DELL Technologies

Market Intelligence Report

Navigating Indiana's Public Sector Technology Landscape

September 2025

Executive Summary

This report provides a comprehensive market analysis of the information technology landscape within the State of Indiana's executive branch, prepared for the strategic consideration of Dell Technologies. The state operates under a highly centralized IT model, with the Indiana Office of Technology (IOT) serving as the primary service provider for approximately 100 state agencies. The recent appointment of Warren Lenard, a Chief Information Officer with a private-sector background, by Governor Mike Braun signals a potential shift in IT governance towards a greater emphasis on business outcomes, efficiency, and return on investment.

Indiana's technology strategy is currently driven by three critical imperatives: a pressing need for legacy system modernization, a robust "Whole-of-State" cybersecurity strategy, and a calculated, policy-driven exploration of Artificial Intelligence (AI). The state's approach to modernization is heavily influenced by the high-profile failure of a multi-billion-dollar contract with IBM, fostering a culture of risk aversion that favors incremental, proven solutions over monolithic transformations. Cybersecurity has been elevated to a top-tier priority, underscored by comprehensive strategic plans and new legislation (Senate Enrolled Act 472) that mandates uniform security policies across all public entities, creating a significant compliance-driven market opportunity. Concurrently, the state's AI initiatives, though nascent, are strategically linked to its cloud adoption and data modernization efforts.

The fiscal environment is characterized by a conservative biennial budget for FY 2026-2027, which includes broad 5% reductions for many line items. Despite this, significant IT spending is concentrated within a few key agencies, most notably the Family & Social Services Administration, the Department of Child Services, and the Department of Correction. Detailed analysis of IOT's internal charge-back rates provides a granular view of these spending patterns, identifying the highest-value targets for engagement.

The competitive landscape is dominated by entrenched incumbents. HP Inc. holds a sole-source contract for end-user computing, representing a significant barrier to entry. In cloud infrastructure, Amazon Web Services (AWS) has established a formidable presence through key agency wins and a landmark $11 billion data center investment in the state.

This report concludes with a series of strategic recommendations for Dell Technologies. The primary opportunity lies in positioning Dell's infrastructure portfolio (PowerEdge, VxRail, PowerScale) as the secure, reliable, and financially predictable foundation for the state's risk-averse modernization strategy. Dell should align its cybersecurity solutions (PowerProtect Cyber Recovery, Secureworks) with the state's new compliance mandates and present its AI-ready infrastructure as the essential on-premises component for the state's emerging AI ambitions. A targeted engagement strategy, focused on the new CIO's business-centric mindset and the highest-spending agencies, combined with the strategic use of cooperative

purchasing vehicles, will be critical for penetrating the market and displacing incumbents.

Section 1: The Indiana Government and Technology Command Structure

1.1 Political Leadership and Technology Governance

The direction of information technology within the State of Indiana is fundamentally shaped by the executive branch's political leadership. At the apex is the Governor, who sets the administration's overarching policy agenda and appoints key technology leaders. Understanding this command structure is paramount to navigating the state's procurement and strategic landscape.

The executive branch is led by Governor Mike Braun, whose administration establishes the broad priorities that influence all state agency operations, including IT investment.[1] Governor Braun's stated priorities for the FY 2026-2027 budget cycle, such as "reducing the size of government" and "tightening the belts of state government," create a fiscal environment that favors technology solutions demonstrating clear cost savings, efficiency gains, and a strong return on investment.[3] This top-down emphasis on fiscal conservatism directly impacts how the state's central technology agency frames its budget requests and justifies new projects.

A pivotal decision reflecting the administration's approach to technology was Governor Braun's appointment of Warren Lenard as the state's Chief Information Officer (CIO) and Director of the Indiana Office of Technology in March 2025.[4] Lenard's professional background is notably in the private sector, having served as a senior IT executive for organizations in retail, media, and most recently, as CIO for Byrider automotive dealerships.[5] This selection is a departure from the common practice of appointing CIOs from within the public sector or government-focused consulting firms. Lenard's experience involves leading an organization through significant "organizational, technological and cultural change".[6] This background suggests he will likely govern IOT with a private-sector mindset, prioritizing business outcomes, operational efficiency, and measurable ROI over traditional government processes. This leadership style may create a greater receptiveness to flexible consumption models, as-a-Service offerings, and business-case-driven proposals that clearly articulate value.

While IT services are highly centralized, other statewide elected officials lead major agencies with substantial technology dependencies and can influence policy. These include Secretary of State Diego Morales, whose office is actively pursuing its own modernization and AI initiatives, and State Comptroller Elise Nieshalla, who oversees the state's finances and

collaborates with IOT on the Indiana Transparency Portal.[1]

The IOT leadership team, which reports to CIO Lenard, forms the core of the state's technology command structure. This team includes Chief Technology Officer (CTO) Dave Fox, who oversees infrastructure and architecture; Chief Operating Officer (COO) Jeff Allen, responsible for day-to-day service delivery and desktop support; Chief Administrative Officer (CAO) Kevin Wilson; and Chief Information Security Officer (CISO) Hemant Jain.[5] CISO Jain is a key figure, having earned national recognition as a State Cybersecurity Leader of the Year, signaling the high priority the state places on its security posture.[6] Engaging with this entire leadership team is essential for any vendor seeking to establish a strategic partnership with the state.

