Quorion Signal

MARKET INTELLIGENCE
NOTE 001

UK defence suppliers are operating in a 1% signal environment

Quorion Signal Market Intelligence Note 001 | April 2026

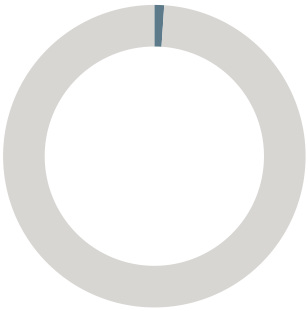
April 2026

quorionsignal.com

THE NUMBER

1.04%

Signal density – core public procurement portals, 30 Mar–11 Apr 2026



UNIVERSE: CORE PUBLIC PORTALS – FIND A TENDER, CONTRACTS FINDER, DEFENCE SOURCING PORTAL

80,086	834	1 : 96
Procurement events published	Relevant to defence & industrial supply chains	Signal-to-noise ratio

Over a two-week cycle (30 March to 11 April 2026), 80,086 procurement events were published across three core UK public procurement portals: Find a Tender Service, Contracts Finder, and the Defence Sourcing Portal.

Just 834 were relevant to defence and industrial supply chains.

That is 1.04% signal density.

For every 96 notices published, one is relevant.

For suppliers monitoring core public portals, the constraint is not access to procurement data but the low density of commercially relevant signal.

01

The noise field

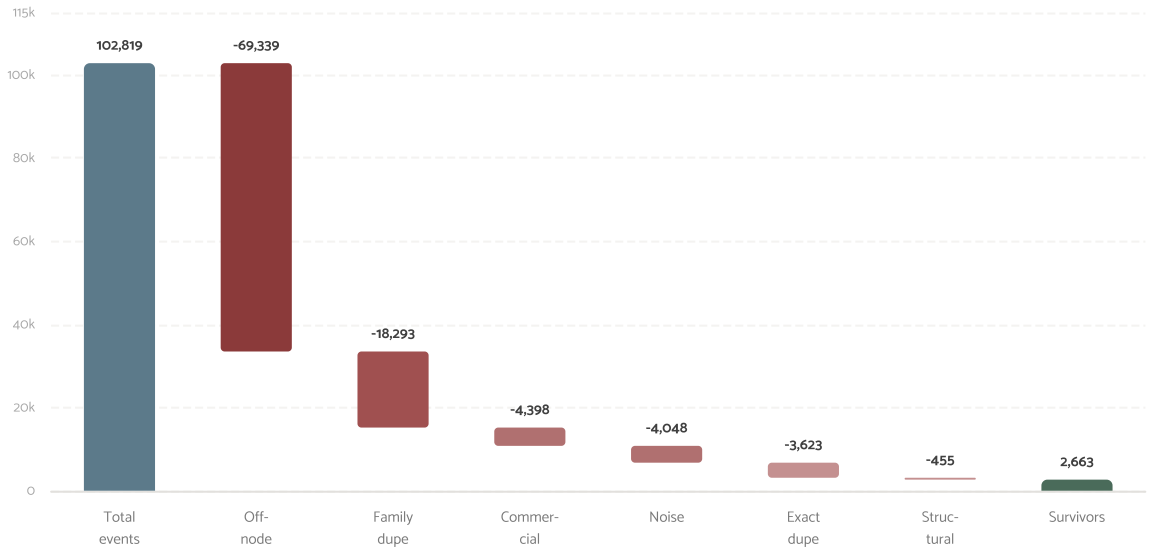
The UK public procurement system publishes at volume, but volume is not the same as opportunity.

Public portals are disclosure infrastructure, not commercial decision tools. They publish notices effectively, but they do not distinguish what is relevant, actionable, or time-critical for a specific supplier.

The three core portals make that visible. Out of 80,086 events published over the cycle, only 834 were relevant to defence and industrial supply chains. The overwhelming majority of what a supplier sees on those portals is irrelevant to their market, their capability position, or their bid strategy.

