War Plan Britain

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Foreword

By Julian Lewis

Ten years have passed since the House of Commons Defence Committee published its *Shifting the Goalposts?* report which revealed that the then Government would likely have fallen below spending 2 per cent of GDP on Defence without the use of “creative accounting" techniques. In 2018, the Committee went further with its *Beyond 2 per cent* report, which first proposed "a level of Defence expenditure approaching the figure of 3 per cent of GDP which the United Kingdom still maintained as late as the mid-1990s". Both reports were agreed by Defence-minded backbenchers from four different political parties.

Despite this consensus, following the outbreak of the gravest military conflict since 1945, successive UK Governments have done little to restore Defence spending to anything comparable to the 4.5–5 per cent of GDP that their predecessors achieved during the Cold War years of the 1980s. Today, with Europe facing danger greater than anything since the downfall of Nazi Germany, it is assumed that Vladimir Putin's declared wish to restore Russian control in liberated lands will helpfully mark time for several years yet.

In this significant and ambitious paper, Lee Rotherham identifies critical gaps in our capabilities, of which Whitehall is well aware. In the absence of a public audit of where military shortfalls lie, he has set himself the task of systematically examining the contrast between what the UK used to be able to do, what it no longer can do, and what it needs to be able to do in order to fulfil the core functions of Defence. Building on that and taking a leaked MOD current shortfall figure of £28 billion as his starting point, Dr Rotherham provides credible calculations of the expenditure needed to restore our ability to defend ourselves conventionally over a protracted period.

He would be the first to acknowledge that such calculations cannot be precise, given the limited range of source material. Nevertheless, they clearly indicate the huge gulf between what politicians are proposing and what national security requires. Ministers certainly do not have the luxury of time – they cannot foretell when the techniques used in Ukraine may be applied to a NATO member state. Though the remedial expenditure identified in this study seems substantial, it is just a fraction of what would have to be spent in the horrific scenario of all-out conventional warfare – quite apart from the incalculable losses in human terms.

That is why I would take issue with any suggestion that having a *War Plan Britain* implies that such a disaster is inevitable. It is only by showing a potential aggressor that victory is unlikely, if not impossible, that the probability of attack can be minimised, if not eliminated. Must we wait for the worst to happen before providing the resources we need? Far better to invest in them now, so the War Plan need never be implemented.

Rt Hon Sir Julian Lewis is MP for New Forest East and chaired the Defence Committee from 2015 to 2019.

Summary Findings

- The UK has seen its Defence capabilities rashly underfunded for fifteen years, and more generally underfunded for more. The shortfall is now visible to our enemies and has operational effect. A number of specific capability gaps are identified.
- Our estimate to fill these gaps requires £70.3bn, and an estimated additional £4.7bn sustainment spend in the Defence budget for successive years.
- Note that the above gets us to something approaching a capability of deterrence, and a posture allowing a global footprint, but not a position of overmatch – i.e. the UK avoiding quickly losing, but without actually winning, a short but intense conflict.
- The UK is facing a significant risk of war with a peer power: the shortfall severely limits the UK's options, exacerbates the risk of confrontation turning hot through lack of credible deterrence, and risks catastrophic failure. The balance of risk has shifted, and the underspend gamble is no longer a choice for policymakers.
- The resignation of a Secretary of State for Defence and one of his ministers on this issue demonstrates how strategically critical it is. The political significance of that act is perhaps only on a par with the resignation of Peter Thorneycroft and two of his Treasury team in 1958.

Headline Figures and Associated Key Points

In this report, we will review Defence capabilities the UK used to have before an age of cutbacks. Regardless of the motivation and the political direction at the time, the end state has been the loss of capability. The following table provides a brief summary of what we assess it would take to bring back those mission-critical capabilities, largely in terms of assets.

Note that this is merely sufficient to get the UK to a position back to where it will be far less likely to lose a war quickly. Effectiveness beyond that – and that significantly includes generating a force that constitutes such a credible deterrent that it means avoiding conflict altogether – depends on a level of sustained expenditure as the UK's Defence establishment re-inflates back into a credible shape, across everything from ammunition holdings to manpower scaling to the size and nature of the Defence Estate.

The modernisation of Defence capability to account for the changing technological tools of warfare is yet more spend, and is included in the estimates that follow.

We aspire in this paper rather to generate a starter list for serious discussions amongst policy makers politically, policy shapers within MoD Main Building, and policy breakers within the Treasury.