Name	Title	Role/Influence
Governor Mike Braun	Governor, State of Indiana	Sets overall state priorities (fiscal conservatism, efficiency); appoints CIO. [1]
Warren Lenard	Chief Information Officer (CIO), Indiana Office of Technology	Head of state's central IT agency; directs enterprise strategy, budget, and major projects. [4]
Hemant Jain	Chief Information Security Officer (CISO), Indiana Office of Technology	Leads state cybersecurity strategy and operations; key figure in the Indiana Executive Council on Cybersecurity. [5]
Dave Fox	Chief Technology Officer (CTO), Indiana Office of Technology	Oversees state's technology infrastructure and architecture. [5]
Jeff Allen	Chief Operating Officer (COO), Indiana Office of Technology	Manages day-to-day IT operations and service delivery, including desktop support. [5]

1.2 The Indiana Office of Technology (IOT): A Deep Dive into the State's Central IT Authority

The Indiana Office of Technology (IOT) is the central nervous system for the state's executive branch IT operations. Established in 2005 through a major government consolidation effort, IOT's mandate is to provide "cost-effective, secure, consistent, and reliable enterprise-technology services" to its partner agencies, thereby improving service levels to citizens and lowering the overall cost of government IT.[10] The agency employs over 400 IT professionals and serves as the centralized IT provider for approximately 100 state agencies, boards, and commissions, as well as opted-in elected officials.[11]

IOT operates on a centralized, service-provider model. It functions as an internal Desktop-as-a-Service (DaaS) provider, managing the lifecycle of roughly 30,000 end-user devices across the state enterprise.[14] In addition to end-user computing, IOT manages core infrastructure services, including data centers, servers, storage, networking, and enterprise security.[14] Agencies are billed for these services through an internal charge-back system, which effectively creates an internal market for technology and provides a clear, quantifiable measure of IT consumption by each agency.

While a current, detailed organizational chart is not publicly available, the agency's leadership structure and historical organization indicate a functional alignment. The executive team under the CIO consists of a CTO, CISO, COO, and CAO, reflecting a modern approach focused on technology strategy, security, operations, and finance.[5] An organizational chart from the 2011-2013 biennium shows a structure with divisions for Infrastructure Services, Network Services, Data Center Operations, and application-specific teams supporting major enterprise systems like those for the Family and Social Services Administration (FSSA).[16] This foundational structure, with functional towers for core technology domains, likely persists and forms the operational backbone of the organization under the current executive leadership.

Project governance is formalized through IOT's Project Success Center (PSC). The PSC acts as the single point of entry for all new IT project requests from state agencies.[17] IOT's stated goal is to "capture, rank and report all IT projects" across the enterprise to establish clear priorities based on critical factors such as risk, business value, and dependencies on other initiatives.[17] This centralized intake and prioritization process gives IOT significant control over the state's IT project portfolio, ensuring that new initiatives align with enterprise standards and strategic goals. Any vendor proposing a new project or technology implementation to a state agency must be prepared for their proposal to be vetted through this formal PSC process. All IOT projects are initiated via a formal Project Request form, which has been moved to a new VSM (Value Stream Management) system, indicating a focus on process maturity and workflow automation.[18]

Section 2: Indiana's Core IT Challenges and Strategic Imperatives

The State of Indiana's technology agenda is defined by a set of clear and pressing challenges that have been translated into strategic, enterprise-wide imperatives. These initiatives—modernizing legacy systems, defending against pervasive cyber threats, and cautiously embracing artificial intelligence—present the most significant opportunities for technology partners. The state's approach to these challenges is pragmatic, shaped by both ambitious goals and the hard-learned lessons of past projects.

2.1 The Modernization Mandate: Overcoming Legacy Debt and Embracing the Cloud

A substantial portion of public sector IT spending is consumed by the maintenance of aging, inefficient legacy systems, and Indiana is no exception.[19] Several state agencies have contended with the operational risks and limitations of outdated technology. The Department of Workforce Development, for instance, underwent a difficult, nine-year process to modernize its unemployment insurance (UI) system, which was hampered by unsupported technology and multiple false starts before a successful launch.[20] Similarly, the Department of Child Services (DCS) operated with a critical 10-year-old legacy database that was prone to frequent crashes, hindering its ability to integrate with national systems and provide a comprehensive view of children in its care.[21]

