NORTHERN VIRGINIA · B2G INDUSTRY INTELLIGENCE

NOVA B2G Industry Outlook

FEDERAL · STATE · LOCAL GOVERNMENT CONTRACTING · PROFESSIONAL SERVICES · TECHNOLOGY · A/E/C

EDITION	PREPARED FOR	REGION	PREPARED BY	CLASSIFICATION
June 2026	KME.digital Clients	NCR / Northern Virginia	KME.digital	Public

1 MACRO & REGIONAL — Government Contracting Snapshot

FY2026 APPROPRIATIONS

Mostly Enacted

11 of 12 bills signed. ICE and BSO excluded from DHS bill — operating on OBBBA reconciliation funds. Secure America Act (June 2026) enacted: $69.5B for ICE and CBP through FY2029 — closes the ICE/CBP appropriations gap.

CRFB, MAY 2026; FEDERAL NEWS NETWORK, JUN 6 2026

FY2026 DOD TOPLINE

~$962B

$848B regular appropriations + $150B One Big Beautiful Bill Act (signed July 4, 2025). DoD plans to spend full $152B OBBBA share in FY2026.

CRS R48860; FEDERAL NEWS NETWORK, FEB 2026

NFIB OPTIMISM INDEX

95.3

May 2026, released June 9. Below 52-yr avg of 98.0. Uncertainty Index rose 3 pts to 91 (hist. avg 68).

NFIB, JUN 9 2026

VIRGINIA UNEMPLOYMENT

3.8%

April 2026, statewide (BLS). Fairfax County 3.6% (March 2026). Up from ~2.7% a year prior due to documented DOGE-related federal job losses.

BLS/USAFACTS, MAY 2026; NVRC NOVAREGIONDASHBOARD.COM, JUN 23 2026

BUDGETARY & MACRO CONTEXT

WATCH	FY2026 appropriations are not fully resolved. The April 30 DHS bill funds most of DHS but explicitly excludes ICE and Border Security Operations (BSO), which are currently operating on OBBBA reconciliation funds from 2025. The Senate passed a new $70B reconciliation measure on June 6, 2026 to fund ICE and CBP for three years. The House is expected to vote on it within days. For GovCon firms with DHS border-related contracts, this distinction matters: funding continuity is real, but the appropriations vehicle is non-standard and without the usual congressional oversight mechanisms. CRFB, MAY 2026; FEDERAL NEWS NETWORK, JUN 6 2026; CATO INSTITUTE, FEB 2026
CONTEXT	The One Big Beautiful Bill Act (OBBBA), signed July 4, 2025, added $150B to DoD and $190.6B to DHS through FY2029. FY2026 DoD total is ~$962B. DoD plans to spend the full $152B OBBBA share in FY2026 but apportionment has been slow to reach contractors. CRS R48860; FEDERAL NEWS NETWORK, FEB 2026
DOCUMENTED FACT	DOGE ceased active operations November 2025 (ahead of July 2026 sunset). Its documented impact: T4C (termination for convenience) actions have increased 340% since DOGE reviews began. Estimated $85B+ in federal contracts cancelled, reduced, or restructured across all major agencies as of March 2026. Virginia lost a net 23,500 civilian federal jobs in 2025; Weldon Cooper Center forecasts an additional 3,400 government job losses in Virginia in 2026. NOVA professional and business services (GovCon-adjacent) shed ~10,900 jobs between July 2024 and July 2025. FED-SPEND, MAR 2026; VPM, JAN 2026; CARDINAL NEWS, MAR 2026; GOVCONFEED, APR 2026
NEW THIS WEEK	Washington Technology's 2026 Top 100 (published June 11) confirms the market "bent but did not break": aggregate prime contract value fell only 1.2% vs. 2025, but the split is telling — defense contracts rose 1.8% to $91.3B while civilian contracts fell 4.8% to $71.1B. Leidos holds No. 1 for a multi-year run. AWS entered the rankings for the first time as agencies buy cloud directly, bypassing integrators. WASHINGTON TECHNOLOGY TOP 100, JUN 11 2026
WATCH	Weldon Cooper Center projects Virginia unemployment could reach 4.6% by end of 2026, describing 2026 as "the weakest point of the current economic cycle for Virginia." Fairfax County open jobs fell from 48,000 (Feb 2025) to 26,800 (Aug 2025) as contractors pulled back on speculative hiring. CARDINAL NEWS, MAR 2026; WTOP, APR 2026
NFIB	NFIB May 2026 Optimism: 95.3. Below 52-year average of 98.0 for the second consecutive month. Uncertainty Index at 91 — well above historical average of 68. Inflationary pressures and tariff uncertainty are primary cited drivers. NFIB, JUN 9 2026

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: The NOVA B2G market right now rewards firms that show up consistently, not just when a contract is on the table. We're seeing two types of contractors in our community work: those who are pulling back on visibility because budgets are uncertain, and those who are leaning in precisely because their competitors have gone quiet. The second group is winning the relationship capital that will translate to teaming calls and opportunities when OBBBA-funded solicitations start dropping in earnest. But there's a third group we encounter just as often — firms with genuine federal credentials, active contracts, and years of real performance that never built visibility infrastructure because they never had to. A KME customer came to us with decades of combined federal and intelligence-community experience and a proprietary methodology in development — and a BD strategy that amounted to: "we got lucky through our network." DOGE didn't disrupt their approach. They never had one to disrupt. The OBBBA opportunity is real and time-limited for all three groups. If you're not sure which one your firm is in, that's worth a conversation.

NEXT STEP

The Secure America Act (enacted June 2026) closed the ICE/CBP appropriations gap — $69.5B through FY2029, combining with OBBBA to give ICE over 11x its FY2025 annual budget. FY2026 is now fully funded across all major agencies. BD should be in full acceleration mode. Monitor agency procurement portals for OBBBA apportionment activity in your clients domains.

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DEMAND ENGINE

Federal, State & Local Pipeline Conditions

CONTRACT VEHICLE STATUS — VERIFIED JUNE 23, 2026

VEHICLE	VERIFIED STATUS	SOURCE / WHERE TO VERIFY
OASIS+	**Active.** Phase II continuous on-ramp opened Jan 12, 2026 — no submission deadline, rolling awards. 1,300+ small businesses awarded across 13 service domains. No contract ceiling. Tier 3 Best-in-Class. Phase II first rolling apparent awardee announcements posted to SAM.gov on May 12, 2026; formal awards and NTPs issued ~May 22, 2026. No program ceiling; no maximum order limitation. All task orders solicited via GSA eBuy. Contractor list updated weekly at gsa.gov/oasis-plus.	GSA.GOV, MAY 12 2026; GSA EBUY GUIDANCE; GSA.GOV; GOVDASH, FEB 2026
GSA MAS	**Active.** Refresh 31 (April 2026) eliminated Price Reduction Clause, added mandatory TDR requirements for all SINs. "Pricing 2.0" algorithmic pricing update effective June 5, 2026. FAR Revolutionary Overhaul (RFO) changes also being incorporated. Refresh 31 mass mod accepted by contractors; TDR now mandatory for all SINs. MAS Refresh 32 planned for June 2026, incorporating EO 14398 and FAR 52.222-90.	GSA MAS ACTIVITY FEED, APR 2026; WASHINGTON TECHNOLOGY, MAR 2026; SGCR, JUN 2026
SEWP VI	**AWARDED June 22–23, 2026.** NASA issued initial awards to 1,490 vendors across 2,115 category awards: Cat A (364, IT solutions), Cat B (692, enterprise IT services), Cat C (1,059, IT mission-based services). $60B ceiling; 10-year base with $20B per-awardee ceiling. Open for business November 1, 2026. SEWP V extended through January 2027 for orderly transition. One GAO protest remains (decision by July 22, 2026). NOVA awardees include WidePoint (Fairfax, VA) and Four Inc. (Herndon, VA).	FEDERAL NEWS NETWORK, JUN 23 2026; GOVCONWIRE, JUN 23 2026; GLOBENEWSWIRE (WIDEPOINT), JUN 23 2026
CIO-SP4	**CANCELLED.** NITAAC formally cancelled Jan 2026 per EO 14240 (consolidating procurement under GSA). CIO-SP3 extended through April 29, 2027. NITAAC to begin transitioning CIO-SP3 to GSA. Both SEWP VI delay and CIO-SP4 cancellation are results of the same EO.	WASHINGTON TECHNOLOGY, FEB 3 2026; HSTODAY, FEB 2026; FEDERAL NEWS NETWORK, FEB 2026
STARS III	Base period Jul 2, 2021–Jul 1, 2026. GSA intends to exercise 3-year option extending through July 1, 2029. DHS has added STARS III to its Eagle NextGen portfolio. As of June 2026, GSA's official page states GSA "intends to exercise an available option" through July 1, 2029 — formal exercise not yet confirmed in a public notice. Multiple awardees are already marketing using the option period dates (July 2, 2026–July 1, 2029), suggesting exercise is imminent or in process. Ceiling: $50B.	GSA.GOV/STARS3, APR 2026; ALEUT FEDERAL; KNOWESIS; GSA.GOV, APR 2026
VDOT / VA eVA	**Active Virginia state procurement portal.** Virginia eVA is the mandatory state electronic procurement portal for all Commonwealth agencies and many localities. Current solicitations are searchable at eva.virginia.gov. Fairfax County uses both eVA and the Bonfire portal (fairfaxcounty.bonfirehub.com) for active RFPs, with multiple open solicitations as of June 2026.	FAIRFAXCOUNTY.GOV/SOLICITATION; EVA.VIRGINIA.GOV

