Market Brief: Accela Civic Platform

Market Description: The Accela Civic Platform is positioned as a comprehensive, user-friendly, and adaptable solution for government agencies to enhance their service delivery and engage more effectively with residents. Accela is used to improve services around **permitting, inspections,** and **regulatory compliance**, and supports community growth with a strong public-facing web platform to intake everything from zoning inquiries to high grass complaints. It is full featured off the shelf and also highly extensible, and can function within a single agency or across many agencies and locations.

Criteria	X Market
Market Size/yr in US *	• 2023: $3.03B with a CAGR of 23.4% projected through 2030. • 2024: Approximately $3.77B • 2025: Approximately $4.68B • 2026: Approximately $5.82B
Service Needs in the Market	• Service inefficiencies in inspection and code enforcement government agencies at the city, county and state level • Digital Transformation – specifically and literally, changing from an entirely file-cabinet-based organization to a purely digital one. • Perpetual laggard. The smaller the government entity, the more outdated and isolated its systems tend to be. • Engaged local communities are a goal but also drive change. The more engaged a community is, the higher its standards will be for its engagement experience. • Permits, inspections and agencies like DoH and Fire Departments are or will soon be zero-error-tolerance environments. • Regulated transparency. The public nature of government transactions mandates an audit-friendly solution. • Increased agency interactions. Artificial silos cause problems for government entities; inter-system and inter-agency integrations need to be a standard, not an outlier.
3SGPlus Position in the Market Existing Clients Net Revenue in 2023 Forecast Yr End Potential with Existing Clients for 2024	████████████████████████████ ████████████████████████████ ████████████████████████████
Market Pricing Multiplier Target/Range Pricing Strategy	Cost-Plus pricing model except Accela license price and margin for net new customers largely dictated by vendor. Professional Services prices based on rates for projected development hours, onsite personnel placement can run through OST. Scanning is not normally considered part of an Accela deal but Accela deals can uncover imaging ███████████████
3SGPlus Target Services	1- Accela new Licenses + Professional Services for Building/Zoning 2- Accela new Licenses + Professional Services for County Dept of Health 3- Accela new Licenses + Professional Services for County Auditor
3SG Plus Differentiators	• Implementation expert was an Accela user in City Cols B&Z with 10+ years' experience in regulatory space • Deep + wide service options beyond normal no-code tweaks of other VARs (Staffing, imaging, PODs if needed) • Tons of relationship connections in local and state government • The spelling of our name gets us top billing on the Accela site vendor lookup default, which sorts alphabetically.
New Target Clients	████████████████████████████

3SG Plus Target Geographic Location	US market, Ohio primary. But also RI, VA, WV, KY, TN, IN, IL, PA, MI, NY. Large (in tax base/population, not necessarily physical size) counties are an ideal mix of mostly untapped by Accela direct + Open to PH, B&Z and FD solutions
Competitors	Avocette, Vision 33, Avolve, Byrne, Carahsoft, RedMark, SLS, TechGlobal, TruePoint, Visionary Integration Professionals (VIP), SEP, s-cube, Ingraham-Kern (IK) Consulting, Gray Quarter, GCOM, ETech, DJSC, CGI; conveniently Accela lists them. We also compete against Accela in some cases. Where Accela's competition sells direct like they do, we compete against OpenGov, Tyler, Healthspace, HDIS and other developers directly.
Competitor's Strategies	Prebuilt solutions for specific needs; limiting geography (RedMark, for instance, is primarily Florida/Latin America), or leaning into public + private scope (Carahsoft).
Barriers to Entry for 3SG Plus	Relatively new to the market, shallow funnel; Selling directly against Accela at state and city level in many cases, and their level of interference may be unpredictable. Competitors have established books of business and can grow through referrals and relationships where 3SG Plus must fall back on lead gen/demand gen tactics
3SG Plus Sales/Investment in 2024	Marketing Investment Direct: (specific events, media valuable for Accela only, etc): ▇▇▇ Proportional value in shared messaging (3/10 of remaining budget) = ▇▇▇
3SG Plus Sales/Investment in 2025	Marketing Investment +20%; Direct ▇▇▇ Shared ▇▇▇
EEC Sales/Investment in 2026	Marketing Investment +20% Direct ▇▇▇ Shared ▇▇▇
Marketing Initiatives to Penetrate or Build the Market	1. Deepen connection/interaction with regional, county, state level commissioner + officials associations (OEHA, OBOA, APAOH, AHC, NACCHO). Speak at, sponsor, host, etc, Topics of conversation are topics for email and social campaigns. 2. Email and social campaigns (webform CTA) tied to Accela cobranded content; huge push for Onboarding and Professional Services launching alongside 5/24 statewide rollout 3. Closed-audience Webinar event(s) co-hosted with Accela, highlighting professional services and topics of interest, recorded and available behind form fill 4. Manual and automated monitoring of RFP sites for Accela and permitting software projects (ohiobuys, city of Columbus, Cinci, Cleveland, Franklin Cy, Cuyahoga Cy. Etc; 5. Manual and automated monitoring of grants, personnel changes, other churn opportunity
Sales Initiatives to Penetrate or Build the Market	1.

* Sources:

- [Cloud Computing in Government Market Trends, Challenges, and Opportunities 2023 To 2030 | Adobe Systems, Blackboard, Cisco (digitaljournal.com)](#)

Accela and similar companies focus on front-end solutions like permitting, inspections, community interactions, etc. This segment is distinct from and smaller than the Cloud Computing backend provided by companies like AWS, Azure, and Cisco, and from other front-end cloud solutions used in Governance such as records management, elections tabulation and tax collection. As such, a fractional portion (10%) of the total Cloud Computing in Government Market Size estimate ($30.8B) was used in this exercise, taking into account the 35,000 county agencies, 5,000+ state agencies, and 8,000+ agencies in cities of over 50,000 people in the US, the majority of which are not currently using Accela in favor of a patchwork of other solutions.

A peculiarity of this market is that, unlike typical B2B business markets where potential customer enterprises disappear due to closures/mergers and new enterprise-scale businesses come into the market every year at varying and unpredictable rates, cities, counties and states are effectively permanent entities. Agencies merge or are created slowly, and all will use something, if not Accela. New Accela customers are no longer in the net new license market, and because the agency churn is so low, the market size per year for new licenses may begin to decline despite the rapid growth driven by DX forces if Accela is very successful and saturates the market. It is unlikely this effect will manifest within the period 2024 – 2026, however, and it applies only to net new licenses, not Accela Professional Services.