AEGEAN INTELLIGENCE GROUP

PUBLISHABLE MARKET RESEARCH · 2026

CLASSIFICATION
PUBLIC

PRODUCT ID
PMR-2026-0716-USA-001

TIMELINESS
DURABLE

DATE
2026-07-16

The Field Before the RFP

Capture Intelligence Basics: The Competition Is Usually Decided Before the Solicitation Publishes

~13%
COMPETED DOD DOLLARS DRAWING ONE OFFER

52%
GAO PROTEST EFFECTIVENESS RATE, FY2025

70-80%
TYPICAL INCUMBENT RETENTION ON RECOMPETES

51 to 5
DEFENSE PRIME CONSOLIDATION SINCE 1990S

EXECUTIVE DASHBOARD

The solicitation is the last document in the story, not the first. By the time an RFP publishes, the requirement has been shaped, the incumbent has positioned, and the serious competitors have been working the field for a year or more. Most of what decided the outcome is sitting in the public record, and most losing bidders never read it.

THESIS

A federal competition is substantially decided before its solicitation publishes. The shaping window, from long-range forecast through sources sought, industry day, and draft RFP, runs months to years; the visible response window runs weeks. The evidence signature of a pre-decided field is measurable: roughly one in eight competed defense dollars draws exactly one offer, incumbents retain the large majority of recompetes, and the government's own auditors locate the competition problem in the acquisition phase before solicitations issue. The same record that documents this is open to any competitor: award history, expiring contracts, agency forecasts, pre-solicitation notices, and protest dockets are all public. Reading that field early, and making the bid or no-bid decision against it, is the cheapest intervention in the entire pursuit lifecycle, and the one most teams skip. The alternative field-read instruments are worse: a proposal loss is an expensive read delivered late, and a bid protest is the most expensive read there is, delivered after the money is spent.

KEY STATISTICS

$744.7B
FY2025 federal contract obligations reported[7]

54.2%
Ten-year average DoD competition rate[3]

~13%
Competed DoD obligations drawing one offer[4]

51 to 5
Prime consolidation since the 1990s[3]

70-80%
Typical incumbent retention on recompetes[12]

1,688
GAO bid protests filed FY2025[1]

52% / 14%
FY2025 effectiveness and sustain rates[1,2]

80-270 days
Solicitation-to-award, new large contracts[6,11]

Scope & method. Open-source intelligence only, verified against allowlisted Tier 1 to 4 sources: Government Accountability Office reports and the GAO bid protest annual report, Department of Defense published analysis, Federal Register rulemaking, federal spending data platforms, and established trade press. Incumbent-retention figures come from industry and vendor analyses of federal award data and are attributed as such; no government source publishes an official recompete statistic, and confidence is graded accordingly. Defense data anchors several findings because DoD publishes the deepest competition record; the structural argument applies across civilian agencies with local variation. This brief is a practice explainer: it teaches the reading of a competitive field using only public instruments, and it draws on AEIG's published sector work where a field illustration is needed (PMR-2026-0603-USA-001 on the munitions industrial base; PMR-2026-0619-USA-003 on the counter-UAS market). Timeliness: DURABLE. The structural argument is stable on a multi-year horizon; the FAR overhaul rulemaking now in progress is the one live variable that could move the mechanics, and it is tracked in the outlook. No client-attributable material is used anywhere in this brief.

KEY JUDGMENTS

Six judgments anchor this assessment. Each is tied to the cited evidence in the sections that follow and carries an explicit confidence level.

1 `High` The decisive phase of a federal competition precedes the solicitation. GAO's own finding on defense competition locates the fix in the acquisition-planning phase, before a solicitation ever issues, because that is where requirements are shaped and where incumbent advantage hardens into single-offer outcomes.^5

2 `High` A pre-decided field leaves a measurable signature in public data. Roughly 13 percent of DoD competed obligations drew exactly one offer, 69 percent of non-competitive exceptions cite "only one responsible source," and the DoD competition rate has averaged 54.2 percent over a decade against a consolidated base of five primes.^3,4

3 `High` The field is reconstructable from public instruments alone. Award history and expiring contracts (FPDS and USAspending), pre-solicitation activity (SAM.gov sources sought, RFIs, industry days), agency long-range forecasts, and GAO protest dockets together support a working map of buyer, incumbent, and likely field with no proprietary access.^8,9,10