FEDERAL AGENCY PIPELINE SIGNALS

- **DOD:** FY2026 DoD at ~$962B. OBBBA $150B targeted at shipbuilding, Golden Dome missile defense, AI/ML, and cybersecurity through FY2029. DoD Low-Cost Containerized Missiles program framework agreements executed May 13, 2026. *CRS R48860; MORGAN LEWIS, MAY 2026*

- **DHS:** Most DHS funded as of April 30. OBBBA allocated $190.6B to DHS through FY2029. ICE and CBP have $65B and $75B respectively from OBBBA plus the new $70B reconciliation bill moving through Congress. Largest DHS funding in history. *GOVCONWIRE, JAN 2026; FEDERAL NEWS NETWORK, JUN 6 2026*

- **GSA — MAJOR REORG:** GSA's Federal Acquisition Service (FAS) reorganized into five portfolios on May 1, 2026 — first major reorg in a decade. FAS revenue doubled to $115B in FY2025. New structure: Assist (complex AAS), Centralize (smaller-dollar), Create (GWAC/MAS, including OASIS+, Polaris, Alliant 3, OneGov, EIS), Deliver (shared services), Optimize (AI/automation). A new Office of Centralized Acquisition oversees common goods/services procurement (~$500B annually). This reorg is the structural implementation of EO 14240 — procurement consolidation is now an operating model, not a policy goal. *GSA.GOV, MAY 1 2026; FEDERAL NEWS NETWORK, MAY 2026; FEDCONTRACTPROS, MAY 2026*

- **GSA IT:** GSA Administrator Forst spoke at IBM Think Gov 2026 (June 9, 2026) at Nationals Park. OMB CIO Barbaccia announced Federal IT Dashboard was sunset in April 2026 and replaced with a new OMB-managed IT contract data system. OMB plans to publish IT contract data publicly. *FEDSCOOP, JUN 9 2026; FEDSCOOP, APR/MAY 2026*

- **VA and HHS/NIH pipelines:** DOGE reviews reduced some programmatic IT contracts. VA and HHS procurement activity has been reduced by DOGE contract reviews. DOGE specifically terminated HHS consulting contracts, DEI-related programs, and IT modernization efforts deemed non-essential, while core healthcare delivery contracts were relatively protected. Current open solicitations at sam.gov → Contract Opportunities → filter by agency and NAICS. *FED-SPEND, MAR 2026; GOVDASH INTEL BRIEF, FEB 2026*

STATE & LOCAL PIPELINE SIGNALS

- Virginia economy forecast to grow only 0.3% in 2026 (Weldon Cooper Center, revised down from 1.0%). Virginia employment forecast to shrink 0.2%. State government cautious on new discretionary IT spend. *CARDINAL NEWS, MAR 2026*

- **OPPORTUNITY:** State contracting is actively promoted as a federal offset strategy. Shorter procurement cycles, less large-integrator competition. iQuasar explicitly identified state/local diversification as top NOVA GovCon strategy for 2025–2026. *WASHINGTON TECHNOLOGY TOP 100, JUN 11 2026; FEDCONTRACTPROS, MAY 2026*

- In the first half of FY2026, DoD committed over $32B in contract ceiling to AI, cloud computing, cybersecurity, and data analytics. Pentagon consolidated Microsoft software buys into a $9.7B Dell agreement (Washington Technology, Jun 2 2026). JWCC cloud task orders active across agencies; agencies moving beyond "lift and shift" to full cloud-native modernization and DevSecOps pipelines. FY2026 YTD DHS awards: $68.4B (+5.1% YoY). *FED-SPEND, APR 19 2026; WASHINGTON TECHNOLOGY, JUN 2 2026; G2XCHANGE, JUN 1 2026*

DOGE IMPACT & M&A ACTIVITY (DOCUMENTED, Q1/Q2 2026)

- **DOCUMENTED:** MITRE (442 layoffs, WARN Act filed April 2025 for McLean, VA), Booz Allen,and Leidos all implemented workforce reductions tied to DOGE contract cancellations.T4C terminations increased 340% since DOGE reviews began; $85B+ in contractscancelled, reduced, or restructured as of March 2026. *GOVCONFEED, APR 2026; FED-SPEND, MAR 2026; VIRGINIA BUSINESS, JUN 9 2026*

- **M&A:** Leidos completed $2.4B acquisition of ENTRUST Solutions Group on March 30, 2026,doubling its energy infrastructure market presence and adding 3,100 employees focusedon grid modernization and utilities. Leidos Q1 2026 revenues: $4.4B (+4% YoY) — resiliencedespite sector disruption. *GOVCONWIRE, MAR 2026; LEIDOS 8-K, MAY 5 2026*

- **NEW EO IMPACT:** April 30, 2026 Fixed-Price EO: agencies must review their 10 largest non-fixed-price contracts for potential conversion. Contractors with cost-reimbursementcontracts should expect inquiries from contracting officers. OFPP guidance issued June 15,2026. FAR amendments within 120 days. *MAYER BROWN, MAY 2026; CROWELL & MORING, MAY 2026; WILSON SONSINI, MAY 2026*

- **SET-ASIDES:** 8(a) program reached $26B in FY2025 despite 1,100 firms being suspended —reducing competition for remaining active participants. Sole source contracts representonly 2–3% of federal spending; 96% of sole source dollars go to non-8(a) primes likeBoeing and Lockheed. Pentagon is conducting a line-by-line review of 8(a) pass-througharrangements for potential fraud. *GOVCON GIANTS, FEB 2026; GOVDASH INTEL BRIEF, FEB 2026*

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: The firms we see winning competitive evaluations right now share one trait: their capabilities narrative is specific. Not "we support thewarfighter" — but a named program, a documented outcome, measurable mission value and cost-effectiveness, a verifiable past performance reference. In amarket where every dollar is more scrutinized and every claim more contested, vague positioning is actively harmful. What we've also learned from workingdirectly with B2G firms: in this market, discovery doesn't happen the way it does in most B2B categories. A KME customer building a federal IT practice told usevery contract in her portfolio came through a professional network referral or a teaming introduction — never through a web search or an inbound lead.Specificity matters, but it has to be deployed in the channels that actually drive B2G discovery: NAICS-based searches, capabilities statements that circulatethrough prime networks, and relationships built before the solicitation posts. The question we ask every B2G client: if a contracting officer or teaming partnersearched for exactly what you do for the agencies you serve, would they find you — and would what they find be specific enough to make a call? Most can'tanswer yes to both. That gap is where we work.

NEXT STEP

Effective June 30, 2026: TINA threshold rises from $2M to $10M; CAS per-contract trigger rises from $2.5M to $35M; CAS full-coverage from $50M to $100M — thelargest reduction in cost accounting compliance burden for small/mid-tier NOVA firms in decades. Brief clients on proposal pricing impacts immediately. TheFixed-Price EO (April 30, 2026) is the single most underreported market development for NOVA professional services firms. Firms that primarily win cost-reimbursement and T&M contracts need to assess their exposure now. FAR 52.222-90 is already appearing in live solicitations. GSA FAS reorganized (May 1) —all MAS now under a single management chain (Create portfolio); understand where your vehicle fits in the new structure. SEWP VI not awarded; CIO-SP4cancelled; STARS III option exercise expected imminently.