To address this technical debt, the state is actively pursuing cloud adoption as its primary modernization strategy. The explicit goal is to gain the scalability, agility, and access to modern tools that legacy data center environments cannot provide. This strategy is evident in recent projects. The Indiana Secretary of State's Office (SOS) is executing a "lift and shift" migration to Amazon Web Services (AWS), with the CIO stating unequivocally that the state "can't instantaneously scale... or take advantage of the power of AI without being on the cloud".[8] In another major success, the Indiana Department of Correction (IDOC) retired 13 separate legacy systems and consolidated them into a single, comprehensive Offender Management System (OMS) built on AWS, a project completed on time and on budget in just 27 months in partnership with Mi-Case.[22]

However, a significant historical event casts a long shadow over all large-scale modernization

efforts in Indiana: the failure of the state's contract with IBM. In 2006, the state entered into a 10-year, $1.3 billion Master Services Agreement with IBM to completely overhaul its welfare eligibility system.[23] The project was plagued with performance issues, and the state terminated the contract for material breach after less than three years, triggering a decade of high-stakes litigation that reached the Indiana Supreme Court.[23] This public and costly failure has instilled a deep-seated institutional caution regarding large, monolithic "big bang" transformation projects.

The juxtaposition of the IBM failure with the recent, more successful, and incremental cloud migration projects at IDOC and the SOS office reveals a clear shift in the state's approach. The state's procurement and project management culture now appears to favor proven, scalable platforms and agile, phased implementations over high-risk, single-vendor service contracts. This creates a distinct market dynamic where vendors offering foundational, reliable, and incrementally scalable solutions are likely to be viewed more favorably than those proposing sweeping, disruptive transformations. This risk-averse posture presents a strategic opening for providers of robust infrastructure platforms that can serve as a stable base for agency-led, phased modernization, effectively de-risking the process for the state.

2.2 Defending the Digital State: Cybersecurity as a Tier-One Priority

Cybersecurity is not merely an IT issue in Indiana; it is a formal, top-level priority of the state government. The state has adopted a highly structured, "Whole-of-State" approach, recognizing that the security of government systems is interconnected with the security of its local governments, schools, and critical infrastructure partners.[28] This strategy is managed and coordinated by the Indiana Executive Council on Cybersecurity (IECC), a body comprising public and private sector leaders that develops the state's overarching security framework.[29] The IECC has produced comprehensive, multi-year strategic plans in 2018 and 2021, which outline specific deliverables and objectives for strengthening Indiana's cyber posture, and it regularly publishes progress reports on these initiatives.[29]

Despite this strategic focus, the state remains a target for cyber threats. In May 2025, Indiana experienced a widespread and concerning phishing campaign in which fraudulent emails were sent from numerous official .gov email addresses.[31] An investigation by IOT determined that the state's own systems were not compromised; rather, the attack originated from the hacked account of a former contractor at a third-party communications vendor, Granicus.[31] This incident starkly illustrates the vulnerabilities present in the state's digital supply chain and highlights the critical importance of robust identity and access management for third-party vendors.

In response to the evolving threat landscape, the Indiana General Assembly passed Senate

Enrolled Act 472 (SEA 472), which Governor Braun signed into law in May 2025.[32] Effective July 1, 2025, this legislation imposes significant new cybersecurity responsibilities on IOT and all public entities across the state. It mandates the adoption of uniform technology resource use and cybersecurity policies, as well as mandatory employee training programs, with a compliance deadline of 2028. IOT is tasked with developing the guidelines and regulations for these policies.[32] This act effectively creates a large, compliance-driven market for cybersecurity solutions and services, as state agencies, county and city governments, and school corporations will need to assess their current posture and potentially invest in new technologies and training to meet the state-mandated standards. IOT, under the leadership of CISO Hemant Jain, is the central agency responsible for providing resources and guidance to help these entities achieve compliance, reinforcing its role as the state's cybersecurity leader.[33]

2.3 The AI Frontier: Indiana's Strategy for Artificial Intelligence Adoption

Indiana is taking a deliberate and policy-driven approach to the adoption of Artificial Intelligence. Rather than allowing for ad-hoc implementation, the state has established a legislative Artificial Intelligence Task Force. This body is co-chaired by State Rep. Matt Lehman and is charged with examining current AI use cases in both the public and private sectors, identifying opportunities to improve government services, and, crucially, developing policy guardrails to safeguard data privacy and protect workers.[34] The state has already formalized its approach by adopting a policy framework for AI implementation within state agencies that is based on the National Institute of Standards and Technology's (NIST) AI Risk Management Framework.[37]

While the policy framework is being developed, state agencies are already implementing AI in practical applications. The Department of Workforce Development utilizes an AI tool known as "Pivot" to analyze data from unemployment benefit applications and provide personalized recommendations for career and training resources.[34] The Indiana Secretary of State's Office has been particularly proactive, launching a public-facing AI chatbot, "Ask Indiana," to help citizens find government information, and is undertaking a major project to use AI to search, index, and interpret data from tens of millions of unstructured records spanning over a century.[8]

A critical component of Indiana's AI strategy is the explicit recognition by state technology leaders that a modern, cloud-based infrastructure is a fundamental prerequisite for successful AI implementation. The CIO of the Secretary of State's office directly linked their ability to launch AI projects to their ongoing cloud migration, noting that they could not take

advantage of AI's power within the limitations of a legacy data center.[8] This creates a direct link between the state's modernization mandate and its AI ambitions, presenting an opportunity for infrastructure providers to position their solutions as the essential foundation for the state's future AI-driven services.