Restoring Lost Capability **Capability**	**Cost Estimate**
Admitted starting shortfall *MoD's leaked internal estimate simply to match the SDR's starting point*	£28bn
Missile defence *Countering the ballistic missile and drone threat*	£7bn
Ballistic conventional retaliation *Reducing the risk of attack by generating a swift counterstrike capability*	£500m
4 sloops *Home waters patrolling*	£100m
50 F35As *Plugging the air defence and offensive strike shortfall*	£5bn
SEAD missiles (Suppression of Enemy Air Defences) *Allowing for air dominance on overseas missions*	£200m
Airfield development *A token start to the hardening of shelters and dispersal of assets*	£100m
Deployable AD for RAF *Protecting air assets when at their most vulnerable*	£130m
2 additional Wedgetail *Plugging an air intelligence gap*	£1.5bn
Military deception capabilities *Confusing the King's enemies in their strike planning*	£100m
Civil Defence funding (non-MoD) *Not an MoD budget, but a NATO expectation: civil contingency planning under NATO Article 3 where Whitehall has persistently failed to meet obligations*	£5bn (separate spend, here noted for completeness)
Artillery for airborne *Local air-portable fire support*	£150m
AD and AT for airborne *Local defence for light armed forces on immediate insertion*	£50m
RM close support *Man-portable missiles, plus light guns*, as per airborne	£200m
8 A400M *Getting airborne elements to places in sufficient numbers in sufficient time*	£750m

2 C17s *Getting heavier kit to airborne in time*	£400m
Red Ensign CP teams *Fire teams to deter piracy against UK-flagged ships*	£10m
6 minesweepers *Restoring and developing lost capability*	£650m
RM expansion *Generating the manpower for the expeditionary force, not covered in the SDR*	£250m
2 landing ships and **light role aviation** *Getting the maritime expeditionary force ashore*	£1.75bn
Rangers expansion *Delivering a credible capability of strategic influence*	£170m
Regimental Defence diplomacy *Easy wins with historic allied forces*	£10m
AD for carriers *Removing total dependency on escorts*	£500m
3 E-2Ds for carriers *Plugging an intelligence gap currently only partially filled by helicopters*	£1.8bn
12 Poseidons, maritime surveillance *Buying time for attack submarines to come into service*	£2.4bn
8 additional Type 26 *A credible number of the core warships*	£6.8bn
10 additional Type 32 *Generating a real global presence and capability*	£3bn
4 Tide Class tankers *Sustaining at sea independently*	£600m
2 extra fleet solid support ships *Sustaining at sea independently*	£1bn
10 Merlins *Managing the burden on aviation assets*	£25m
Cyber support to private sector *Helping private companies, potentially the weak underbelly in any cyber attack*	£200m
GCHQ/SIS/MI5 *Supporting world leading capabilities*	£500m

42 additional Archer *Immediately regenerating artillery support to the deployable division*	£350m
DSTL microsatellites research *Funding research gambles in a cost-effective field*	£30m
Traditional munitions stocks *Keeping a conventional war going for longer than one week*	£1bn
Strategic messaging *Winning and keeping friends*	£50m
Commit fully to buy 12 SSN-AUKUSS *Pushing on with the pledge to develop submarine capability*	Future budgets
TOTAL	**£70.3bn**

Our total cost estimate for plugging major gaps comes to £70.3bn. Sustaining this expansion comes of course with its own long-term costs, which we assess as an increase to the Defence budget over the following 30 years at a rolling additional £4.7bn annually.

Note that the above gets us to something approaching a capability of credible deterrence, and a posture allowing a global footprint, but not a position of overmatch.

Defence spending however is often done in terms of NATO targets and as a share of GDP. It may be easier to visualise costs in these terms.

UK Defence spending is currently expected to total £62.2bn in 2025/26, increasing to £73.5 billion in 2028/29. That does not obviously take into account either inflation or guarantee the Chancellor of the Exchequer will release the money (this in particular, astonishingly, is now in doubt).

What that means in percentile terms is that the UK is currently spending around 2.4% of GDP on Defence – though even that figure is based on NATO's rather generous interpretation of what counts as Defence spending; but let's apply that here, as parts of Whitehall would.

To simplify matters, we exclude some unknowns that affect both ends of the equation (available budget and costs) - we exclude both inflation and limited GDP growth (we are currently in the fall-out of a disruptive Middle East war).