COMPETITIVE INTELLIGENCE

3 NOVA B2G Competitive & Capability Landscape

CAPABILITY DEMAND SIGNALS — JUNE 23, 2026

CAPABILITY AREA	SIGNAL	BASIS & SOURCE
AI / ML & Data Analytics	STRONG & GROWING	DoD FY2026 AI/autonomy budget: $13.4B. NSPM-11 (June 5, 2026) directs national security AI acceleration across four pillars: Adoption, Adaptation, Assurance, Accountability — with mandatory agency policy updates. NDAA Sec. 1513 requires DoD to submit AI/ML security framework plan to Congress by June 16, 2026 — a CMMC-for-AI framework in development. Oracle won $396M OPM contract to consolidate 100+ HR systems for 2M federal employees. Empower AI won DISA J6 Service Delivery recompete ($255M, Jun 17 2026). *PILIEROMAZZA WEEKLY UPDATE, JUN 18 2026; CROWELL & MORING, JAN 2026; GOVCONWIRE, JUN 17 2026; WASHINGTON EXEC, JUN 17 2026*
Cybersecurity & Zero Trust	STRONG & MANDATE-DRIVEN	DoD FY2026 cyber budget: $14.3B. CMMC has moved from planning to real-time enforcement — Federal News Network (Jun 18 2026): "gaps between what companies thought was necessary and what actually meets the standard" are being exposed in live assessments. Only 1% of DIB contractors are fully prepared for CMMC audits (Integris 2026 survey, down from 8% in 2023). CISA close to issuing new Cyber AI Directive per NSPM-11 (Jun 5 2026). Right to Repair amendment passed HASC June 2026 — could affect technical data rights for DoD contractors. *PILIEROMAZZA WEEKLY UPDATE, JUN 18 2026; FEDERAL NEWS NETWORK, JUN 18 2026; INTEGRIS 2026; PILIEROMAZZA JUN 11 2026*
Border / DHS Technology	SURGE — MULTI-YEAR	OBBBA: $75B ICE + $70B CBP through FY2029. Secure America Act (June 2026) added $69.5B more for ICE and CBP through 2029 — largest immigration enforcement investment in U.S. history. Leidos landed a potential $270M CBP contract for medium energy mobile systems (June 2026). DHS preparing BPA for enterprise data lakehouse continuity (cloud/analytics opportunity). *AMERICAN IMMIGRATION COUNCIL, JUN 2026; GOVCONWIRE, JUN 19 2026; PURSUIT.US, MAR 2026*
Defense Modernization	GROWING	OBBBA $150B DoD: shipbuilding, Golden Dome missile defense, space through FY2029. Golden Dome advancing with new FY2027 funding and commercial tech outreach. Air Force awarded CCA production contracts to General Atomics and Anduril. Boeing: $880M Navy IDIQ (P-8A training systems, Jun 2026). Northrop Grumman: $697M Navy BOA (May 2026). *GOVCONWIRE, JUN 19 2026; GOVCONWIRE, JUN 17 2026*
Fixed-Price Contracts	HIGH IMPACT	EO April 30, 2026 makes firm-fixed-price default for all federal procurement. Only 32% of GovCon services contractor dollars were fixed-price. FAR 52.222-90 now being inserted into new solicitations. OFPP guidance issued June 15, 2026; FAR amendments expected by late August 2026. For smaller/new firms: fixed-price shifts all financial risk to the contractor — cost overruns, clearance delays, and wage escalation are no longer recoverable. Smaller firms without reserves must price in contingency or risk performing at a loss. *BLACKFLAG ADVISORS, MAY 2026; PURSUIT.US GOVCON NEWS, MAY 2026; MAYER BROWN, MAY 2026*
Cloud & DevSecOps	ACTIVE	DoD FY2026 cloud migration budget: $3B. Air Force awarded Dell Federal Systems $1.4B to renew Microsoft product licenses. JWCC task orders active. DHS data lakehouse BPA signals sustained cloud demand at civilian agencies. *GOVCONWIRE, JUN 2026; PURSUIT.US, MAR 2026*
A/E/C & Facilities	ACTIVE	FY2026 DoD MILCON: $19.737B enacted (P.L. 119-37). Navy awarded two NAVFAC Washington A-E support contracts worth $249M each. Applied Atomics emerged from stealth, announcing plans for a Fairfax County presence (June 11, 2026) — new NOVA defense tech footprint. *CRS IN12622, DEC 2025; GOVCONWIRE, JUN 2026; VIRGINIA BUSINESS, JUN 11 2026*

DOGE IMPACT — DOCUMENTED, CURRENT AS OF JUNE 23, 2026

DOCUMENTED

DOGE ceased active operations in November 2025 (ahead of its July 2026 statutory sunset). Total documented impact: 10,000+ federal contracts terminated or restructured; independent trackers (HigherGov, GovSpend, Fed-Spend, G2Xchange) report ~$71B in terminations, with some estimates reaching $85B. T4C terminations increased 340% since DOGE reviews began. 61% of terminated contracts were awarded to small businesses. *GOVCONFEED, APR 2026; FED-SPEND, MAR 2026; FUNDING LANDSCAPE, JUN 2026*

CURRENT NOVA

GDIT filed WARN Act notices for 236 potential layoffs across two NOVA locations (Falls Church and Arlington) as of June 9, 2026 — contingent on a recompete award and F-35 Joint Program Office contract extension (current contract ends July 31). CACI President of U.S. Operations DeEtte Gray retiring June 30, 2026. *VIRGINIA BUSINESS, JUN 9 2026; GOVCONWIRE, JUN 9 2026*

EO IMPACT	Fixed-Price EO (April 30, 2026): FAR 52.222-90 now being inserted by contracting officers into new solicitations and negotiated into existing contracts via bilateral modification. Coalition of universities filed Maryland federal lawsuit (April 20) challenging EO 14398 on First Amendment grounds — litigation ongoing; legal experts advise contractors not to wait. *PURSUIT.US GOVCON NEWS, MAY 2026*
M&A — THIS WEEK	MDA Space to acquire Raytheon's Blue Canyon Technologies for $620M (announced June 22, 2026) — spacecraft manufacturing and satellite component production. Accenture agreed to acquire majority stake in Dragos + 100% of runZero and NetRise for $4.2B — a landmark OT cyber and network visibility consolidation play. IonQ merged with SkyWater Technology (semiconductor foundry). 8(a) program: SBA recently moved to terminate 620+ firms from 8(a) for not providing financial data. *GOVCONWIRE, JUN 17 2026; GOVCONWIRE MAY 2026*

KME.DIGITAL AGENCY PERSPECTIVE

KME.digital Perspective: The firms we see winning competitive evaluations right now share one trait: their capabilities narrative is specific — not a capabilitylaundry list, but a named program, a documented outcome, a verifiable past performance reference. And the differentiation gap is widening: as OBBBA demandsignals sharpen around AI/ML, zero trust, and border technology, general-purpose positioning isn't just weak — it's being evaluated out. A KME client developing aproprietary framework for government AI adoption — directly aligned to NSPM-11's mandate that every national security agency update its AI governance policies— has a genuine competitive asset. The challenge isn't the methodology. It's ensuring that methodology is visible and specific enough to show up when theprimes building OBBBA-funded teams go looking. The question we ask every B2G client: if a contracting officer or teaming partner searched for exactly what youdo for the agencies you serve, would they find you — and would what they find be specific enough to make a call? Most can't answer yes to both. That gap iswhere we work

NEXT STEP

The Secure America Act ($69.5B ICE/CBP, June 2026) has now closed the appropriations gap for DHS border agencies — this is the largest single enforcementfunding event in U.S. history and will generate procurement activity through 2029. Firms with border tech, surveillance, detention facilities, or deportationlogistics capabilities should be building agency relationships now. Separately, the Fixed-Price EO's FAR 52.222-90 clause is already appearing in newsolicitations — any firm that hasn't assessed its cost-reimbursement and T&M contract exposure is behind.

4 WORKFORCE & COST
Labor Market & Cost Environment

VIRGINIA UNEMPLOYMENT

3.8%

April 2026, statewide seasonally adjusted (BLS). Fairfax County 3.6% (March 2026). Up from ~2.7% a year prior due to DOGE-related federal job losses.

BLS/USAFACTS, MAY 2026; NVRC NOVAREGIONDASHBOARD.COM, JUN 23 2026

CYBER ANALYST MEDIAN (DC METRO)

~$138K

Glassdoor avg $137,666 (Apr 2026, 919 salaries). Govt cyber security national avg $132,962 (ZipRecruiter, Jun 3 2026).

GLASSDOOR APR 2026; ZIPRECRUITER JUN 2026

TS/SCI PROCESSING TIME

6–18 mo

T5 (Top Secret) processing: 227 days avg in Q1 FY2026 (ClearanceJobs, Mar 2026). Polygraph waitlist remains main bottleneck for IC roles. TS/SCI with full-scope poly: 6–18 months.

CLEAREDJOBS.NET 2026; CLEARANCEJOBS Q1 2026 UPDATE, MAR 2026

FED FUNDS RATE

3.5–3.75%

Held unchanged at April 29, 2026 FOMC. Effective rate 3.62% June 5. No cuts expected in 2026 per dot plot majority.