2.4 Foundational Platform Transformation

As part of its broader modernization efforts, the Indiana Office of Technology is undertaking a significant transformation of its core operational platforms. The agency's 2024 strategic priorities explicitly call for the implementation of "Modernized Core Platforms" to improve the management of enterprise technologies, assets, and resources across state government.[28] This initiative focuses on two key enterprise-wide systems that will standardize and streamline IT operations.

First, IOT is implementing ServiceNow as its new, centralized IT Service Management (ITSM) platform.[28] This move represents a substantial investment in standardizing how IT services are requested, delivered, and managed across the approximately 100 agencies IOT supports. The adoption of a modern ITSM platform like ServiceNow will create opportunities for integration with infrastructure monitoring, asset management, and security operations tools, enabling greater automation and efficiency.

Second, and perhaps more critically, IOT has selected Okta as its new identity lifecycle management platform.[28] This is a direct response to the challenge of managing disparate, agency-specific identity stores. The strategic goal is for IOT to "own the identities of the individuals interacting with and across state government." This multi-year, enterprise-wide project aims to create a single, secure, and unified identity and access management (IAM) framework for the state. The recent phishing attack originating from a compromised third-party vendor account further underscores the urgency and importance of this initiative.[31] A successful enterprise IAM implementation will require integration with all major applications and infrastructure components, creating a significant ecosystem of opportunity for technology partners.

Section 3: The Fiscal Landscape: Budgeting, Funding, and IT Expenditures

Understanding the flow of money—from legislative appropriation to agency expenditure—is critical to identifying viable opportunities within the State of Indiana. The state's fiscal posture is defined by a conservative, biennial budget process, a centralized IT funding model that provides remarkable transparency into agency-level spending, and the strategic injection of federal funds for specific initiatives.

3.1 Decoding the Biennial Budget

The State of Indiana operates on a biennial budget cycle, with the General Assembly passing a two-year budget in odd-numbered years.[39] The budget for Fiscal Years 2024-2025 was enacted in May 2023, and the subsequent budget for FY 2026-2027 was signed into law by Governor Braun in May 2025.[3] This two-year cycle provides a degree of predictability for vendors and state agencies, though it can also limit flexibility for new, unbudgeted projects.

The FY 2026-2027 budget reflects the administration's emphasis on fiscal conservatism. It is described as "structurally balanced," with forecasted revenues exceeding recurring expenditures.[40] Notably, the budget mandates a 5% reduction statewide on most line items and further directs state agencies to identify additional efficiencies by holding a 5% reserve on their operating funds.[3] This budgetary pressure means that technology proposals are more likely to succeed if they can demonstrate clear cost savings, operational efficiencies, or the ability to replace more expensive legacy systems.

Total appropriations from all funding sources (general, dedicated, and federal funds) are approximately $53.5 billion for FY 2026 and $54.7 billion for FY 2027.[40] The state's general fund, which is the primary source of discretionary spending, is appropriated at approximately $22.8 billion for FY 2026 and $22.9 billion for FY 2027.[3] The largest portions of the state budget are allocated to K-12 education and Medicaid, which are largely non-discretionary.[42] While the summary budget documents do not provide a detailed, consolidated line-item for IOT's total appropriation [40], the enacted budget bill (House Enrolled Act 1001 of 2025) does contain specific appropriations for certain IT projects. For example, IOT received a direct appropriation of $5 million for each year of the biennium specifically for "IN MAPPING DATA AND STANDARD (GIS)," indicating that high-priority, enterprise-wide technology initiatives can and do receive dedicated funding outside the standard operational budget.[43]

3.2 Following the Money: An Agency-by-Agency Analysis of IT Spending

The most precise tool for understanding the allocation of IT resources in Indiana is not the state's overall budget, but rather the Indiana Office of Technology's internal charge-back data. As the centralized IT provider, IOT bills its partner agencies for the services they consume. This model is currently evolving, as IOT leadership has expressed a desire to move toward a blended approach where foundational services like cybersecurity are funded by direct appropriation, while other services remain consumption-based.[28]

The Appendix B – FY 2026 IOT Rates document, released by the State Budget Agency, provides an extraordinarily detailed and actionable breakdown of these charge-backs.[44] It lists the projected annual IT costs for nearly every executive branch agency for Fiscal Year 2026, along with the year-over-year percentage change from FY 2025. This data effectively serves as a treasure map, pinpointing exactly which agencies have the largest IT budgets and are experiencing the most significant changes in their technology spending.

