

## Small Business in Low Code/No Code

The Federal Government spends almost \$236M annually on Low Code/No Code capabilities. Low Code/No Code is a visual-based application development platform which converts the development environment from text based to a model-driven, drag-and-drop interface. As such, Low Code development is more accessible to users who are not professional developers. There are a number of Low Code/No Code development platforms on the market and procurement of Low Code/No Code is growing steadily within the federal government. This provides opportunities to establish acquisition practices that maximize use of small business suppliers.

Federal Contracting	Worldwide Industry
FY23 Total \$:----- <b>\$236M</b>	Total \$:----- <b>\$26.9B</b>
#businesses:----- <b>~240</b>	CAGR:----- <b>26.12%</b>
Small Business:----- <b>\$138M</b>	# Businesses:----- <b>~450+</b>
#SBs:----- <b>182</b>	US-based Businesses:----- <b>53%</b>
SB Utilization%:----- <b>58%</b>	2030 Market Size:----- <b>\$187B+</b>

- The Low Code No Code market is growing steadily. Federally, it has doubled to almost \$236M the last 4 years.
- Small businesses play an important role in providing Low Code/No Code platforms to the Federal government, holding 59% of Federal spend in FY23.
- Agencies heavily use Government-wide contracts, especially MAS IT/Schedule 70 (\$65M) and NASA SEWP (\$52M) to acquire Low Code/No Code platforms
- Small businesses are prominent platform developers as well as resellers of value-add services such as integration and product management

## Insights for Federal Buyers

1. Low/No-Code platforms are experiencing a surge in popularity, with industry analysts projecting these platforms will dominate the development landscape and will account for more than 60% of all application development activities. In this quickly changing market, stay open to new entrants and emerging technology platforms.
2. Almost 60% of Low Code/No Code spending is on Best-in-Class contracts, which have high small business utilization; consider contracts such as NASA SEWP and MAS IT first.
3. NAICS code selection influences which small businesses are able to participate in a procurement. The most common Low Code/No Code NAICS code is 541519. This code includes an exception for IT VARs, which has a size standard of >150 employees.

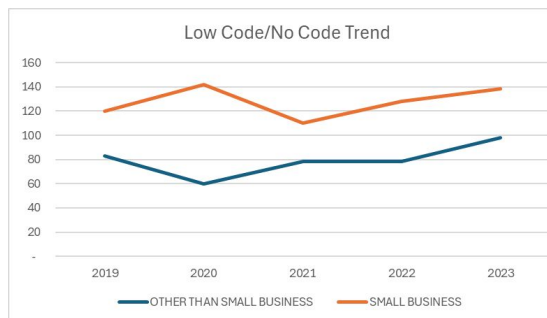
Sources:FPDS-NG, SystemforAwardManagement(SAM), [GSASupplierBaseDashboardandProcurementEquityTool](#), [USEconomicCensus/AnnualBusinessSurvey](#), [Statista](#), [Forrester](#), [Yahoo Finance](#), [Spreadsheet Web](#)

# Select Views of Federal Low Code/No Code (Contracting)

## FY23 Socio-economic and Subcategory Detail

Type	# Businesses	% Utilization
SB	182	59%
WOSB	36	19%
SDVOSB	31	8%
SDB	11	4%
8(a)	59	27%
Hubzone	24	9%

## SB vs OSB Contracting Obligations (\$M) Trends



NAICS	NAICS Description	% Total
541519	Other Computer Related Services	46%
541511	Computer Systems Design Services	27%
541512	Custom Computer Programming Services	10%
511210	Satellite Telecommunications	9%
Others		8%

	OSB (\$M)	SB (\$M)	% SB
Capability As a Service	57.53	21.78	27%
IT Professional Services	22.91	58.32	72%
Products	17.26	44.76	72%

## FY23 Top Contracts and SUM Breakout

Contract Name	SUM Tier	% SBU	% Spend	Obs (\$M)
NASA SEWP	BIC	90%	22%	52.0
SCHEDULE 70-INFO TECH	TIER 2	50%	19%	45.2
Unnamed contract	Tier 0	5%	17%	39.4
8(a) STARS III	BIC	100%	14%	32.0
Socioeconomic Disadvantaged	TIER 2SB	100%	6%	13.7
Sched 70 HW SW	BIC	20%	5%	11.2
SETI	TIER 1	0%	4%	10.2
MAS	TIER 2	61%	4%	8.3
8(a) STARS II	BIC	100%	2%	4.6
Other			8%	19.6
		<b>Total</b>	<b>100%</b>	<b>236.2</b>

## FY23 Top Vendors

Indicates SB

Row Labels	Reseller	Obs (\$M)
SEGOVIA, INC.		21.6
ACUMEN SOLUTIONS, INC.		17.6
SOFTWARE INFO RESOURCE	X	13.8
NORTHROP GRUMMAN CORP		10.2
NEW TECH SOLUTIONS INC		8.4
DLT SOLUTIONS, LLC	X	7.1
CARAHSOFT TECHNOLOGY CORP	X	6.0
GOVSMART, INC.	X	4.7
ARLLUK TECH SOLUTIONS, LLC		4.7
CAPSTONE CORPORATION		4.4
CACI NSS, INC.		4.3
OPEN TEXT INC.		4.1
BLUE TECH INC.		3.5
ACC3 INTERNATIONAL INC.		3.5
FEDSTORE CORPORATION	X	3.5
REI SYSTEMS, INC.		3.2
Other		115.6
<b>Total</b>		<b>236.2</b>

## FY23 Top Funding Agencies

Top Funding Department Name	OSB (\$M)	SB (\$M)	SB %
DEPT OF DEFENSE	44.06	31.94	42%
HOMELAND SECURITY	22.93	10.70	32%
HEALTH AND HUMAN SERVICES	4.99	22.29	82%
LABOR	3.67	12.10	77%
JUSTICE	3.29	9.29	74%
TREASURY	4.09	8.07	66%
STATE	0.09	9.33	99%
TRANSPORTATION	2.47	6.20	72%
AGRICULTURE	2.24	5.19	70%
INTERIOR	2.57	3.09	55%

# Select Views of Low Code/No Code (Industry)

## Top Vendors by Select Low Code/No Code Subcategories

\*Small Business

Databases	Websites	App Development
<ul style="list-style-type: none"> <li>• Airtable</li> <li>• Caspio*</li> <li>• DataDog</li> <li>• PlanetScale*</li> <li>• Xano*</li> </ul>	<ul style="list-style-type: none"> <li>• Bubble.io*</li> <li>• Duda*</li> <li>• Figma</li> <li>• Webflow</li> <li>• Vercel*</li> </ul>	<ul style="list-style-type: none"> <li>• Appian</li> <li>• FlutterFlow*</li> <li>• OutSystems</li> <li>• Retool*</li> <li>• Thinkable*</li> </ul>
Chatbots	Workflow Automation	Content Management Systems
<ul style="list-style-type: none"> <li>• Chatfuel*</li> <li>• Hubspot</li> <li>• Manychat*</li> <li>• Rasa*</li> <li>• Tars*</li> </ul>	<ul style="list-style-type: none"> <li>• Integrify*</li> <li>• Notion</li> <li>• Salesforce</li> <li>• Process Street*</li> <li>• Zapier*</li> </ul>	<ul style="list-style-type: none"> <li>• Drupal*</li> <li>• Joomla*</li> <li>• Netlify*</li> <li>• Squarespace</li> <li>• Wordpress*</li> </ul>

## Low Code/No Code Subcategories Total= \$26.9B for FY23

Market Value (\$Billion) vs. FY Year