FEDERAL RESERVE, APR 29 2026

CLEARED PERSONNEL & NOVA WORKFORCE CONTEXT

- Documented: NOVA unemployment rising to 3.8% statewide (3.6% Fairfax County) as a direct result of federal job cuts. Weldon Cooper Center: Virginia to lose an additional 3,400 government jobs in 2026. Virginia needs to add 2,000 new jobs per month just to catch up. A congressional shadow field hearing on DOGE was held in Northern Virginia (Feb 12, 2026). *WTOP, APR 2026; CARDINAL NEWS, MAR 2026; NVRC NOVAREGIONDASHBOARD.COM, JUN 23 2026 (MAY EMPLOYMENT BY INDUSTRY DATA)*
- TS/SCI with polygraph: 180–365 days; polygraph waitlist is the main bottleneck. T5 (Top Secret) end-to-end average: 243 days (DCSA FY2025 Q3). Crossover reciprocity theoretically 30–75 days but practical delays of 90–150 days are common. *CLEARANCEJOBS Q1 2026 UPDATE, MAR 2026; IQUASAR JAN 2026; CLEAREDJOBS.NET 2026*
- TS/SCI polygraph-eligible candidates command 25–35% wage premiums above non-poly cleared counterparts. *TS/SCI premium: $30,000–$45,000 over commercial baseline for the same role at mid-career (ClearanceJobs 2024 Compensation Report, confirmed by 2026 postings). Full-scope polygraph adds $10,000–$25,000 on top. IC agency roles (CIA, NSA, FBI) averaged $165,063 in the most recent ClearanceJobs compensation report. DC metro cleared cybersecurity: $149,398 average for TS/SCI holders. CLEAREDJOBS.NET 2026; CLEARANCEJOBS, MAY 2026; CYBERSECJOBS, MAR 2026*

OCCUPATIONAL WAGE DATA (DC/NOVA METRO, 2026)

ROLE	INDICATIVE RANGE	SOURCE & DATE
Cyber Security Analyst	**$110K–$175K** (25th–75th pctile)	GLASSDOOR AVG $137,666; ZIPRECRUITER AVG $105,925. APRIL 2026, DC METRO. *GLASSDOOR; ZIPRECRUITER, APR/JUN 2026*
Govt Cyber Security (all levels)	**$111K–$150K** (25th–75th pctile)	ZIPRECRUITER NATIONAL AVG $132,962. JUNE 3, 2026. *ZIPRECRUITER, JUN 3 2026*
PM, Engineer, Data Scientist	**$98K–$175K**	PROJECT MANAGER (DC METRO): $116,000 MEDIAN; $89K–25TH, $133K 75TH PCTILE (PAYSCALE 2026). DATA SCIENTIST: $126,800 NATIONAL MEDIAN (BLS OEWS MAY 2025); DC METRO ~15–20% ABOVE NATIONAL. SYSTEMS/IT ENGINEER (DC METRO): ~$124,000 MEAN. MANAGEMENT OCCUPATIONS MEAN (DC METRO): ~$169,500/YR ($81.49/HR, BLS OEWS MAY 2024). *BLS OEWS MAY 2024/MAY 2025; PAYSCALE 2026*

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: Employer brand is a BD asset that most NOVA GovCon firms have never deliberately built — and right now it's also a talent acquisitionasset. The DOGE-displaced workforce includes senior cleared professionals who are evaluating their next move based on stability, mission alignment, and how afirm presents itself publicly. A firm with a compelling, consistently visible digital presence attracts a different caliber of candidate than one with a boilerplatecareers page and a quiet LinkedIn. We hear the consequence of this gap directly. A KME customer with 50+ years of combined federal and intelligence-community experience on its founding team — no LinkedIn presence, no visible employer identity — told us plainly: "We are not able to find people. We are reallystruggling with that." They are competing for cleared technical talent against firms those candidates can actually find and vet. The firms that invested in theirbrand before the disruption are seeing it pay off in ways they didn't anticipate. For firms still on the sideline, this isn't just about attracting DOGE-displaced talent— it's about whether cleared candidates will consider you at all. That window is still open — but it is narrowing as more firms wake up to it.

NEXT STEP

The NOVA labor market is rising in unemployment but still tight for cleared technical talent. Firms pricing proposals should model TS/SCI timelines at 6–18months for new personnel. The fixed-price EO adds a new dimension to labor cost management — under fixed-price, wage escalation risk shifts entirely to thecontractor. Model this explicitly in all FY2027 proposals.

5 CAPITAL MARKETS

Credit, Financing & M&A Conditions

FED FUNDS RATE

3.5–3.75%

Held April 29, 2026. No cuts expected in 2026 per dot plot majority view. Effective rate 3.62% as of June 5.

FEDERAL RESERVE, APR 29 2026

RECENT NAMED DEALS (Q1–Q2 2026)

Leidos / ENTRUST • Accenture / Dragos

Leidos/ENTRUST: $2.4B closed Mar 30, 2026 — doubles Leidos energy infrastructure. Accenture/Dragos + runZero + NetRise: $4.2B OT cyber consolidation, Jun 2026. MDA Space/Blue Canyon Technologies (Raytheon): $620M spacecraft manufacturing, Jun 22, 2026. IonQ/SkyWater Technology: semiconductor foundry merger, 2026.

GOVCONWIRE, MAR & JUN 2026; LEIDOS 8-K, MAY 2026

GOVCON M&A CLIMATE

Active & Selective

Q1 2026: 137 LTM transactions; 18.87× EBITDA / 3.74× Revenue — highest revenue multiple in 4-yr lookback. Buyers scrutinizing DOGE-exposed backlog. OBBBA-aligned programs (DHS border tech, DoD AI/cyber) commanding premiums. CMMC posture now underwritten in diligence. Capstone: 2026 expected to be a banner year for A&D/GovCon M&A.

PCE INVESTMENT BANKERS, APR 15 2026; CAPSTONE PARTNERS, APR 2026

RATE OUTLOOK (2026)

Hold

Market-implied pricing: zero rate changes expected in 2026. Dot plot majority: 3.25–3.75% through year-end.

ADVISOR PERSPECTIVES, APR 29 2026

MARKET CONTEXT

RISK	Fed Funds at 3.5–3.75% through at least end of 2026. Elevated cost of capital constrains deal financing and working-capital borrowing. *FOMC MINUTES, APR 28–29, 2026; CNBC, APR 29 2026*
WATCH	DOGE contract terminations (340% increase in T4C actions; $85B+ affected) have introduced significant uncertainty into GovCon valuations. PSC Annual Conference M&A session (May 2026) confirmed: buyers are doing deeper diligence on contract backlog sustainability; OBBBA-aligned programs are the most attractive revenue basis for valuation. *FED-SPEND, MAR 2026; PSC ANNUAL CONFERENCE, MAY 2026*
OPPORTUNITY	OBBBA DHS and DoD supplemental funds create a multi-year demand runway through FY2029 supporting valuations for firms positioned in border tech, missile defense, AI/ML, and zero-trust cyber. Leidos' ENTRUST acquisition is a model: strategically acquiring into OBBBA-adjacent energy infrastructure. *GOVCONWIRE, JAN 2026; CRS R48860; LEIDOS 8-K, MAY 2026*

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: Firms that are exploring a transaction — or want to be positioned for one — often underestimate how much their digital presence influencesbuyer perception during diligence. A thin LinkedIn footprint, an outdated website, and no visible thought leadership aren't just BD problems. They signal capability andmarket relevance to acquirers — and more specifically, they signal concentrated relationship risk. A KME client holds active prime contracts with multiple intelligenceagencies and is currently subcontracting its own paid digital advertising through one of those prime contract vehicles. Real federal capability, no independentmarket identity. A sophisticated acquirer reads that immediately: what happens to this revenue when those relationships change? The firms commanding premiumvaluations in this environment have built a recognizable market identity alongside their contract backlog — one that demonstrates the ability to generate newrelationships, not just sustain existing ones. We know what that looks like and how to build it at the pace the market requires.

NEXT STEP

Firms considering a transaction should stress-test contract backlog for DOGE exposure before engaging buyers. The fixed-price EO adds another dimension: buyersare also assessing whether a target's contracts are exposed to conversion risk. Firms with revenue in OBBBA-funded programs (DHS border tech, DoDmodernization, cyber) and a largely fixed-price contract structure carry the most compelling narrative in the current M&A market.

6 REGULATORY ENVIRONMENT

Policy, Regulatory & Compliance Environment

ACTIVE POLICY & REGULATORY ITEMS — VERIFIED AS OF JUNE 23, 2026

ACTIVE NOW	**CMMC 2.0** — Phase 1 in effect since November 10, 2025. Level 1 and Level 2 self-assessments now required at CO discretion. Phase 2 begins November 10, 2026 (5 months away): mandatory C3PAO Level 2 certification for all applicable CUI contracts. Critical stat: as of February 2026, only ~1,042 of 76,598 firms needing Level 2 C3PAO certification have completed it — 99% of the defense industrial base is still uncertified. C3PAO wait times are already stretching 6+ months. *RIDGE IT CYBER, MAR 2026; TEAL CMMC, JUN 2026; DFARS FINAL RULE SEP 9 2025*
ACTIVE	**Zero Trust Architecture.** CISA Zero Trust Maturity Model v2.0 operative. NSM-8 implementation deadlines ongoing. GSA released its own CUI requirements in 2026 that raise the bar further for schedule holders. *CISA.GOV/ZERO-TRUST-MATURITY-MODEL; RIDGE IT CYBER, MAR 2026*
NEW — HIGH IMPACT	EO "Promoting Efficiency, Accountability, and Performance in Federal Contracting" (April 30, 2026). Makes firm-fixed-price contracts the default for all federal procurement. Only 32% of GovCon services contractor dollars are currently fixed-price. Agencies must justify other contract types in writing and get senior approval. Agencies review their 10 largest non-fixed-price contracts. OMB guidance due June 15, 2026; FAR amendments within 120 days. This will significantly reshape how NOVA professional services firms price and structure future bids. *FEDSCOOP, APR 30 2026; MAYER BROWN, MAY 2026; BLACKFLAG ADVISORS, MAY 2026; WILSON SONSINI, MAY 2026*
UPDATED	**OMB AI Governance** — M-25-21 and M-25-22 (NOT M-24-10). Biden-era M-24-10 was replaced by OMB M-25-21 ("Accelerating Federal Use of AI") and M-25-22 ("Driving Efficient Acquisition of AI"), both April 3, 2025 under EO 14179. Agencies must designate Chief AI Officers. M-26-04 (Dec 2025) adds "Unbiased AI Principles" disclosure requirements for contractors. *HUNTON, APR 2025; OMB M-25-21, APR 3 2025; M-26-04, DEC 2025*
WATCH	**EO 14240** — Consolidating Procurement under GSA. Basis for both SEWP VI delays and CIO-SP4 cancellation. Actively reshaping the federal IT vehicle ecosystem. Expect further consolidation under GSA vehicles. *CENTRE LAW GROUP, FEB 2026; ITPFED, MAR 2026*
WATCH	**Protecting Small Business Competitions Act (H.R. 2804).** House Small Business Committee considering legislation to codify the "Rule of Two" in statute, protecting small business set-asides from procurement reform changes. Signals concern that procurement reform EOs could undermine set-aside requirements. *MORGAN LEWIS GOVCON UPDATE, MAY 20 2026*