To understand why the portal environment feels so noisy, it helps to look at the wider procurement flow. Across 16 source channels covering defence, aerospace, nuclear, rail, maritime, construction, energy and transport, 102,819 events were published in the same period. Of those, 2,663 survived seven-stage classification – source trust, structural validation, noise filtering, canonical deduplication, node relevance, commercial relevance, and candidate routing. **100,156 did not.**

REJECTION CASCADE – 16-CHANNEL INGEST NETWORK



Most raw flow was removed for scope and duplication reasons before commercial judgement was required.

> **69,339** (69%)
>
> **Off-node.** Outside the defence, aerospace, nuclear, maritime, rail, construction, energy and transport supply chains under analysis.

> **18,293** (18%)
>
> **Family duplicates.** The same opportunity republished across portals, formats, or stages of the procurement lifecycle.

> **12,524** (12%)
>
> **Remaining filters.** A further 4,398 were commercially irrelevant, 4,048 failed noise filters, 3,623 were exact duplicates, and 455 failed structural validation.

Taken together, off-node events and family duplicates removed roughly 85% of total raw volume before any real commercial judgement was required.

> **That is the core market reality.** The public procurement problem is not primarily about speed. It is about signal density.

UNIVERSE: 16-CHANNEL INGEST NETWORK

102,819	2,663	97.4%
Events published across 16 source channels	Survived seven-stage classification	Pipeline rejection rate

SECTION 02

The portal problem is not speed. It is signal density.

At roughly 1% relevance on core public portals, the information environment is statistically hostile to manual monitoring. The interface flattens fundamentally different signal types into a single feed.

02

False abundance

For most business development (BD) teams, the portal experience creates a false sense of abundance.

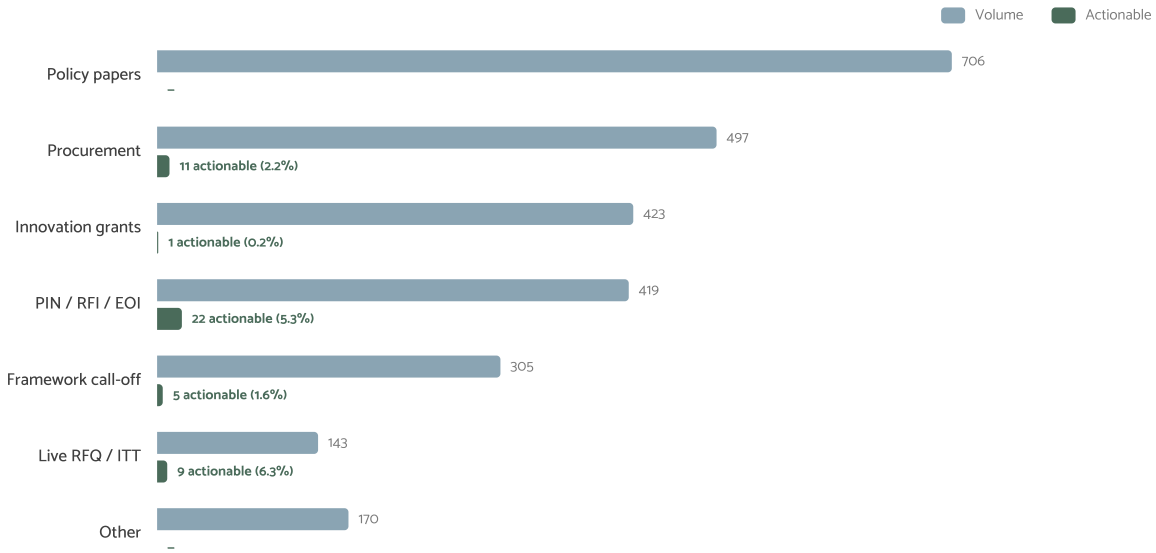
A supplier opens Find a Tender or Contracts Finder and sees a constant stream of notices: new publications, new buyers, new activity. The psychological effect is obvious. It feels as though opportunity is plentiful and the task is simply to scan hard enough to find the right ones.