What then does this mean in terms of what needs to go into Defence? The total spending going adding this new commitment onto existing ones, **means 5.1% of GDP going into Defence if budgeted for a single year (a somewhat fanciful spending surge), or 3.8% over two years – and that is just to plug the most startling gaps**. That would also be accompanied by an additional 0.2% of GDP subsequently required for the MoD budget to retain these specific capabilities.

Such, unhappily, is the price of simply playing catch up. Given purchasing power over time, in ballpark terms the above could already have been covered by spending perhaps as low as an

extra 0.4% of GDP on Defence for each year since 2022, and probably less given false economies made to balance the books.

This assessment, as we have underlined, is also one of merely restoring urgently gapped capabilities. It excludes many other areas where strategic planning is overdue in making costed decisions. How does the UK military regenerate its recruitment footprint nationally? What size does the army, indeed all the services, need to be? Does the country also now need a strategic surface fleet base away from the South Coast?

Conversely, let's up front also consider the changing price of strategic failure;

- The UN's current estimate of the end-cost of the Ukraine War to Ukraine stands at £439bn.[i]
- The cost of the Bishopsgate bomb in 1993, as an example of comparative impact of one incident of missile strike damage (at 2026 equivalent) was £765m.[ii]

It is important here to make a fundamental observation on these estimates, which is that they are precisely that — estimates. That particularly applies for costs relating to Defence Estate expansion, war hardening, cyber defence, and munition stockpile requirements.

The data-sets behind many of these areas fall into problematic categories. Some are commercially sensitive. Some are significantly open to market variables. Others involve compound costings in order to generate a grouped effect, such as when creating a formation out of a variety of assets. All depends on the availability of suppliers, market forces, competing commercial demands, potentially limited production or conversely opportunities generated by cancellation of orders by others, or alternative options arising from the unanticipated release of second-hand kit. So our estimate is not a concrete NAO audit, and it draws from comparative costs as revealed during past bids for similar capability, cancelled UK orders, or orders put in by other states.

But as Open Source-based estimates they at least serve to open the debate. Critics should consider this our laying down the gauntlet to those with better access to privileged data to provide more accurate estimates of what it will cost to restore our lost capability gaps - which is, after all, the core issue at stake.

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Introduction

The UK is not ready for war. Very arguably, it is not ready for conflict on any scale, certainly not against anything remotely approaching a peer adversary or perhaps even an innovative middle-tier one. Given the deteriorating international security environment, this is far from ideal and at worst it actively invites hazard.

Russia currently views the UK as, at best, a hostile competitor and in some quarters as an undeclared adversary. It has stated that UK and French troops deployed as peacekeepers in Ukraine would be legitimate targets. It has conducted chemical and radiological attacks in UK civilian spaces, and sabotage attacks through proxies including on the UK economy. Russian air and naval forces provocatively patrol near the UK. Scope for a tactical misunderstanding already exists with a UK military presence in Estonia.

The aftermath of the war in the Middle East could also draw in the UK if, with other nations, Britain helps to secure the passage of maritime trade. Without judging either of these potential deployments as wise or inevitable, they highlight the hazard and the incongruity of Britain's extraordinary shortfall in Defence capability.

Even simply in deterrent terms, the shortfall multiplies danger and generates strategic risk. It weakens national diplomatic credibility and erodes the Special Relationship that we could so easily have won back with President Trump. It generates a doom spiral as undermined Defence resources (including manpower) are incapable of self-sustenance let alone offer a base for emergency regeneration in a crisis. UK 'Soft Power' has meanwhile shifted from being a force multiplier into becoming Whitehall's empty-shelled fantasy replacement.

This publication is about fixing the shortfalls in UK Defence capability

To borrow military parlance of a test by the 'Directing Staff', the 'DS' question is this: Given the terrible starting point, what does it now take for the UK to rearm, refit and reposition in order to sustain and simply not quickly lose in a conflict of national importance? And ideally, to assure victory. Meaningful deterrence, let alone operational success, depends on this.

The UK is possessed of certain specific features, some innate in geography and others the result of hard-won historical advantages. It is an island nation, far from self-sufficient in its needs but with trusted suppliers amongst its allies. Shipping plays a significant economic role as does its service sector. It has overseas territories and protectorates, which offer global basing opportunities for intelligence gathering and force projection. A higher share of its GDP is either generated internally or through global trade in contrast to its immediate European neighbours.[iii] It has allies, some of them sustained through personal ties whether by families or royal families. It is a global power, or at least perceived as one by friends and enemies. It is exposed to global threats. Its people, certainly up to recent times, have shown themselves psychologically disposed toward interventionism.