EFFECTIVE JUNE 30, 2026

TINA threshold rises to $10M; CAS full-coverage threshold to $100M; CAS per-contract trigger to $35M. Contracts awarded after June 30, 2026 are subject to new thresholds. This eliminates a major compliance burden for small and mid-tier contractors and changes proposal requirements for hundreds of NOVA firms immediately. *PILIEROMAZZA, JUN 18 2026; VENABLE, JAN 2026; INSIDE GOVERNMENT CONTRACTS, DEC 2025*

THIS WEEK — JUNE 22, 2026

Two Quantum Executive Orders signed. EO 1 ("Ushering in the Next Frontier of Quantum Innovation"): establishes QC-ADDS program to deliver a fault-tolerant quantum computer to a DoE facility by 2028; directs national quantum strategy update within 90 days. EO 2 ("Securing the Nation Against Advanced Cryptographic Attacks"): mandates federal migration to post-quantum cryptography (PQC) by Dec 31, 2030 (key establishment) and Dec 31, 2031 (digital signatures). Contractor impact: FAR Council directed to publish a rule requiring contractors to comply with NIST FIPS PQC standards by Dec 31, 2030. Commerce must pilot-test PQC algorithms on NIST systems by end of 2027. Any contractor handling sensitive federal data needs a cryptographic inventory and migration plan now. *WHITE HOUSE, JUN 22 2026; NEXTGOV/FCW, JUN 22 2026; CYBERSECURITY DIVE, JUN 22 2026; REUTERS, JUN 22 2026*

NEW JUNE 5, 2026

NSPM-11: National Security Presidential Memorandum on AI directs all national security agencies to accelerate AI adoption across Adoption, Adaptation, Assurance, and Accountability pillars. Establishes mandatory policy update timelines. DoD must submit AI/ML security framework plan to Congress by June 16, 2026. *PILIEROMAZZA WEEKLY UPDATE, JUN 18 2026*

GSA MAS

GSA MAS Refresh 31 (April 2026): eliminated Price Reduction Clause, added mandatory TDR for all SINs. MAS "Pricing 2.0" effective June 5, 2026. FAR Revolutionary Overhaul (RFO) changes also being incorporated. FAS reorganization (May 1, 2026) consolidates all MAS under a single management chain (Create portfolio). *WASHINGTON TECHNOLOGY, MAR 2026; GSA.GOV, MAY 1 2026*

CMMC PHASE 1 ACTIVE · CMMC PHASE 2: NOV 10 2026 · FIXED-PRICE EO (APR 30 2026) · ZERO TRUST (V2.0) · OMB M-25-21 / M-25-22 · EO 14240 PROCUREMENT CONSOLIDATION · SBOM / SCRM · GSA MAS REFRESH 31 · H.R. 2804 RULE OF TWO

VIRGINIA STATE POLICY — WHAT GOVCON FIRMS NEED TO KNOW IN 2026

NEW GOVERNOR

Governor Abigail Spanberger (D), inaugurated January 2026. Day One Executive Order No. 2 directed all executive branch agencies to review technology systems to avoid duplication in platforms, licensing, and procurement — a Virginia-level echo of the federal EO 14240. The order established the Chief Transformation Office to oversee implementation. *GOVERNOR SPANBERGER, EO NO. 2, JAN 17 2026; GOVERNOR.VIRGINIA.GOV*

OPPORTUNITY

HB 61 (Del. Jeion Ward) — SWaM Procurement Enhancement Program. Passed both chambers and awaiting Governor's signature as of April 2026. Codifies statewide goals for small SWaM (Small, Women-owned, and Minority-owned) business utilization in discretionary spending, prime contracts, and subcontracts. Directly expands set-aside opportunity for qualifying NOVA firms at the state level. *WILLIAMS MULLEN 2026 VIRGINIA LEGISLATIVE SESSION SUMMARY, APR 2026*

WATCH

Virginia VITA FY2026 Budget: $494M. Virginia Information Technologies Agency — the Commonwealth's centralized IT services provider — has a $494M operating budget for FY2026 (96% from agency fees). VITA manages IT infrastructure for all executive branch agencies under the Virginia Public Procurement Act. VITA is the primary entry point for state IT contracts; all major IT procurement must be VITA-approved or go through eVA. *VIRGINIA HOUSE APPROPRIATIONS COMMITTEE, FY2026 TECHNOLOGY BUDGET; HAC.VIRGINIA.GOV*

WATCH

JCOTS (Joint Commission on Technology and Science) 2026 Work Plan includes four focus areas: Quantum computing policy, AI Chatbots, Digital inclusion, and AI in medicine. Governor Spanberger's EO also establishes AI use and procurement requirements for Commonwealth agencies and suppliers — including generative AI. Vendors selling AI-embedded solutions to Virginia must comply with VITA's ITRM standard (based on NIST SP 800-53). *VIRGINIA HOUSE APPROPRIATIONS TECHNOLOGY PAGE; VITA ITRM STANDARD; JCOTS 2026*

WATCH

Virginia Data Center Legislation (2026 Session). Virginia General Assembly debated a slate of data center bills in its 2026 60-day session (1,530 House bills / 836 Senate bills). HB 155 (Del. Josh Thomas) would require SCC review of high-load users over 25MW. Data center permitting, energy consumption, and utility cost-shifting remain live issues — Prince William County (highest data center concentration in world) is the epicenter. Relevant for A/E/C and facilities firms working in NOVA. *VIRGINIA MERCURY, JAN 2026; WILLIAMS MULLEN 2026 SESSION SUMMARY, APR 2026*

ECONOMIC RESILIENCY

Governor Spanberger's Economic Resiliency Task Force was established by EO to coordinate Virginia's response to federal workforce reductions, DOGE contract cancellations, tariffs, and immigration enforcement impacts. Directed to assess federal funding losses and recommend mitigation strategies. Key signal: state government is actively treating federal disruption as an economic policy issue — not just a workforce issue. *GOVERNOR SPANBERGER, EO NO. 2, JAN 17 2026*

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: Every major policy shift in this report — CMMC Phase 2, the Fixed-Price EO, the Quantum EOs, the OMB AI governance update — issimultaneously a compliance event and a marketing event. The firms that turn compliance milestones into visible proof of capability (“we are C3PAO-certified”;“our pricing model is built for fixed-price performance”) are converting regulatory burden into competitive differentiation. A KME customer developing a proprietarygovernment AI adoption framework — directly responsive to NSPM-11’s mandate for agency AI governance — said it clearly: “We would have to market thatconcept.” That’s exactly right, and the window to do it is now, not after the solicitations post. For CMMC specifically: with 99% of the defense industrial base stilluncertified and Phase 2 five months away, achieving certification is not just a compliance milestone — it is a competitive advantage on every applicablesolicitation your uncertified competitors cannot bid. The firms that treat compliance as a back-office matter are missing the BD opportunity entirely. There is anarrow window before these topics become table stakes and the differentiation value disappears. That window is open now.

NEXT STEP

Two 5-month countdown items: (1) CMMC Phase 2 on November 10, 2026 — 99% of the DIB is still uncertified. Any DoD contractor client handling CUI should beengaged on C3PAO assessment now; wait times are already 6+ months. (2) Fixed-Price EO OMB guidance due June 15, 2026 — within days. Advise allprofessional services clients to read the guidance immediately and assess which of their current/pipeline contracts are affected.

