Lifecycle, 12 Month S&S Renewal, Client Device + with HCL BigFix Known Exploited Vulnerabilities Catalog Add-On, 12 Month Term License & S&S, Endpoint (TN100974Y01 up to 35,885 end points)	E0BDDLL/TN100974Y01	111800
CLIN 3001	HCL BigFix Inventory, 12 Month S&S Renewal, Client Device	E0BDFLL	104740
CLIN 3002	HCL BigFix Inventory, 12 Month S&S Renewal, Resource Value Unit	E0BDELL	43300
CLIN 3003	HCL BigFix Compliance, 12 Month S&S Renewal, Resource Value Unit	E0BDKLL	43300

CLIN 3004	HCL BigFix Compliance, 12 Month S&S Renewal, Client Device	E0BDLLL	9300
CLIN 3005	HCL BigFix Lifecycle, 12 Month S&S Renewal, Resource Value Unit	E0BDCLL	42100
CLIN 3006	HCL BigFix Lifecycle, 12 Month S&S Renewal, Client Device + with HCL BigFix Known Exploited Vulnerabilities Catalog Add-On, 12 Month Term License & S&S, Endpoint (TN100974Y01 up to 35,885 end points)	E0BDDLL/TN100974Y01	111800
CLIN 4001	HCL BigFix Inventory, 12 Month S&S Renewal, Client Device	E0BDFLL	104740
CLIN 4002	HCL BigFix Inventory, 12 Month S&S Renewal, Resource Value Unit	E0BDELL	43300
CLIN 4003	HCL BigFix Compliance, 12 Month S&S Renewal, Resource Value Unit	E0BDKLL	43300
CLIN 4004	HCL BigFix Compliance, 12 Month S&S Renewal, Client Device	E0BDLLL	9300
CLIN 4005	HCL BigFix Lifecycle, 12 Month S&S Renewal, Resource Value Unit	E0BDCLL	42100
CLIN 4006	HCL BigFix Lifecycle, 12 Month S&S Renewal, Client Device + with HCL BigFix Known Exploited Vulnerabilities Catalog Add-On, 12 Month Term License & S&S, Endpoint (TN100974Y01 up to 35,885 end points)	E0BDDLL/TN100974Y01	111800

3.b Includes IT: ☒ Yes ☐ No NAICS: 541519; PSC: 7A21

3.c IGCE/Estimated dollar value:

The total IGCE amount of $14,502,121.80. See breakdown:

Base Period: $2,375,007.20
Option Period 1: $2,612,156.00
Option Period 2: $2,873,754.80
Option Period 3: $3,162,061.80
Option Period 4: $3,479,142.00

4.a Identification of the exception to fair opportunity being used:

☐ FAR 16.505(b)(2)(i)(A) – The agency need for the supplies or services is so urgent that providing a fair opportunity would result in unacceptable delays.

☐ FAR 16.505(b)(2)(i)(B) – Only one awardee is capable of providing the supplies or services required at the level of quality required because the supplies or services ordered are unique or highly specialized.
☐ FAR 16.505(b)(2)(i)(C) – The order must be issued on a sole-source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under the contract, provided that all awardees were given a fair opportunity to be considered for the original order.
☐ FAR 16.505(b)(2)(i)(D) – It is necessary to place an order to satisfy a minimum guarantee.
☐ FAR 16.505(b)(2)(i)(E) – For orders exceeding the simplified acquisition threshold, a statute expressly authorizes or requires that the purchase be made from a specified source.
ó FAR 16.505(a)(4) – The requirement is for an item peculiar to one manufacturer. (i.e., Brand Name specifications)

4.b Supporting rationale:

HCL BigFix provides endpoint management services (client and server components), including asset inventory/discovery, security vulnerability detection and remediation, security policy enforcement, software distribution, Information Technology (IT) compliance reporting, patch management and software license management. The BigFix client is installed on endpoints and tracked by a centralized BigFix server(s) and console application.

BigFix allows the IRS to maintain security compliance by providing patch management, software updates, mitigate vulnerabilities, reduce security risks, perform software distribution, perform inventory scans and produce/publish security reports. The IRS is able to effectively apply critical O/S (Operating System) patches within established timeframes to all fileservers on all platforms as well as report on success of patching effort. Cyber security will be able to verify server configurations are security compliant. DHS (Department of Homeland Security) mandates the requirement to implement HCL BigFix components.

These HCL BigFix licenses are perpetual and owned by the IRS. The IRS is looking to renew the maintenance on these perpetual IRS owned software licenses. This requirement is strictly for maintenance and there are no licenses being procured.

HCL BigFix must provide an endpoint management platform designed to help the agency manage, secure, and maintain large fleets of devices (servers, desktops, laptops, and cloud endpoints) from a single console. BigFix must provide core capabilities that are grouped into three main solution areas:
1. BigFix Inventory-Provides software asset management. It discovers installed software across endpoints, normalizes product data, and helps track license usage. This enables organizations to optimize software spend, ensure proper licensing, and prepare for vendor audits.
2. BigFix Lifecycle- Handles day-to-day endpoint management. It provides patch management, operating system deployment, remote control, software distribution, and configuration management. The goal is to keep systems up to date, properly configured, and running efficiently across the entire environment.
3. BigFix Compliance- Provides security and regulatory compliance. It continuously monitors endpoints against security policies and industry standards (e.g., CIS, DISA STIGs), identifies

vulnerabilities or misconfigurations, and automates remediation. This helps maintain a secure posture and demonstrate compliance for audits. Together, these components give organizations real-time visibility and control over their endpoints, improving operational efficiency, reducing risk, and ensuring compliance.
IRS main must provide license support for Criminal Investigations (CI) and Computer Security incident Response Center (CSIRC) under this agreement also.