In an era of extraordinary uncertainty and high stakes, having a diminished defence capacity is a terrible position to be in, given Britain's global equities and interests.

The challenge is becoming politically mainstream. At the 2026 London Defence Conference, the Leader of the Opposition openly observed, "The cold hard reality is that if the West is to prevail every country with an interest in freedom must conduct an urgent and brutally honest audit of what we bring to the table." She continued by saying that Britain must again become "A country that can look after itself and that other countries want on their side. We must start by asking ourselves, what exactly do we currently have to offer? What leverage do we have? Why would people want us on their side?"[iv]

The question really needs a Strategic Defence Review and 18 months of detailed analysis to answer, but we have had one of those published in July 2025. Confronted with the hard realities of Treasury intransigence the review could only come up with a sticking plaster solution.

This report, necessarily much shallower, considers the problem rather than its political boundaries. It seeks to encourage more radical thinking around the genuine need for a massive reset and the critical surgery needed to save the patient. That means a surge of funding simply to get back lost capability, place Defence in a position where in the near future it can safely sustain the minimum level of capability required, let alone build on it.

A number of papers from House of Commons Committees over the years are cited, because these failures have been happening in plain view and with publicly-provided warnings from experts well-resourced with the facts.[v] Most importantly, this report contributes an original speedy audit of that shortfall between current UK Defence capability and where it needs to be, based on publicly available costs of defence capability that has in many instances been left for years to atrophy.

The Context: Rearming after Atrophy

Cheap Downing Street platitudes aside about how marvellous our armed forces personnel are, most people who understand Defence are aware that the UK's pretensions do not match the corresponding political dreamscape. Moreover, this has been the reality for some time.

After the end of the Cold War, the UK's Defence posture naturally and inevitably shifted and weakened. One of the enduring reasons cited for relative UK economic decline compared with, in particular, West Germany's economic miracle was the latter's comparatively lower level of spending on Defence, a distraction considered by economists as a drain on GDP growth. There is an element of truth in the argument about picking butter (or rather, white goods manufacturing) over guns, though not to the extremes of logic the subsequent cuts delivered.

The critical hammer blow came after the economy crashed under Gordon Brown, resulting in staggering levels of deficit that were unsustainable even for a high credit rating economy. The result was that in 2011, the Coalition Government delivered a range of cuts across Whitehall, and while some departments were ring-fenced Defence was certainly not one of them. Conservative Defence ministers signed off these Treasury cuts on the stated proviso that the resulting loss of capability was a temporary gap and would be made good in the future. However, that pledge was not kept.[vi]

The Daring Class destroyers provide a useful example here. Daring herself was launched in 2009, six years after work physically began on her. But she and her five Type 45 sister ships were originally meant to be twelve in total. Choices were made in the 1998 Strategic Defence Review but the operational costs of operations in Iraq and Afghanistan changed realities. The number of platforms was reduced, and platforms can only be in one place at any one time – which this year turned out, embarrassingly, not to initially include defending Cyprus. Lessons still have not been learned. There is reporting that the proposed replacement class, the Type 83, is already being put into the long grass despite being ten years out from introduction.[vii]

The House of Commons Defence Select Committee in 2020 reflected on the no fewer than ten Defence Reviews that had happened over the previous quarter century, noting; "A recurring theme in the evidence we received is that earlier Reviews failed to match ambition with the resources required to realise them," and further adding that only the 1998 Review was not driven by the impetus of saving money.[viii] Going further back, in 2017 the then-Chairman of the committee argued that the Defence budget needed to be pushed up to 3% rather than the 2% baseline minimum, to prevent the hollowing out of Defence.[ix]

We might of course add that this did not happen – indeed, without accountancy wizardry the 2% threshold was being breached as early as the 2014-15 spending year, meaning the catch-up today will cost more.[x] Jeremy Hunt, when he pursued the leadership of the Conservative Party, and with it the role of Prime Minister, adopted a different tack by seeking to ingeniously bundle Defence, Aid and Soft Power together into a single budget category that would receive at least a 4% overall spend, aiming to put the UK on a par with US spending.[xi] Hunt lost that leadership election, and did not pursue the idea when he subsequently became Chancellor either.