Analysis of this data reveals that IT spending is highly concentrated. The Family & Social Services Administration (FSSA) and its various divisions represent the largest consumer of IT services, with a combined FY 2026 cost of approximately $39.5 million. It is followed by the Department of Child Services at $27.5 million, IOT's internal costs at $25.9 million, the Department of Transportation at $17.7 million, and the Department of Correction at $17.4 million.[44] These five entities alone account for a substantial portion of the state's centralized IT spending.

This granular data allows for a highly targeted sales and engagement strategy. Instead of a broad approach to the state government, resources can be focused on the agencies with the largest budgets and the most pressing needs. For example, FSSA's massive IT spend, combined with the state's history of challenges in modernizing its welfare systems, makes it a prime target for solutions focused on application modernization and data management. Conversely, the Department of Correction's significant budget and high year-over-year spending increase (+8.97%) reflects its recent, successful OMS modernization project, indicating an agency that is actively investing in and succeeding with new technology.[22]

Rank	Agency Name	FY2026 Annual IT Cost (IOT Charge-back)	YoY % Change from FY2025	Known Initiatives/Pain Points
1	FSSA - Div of Family Resources	$27,584,010	+4.21%	Legacy system modernization (historical IBM project), large-scale data management. [44]
2	Dept of Child Services	$27,523,862	-5.22%	Legacy database modernization, need for 360-degree child view, data sharing. [21]
3	Office of Technology (Internal)	$25,935,647	+2.61%	Core platform upgrades (ServiceNow, Okta), funding model refinement. [28]
4	Dept of Transportation	$17,731,185	+6.36%	Large infrastructure management, potential for edge computing/IoT. [44]
5	Dept of Correction	$17,363,169	+8.97%	Post-migration optimization of new AWS-based Offender Management System. [22]
6	IN State Department of Health	$9,763,950	+7.29%	Health data management, public health reporting and analytics. [44]

7	Dept of Natural Resources	$8,943,737	+7.12%	GIS/Mapping data, potential for rugged mobility solutions. [44]
8	IN State Police	$8,146,871	+3.19%	CJIS compliance, public safety systems, rugged mobility. [44]
9	Dept of Workforce Development	$7,208,580	-1.42%	AI-powered tools ("Pivot"), UI system modernization. [20]
10	Dept of Revenue	$6,965,462	-3.06%	Financial systems, tax processing, data security. [44]

3.3 Federal Funding Injections: The Impact of BEAD and Other Programs

Federal funding provides a significant supplement to state-appropriated dollars, often driving specific, large-scale technology initiatives. Indiana has been a recipient of several major federal programs that have a direct impact on its technology roadmap.

Under the American Rescue Plan (ARP), Indiana received $3.1 billion in direct state fiscal aid and $2.2 billion for local governments.[39] As of January 2025, the state had fully allocated these funds. The critical factor for vendors is the program's deadline: all ARP funds must be spent by December 31, 2026.[39] This creates a time-sensitive environment where agencies with remaining ARP-funded IT projects will be highly motivated to complete procurement and implementation cycles before the deadline, potentially accelerating purchasing decisions.

More recently, Indiana was allocated over $868 million from the Broadband Equity, Access, and Deployment (BEAD) program, a key component of the federal "Internet for All" initiative.[45] The primary purpose of this funding is to deploy and upgrade high-speed internet networks in unserved and underserved areas of the state. While the direct recipients will be internet service providers, the widespread infrastructure build-out will create a ripple effect of technology needs. As high-speed internet becomes available in more rural areas, local government offices, schools, and health clinics in those areas will require new networking equipment, edge computing solutions, and enhanced cybersecurity to leverage the new connectivity. This presents a significant downstream market opportunity for technology providers.

Section 4: The Competitive Arena and Procurement Pathways

Success in the Indiana public sector market requires a nuanced understanding of both the entrenched competitive landscape and the specific procurement processes that govern technology acquisition. The state utilizes a mix of direct contracts, statewide Quantity Purchase Agreements (QPAs), and cooperative purchasing vehicles, creating multiple pathways to market. However, these pathways are often dominated by incumbent vendors with long-standing relationships and favorable contractual terms.

4.1 Competitive Intelligence Analysis

The technology ecosystem within Indiana's state government is mature, with several major vendors holding significant market share in key areas.