4	Moderate	Incumbency is an advantage, not a verdict. Industry analyses put incumbent retention on recompetes at roughly 70 to 80 percent, dropping materially where performance problems are documented; the counter-UAS market's rapid new-entrant awards show open fields do get taken. Confidence is moderate because retention figures are vendor-analyzed rather than government-published.^12,14
5	High	The protest docket is a field-read delivered too late. FY2025's 52 percent effectiveness rate shows agency evaluation records are often defective, but the leading sustain grounds, unreasonable technical and cost evaluations and unreasonable proposal rejection, describe failures a capture-phase read of the buyer's history and evaluation habits would have priced in before bid.^1,2
6	High	The operative decision is bid discipline. A standing capture-intelligence baseline, the expiry calendar, incumbent map, buyer history, and field structure, held before the RFP, converts the bid or no-bid call from instinct to evidence. A pursuit entered at solicitation competes against teams that have been shaping the outcome for a year.^5,6,13

SECTION 01 · CLOCK

The Decision Happens Before the Document

The shaping window runs months to years; the visible response window runs weeks. Position is built before publication or not at all.

A federal requirement does not begin life as an RFP. It begins as a budget line and an agency forecast, surfaces as a sources-sought notice or request for information, is socialized at an industry day, often circulates as a draft solicitation, and only then publishes as the RFP that most vendors treat as the starting gun. Each stage of that sequence is a shaping opportunity: responses to a sources-sought notice inform how the requirement is scoped and whether it is set aside; RFI answers and industry-day questions surface who is positioning; a draft RFP's comment period is where evaluation criteria get contested. The vendors engaged across that sequence are not predicting the requirement, they are participating in its formation.

The visible window at the end is short by comparison, and the government's own lead-time data frames the asymmetry. GAO found median DoD solicitation-to-award time of roughly 32 days in 2022 for the run of ordinary actions, while new contracts in the $100 million to $250 million class run 80 to 270 days from solicitation to award, and median lead times for actions above $50 million grew by 70 days between 2019 and 2022.^6,11 Read those numbers from the pursuit side: for routine work, the period between publication and proposal deadline is measured in weeks, far too short to build position; for major new work, the long award cycle is preceded by an even longer planning trail, forecasts, notices, and drafts, that is public for a year or more before the RFP. In both cases the conclusion is the same. The interval in which position can actually be built sits before publication, in the shaping window, not after it.

ASSESSMENT · HIGH CONFIDENCE

Treat the RFP as the end of the intelligence period, not the beginning of the pursuit. A team that first engages a requirement at publication has conceded the shaping window entirely to competitors and has compressed its own field-read into the proposal clock.

Rationale: *The pre-solicitation sequence is structural in federal acquisition, the lead-time data bounds the visible window, and GAO's early-attention finding locates competitive outcomes in exactly the phase that publication ends.^5,6,11*

SECTION 02 · SIGNATURE

One Offer Is a Verdict

Roughly one in eight competed defense dollars draws a single bid. A one-offer competition is procedurally competitive and practically decided.

The clearest evidence that fields are decided early is what happens when the government competes a requirement and only one bid arrives. GAO examined this directly: competitive one-offer awards ran at roughly 13 percent of DoD competed obligations, $20.9 billion in fiscal 2014, the last period examined at that depth.^4 A one-offer competition is procedurally competitive and practically decided; every other potential bidder read the field and declined. GAO's companion finding assigns the cause: enhancing competition requires "early attention in the acquisition process," before solicitations issue, because short response windows and hardened incumbent advantage suppress second offers.^5 The one-offer statistic is the shaping window's receipt.

The structural backdrop makes the signature more pronounced. DoD's own State of Competition report characterizes competition in its industrial base as poor: a ten-year average competition rate of 54.2 percent with a fiscal 2020 low of 50.1 percent, a prime-contractor base consolidated from 51 firms to five since the 1990s, 90 percent of missiles sourced from three suppliers, and "only one responsible source" cited in 69 percent of exceptions to competition.^3,4 AEIG's munitions-bottleneck brief traced what that concentration does to supply; the same concentration defines the capture terrain, because a five-prime field with deep incumbency is precisely the environment where outcomes settle before publication.^13 Half of the addressable market, in other words, is competed in name, and the effective competition happened upstream.

ASSESSMENT · HIGH CONFIDENCE

Where a target shows one-offer history, a long-tenured incumbent, and a buyer whose exceptions run through "only one responsible source," the field should be presumed decided unless affirmative shaping evidence says otherwise, and the bid decision priced accordingly.

Rationale: *The one-offer rate, the exception pattern, and the consolidation data are government-published, mutually consistent, and directly tied by GAO to the pre-solicitation phase.^3,4,5*

SECTION 03 · RECORD

The Field Is a Public Record

Award history, expiring contracts, pre-solicitation notices, forecasts, and protest dockets reconstruct most of a competitive field with no proprietary access.