This is the all-too familiar context of today's shortfall. In March 2026, HMG published its new Defence Diplomacy Strategy.[xii] The document offers a somewhat rosy overview of how UK Defence posture, capability and confidence is seen in the wider world. And by implication, how others interpret Britain's ability to deliver meaningful Defence aid and support to deterrence. But this HMG document fails to acknowledge weakness as its starting point, finding it far better to focus instead on the value added by very small numbers of service personnel briefing and training their counterparts. A pity that the same effect could be delivered by Luxembourg.

Having identified in principle that there is a shortfall, and a significant one at that which requires immense political capital to literally find the capital, how then do we work out how to deliver the catch-up?

The approach in this report is open-source audit

There are two obvious approaches. The first is the simple one of front-loading the funding at a bluntly asserted rate and letting the Service Chiefs do the homework based on the sensitive data. One option here would be to dedicate, say, 5% of GDP to Defence for three years (and allowing for carry-across into successive financial years where budgets can't efficiently be signed off in time). Following this surge to plug the gaps, the budget could then settle at a lower figure of somewhere across 3-4% of GDP to Defence.

The approach is of course utterly arbitrary but has the merit of professional delegation, which would need to be accompanied by subsequent scrutiny and accountability without hampering innovation and inspiration — not an easy cocktail. However, the 2025 SDR did generate 8,000 submitted responses including 30 from allies and partners.[xiii] Internally held, this is an already-collated body of insight, offering go-to points for number crunching on delivering the very specific fixes. Decision makers will also have access to a range of critical documents that are not in the public domain, such as the Defence Planning Assumptions which became classified (and at SECRET) some 10-15 years ago.[xiv]

The other approach is to generate a line by line account of all the assets and capabilities that are deemed to be lacking, and then work out how much it would cost to replace them, applying commercially sensitive rates and accepting that prices have gone up and requirements and technical specs have advanced since 2011.

This report opts for a position somewhere in between with a very simple open source audit, accepting imperfection in the study, but at least generating some headline estimates of what sort of sums politicians ought to be talking about. Ours is certainly not a perfect answer in these pages and relies on many knee-deep assumptions; but we hope at least to shift the Overton Window in terms of what MPs are emboldened to talk about.

What is Defence For?

In really big picture terms, we seem to have a general consensus on this point at least. The latest SDR defined Defence's core roles as falling into the following five areas;

1. Defend, protect and enhance the resilience of the UK, its Overseas Territories, and Crown Dependencies
2. Deter and defend in the EuroAtlantic
3. Shape the global security environment
4. Drive secure and resilient economic growth
5. Support wider government objectives[xv]

Those five headline objectives however don't really answer the more honed question of what Defence is about. What are the threats and dangers that face the UK that the Defence establishment should be set out to counter, deter, and if necessary overcome? In this short paper we focus on the following *five task and contingency scenarios*:

1. The protection of core bases and the wider homeland, including the Overseas Territories and Crown Dependencies and sovereign territory;
2. Credible but limited intervention in defence of clear strategic national interests in the Middle East and beyond;
3. Brigade-level expeditionary intervention at speed at an early tipping point in a geopolitical crisis, for instance in Africa;
4. Credible deterrence and capability versus the Russian hybrid threat, up to and including the maintenance of a significant land force (though one which falls well below British Army of the Rhine scale);
5. In accepting the fact of US primacy in any Taiwan conflict, providing strategic cover over any gaps that develop in second echelon areas of Western interest as US assets are relocated, while supporting regional allies at trade choke points and generating sufficient capability to resist Chinese remote hostile responses.

One might readily argue over the definitions and even the nuances of the selection itself. Nevertheless, these tasks and contingencies are rather handy as they expose different capability gaps, while also revealing the nature of overlaps.[xvi]

The plain fact is that reviewing these five clearly exposes the UK's significant current gaps. In 2024, the Defence Committee report *Ready for War?* expressed concern that the Services "all have capability shortfalls and stockpile shortages, and are losing personnel faster than they can recruit them. They are also consistently overstretched, and this has negatively impacted retention as well as delaying the development of warfighting readiness. Either the Ministry of Defence must be fully funded to engage in operations whilst also developing warfighting readiness; or the Government must reduce the operational burden on the Armed Forces."[xvii]

Putting aside the political decision to take on operational burden — which as stated is not the focus of this report — what does UK Defence need to develop from its current atrophied state to credibly perform these five tasks, in isolation or in some combination?