The data says the opposite.

At roughly 1% relevance on the core public portals, the information environment is statistically hostile to manual monitoring. Most notices are irrelevant. Many are duplicated. Some are commercially too late to shape. Others are technically in-market but strategically unimportant.

The interface hides that by flattening fundamentally different signal types into a single feed. Among the commercially distinct classes identified this cycle:

SIGNAL TYPES – 16-CHANNEL CLASSIFIED UNIVERSE, 2,663 SIGNALS



To a human scanner, these appear as notices. To a commercial operator, they are not equivalent.

A policy paper may indicate future intent but offer no immediate route to revenue. A framework call-off may matter only if the supplier already holds a framework position. A live ITT may be biddable, but late. A PIN or market engagement notice may look preliminary, but it is often the moment at which requirements are still fluid, supplier influence is still possible, and competitive position is still shapeable.

The value of pre-market is timing. In this cycle, the pre-market layer produced **22 actionable signals, against 9 from live RFQ/ITT notices.** Live RFQ/ITT had a slightly higher actionable rate (6.3% versus 5.3%), but pre-market signals appear when requirements are still fluid, supplier influence remains possible, and competitive position can still be shaped.

By the time the formal tender is published, a meaningful portion of the strategic work has already happened: problem definition, early engagement, market testing, internal buyer alignment, and competitor positioning.

> **Tender watching, on its own, is a trailing indicator.**

UNIVERSE: 16-CHANNEL CLASSIFIED UNIVERSE, 30 MAR–11 APR 2026

22	9	2,663
Actionable pre-market signals this cycle	Actionable signals from live RFQ / ITT	Classified signals 16-channel universe

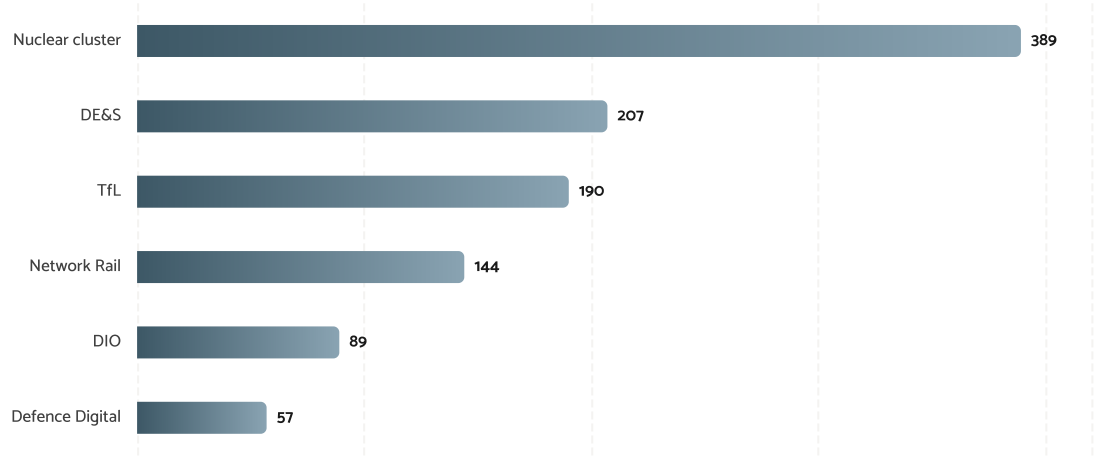
03

Where the edge sits

Once the noise is stripped away, a second pattern becomes clear: useful market activity is concentrated.

Across the wider classified universe, the nuclear cluster (UKAEA, Sellafield, NDA and ONR) generated 389 signals in the cycle. DE&S generated 207. TfL generated 190. Network Rail generated 144. DIO generated 89. Defence Digital generated 57.

