Justification and Approval (J&A) for Gartner
Other than Full and Open Competition – Brand Name/Limited Source Justification (GSA)

Organization:

U.S. Department of Energy (DOE), Naval Reactors (NR), Naval Reactors Laboratory Field Office (NRLFO)

Nature and/or description of the action being approved:

This procurement action is to acquire specialized subscription-based research, advisory and decision-support services from Gartner, Inc. in support of enterprise HR, organizational capability development and enterprise IT strategy.

The requirement of services needed for a base year plus 2 option years are:

- 1 Team Leader License – Product # HRLDRTL-00001 HR Leaders Team – Leader - (provides enterprise-level leadership advisory, benchmarking, and strategic research access) – intended for 08W Section Head
- 1 Advisor Member License – Product # HRLDRADVTM-00001 HR Leaders Team – Advisor Member - (provides role-based research, tools, and analyst inquiry access) – intended for 08W Training and Professional Development lead
- 1 Gartner for IT Leaders – Product # ITLTAMEM-00001 IT Leadership Team – Advisor Member - Individual Access Advisor License (provides individualized advisory support, research insights, and direct analyst engagement) – for 08Y designated person as determined by 08Y Section Head

These services are required to support senior leadership decision-making across HR and IT investment planning, workforce capability development, emerging technology adoption, and enterprise transformation initiatives.

The subscriptions include:

- Access to proprietary research and frameworks
- Direct inquiry access to Gartner analysts
- Benchmarking data and diagnostics tools
- Strategic roadmaps and maturity models
- Peer networking and executive-level insights

NAICS Code: 541611 Administrative Management and General Management Consulting Services, though potentially 541690 – Other Scientific and Technical Consulting Services, 541618 – Other Management Consulting Services, 541910 – Marketing Research and Public Opinion Polling.

Estimated Value for base year

Based on current market pricing and historical federal procurements for similar subscriptions, the estimated value is [redacted]

- Team Leader License, [redacted]
- Advisor Member License, [redacted]
- IT Leaders Individual Access Advisor, [redacted]

Estimated value for Option Year 1: [redacted]

- Team Leader License, [redacted]
- Advisor Member License, [redacted]
- IT Leaders Individual Access Advisor, [redacted]

Estimated value for Option Year 2: [redacted]

- Team Leader License, [redacted]
- Advisor Member License, [redacted]
- IT Leaders Individual Access Advisor, [redacted]

Total estimate (base + 2 option years): [redacted]

GSA Schedule pricing for Gartner advisory subscriptions is set based on the range and extent of services and access that Gartner provides.. Based on recent federal procurements, specifically including Gartner licenses used in FY24-FY25, and market research against the services that NR needs in FY26, the licenses named above are estimated to cost approximately $40K per license.

Statutory Authority Permitting Other than Full and Open Competition:

FAR 8.405-6(a)(1)(B) (GSAR 538.7104-3(b)(ii) – "Items peculiar to one manufacturer." An item peculiar to one manufacturer can be a particular brand name, product, or a feature of a product, peculiar to one manufacturer. A brand name item, whether available on one or more schedule contracts, is an item peculiar to one manufacturer. Only one source is capable of providing the supplies or services required at the level of quality required because the supplies or services are unique or highly specialized.

Demonstration that the proposed contractor's unique qualifications or the nature of the acquisition requires use of the authority cited:

Gartner, Inc. is uniquely qualified to fulfill this requirement due to the following differentiators:

(1) Proprietary Research and Methodologies. Gartner provides exclusive access to
- Magic Quadrant evaluations
- Hype Cycle technology maturity models
- IT Score and maturity diagnostics
- Benchmarking datasets derived from global enterprise clients

These frameworks are proprietary and are not replicated in equivalent depth or integration by other vendors.

(2) Integrated Advisory Model. Gartner uniquely combines
   a. Research
   b. Direct analyst inquiry (an on-demand Subject Matter Expert access)
   c. Strategic advisory services
   d. Peer networking

Competitors typically offer these as separate, unintegrated services, increasing cost and reducing effectiveness.

(3) Analyst Access Model. Gartner provides direct, scheduled inquiry access to named analysts, enabling:
    a. Tailored, mission-specific guidance
    b. Rapid validation of strategies and investments
    c. Real-time decision support

This level of access is not consistently available across competing providers.

(4) Enterprise Benchmarking at Scale
    a. IT spend benchmarking
    b. Workforce capability comparisons
    c. Technology adoption trends

This allows leadership to compare performance against peer organizations with statistically significant data.

(5) Federal Market Experience. Gartner has extensive experience supporting Federal agencies, DoD components and Civilian agencies. Their offerings are already aligned to federal mission environments, reducing onboarding time and risk.

Market Research

Market research was conducted to identify comparable vendors providing HR and IT research and advisory services. The following vendors were evaluated:

1. <u>Forrester Research, Inc.</u>

Estimated pricing for leadership-level subscriptions ranged from [redacted] per user annually.