Everything in the two sections above was established from public documents, and that is the practical point of this brief: the same record is available to any pursuit team willing to read it. Four public layers, combined, reconstruct most of a competitive field. Award history (FPDS, surfaced through USAspending) shows who holds the incumbent contract, at what value, on what vehicle, since when, and when it expires; the expiring-contract calendar is the single highest-value prospecting instrument in the public domain, because every expiry is a future competition with a knowable date.^8 Pre-solicitation activity on SAM.gov, sources-sought notices, RFIs, industry-day announcements, and draft solicitations, shows which requirements are moving and who the buyer is talking to.^9 Agency long-range acquisition forecasts state intended competitions, estimated values, and set-aside intent, imperfectly but publicly. And the GAO protest docket records how a buyer's evaluations have failed before, which is a direct read on how that buyer actually scores.^1

The record also bounds the incumbent question. Industry analyses of federal award data consistently put incumbent retention on recompetes in the 70 to 80 percent range, with retention falling sharply where performance problems are documented and where the incumbent ran no visible capture effort of its own.^12 No official statistic exists, so the figure carries vendor attribution and moderate weight, but its two implications survive any reasonable error bar. For a challenger, most recompetes are not worth full pursuit spend without a documented incumbent weakness or a structural change in the requirement. For an incumbent, retention is earned in the same pre-RFP window, and the loss base is heavily populated by incumbents who treated renewal as automatic. Where fields are structurally new, the record shows entry is real: the counter-UAS market AEIG mapped in June formed around new statutory authority, and its early award ceilings went disproportionately to non-traditional entrants who were positioned before the requirements published.^14

ASSESSMENT · HIGH CONFIDENCE

A working field read, buyer, incumbent, expiry, vehicle, prior protest behavior, and probable competitor set, is assemblable from public instruments alone for essentially any federal pursuit, at a cost that is a rounding error against bid-and-proposal spend.

Rationale: *Each layer is a public system of record, the layers cross-validate, and the incumbent-retention literature, though vendor-published, is directionally consistent across independent analyses.^1,8,9,12*

SECTION 04 · FAILURE

The Protest Is the Receipt

FY2025: 1,688 protests, 53 sustains, 52 percent effectiveness. The sustain grounds describe evaluation behavior that was readable before the RFP.

When the field read never happens, the pursuit system produces its most expensive substitute: the bid protest. The FY2025 GAO numbers describe the instrument precisely. 1,688 protests were filed, down 6 percent from FY2024 and continuing a multi-year decline; 53 were sustained, the lowest count in over two decades, for a 14 percent sustain rate; and the effectiveness rate, protests that produced relief through sustain or voluntary agency corrective action, held at 52 percent.^1,2 Two readings coexist. Agencies' evaluation records are defective often enough that half of protesters obtain some relief. And yet outright sustains are rare, relief usually means re-evaluation rather than reversal, and the protester has by then paid for a full proposal, a lost award, and a legal action.

The sustain grounds are the instructive part. GAO sustained FY2025 protests principally for unreasonable technical evaluations, unreasonable cost or price evaluations, and unreasonable rejection of proposals.^2 Each of those is a statement about how a specific buying office evaluates: what it rewards, where its documentation is weak, how it treats price realism. That behavioral profile existed before the RFP, in the buyer's award history and prior protest record, and a capture-phase read would have priced it into the bid decision and the proposal strategy. The protest docket, read after losing, is remediation. Read before bidding, it is intelligence. The declining filing volume suggests the market is already internalizing the math: at a 14 percent sustain rate, litigation is a poor substitute for having read the field.^1

ASSESSMENT · HIGH CONFIDENCE

The protest system should be treated as a published error log on federal evaluation behavior and consulted during capture, not held in reserve as a remedy. A pursuit that expects to need the protest option is signaling that its field read is incomplete.

Rationale: *The FY2025 statistics are official, the sustain grounds are evaluation-behavior findings by nature, and the cost asymmetry between a capture-phase read and a post-award protest is not close.^1,2*

SECTION 05 · DECISION

The Capture Baseline

Five components, one owner, a stated cadence: the instrument that converts bid or no-bid from instinct to evidence.

For an executive who approves pursuit spending, the actionable question this brief raises is the one from AEIG's principal-exposure work, transposed: does anyone currently know what the field looks like on the pursuits this firm intends to win, and is anyone accountable for keeping that picture current. The instrument is a capture-intelligence baseline, held per target market and refreshed on a cadence, with five components. An expiry calendar of the contracts the firm could credibly compete, drawn from award data, twelve to thirty-six months out. An incumbent map for each: tenure, value, vehicle, visible performance signal, and whether the incumbent is running capture. A buyer profile: competition history, one-offer frequency, set-aside behavior, protest record, and evaluation habits. A field structure read: who else is positioned, teaming patterns, and whether the market is consolidated or open. And a shaping monitor: the sources-sought, RFI, and draft-RFP trail on every target, watched from first signal.