BUYER CLUSTERS – 16-CHANNEL CLASSIFIED UNIVERSE, 1,076 OF 2,663 SIGNALS (40%)



The lesson is straightforward. Those six buyer clusters accounted for 1,076 signals – roughly 40% of the 2,663 classified universe, drawn from 432 distinct contracting authorities. Commercially meaningful activity is not evenly distributed. It clusters.

That changes how a serious supplier should operate.

A horizontal monitoring model – scanning everything, reacting to whatever appears, relying on portal alerts and manual forwarding – is weak. It assumes the market reveals itself evenly. It does not.

A stronger posture is buyer-specific pattern recognition: understanding which authorities publish consistently relevant demand, what type of signal they emit, how early those signals appear, how procurement routes differ by buyer, and where pre-market activity tends to convert into formal opportunity.

The same is true of rejected data.

The rejected corpus is not waste. It is the negative image of the market.

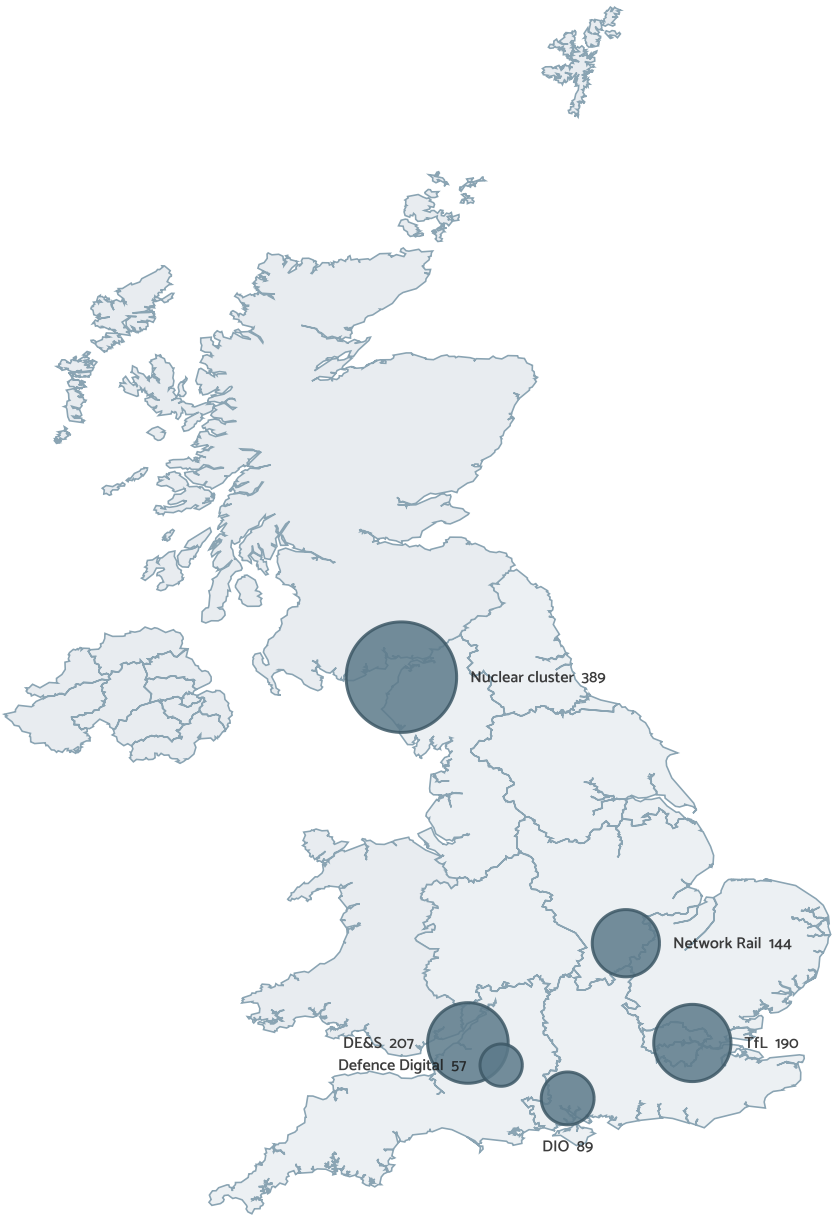
Rejected contract awards show who won, at what value, and through which commercial route. Off-market buyer rejections define the boundary of the addressable market. Below-threshold and low-value notices, which appear in raw ingest but are removed during classification, show the long tail of procurement that absorbs portal attention without supporting supplier economics.