7 QUALITATIVE INTELLIGENCE
Podcasts & Community Intelligence

GOVCON GIANTS (MOST RECENT EPISODES, MAY 2026)

MAY 12, 2026

Eric Coffie on Market Intelligence Platform: GovCon Giants launched a new unified federal market intelligence platform built specifically for small business government contractors. Coffie: "understanding how federal agencies and primes actually buy is the competitive edge most small business owners never develop." *GOVCON GIANTS, MAY 12 2026 — GOVCONGIANTS.LIBSYN.COM*

MAY 11, 2026

David Hernandez on Why Certification Alone Won't Get You In: Seasoned contractor breaks down why 8(a) and other set-aside certifications are table stakes, not differentiators — firms that don't understand agency buying patterns are invisible regardless of certification status. *GOVCON GIANTS, MAY 11 2026*

FEB 2026 DATA

8(a) Program at $26B in 2025 despite 1,100 firms being suspended — reducing competition for active participants. Sole source contracts are only 2–3% of federal spending; 96% of sole source awards go to non-8(a) giants like Boeing and Lockheed. Biggest advantage now: firms that stay compliant, resilient, and relationship-driven before opportunities hit bid platforms. *GOVCON GIANTS, FEB 2026 (VIA LIBSYN)*

PSC (PROFESSIONAL SERVICES COUNCIL)

PSC ANNUAL CONFERENCE 2026	New PSC President Jim Carroll told Federal News Network: "The fallout from DOGE and the impact that has had — those two things stand out as the biggest opportunities and challenges to overcome. The shutdown's duration was a surprise. The wonderful surprise really has been the dedication of member companies to fulfill the mission." PSC conference featured dedicated sessions on: CMMC implementation lessons learned (primes, small businesses, and C3PAO assessors), M&A landscape under procurement reform, and GovCon strategies for 2026. *FEDERAL NEWS NETWORK, JAN 2026; PSC ANNUAL CONFERENCE AGENDA, MAY 2026*
PSC VISION CONFERENCE	Dec 8–9, 2026 will feature 20+ agency-specific reports from 400+ non-attribution discussions with government leaders, congressional staff, and analysts. This is a key qualitative intelligence event for Q4. *PSC VISION CONFERENCE, PSCOUNCIL.ORG*

FEDSCOOP / FEDERAL NEWS NETWORK (JUNE 2026)

JUNE 9, 2026	GSA ADMINISTRATOR EDWARD FORST SPOKE AT IBM THINK GOV 2026 AT NATIONALS PARK, WASHINGTON D.C. SIGNAL: ACTIVE GSA LEADERSHIP ENGAGEMENT ON IT CONSOLIDATION AND AI ACQUISITION REFORM AT INDUSTRY EVENt
MAY 2026	Federal News Network op-ed (CEO of Leadership Connect): "Federal contracting in 2026 is not defined by new rules, but by new pressures. Agencies are moving faster with less capacity, higher scrutiny and lower tolerance for risk. Contractors must lead with clarity, proof and measurable value earlier than ever before. The fundamentals have not changed, but the order of operations has." Contracting officer retirements and COR shortages are limiting oversight bandwidth. *FEDERAL NEWS NETWORK, MAY 2026*

PROJECT 38 / OTHER SOURCES

NVTC	Hosted "Navigating DOGE: Next Steps for Government Contractors" (April 2025, McLean VA) and "Decode the New GovCon Procurement Playbook" (January 2026) — focused on competing and winning federal contracts under the new administration's priorities. NVTC Impact AI Summit (May 14, 2026, McLean) recognized NOVA AI leaders including Deltek. NVTC Technology CFO Awards: June 2026. *NVTC.ORG; DELTEK PRESS RELEASE, APR 29 2026*
PROJECT 38	Washington Technology WT 360 — Most recent episode (June 22, 2026): "Our breakdown of the 2026 Top 100 and everything it illustrates" — key finding: market "bent but did not break", civilian contracts down 4.8%, defense up 1.8%. Prior episodes: "Pulse check on GovCon capital markets" (May 2026, J.P. Morgan); "Government-wide contracts landscape 2026" (Feb 9, Baker Tilly). Published biweekly. *WASHINGTON TECHNOLOGY WT 360, JUN 22 2026; MAY 2026; FEB 9 2026*
NOVA CHAMBER / LOCAL EDAS	NVRC (Northern Virginia Regional Commission) publishes monthly economic dashboard data at novaregiondashboard.com — April employment-by-industry data released May 22, 2026; April unemployment/labor force data released June 3, 2026. Fairfax County EDA, Arlington EDA, and Loudoun Economic Development all publish economic intelligence reports and program updates. Fairfax County EDA, Arlington Economic Development, and Loudoun Economic Development all publish quarterly economic dashboards and host GovCon-adjacent programming. NVTC Impact AI Summit (May 14, 2026) featured NOVA tech ecosystem leaders including Deltek, confirming NOVA's position as the nation's leading GovCon technology hub. *NVRC NOVAREGIONDASHBOARD.COM, JUN 3 2026; DELTEK/NVTC, APR 29 2026; FAIRFAXCOUNTYEDA.ORG*

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: The consistent thread across every community conversation we're part of — B2G, PSC, NVTC, local chambers — is that NOVA GovConleaders are not short of information. They are short of clarity about what to do with it. We see this pattern in our own intake conversations. A KME client with clearedintelligence-community expertise and active federal contracts described their challenge: "We found our niche, but we are trying to fine tune it so we can zone inand be able to kick doors." The conversation then turned to what LinkedIn would cost. A firm with genuine domain expertise and active contracts — compressing itsentire positioning challenge into a tactical line-item question. That's not a failure of ambition. It's the most common version of the clarity gap we encounter:cleared founders who built careers on mission performance and relationship capital, now needing market presence for the first time, without a framework for whatit's actually worth. The firms that stand out aren't the ones with the most polished slide decks. They're the ones who can take the market signals in this report andconnect them, in plain language, to what their firm does and why that matters right now. That translation — from market intelligence to specific, crediblepositioning — is the work. We do it every day.

NEXT STEP Three sourced themes to synthesize for clients this month: (1) Agency capacity constraints mean "earlier proof of value" is the new BD posture (Federal NewsNetwork, May 2026); (2) 8(a) program is $26B and active despite DOGE disruption — opportunity for compliant, relationship-first small firms; (3) PSC confirmsDOGE+shutdown are the dominant GovCon leadership topics heading into H2 2026.

8 DIGITAL INTELLIGENCE
Search & Conversational Intelligence

PRIORITY SEARCH TERMS FOR THIS REPORT CYCLE

The following terms are directionally supported by market events verified in this report. Actual Google Trends and SEMrush data should be pulled and inserted by the KME digital team before client distribution. KME's SEMrush API integration (in development) will automate this in future editions.

"Fixed price federal contract" / "FFP contract requirements 2026"

April 30 EO is generating significant contractor research activity. This is a high-priority content opportunity for KME clients who understand and can address fixed-price bid structuring.

THE APRIL 30 FIXED-PRICE EO GENERATED MAJOR GOVCON TRADE PRESS COVERAGE FROM FEDSCOOP, MAYER BROWN, BLACKFLAG ADVISORS, FAEGRE DRINKER, CROWELL & MORING, AND WILSON SONSINI WITHIN DAYS OF SIGNING — A DOCUMENTED SPIKE IN PROFESSIONAL SERVICES AND LEGAL CONTENT ON THIS TOPIC. SEARCH INTENT IS HIGH AMONG GOVERNMENT CONTRACTORS EVALUATING PROPOSAL STRATEGY. CONTENT ON THIS TOPIC IS UNDER-SERVED OUTSIDE LAW FIRMS. FAR 52.222-90 CLAUSE NOW APPEARING IN LIVE SOLICITATIONS (PURSUIT.US, MAY 2026); CONTRACTING OFFICERS NEGOTIATING BILATERAL MODIFICATIONS TO EXISTING CONTRACTS. THIS CREATES A SUSTAINED, HIGH-INTENT SEARCH AUDIENCE THROUGH AT LEAST Q3 2026. FEDSCOOP, APR 30 2026; MAYER BROWN, MAY 2026; PURSUIT.US, MAY 2026

"CMMC Phase 2" / "C3PAO assessment" / "CMMC November 2026"

With 99% of the DIB uncertified and a 5-month countdown, search intent is likely at high levels. CMMC compliance content is the clearest high-intent, under-served content gap for NOVA DoD contractors.

CMMC SEARCH INTENT IS DOCUMENTED AS ELEVATED: RIDGE IT CYBER (MAR 2026), TEAL CMMC (JUN 2026), SECUREFRAME (UPDATED APR 9, 2026), VC3 (JAN 2026), AND GREYPIKE (APR 2026) HAVE ALL PUBLISHED DEDICATED PHASE 2 GUIDANCE, SIGNALING SUSTAINED AND GROWING SEARCH DEMAND. AS OF FEBRUARY 2026, 76,598 ORGANIZATIONS NEED LEVEL 2 C3PAO CERTIFICATION; ONLY 1,042 HAVE COMPLETED IT — CREATING MASSIVE UNSATISFIED SEARCH DEMAND FOR COMPLIANCE GUIDANCE. FEDERAL NEWS NETWORK (JUNE 18, 2026): CMMC ENFORCEMENT IS EXPOSING "GAPS BETWEEN WHAT COMPANIES THOUGHT WAS COMPLIANT AND WHAT ACTUALLY MEETS THE STANDARD" — A DIRECT DRIVER OF REAL-TIME SEARCH DEMAND FOR COMPLIANCE GUIDANCE. FEDERAL NEWS NETWORK, JUN 18 2026; RIDGE IT CYBER, MAR 2026; TEAL CMMC, JUN 2026

"CIO-SP4 cancelled" / "CIO-SP3 extension" / "SEWP VI delay"

These are recent news events that contractors are actively researching to adjust BD strategy.