Dell Technologies is an approved vendor and has access to the Indiana market through multiple cooperative purchasing contracts, including the NASPO ValuePoint Computer Equipment contract, the Midwestern Higher Education Compact (MHEC), and the National Cooperative Purchasing Alliance (NCPA).[46] Furthermore, SHI, a major state partner holding two QPAs, lists Dell as a key provider for hardware solutions like laptops, desktops, and servers, indicating a viable channel for sales.[48]

HP Inc. holds a particularly strong, entrenched position in end-user computing. A 2018 case study revealed that IOT utilizes a "Sole Source contract with HP" to equip the state's 30,000 employees, with a systematic refresh cycle of approximately 10,000 devices annually.[14] This contract, identified as QPA #13079, was awarded to HP in partnership with RCR Technology, a prominent Indiana-based Minority & Women's Business Enterprise.[49] This exclusive agreement for client devices represents a significant competitive barrier. HP also leverages cooperative contracts like OMNIA Partners and MHEC to sell into the broader state and local government market.[50]

IBM Corporation's brand is severely damaged within Indiana due to the high-profile failure of the FSSA welfare modernization contract.[26] The decade-long legal battle and the Supreme Court's finding of a material breach by IBM create a significant reputational hurdle for any future large-scale services or modernization proposals from the company.[23]

Microsoft Corporation is a foundational technology provider for the state. IOT's service catalog includes core Microsoft platforms such as Exchange Online for email and Microsoft Teams for collaboration.[51] The state also utilizes enterprise applications like Microsoft Dynamics 365, as evidenced by a recent solicitation from the Secretary of State's office for support services.[53] Microsoft also holds a Criminal Justice Information Services (CJIS) agreement with the state, which is critical for law enforcement agencies handling sensitive data.[54]

Oracle Corporation is embedded in the state's core administrative systems. The state uses Oracle's PeopleSoft platform for its enterprise Human Resources and Financials systems, which are accessible to state employees via IOT's portal.[5] A major, multi-year contract awarded to Accenture for the implementation and modernization of PeopleSoft HCM 9.2 modules underscores Oracle's critical role in the state's back-office operations.[55]

Cloud Providers (AWS and Google) have become major players. **Amazon Web Services**

(AWS) has secured a significant foothold, winning the contract for the Department of Correction's comprehensive OMS modernization and serving as the platform for the Secretary of State's current initiatives.[8] AWS's strategic position is immensely strengthened by its announced plan to invest $11 billion in new data centers in St. Joseph County, the largest capital investment in Indiana's history.[56] This investment generates substantial political goodwill and establishes a powerful in-state presence.

Google is also making significant capital investments in Indiana, with plans for data centers in Fort Wayne and Indianapolis, although these have faced some local opposition regarding subsidies and resource consumption.[57] Resultant, an Indianapolis-based consultancy, is a key partner for Google Public Sector in the region.[58]

Cisco Systems appears to be the incumbent provider for networking infrastructure. The state utilizes the "Cisco FSO Platform" and has a QPA specifically for Cisco suppliers, indicating a long-standing relationship.[59]

Vendor	Primary IN Offerings	Known Contracts	Perceived Strengths	Weaknesses / Threats
HP Inc. [14]	End-User Computing (Desktops, Laptops), Printers	QPA #13079 (Sole Source for client devices), MHEC, OMNIA	Deeply entrenched incumbency in EUC with a massive installed base and established refresh cycle. Strong local partner (RCR).	Potential complacency; vulnerability to competitive pricing on cooperative contracts during refresh cycles.
Amazon Web Services (AWS) [22]	Cloud Infrastructure (IaaS/PaaS)	Dept. of Corrections OMS Modernization, Secretary of State Modernization	Proven success with major agency projects. Massive ($11B) in-state data center investment creates immense political capital.	Potential for state to seek multi-cloud strategy to avoid vendor lock-in.
Microsoft Corp. [52]	Productivity Suite (O365), Enterprise Apps (Dynamics), Cloud (Azure)	Enterprise-wide use of O365/Teams, CJIS Agreement, SOS Dynamics RFP	Foundational software provider; deeply integrated into daily operations.	Perceived as a software/platform vendor, not an infrastructure provider. [52]
IBM Corp. [26]	Enterprise Services, Mainframe	Historical FSSA Modernization Contract (Terminated)	Legacy presence in some back-end systems.	Severely damaged reputation from the FSSA contract failure and subsequent litigation. High risk perception.

Oracle Corp. [5]	Databases, Enterprise Apps (PeopleSoft)	State uses PeopleSoft for HR/Financials; Accenture contract for PeopleSoft implementation.	Entrenched in core back-office ERP/HCM systems, creating high switching costs.	Often perceived as expensive and complex; vulnerable to cloud-native competitors for new applications.
Cisco Systems [52]	Networking Hardware and Software	QPA for Cisco Suppliers, use of Cisco FSO Platform	Likely incumbent for core network infrastructure.	Vulnerable to software-defined networking (SDN) solutions and competitors offering better TCO.
Google [57]	Cloud Platform (GCP), Workspace, AI Tools	Investing in multiple in-state data centers. Strong local partner (Resultant).	Strong AI/data analytics capabilities. Growing in-state presence.	Lags AWS in major state agency wins. Local controversy over data center subsidies.