Capabilities included:

- Research reports and market analysis
- Some advisory services
- Limited inquiry access depending on tier

Limitations to meeting government needs included:

- Less robust benchmarking datasets
- Fewer integrated tools (diagnostics, maturity models)
- Advisory and research less tightly integrated than Gartner

Overall Forrester Research lacks the breadth and depth of data and the associated insights gleaned from surveys and research done with hundreds of organizations across the HR domain. Without this data and associated insights, NR is unable to leverage the information to anticipate trends, mitigate risk factors and address forces that can and do affect the NR workforce. Additionally, without the research, Forrester does not have the library of thousands of articles, diagnostic tools, templates ignite kits and more that the government needs and would use to proactive or reactively address needs or mitigate risks across the Human Capital lifecycle, whether for recruiting, retention, engagement, performance, leadership, etc.. The lack of depth of research and the missing cohesion between the research and analysts means that the understanding and ability to apply and advise NR leaders is inadequate. The gap NR is working to address would remain if NR only had access to Forrester because fundamentally, Forrester is unable to meet NR's specific requirements and is not an effective option.

2. <u>International Data Corporation (IDC)</u>

Estimated pricing for subscription services ranged from [redacted] per user annually.
Capabilities included:

- Market intelligence and industry reports
- Technology forecasts
- Vendor analysis

Limitations to meeting government needs included:

- Primarily data/report-driven (less advisory depth)
- Limited direct analyst engagement model
- Lacks integrated leadership tools and strategic frameworks

Overall IDC lacks even more services and functionality than Forrester. At its core, IDC's business is to focused on generating static reports based on a point in time that enable primarily private companies to assess for themselves where they are in comparison with competitors or peers based on common data elements. NR does not need that type of product. IDC does not support recurring or in-depth analyst engagements which is a core requirement for NR. IDC does not have a research library of articles, diagnostic tools, templates or any other materials that NR needs to support and enable its small HR team to do more with less and with the existing staff it has. IDC is wholly unable to meet NR's requirements for data, research, insights, analyst support and research library which are the minimum requirements for this procurement.

3. <u>Deloitte (or similar consulting firms such as Accenture)</u>

Estimated pricing for advisory engagements were at least [redacted] per year and were project-specific

Capabilities included:

- Custom consulting and strategy development
- Implementation support

Limitations to meeting government needs included:

- Not subscription-based requires project engagements
- Significantly higher cost for access
- Lacks continuous, on-demand research and inquiry model
- No equivalent to Gartner's standardized benchmarking datasets

Deloitte is unable to meet NR's requirements because they do not conduct research and surveys across organizations so they are not able to use the results to produce insight for strategy guidance, articles, diagnostic tools, templates, ignite kits or other materials that are essential to meeting NR's needs. Deloitte also lacks a cadre of analysts who specialize in specific areas of HR that can be called upon to expound upon, support or enable NR to apply the insights from the research to an NR-specific situation or business need/opportunity. Overall, Deloitte is wholly unable to meet NR's requirements and the cost to engage Deloitte would be significantly higher than the cost of the licenses being procured.

Description of Efforts Made to Ensure that offers are solicited from as many potential sources as is practicable, including whether a notice was or will be publicized as required by FAR Subpart 5.2 and, if not, which exception under FAR 5.202 Applies:

Solicitation will be posted on GSA eBuy (GSAR 538.7103-3) from the multiple award schedule (MAS) under possible GSA Categories 54151ECOM – Electronic Commerce and Subscription Services, 541611, 541690 – Other Scientific and Technical Consulting Services, 541618 – Other Management Consulting Services, 541910 – Marketing Research and Public Opinion Polling to ensure competition is maximized to the fullest extent practicable.
A copy of the brand name justification will be posted along with the RFQ in accordance with FAR 8.405-1(e) (GSAR 538.7104-4).

Determination by the Contracting Officer that the anticipated cost the government will be fair and reasonable:

In accordance with FAR 8.404(d) (GSAR 538.7102-2(d)(2)) GSA has already determined the prices of FSS products, services, or solutions at the order level or BPA level as fair and reasonable. Although GSA has already negotiated fair and reasonable pricing, the CO will seek additional discounts before placing an order (see 8.405-4 or GSAR 538.7102-2(c)(2)). A low price technically acceptable determination will be made based on quotes received that conform to the RFQ. The Contracting Officer will determine that the fixed price for licenses and the overall price for all optional periods and quantities of fixed priced licenses are fair and reasonable.

By placing an order against a schedule contract using the procedures in 8.405 (GSAR 538.710-2), the ordering activity has concluded that the order represents the best value (as defined in FAR 2.101) and results in the lowest overall cost alternative to meet the Government's needs.

Description of the market research conducted and the results or a statement of the reason market research was not conducted:

Market research was conducted, including mandatory Government sources, by reviewing sources available through the GSA multiple award schedule, internet search results, and previous procurements for similar work.

Gartner is not a product line offered by UNICOR or Ability One. A search for Gartner in GSA elibrary brings up 2 categories 339940 Office Products and 511120 Technical Publications and Industry Reports.

Other factors supporting the use of other than full and open competition (Brand Name): N/A

Listing of the sources, if any, that expressed in writing an interest in the acquisition:

Gartner, Inc
56 Top Gallant Road
Stamford, CT 06902

Actions if any the agency may take to remove of overcome any barriers to competition before any subsequent acquisition for the supplies or services required:

The procuring office will solicit offers from multiple dealers licensed to provide Gartner licenses. A RFQ along with a copy of the justification will be posted on EBuy for schedule holders to review and respond. All quotes received will be considered.

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