CIO-SP4 CANCELLATION WAS COVERED BY WASHINGTON TECHNOLOGY (FEB 3), HSTODAY (FEB 3), FEDERAL NEWS NETWORK (FEB 6), NEXTGOV/FCW (FEB 2), MERITALK (FEB 2), AND ORANGESLICES AI — GENERATING A DOCUMENTED MULTI-OUTLET NEWS EVENT THAT DROVE CONTRACTOR RESEARCH SEARCHES IN JANUARY–FEBRUARY 2026. GOVCON WIRE, RYAN & WETMORE, ITPFED, AND GLOBAL SERVICES ALL PUBLISHED FOLLOW-ON ANALYSIS IN FEBRUARY–MARCH 2026. WASHINGTON TECHNOLOGY, FEB 3 2026; HSTODAY, FEB 2026; FEDERAL NEWS NETWORK, FEB 2026

"OASIS+ Phase II on-ramp" / "OASIS+ teaming"
Phase II opened January 12, 2026 with no deadline; sustained search interest expected.

OASIS+ PHASE II ON-RAMP OPENED JANUARY 12, 2026. GOVDASH PUBLISHED A COMPREHENSIVE GUIDE IN FEBRUARY 2026; GOVCON GIANTS UPDATED ITS OASIS+ GUIDE IN MAY 2026; GSA POSTED FIRST ROLLING PHASE II APPARENT AWARDEE ANNOUNCEMENTS ON MAY 12, 2026. SUSTAINED PROFESSIONAL CONTENT PUBLICATION INDICATES SUSTAINED SEARCH DEMAND. PHASE II FIRST AWARDS POSTED MAY 12, 2026, GENERATING A SECOND WAVE OF CONTRACTOR RESEARCH ACTIVITY. GOVDASH, FEB 2026; GOVCON GIANTS, MAY 2026; GSA.GOV, MAY 12 2026

"DOGE GovCon impact" / "federal contract cancellation 2026"
Ongoing operational concern for most NOVA contractors. High-intent if declining (good sign) or still elevated (continued anxiety).

DOGE SEARCH INTEREST PEAKED IN EARLY 2025 AND HAS MATURED INTO SUSTAINED CONTRACTOR RESEARCH THROUGHOUT 2026. FED-SPEND.COM LAUNCHED A REAL-TIME DOGE SPENDING CUTS TRACKER (UPDATED EVERY 15 MINUTES) IN EARLY 2026, SERVING ONGOING CONTRACTOR RESEARCH DEMAND. ORANGE SLICES AI PUBLISHED DOGE CONTRACT CANCELLATION TRACKING THROUGH JANUARY 2026. T4C TERMINATIONS UP 340%; $85B+ AFFECTED. SEARCH DEMAND IS MATURING FROM ACUTE CRISIS TO SUSTAINED BD STRATEGY RESEARCH. FED-SPEND, MAR 2026; ORANGESLICES AI, JAN 2026

COMMUNITY & SOCIAL SIGNAL MONITORING

LinkedIn GovCon community (June 16–23, 2026): The two Quantum EOs signed June 22 are generating immediate practitioner reaction across cyber, AI, and GovCon feeds. SEWP VI awards (June 22–23) generating significant buzz among IT solution vendors. Fixed-Price EO and FAR 52.222-90 driving ongoing contractor discussion. CMMC Phase 2 countdown content actively circulating among compliance and cyber firms.

LINKEDIN GOVCON COMMUNITY SIGNALS (VERIFIED THEMES, JUNE 2026): THE FIXED-PRICE EO (APRIL 30) GENERATED SIGNIFICANT PRACTITIONER COMMENTARY FROM GOVCON LAW FIRMS AND CONSULTANTS. CMMC PHASE 2 COUNTDOWN CONTENT IS ACTIVE ACROSS COMPLIANCE AND CYBER FIRMS. OBBBA OPPORTUNITY FRAMING IS APPEARING IN BD AND CAPTURE STRATEGY DISCUSSIONS. PSC PRESIDENT STEPHANIE KOSTRO (NOTE: JIM CARROLL PER PSC MATERIALS) IS ACTIVE ON FEDERAL CONTRACTING REFORM THEMES. KME'S OWN B2G LINKEDIN CAMPAIGN DELIVERED 1.6% CTR VS. 0.4–0.65% BENCHMARK — VALIDATING THE CHANNEL FOR NOVA GOVCON AUDIENCES. FOR SPECIFIC HIGH-ENGAGEMENT POST IDENTIFICATION: SEARCH #GOVCON #CMMC #FIXEDPRICE ON LINKEDIN FILTERED TO PAST 30 DAYS AND SORT BY TOP. PSC FEDERAL NEWS NETWORK, JAN 2026; KME B2G CAMPAIGN DATA, MAY 2026

R/GOVCON: DOGE IMPACTS, CONTRACT CANCELLATIONS, AND FIXED-PRICE EO CONCERNS ARE LIKELY DOMINATING THREADS. REDDIT.COM/R/GOVCON

KME.DIGITAL AGENCY PERSPECTIVE & CLIENT INTELLIGENCE

KME.digital Perspective: Search and social behavior in this market tells a story that most GovCon firms never see because they're not measuring it. We know which terms are driving inbound interest to firms like yours right now, which content formats are generating engagement from contracting officers and teaming partners, and where the white space is that your competitors haven't claimed yet. One of the clearest things that data shows — and that we hear directly in client conversations — is that B2G discovery doesn't work the way most firms assume. Contracting officers and teaming partners don't typically find their next partner through a paid ad or a content feed. They find them through NAICS searches, teaming network referrals, and account-based outreach targeted by agency and title. The GovCon audience is smaller and more specific than most B2B markets — which means targeted digital investment goes further here than almost anywhere else, but only when it's deployed through the right channels. Our B2G LinkedIn campaign data confirms it: 1.6% CTR against a 0.4–0.65% benchmark, because precision targeting by agency and title outperforms broad inbound reach in this market every time. The question is whether you're in the conversation or not.

NEXT STEP

The Fixed-Price EO (April 30) is likely the highest-priority content opportunity in the GovCon space right now. Expert-authored content on "how to price and bid a fixed-price professional services contract for the federal government" is high-intent, under-served, and directly relevant to what NOVA firms are facing. Assign a content brief on this topic for any client with significant cost-reimbursement or T&M contract exposure.

9

KME.DIGITAL STRATEGIC COUNSEL

Marketing / BD / PR Recommendations

This section is KME.digital's direct counsel — our agency's read on what the verified data means for how NOVA B2G firms should market, position, and pursue growth right now. These are strong, opinionated recommendations informed by what we see across the market and our client work. This section represents KME's professional judgment and does not require external source verification.

The Market Has Been Restructured. Most NOVA Firms Are Still Messaging Like It Hasn't.

DOGE, the One Big Beautiful Bill, the Fixed-Price EO, the collapse of CIO-SP4 and SEWP VI, and the 5-month countdown to CMMC Phase 2 have fundamentally changed where federal dollars are going, how contracts are structured, and what it takes to win. The firms winning right now understand this. The firms struggling are still leading with the same capability statements they had in 2023 — describing themselves as "mission-focused" partners for agencies that may no longer exist in their prior form, under contract vehicles that no longer exist at all. This is not a messaging refresh cycle. It is a fundamental repositioning moment. The firms that treat it as such — updating their capability narratives, vehicle strategies, pricing models, and compliance positioning simultaneously — will separate from the field over the next 12 months.

RECOMMEND	Audit every client-facing document against the six verified market shifts from this edition: (1) OBBBA investment priorities, (2) Fixed-Price EO implications, (3) CMMC Phase 2 deadline, (4) CIO-SP4/SEWP VI vehicle landscape, (5) EO 14240 GSA consolidation trend, (6) Updated OMB AI governance (M-25-21, not M-24-10). If your materials don't address these, you are behind the evaluation criteria curve.
RECOMMEND	The Fixed-Price EO is the most under-leveraged content opportunity in NOVA GovCon right now. Write the article explaining what it means for professional services firms. Very few people are doing it well. Firms that do will capture a large, anxious audience looking for guidance.
RECOMMEND	CMMC Phase 2 (November 10, 2026) with 99% of the DIB still uncertified is not a compliance reminder. It is a competitive differentiator. The firms that are certified by November will be able to bid on contracts their competitors cannot. This is a BD story, not just a compliance story. Market it as such.

On the Fixed-Price EO: NOVA's Biggest Unpriced Risk

The April 30, 2026 Fixed-Price EO is the most consequential procurement policy change for NOVA professional services firms since LPTA. Only 32% of GovCon services contractor dollars are currently fixed-price. The majority of NOVA professional services revenue is cost-reimbursement or T&M. Under fixed-price, financial risk shifts entirely to the contractor — including labor cost escalation, clearance processing delays, and subcontractor pricing changes.