The software maintenance and support packages being acquired are essential for ensuring IRS owned licenses remain capable of providing these core capabilities. Given the proprietary nature of the underlying HCL BigFix licenses, only a brand-name HCL support package is capable of updating/maintaining these licenses.

If the contract is not awarded, there will be no support development and performance functions for Infrastructure Tech. Ops, CI, & CSIRC in support of hardware and software, compliance, zero day, BOD 22-01reporting. Or data support for Splunk, SNOW, CASAM (technopedia), ITAM programs. No contract award would also impact staffing because they would not be able to perform normal maintenance and upgrades of the application which impacts filing season readiness of IRS, CSIRC, & CI systems. In addition, the impact also limits implementation from BigFix to ServiceNow.

5. A determination that the anticipated cost to the Government will be fair and reasonable:

The Contracting Officer will determine the prices to be fair and reasonable. This requirement will also be competed amongst authorized resellers on the NASA SEWP V contract.

6.a Any other facts supporting this justification:

BigFix software licenses are mandatory endpoints required for each IRS laptop to support system operations and support. DHS mandate the requirement to implement HCL BigFix components. The Infrastructure Support Section provides operation and maintenance for the HCL BigFix application supporting Compliance, Inventory and Web Reports.
Infrastructure Support Section is also a service provider to customers who depend on these tools to automate and simplify patch deployments, enforcement of security policies, meet CDM (Continuous Diagnostics and Mitigation) requirements, distribute software updates, monitor activities in real-time, execute inventory scans, monitor compliance requirements and report on enterprise driven activities.

6.b Attachments: ☐ Yes ☑ No

7. A statement of the actions, if any, the Requiring Activity and Contracting Activity may take to remove or overcome any barriers that led to the exception to fair opportunity before any subsequent acquisition for the supplies and services is made:
As for future acquisitions, IRS is taking steps to mitigate the use of brand name products. IRS will continue to pursue market research, issue Request for Information requesting new solutions and the feasibility of utilizing other technologies. Also, IRS management will plan an acquisition strategy that complies with the requirements to obtain maximum competition in the future.

8. Certifications and Approvals:

8.a Program Office Certification (Requiring Activity). I hereby certify that any supporting information and data provided (e.g., the Government's minimum needs or requirements, or other rationale for the limited sources) and which form the basis for this justification for an exception to fair opportunity, are accurate and complete to the best of my knowledge and belief.

Name: Nicholas Coleman **Date:** 05-15-26

Signature: Nicholas Coleman

8.b Contracting Officer Certification and Approval. I certify this justification for an exception to fair opportunity is accurate and complete to the best of my knowledge and belief. Therefore, unless additional approvals are required as prescribed below, as the authorized contracting officer for this acquisition, I hereby approve the processing of this requirement based on the authority specified in 4.a above.

Name: Fatima Paen **Date:**

Signature: Fatima A. Paen Digitally signed by Fatima A. Paen Date: 2026.05.19 08:21:15 -04'00'

9. Additional Reviews and Approvals (As applicable):
9.a Bureau Chief Information Officer or Authorized Designee (for IT requirements that are over $5 million, but not exceeding $90 million) (Contracting Activity). I have reviewed this justification and find it to be accurate and complete to the best of my knowledge and belief, and representative of the Government's need. Therefore, I hereby consent to the approval of this justification. (Note: The Bureau CIO may delegate their authority for proposed contracts over $5 million, but not exceeding $20 million to the Associate Bureau CIO(s).)
Name: Kaschit Pandya, Chief Information Officer, IRS **Date:** _____ **Signature:** Kaschit D. Pandya Digitally signed by Kaschit D. Pandya Date: 2026.06.02 11:45:48 -04'00'
9.b Advocate for Competition (if over $900,000, but not exceeding $20 million) (Contracting Activity). I have reviewed this justification for an exception to fair opportunity and find it to be accurate and complete to the best of my knowledge and belief. Therefore, unless additional approvals are required as prescribed below, as the ordering activity's Advocate for competition, I hereby approve this justification based on the authority specified in 4.a above.
Name: Julius Bradshaw **Date:** 5/19/2026 **Signature:** Julius S. Bradshaw Digitally signed by Julius S. Bradshaw Date: 2026.05.19 08:47:52 -04'00'
9.c Head of the Procuring Activity or Authorized Designee (if over $20 million, but not exceeding $90 million) (Contracting Activity). I have reviewed this justification for an exception to fair opportunity and find it to be accurate and complete to the best of my knowledge and belief. Therefore, unless additional approvals are required as prescribed below, as the head of the procuring activity or authorized designee, I hereby approve this justification based on the authority specified in 4.a above.
Name: _____ **Date:** _____ **Signature:** _____
9.d Treasury Chief Information Officer (for IT requirements that are over $90 million). I have reviewed this justification and find it to be accurate and complete to the best of my knowledge and belief, and representative of the Government's need. Therefore, I hereby consent to the approval of this justification.
Name: _____ **Date:** _____ **Signature:** _____

9.e Senior Procurement Executive (if over $90 million) (Contracting Activity). I have reviewed this justification for an exception to fair opportunity and find it to be accurate and complete to the best of my knowledge and belief. Therefore, as the senior procurement executive, I hereby approve this justification based on the authority specified in 4.a above.
Name:_____ **Date:** _____ **Signature:**_____