In other words, what gets filtered out still teaches you how the market works.

> **432 distinct contracting authorities** appeared in the classified universe. Six buyer clusters accounted for 40% of classified signal volume. The useful market is concentrated and knowable – but only with structured classification.

432	6	16
Contracting authorities in classified universe	Dominant buyer clusters	Source channels in scope

The six largest buyer clusters are headquartered in southern and central England, with the nuclear cluster as the northern outlier. Organisational concentration supports the case for buyer-specific monitoring over horizontal scanning.



Markers indicate buyer-cluster headquarters, not procurement delivery locations. Circle size proportional to classified signal count. Universe: 16-channel classified universe, 30 Mar–11 Apr 2026.

SECTION 04

What this means for your business development model.

In a 1% signal environment, the manual monitoring operating model is structurally wrong. The cost is not just informational – it is commercial.

04

The commercial implication

Many UK defence and industrial suppliers still rely on a largely manual monitoring model: senior BD staff check portals, review tender alerts, forward notices internally, and decide by judgement which items warrant attention.

In a 1% signal environment, that operating model is structurally wrong.

The cost is not just informational. It is commercial.

As an illustrative scenario: at two hours a day over a 220-day working year, manual scanning absorbs roughly **£22,000 to £33,000 per year** of senior BD capacity at £400 to £600 per day, before overhead and before opportunity cost. That is the direct labour cost of reading, filtering and dismissing noise.

The strategic cost is greater.

Firms arrive late to the buying cycle. They mistake duplicated publication for market breadth. They over-weight formal tenders and under-weight pre-market movement. They spend scarce commercial attention on a feed in which most items are irrelevant before any judgement begins.

Alerting does not solve that problem. Faster delivery of the same low-density feed simply accelerates waste.

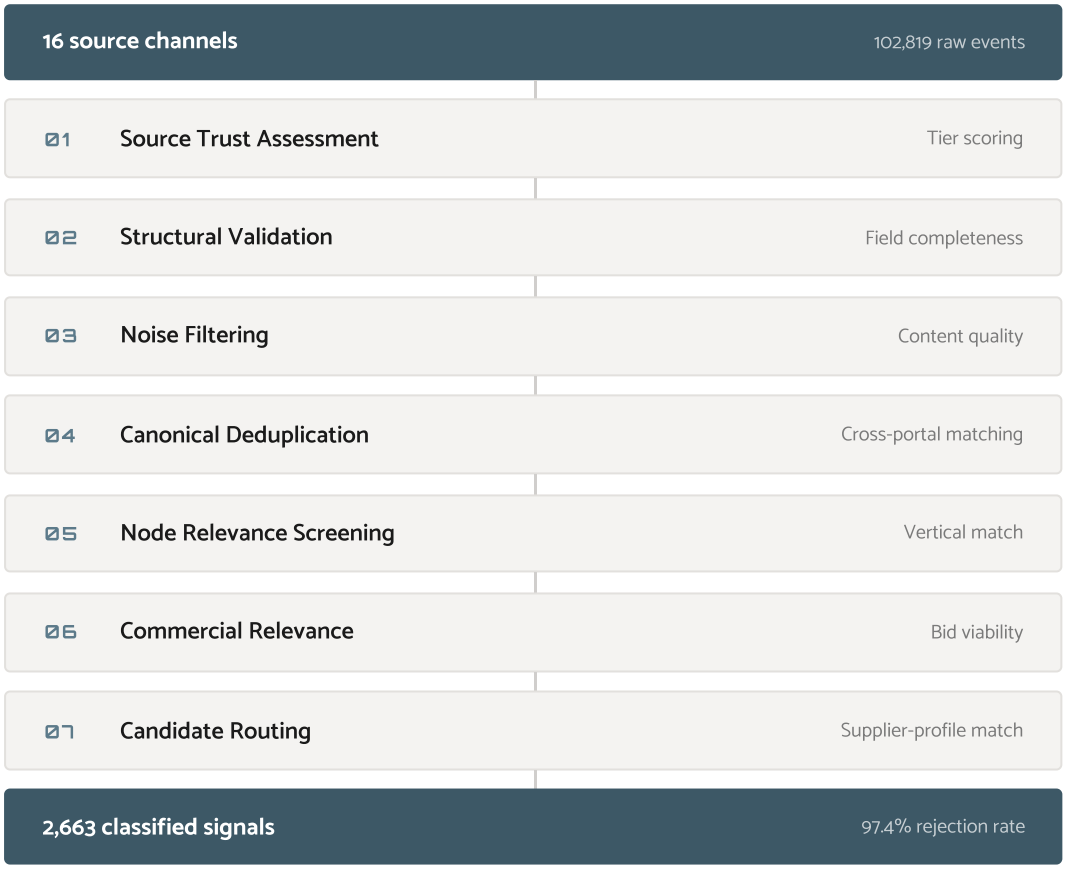
> **A classification-first approach addresses this directly:** reduce the universe, remove duplication, separate policy from procurement, distinguish pre-market movement from live bids, score each signal against vertical and buyer fit, and route only the small number of events that matter for a specific supplier position.