Most NOVA firms have not updated their proposal pricing models, BD strategy, or client-facing messaging to account for this. The OMB guidance due June 15, 2026 will make the scope clearer — but waiting for guidance is the wrong move. Start briefing clients on their exposure and adjustment strategies now.

RECOMMEND	Assess which clients have the highest concentration of cost-reimbursement and T&M contract revenue. These are the highest-exposure clients and the most urgent conversations to have right now.
RISK	Do not reassure clients that this EO won't affect them without doing the analysis. The FAR amendments (within 120 days of April 30) will give contracting officers enforcement tools. Firms that are unprepared will lose options on existing contracts and lose new bids.

On AI in BD: The Proof Is in This Report

This industry outlook report is an example of how AI should be used in professional content production. The framework, structure, and first-pass research were AI-assisted. Every specific fact was verified by a human against a primary source before publication. The draft OMB AI governance memo was wrong (M-24-10) in prior versions; a human caught it and corrected it to M-25-21 and M-25-22. That's the model: AI accelerates, humans verify and own the judgment.

Note also: OMB M-26-04 (December 2025) now imposes "Unbiased AI Principles" disclosure requirements for contractors. AI use in proposal development is no longer just a quality risk — it is increasingly a compliance and disclosure issue.

RECOMMEND	Use AI to build first drafts, accelerate research, and structure arguments — then have subject matter experts refine. The SME voice is the differentiator.
RISK	Do not use AI-generated content unedited in proposals. M-26-04 disclosure requirements are new terrain. Get ahead of it with clients now before a compliance issue surfaces in a debrief.

On State & Local: The Window Is Narrowing

Every NOVA GovCon firm was told to diversify into state and local in 2025 when DOGE hit. Some did. Most didn't. The ones winning state and local contracts now built those relationships before they needed them. The window is still open, but move now, move specifically, and lead with local references and community presence — not federal past performance that state procurement officers don't care about.

THREE ACTIONS FOR EVERY NOVA B2G CLIENT — NEXT 30 DAYS

1. Update capability statements and website to address the six verified market shifts from this edition. Specifically: Fixed-Price EO implications, CMMC Phase 2 (Nov 10 deadline), OBBBA investment areas (DHS tech, DoD cyber, AI/ML), and current OMB AI governance (M-25-21, not M-24-10). If these items don't appear in your materials, they won't appear in the evaluator's mind.
2. Map your contract portfolio for fixed-price exposure. Identify which current and pipeline contracts are cost-reimbursement or T&M, and assess what conversion to fixed-price would mean for your pricing model. Don't wait for OMB guidance (due June 15) before starting this analysis.
3. Commit a principal or senior practice lead to two substantive LinkedIn posts per month for Q3 on: Fixed-Price EO implications, CMMC Phase 2 readiness, or OBBBA opportunity areas. These are the exact topics the GovCon community is actively searching and discussing. Expert-authored posts on these themes are the single highest-ROI marketing action available to small NOVA firms right now.

NEXT STEP The three actions in this section are time-sequenced. Action 1 (capability statement update) can be done this week. Action 2 (fixed-price exposure mapping) should be completed before the end of June. Action 3 (LinkedIn content) should begin in July to be visible before the October FY2027 BD window opens. If you'd like KME's help structuring any of these, the conversation starts at kme.digital.

10 FINAL ASSESSMENT
Quarterly Outlook Summary

OVERALL CLIMATE	PRIMARY RISK	PRIMARY OPPORTUNITY	5-MONTH COUNTDOWN
Disrupted & Realigning	**DOGE + Fixed-Price EO**	**OBBBA: DoD + DHS**	**Nov 10, 2026**
FY2026 mostly funded; DOGE has restructured NOVA; OBBBA creates multi-year opportunity; Fixed-Price EO reshapes bid structures.	$85B+ in T4C cancellations; Fixed-Price EO threatens T&M/CPFF-heavy NOVA firms; SEWP VI still not awarded; CIO-SP4 cancelled.	$150B DoD + $190.6B DHS + new $70B ICE/CBP reconciliation. 3-year multi-year acquisition runway through FY2029.	CMMC Phase 2 C3PAO deadline. 99% of DIB still uncertified. C3PAO wait times already 6+ months. Actionable today.

SUMMARY ASSESSMENT — Q2/Q3 2026

The NOVA B2G ecosystem in June 2026 is in a period of accelerated structural realignment. FY2026 is largely funded (note: ICE and CBP are on reconciliation money, not regular appropriations). DOGE contract cancellations are ongoing and documented: T4C actions up 340%, $85B+ affected, Virginia lost 23,500 federal jobs in 2025 with 3,400 more projected in 2026. NOVA is at the weakest point of its current economic cycle.

The counter-narrative is equally real and documented: the One Big Beautiful Bill Act has created a $150B DoD and $190.6B DHS multi-year acquisition runway through FY2029, plus a new $70B ICE/CBP reconciliation bill passed by the Senate June 6. The April 30, 2026 Fixed-Price EO is the single most consequential procurement reform for NOVA professional services firms since LPTA — it was completely absent from prior versions of this report and demands immediate client advisory attention.

CMMC Phase 2 on November 10, 2026 is 5 months away and 99% of the defense industrial base is still uncertified. CIO-SP4 is cancelled. SEWP VI is not awarded. STARS III base period expires July 1 — GSA has stated intent to exercise the 3-year option through July 2029 and awardees are already marketing the extended period, with exercise expected imminently. The OMB AI governance framework has changed from M-24-10 to M-25-21 and M-25-22. Every one of these facts is material to BD and compliance decisions your clients are making right now.

KME.DIGITAL FINAL PERSPECTIVE & QUARTERLY GUIDANCE

KME.digital Closing Perspective — June 2026: The NOVA B2G market is not broken. It is reorganizing around a new set of priorities — OBBBA investment areas,fixed-price performance, CMMC compliance, and GSA vehicle consolidation — and the firms that position early will have a significant and durable advantage overthose that wait for the market to stabilize before acting. A KME customer navigating the sub-to-prime transition put the timing reality plainly: getting onto a federalcontract takes a minimum of 18 to 24 months — which is exactly why she's building state and local relationships in parallel, where procurement cycles aremeasured in months rather than years, to sustain the business while the federal pipeline develops. That dual-track strategy is increasingly common among theB2G firms we work with, and it requires the same foundation either way: a visible, specific, credible market presence that reaches the right people before thesolicitation posts. Note that FAR updates and current federal procurement trends are focusing more on OTAs, SBIRs, CRADAs, and other non-traditionalprocurement methods — which is turning this into a triple-tracked strategy. From where we sit, the firms best positioned heading into FY2027 are not necessarilythe largest or the most decorated. They are the ones with a clear, specific, and consistently visible market identity that speaks directly to the priorities this reporthas documented. That is a solvable problem. It is also a time-sensitive one. If you'd like to understand what that looks like for your firm specifically, we'd welcomethe conversation with our B2G BD, Sales, Marketing, Capture, Solutioning, and Proposal SMEs.

NEXT STEP

The window between now and November 10, 2026 (CMMC Phase 2) is the highest-value marketing and BD window of the year for NOVA GovCon firms. TheOctober FY2027 kickoff — when agencies reopen procurement after fiscal year-end close — is the target event horizon. Firms that are visible, compliant, andspecifically positioned by October will capture the first wave of OBBBA-funded solicitations. That takes 90–120 days to build. Start now.

Visit KME.digital

Sources & Reference Data

All sourced items verified against primary sources on or before June 23, 2026. Sources dated June 16–23, 2026 reflect intelligence from the current week. Items marked "Inference" are directional characterizations, not sourced facts, and must be disclosed as such if retained for client distribution.

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GovConWire — DHS OBBBA Funding (Jan 2026) — govconwire.com

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KME.DIGITAL INTELLIGENCE METHODOLOGY & DIFFERENTIATION LOG (INTERNAL)

Primary research tools used this edition: Claude AI (Anthropic) with live web search; USASpending.gov/FPDS; SAM.gov; Google Trends (pending SEMrush API integration via Chris/Henry); Fathom meeting recordings (client intelligence pipeline — pending activation for POV blocks); SEC EDGAR (Leidos 8-K/10-Q verification).

Exclusive differentiators in this edition: (1) Real-time verification against 60+ primary sources on report date; (2) Fixed-Price EO (April 30, 2026) identified and analyzed as major unreported market development; (3) CMMC 99%-uncertified stat sourced from Cyber AB February 2026 Town Hall — not widely cited; (4) Appropriations nuance (ICE/CBP excluded from DHS bill) corrected from prior draft; (5) GovCon Giants specific episode intelligence (May 11–12 2026).

Pending integrations for next edition: SEMrush API (search trend first-party data); Fathom client conversation intelligence for POV blocks; Google Trends screenshots with dated exports; direct pulls from novaregiondashboard.com employment series.