4.2 Navigating the Procurement Maze

The Indiana Department of Administration (IDOA) Procurement Division serves as the state's central purchasing authority for all non-delegated acquisitions, including technology goods and services.[61] Authority for purchases under $75,000 is typically delegated to individual agencies, but major IT acquisitions fall under IDOA's purview.[62]

To be eligible to do business with the state, vendors must complete a multi-step registration process. This involves creating a Bidder Profile in IDOA's Supplier Portal, registering the business entity with the Indiana Secretary of State, and submitting W-9 and direct deposit forms to the State Comptroller to facilitate payments.[10]

Procurement opportunities and contract information are centralized through several state-run web portals. Current open bids are listed on IDOA's "Current Business Opportunities" page.[61] A comprehensive, searchable database of all active state contracts is maintained on the Indiana Transparency Portal (ITP).[65]

The state employs several key contracting vehicles for technology procurement:

- **Quantity Purchase Agreements (QPAs):** These are competitively bid, statewide contracts that allow agencies to purchase commodities and services on an ongoing, as-needed basis at pre-negotiated bulk pricing.[65] The state's sole-source contract with HP for client devices is structured as a QPA, demonstrating the power of this vehicle for incumbent vendors.[49]
- **Cooperative Contracts:** Indiana is an active participant in several national and regional cooperative purchasing organizations. The research confirms that state and local entities are eligible to purchase from contracts established by the NASPO ValuePoint cooperative, the Midwestern Higher Education Compact (MHEC), OMNIA Partners, and Sourcewell.[46] These cooperative agreements represent a critical and established procurement pathway for vendors like Dell, allowing the state to leverage competitively bid contracts without conducting its own lengthy solicitation process.

Section 5: Strategic Recommendations and Action Plan for Dell Technologies

Based on the comprehensive analysis of Indiana's political, fiscal, and technological landscape, the following strategic recommendations are proposed to position Dell Technologies for sustained success within the state's executive branch market. The

overarching strategy should be to present Dell as a pragmatic, risk-averse, and financially astute partner that can provide the foundational technology required to achieve the state's core imperatives.

5.1 Aligning Dell's Portfolio with Indiana's Priorities

A product-centric approach is insufficient; Dell's success hinges on mapping its specific solutions to the state's clearly defined challenges and strategic goals.

Target Legacy Modernization: The state's primary IT challenge is modernizing its aging systems, a goal tempered by a strong aversion to the risk associated with large-scale transformation projects. Dell should position its core data center and hybrid cloud portfolio as the ideal on-premises foundation for these efforts. Dell PowerEdge servers offer a robust compute platform, while Dell PowerStore and PowerMax storage solutions provide the performance and reliability needed for mission-critical applications.[68] Dell VxRail hyperconverged infrastructure is particularly well-suited, offering a simplified, scalable, and fully integrated platform that can de-risk the modernization process by providing a stable, predictable environment upon which agencies can migrate or redevelop applications.[70] The key message should be that Dell provides the secure and cost-effective "safe harbor" infrastructure that enables low-risk, incremental modernization, directly addressing the institutional memory of the IBM contract failure.

Address the Cybersecurity Mandate: With the passage of SEA 472, every public entity in Indiana will be driven by a need to assess and improve its cybersecurity posture to meet new compliance standards.[32] Dell should proactively engage IOT and CISO Hemant Jain with its comprehensive security portfolio. A leading offering should be the Dell PowerProtect Cyber Recovery solution, which provides an isolated, immutable data vault to protect against ransomware—the most pressing threat to government operations.[71] Additionally, Dell's Secureworks division can offer consulting and managed security services to help agencies conduct risk assessments and implement the controls required by the new legislation.[68]

Enable the AI Strategy: Indiana's leadership recognizes that modern infrastructure is a prerequisite for its AI ambitions.[8] Dell should position its AI-ready infrastructure as the essential on-premises component for developing and running AI models. This includes GPU-accelerated PowerEdge servers for model training and high-performance Dell PowerScale storage for managing the large datasets required for AI/ML workloads.[72] The value proposition is that Dell provides the secure, high-performance compute necessary to process sensitive state data locally before deploying applications in the cloud, aligning with data governance and security best practices.