The baseline's output is discipline, exercised at two moments. At bid or no-bid, the baseline supplies the evidence: a one-offer buyer with a ten-year incumbent and no shaping signal is a no-bid or a teaming play, however attractive the ceiling; an expiring contract with a wounded incumbent and an active sources-sought trail is where bid-and-proposal money belongs. And in the shaping window itself, the baseline tells the team where engagement can still move the field: which RFIs to answer, which industry days matter, where a draft-RFP comment can contest an evaluation criterion. None of this requires proprietary access or scale; it requires the public record, read early, by an accountable owner. Firms with capture organizations do this as doctrine. The gap this brief addresses is the mid-market pursuit team that funds proposals at publication and calls the result a market.

ASSESSMENT · HIGH CONFIDENCE

Commission the baseline before the next bid decision, not after the next loss. Scope it to the firm's credible market, assign one owner, set a refresh cadence, and require the bid or no-bid memo to cite it. The spend is small against a single proposal, and it addresses the phase where the outcome is actually determined.

Rationale: *The shaping-window evidence, the one-offer signature, the public reconstructability of the field, and the cost asymmetry against protest-phase remediation converge on the same intervention point.^1,4,5,8*

SECTION 06 · OUTLOOK

Three Scenarios, Twelve Months

Construction confidence reflects analytical quality, not probability. Each scenario carries a triggering signal for the question this brief raises: does the pre-RFP field stay readable, and does the shaping window stay decisive.

Baseline · The Window Stays Decisive

CONSTRUCTION CONFIDENCE: HIGH · VELOCITY: GRADUAL

Federal contract volume holds in its recent band around three quarters of a trillion dollars with reporting lag noise.^7 The FAR overhaul proceeds through rulemaking without yet changing day-to-day competition mechanics; consolidation persists; one-offer and incumbent-retention patterns hold. The public data layers stay rich, and the advantage continues to accrue to teams that read them early.

SIGNAL TO WATCH: FY2026 COMPETITION AND ONE-OFFER RATES IN DOD REPORTING; WHETHER GAO PROTEST FILINGS CONTINUE THEIR MULTI-YEAR DECLINE.^1,3

Acceleration · The Rules Move, the Window Shrinks

CONSTRUCTION CONFIDENCE: MODERATE · VELOCITY: RAPID

The Revolutionary FAR Overhaul, which entered its rulemaking phase on June 23, 2026 with comments due July 23, converts to final rules that materially expand contracting-officer discretion, cut prescriptive process, and compress procurement timelines.^15,16 Faster awards and fewer procedural anchors shrink the visible response window further and reduce the protest surface, making pre-RFP position still more decisive while making the paper trail thinner and earlier. Capture intelligence appreciates; publication-phase bidding depreciates.

SIGNAL TO WATCH: FINAL-RULE ISSUANCE AND EFFECTIVE DATES ACROSS THE TWELVE OVERHAUL RULEMAKINGS; ANY MOVEMENT OF PROTEST JURISDICTION OR TIMELINES IN THE PART 33 REWRITE.^15,16

Opening · Competition Policy Bites

CONSTRUCTION CONFIDENCE: LOW-MODERATE · VELOCITY: STRUCTURAL

Competition initiatives, small-business and new-entrant preferences, and post-overhaul plain-language solicitation practice measurably raise offer counts and loosen incumbent retention; agencies publish better forecast data and the one-offer rate falls. Fields become more contestable at publication, and the premium shifts from shaping access toward proposal quality. This is the stated intent of current policy and the least evidenced in current data.

SIGNAL TO WATCH: A SUSTAINED RISE IN AVERAGE OFFERS PER COMPETED SOLICITATION OR A FALLING ONE-OFFER SHARE IN GAO OR DOD REPORTING.^3,4,15

ASSESSMENT · MODERATE CONFIDENCE

The most probable twelve-month path is Baseline shading into Acceleration: the overhaul explicitly targets speed and discretion, and every reform that compresses the visible window raises the value of the field read preceding it. Opening requires behavioral change that policy text alone has not historically produced. Across all three, the Section 05 baseline remains the correct holding.

Rationale: *The rulemaking calendar is public and near, the competition data is official and slow-moving, and the scenarios differ mainly in the speed at which the same asymmetry compounds.^3,15,16*

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