This note quantifies why a classification-first model has commercial value in UK defence and industrial procurement.

METHODOLOGY

Classification pipeline

Two data cuts from the period 30 March to 11 April 2026. **Core public portals** (Find a Tender Service, Contracts Finder, Defence Sourcing Portal): 80,086 events published, 834 relevant. **16-channel ingest network** (defence, aerospace, nuclear, maritime, rail, construction, energy, transport): 102,819 events, 2,663 classified survivors. Classification pipeline v4.1.0.



CATEGORY DEFINITIONS

Relevant – within the 15 defence and industrial verticals in scope and structurally valid.

Commercially relevant – a relevant signal where a supplier in the corresponding vertical could take a commercially meaningful step within the current procurement cycle.

Actionable – a commercially relevant signal where timing, route-to-market, and buyer accessibility permit a specific supplier response (bid, registration, engagement, or positioning).

Pre-market – prior information notices, requests for information, and expressions of interest published before formal tender.

Procurement – live or recently published procurement notices including tenders, call-offs, and dynamic purchasing system opportunities.

Other – classified signals not falling into the six named signal-type categories (e.g. sub-contract notices, market engagement events, contract modifications).

Off-node – outside the vertical supply chains under analysis.

Family duplicate – the same opportunity across portals, formats, or procurement lifecycle stages.

Exact duplicate – near-identical republication of the same notice.

Quality control. All classification stages are automated. Actionability judgements on surviving signals were reviewed by an analyst against source notices before inclusion in the actionable count.

Scope and limitations. Results reflect a two-week snapshot and a single classification model. Signal density and actionability will vary by period, buyer mix, and supplier profile. Private-sector procurement, classified programmes, and below-threshold contracts are not included in the classified universe; below-threshold notices appear in raw ingest and contribute to rejection-corpus analysis. Future editions will track longitudinal trends.

Quorion Signal

The Signal Density Index is a continuing series.

Future editions will track longitudinal trends in signal density, buyer concentration, and pre-market activity across UK defence and industrial procurement.

ABOUT THIS RESEARCH

- 102,819 procurement events processed across 16 source channels
- 15 defence and industrial verticals, seven-stage pipeline
- Structured rejection data – the negative image of the market
- Published by Quorion Signal Ltd

TO DISCUSS

Jamie Lansdell

Founder, Quorion Signal
jamie@quorion.co

QUORIONSIGNAL.COM