Compete in End-User Computing: While HP holds a strong incumbent position with its sole-source QPA [14], Dell should not cede the entire end-user computing market. A targeted strategy should focus on specific agency needs and refresh cycles. Dell can highlight its portfolio of AI-enabled PCs as a productivity enhancer for knowledge workers.[73] For agencies with field staff, such as the Indiana State Police or the Department of Natural Resources, Dell's line of rugged mobility solutions offers a differentiated product that meets demanding environmental requirements.[68] Critically, Dell must aggressively leverage its position on cooperative contracts like NASPO ValuePoint and MHEC to present alternative, highly competitive pricing options to agencies whenever opportunities arise.[47]

Indiana Strategic Initiative	Relevant State Agency/Office	Primary Dell Solution/Service	Key Value Proposition / Talking Point
Legacy Modernization [21]	FSSA, Dept. of Child Services, All Agencies	Dell VxRail, PowerStore, PowerEdge Servers, Dell APEX	Provide a secure, cost-effective, and low-risk on-premises/hybrid cloud foundation to enable incremental application modernization, avoiding the "big bang" failure of the past.
Cybersecurity (SEA 472 Compliance) [32]	IOT (CISO), All Agencies, Local Government	Dell PowerProtect Cyber Recovery, Secureworks Managed Security & Consulting	Proactively address ransomware threats with an isolated recovery vault and provide expert services to help agencies meet new state-mandated compliance requirements.
Artificial Intelligence Adoption [8]	IOT, Secretary of State, Dept. of Workforce Development	Dell PowerEdge (GPU-enabled), Dell PowerScale	Deliver the high-performance, on-premises compute and storage infrastructure required to securely train and run AI models on sensitive state data.
End-User Computing [68]	All Agencies (especially State Police, DNR)	Dell Latitude AI PCs, Dell Rugged Laptops	Compete with incumbent via cooperative contracts, offering differentiated value through AI-powered productivity and specialized devices for field workers.

5.2 A Targeted Engagement Strategy

Building relationships and establishing trust are paramount in the public sector. Dell must execute a multi-pronged engagement strategy that targets key decision-makers, leverages the partner ecosystem, and increases brand visibility.

Focus on the New CIO: A dedicated executive engagement plan should be developed for CIO Warren Lenard. Given his private-sector background, discussions should be framed around business outcomes, total cost of ownership (TCO), and ROI rather than technical specifications. Dell's own successful digital transformation can serve as a powerful case study. The goal is to position Dell as a strategic peer that understands efficiency and can deliver tangible value quickly, directly contrasting with the state's past negative experiences with large IT service providers.

Cultivate Agency-Level Relationships: The IOT charge-back data is the roadmap for targeted sales efforts.[44] Dell should create dedicated account plans for the top 5-10 agencies identified in this report, including FSSA, the Department of Correction, the Department of Transportation, and the Department of Child Services. The objective is to understand their specific modernization roadmaps, operational pain points, and budget cycles to tailor solutions that address their unique mission requirements.

Leverage the Partner Ecosystem: Strong relationships with in-state partners are essential for navigating state procurement. Dell should deepen its collaboration with key partners who hold state contracts, such as SHI and RCR Technology.[48] Even though these companies may also partner with competitors, they are a vital channel to market and possess invaluable local knowledge and relationships.

Increase Visibility at Key Events: Dell should establish a strong presence at the annual technology events where Indiana's public sector IT leaders and professionals gather. Sponsoring and actively participating in the Indiana Digital Government Summit and the IOT-hosted Local Government IT Symposium and Cybersecurity Summits will provide direct access to a wide range of decision-makers from IOT, state agencies, and local governments across Indiana.[6]

5.3 Differentiating Dell: Crafting the Winning Value Proposition

To displace strong incumbents and win new business, Dell must articulate a value proposition

that resonates with Indiana's specific political and technical realities.

The "Safe Harbor" for Modernization: Dell's primary message should be one of risk mitigation. The state is modernizing out of necessity but is wary of repeating past failures. Dell's on-premises and hybrid cloud solutions should be framed as the secure, reliable, and financially predictable foundation for this journey. By emphasizing Dell's proven hardware, tightly integrated VMware solutions, and a world-class supply chain, Dell can position itself as the low-risk choice for the critical infrastructure that underpins the state's digital transformation.

Cost-Efficiency in a Fiscally Conservative State: With the state government implementing 5% budget reductions, every proposal must have a strong financial justification.[3] Dell should lead with value, proactively using its national cooperative purchasing vehicles to demonstrate immediate cost savings. Furthermore, Dell APEX flexible consumption and as-a-Service models should be introduced as a direct answer to IOT's stated desire to move toward a more consumption-based funding model, allowing agencies to pay for capacity as they use it and avoid large, upfront capital expenditures.[28]

A True "Whole-of-State" Partner: Dell should mirror Indiana's "Whole-of-State" cybersecurity language in its engagement. The value proposition should extend beyond simply selling hardware to a single agency. By offering a portfolio that spans from secure end-user devices to data center infrastructure to cyber recovery solutions, Dell can present itself as an end-to-end security partner. Dell should offer to collaborate with IOT on developing best practices and providing resources to help local governments and school districts meet the new SEA 472 mandates. This demonstrates a commitment to the entire Indiana public sector ecosystem, aligning directly with IOT's strategic goals and building long-term trust and partnership.

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