Defence modernisation: balancing traditional and automated platforms

This is a difficult area to discuss sedately in some circles, especially for those wishing to spurn traditional defence platforms. For example, when the SDR asserts that "In modern warfare, simple metrics such as the number of people and platforms deployed are outdated and inadequate", this is only a partial truth. If you have too few assets (or worse, zero complex capability at all) then that is the worst metric going.

This is why we have used the five tasks and contingencies listed above to interrogate Defence capability shortfalls. When it comes to actually delivering outcomes, from deterrence all the way to operational success abroad, traditional platforms cannot be simply spurned.

Warfare, and the tools with which it is fought, are undeniably changing. Automation and robotisation – which are coming of age in Ukraine – focus attention on adaptation needs for the new era, when land, air, and sea drones supplement humans. The 2025 SDR wrestled with this challenge, with the Army writing that "A '20-40-40' mix is likely to be necessary: 20% crewed platforms to control 40% 'reusable' platforms (such as drones that survive repeated missions), and 40% 'consumables' such as rockets, shells, missiles, and 'one-way effector' drones."[xviii] The Navy and Air Force acknowledged in the SDR the need for equivalent capability mixes but used less specific language.

The following observation in the SDR is particularly important: "Survivability in a more transparent battlespace is increased through greater dispersion, protection, and mobility." Combat efficiency will require "restored stockpiles of munitions, parts, and fuel ultimately dispersed across the UK and potentially to storage facilities in Europe. Defence should maintain an 'always on' munitions capability so that production can be scaled up at speed if needed." Yet, where is the money coming from to deliver on that?

The SDR was also bounded by its contemporary political constraints. Its planned costings were framed within an increased Defence budget of 2.5% of GDP from April 2027 and 3% in the 2030s, subject to economic and fiscal conditions, which basically meant a small increase in the short term and no guarantee of end delivery at all. Delivery is set to take place through the new ten-year Defence Investment Plan, but as we shall see in a case study later, the dynamics of that are still apparently set in treacle.

Even in 2015 its predecessor committee flagged that cutting the number of Main Battle Tanks (MBTs), lower than 240 (half what it was 20 years earlier) was "fraught with risk" and that "defence expenditure has fallen to an unacceptably low level in GDP percentage terms."[xix] Even before automation and robotics became as developed as they are now, the risks were clear and have been for some time now. Let's correspondingly turn to our five scenarios in turn, and reflect on what shortfalls exist, accepting that this is far from a brand new problem.

Theatre 1: Core Defence

Self-defence is a sovereign state's fundamental duty and it requires a wide range of capabilities. This is a standing task of sadly rising importance: of the exposure of the homeland, and by extension sovereign or dependent territories overseas, to attack by hostile forces. Attacks may be delivered by remote kinetic targeting or through proxies.

The risk set also includes issues around Counter Terrorism and domestic threats; for the sake of this report we put to one side the role of the military in support to the civilian power, which in the event of any crisis will need to stand on its own two feet given bearing the load Defence assumes in its own core role (a detail wider Whitehall needs to be fully aware of).

Let's begin with the underpinning problems, and where we currently stand.

- **Our Defence industrial base, while significant and capable of expansion in the right circumstances, has suffered from a combination of factors.** Reduced domestic spend on Defence; uncertainty over contracts even when signed; wavering governments; often limited export successes and too much of a willingness by politicians to yield to the rhetoric of others about the 'intrinsic evil' of an arms industry. The consequences of this withering were spelled out in a November 2025 Commons Defence Select Committee paper.[xx] It included: the limited number of alternative supply routes; production bottlenecks; lack of credible stockpiling; and potential over-reliance on the US (particularly problematic in any war involving both countries that generates competing calls on resources). These have at least notionally been recognised by the new Defence Industrial Strategy, but as we shall later see not yet properly embraced in their resolution.

- Already in 2017, the difficulty with maritime regeneration and the scale and capability of the nation's shipyards was acknowledged by Government.[xxi] Sir John Parker's 2016 independent report to inform the National Shipbuilding Strategy had 34 recommendations, including more coherence across design to commissioning and the retention (and by inference, now the expansion) of specialist skills and trades. Increased and more stable procurement will generate this, but the implication has to be that capability gaps need to be filled by some shortfall builds exported overseas to maintain production lines.

- Places are needed to stockpile and to prepare for all the Services. Despite the military establishment warning that conflict with Russia was a genuine risk, the MoD is still (under financial pressure from the Treasury) seeking to sell off its real estate. Dispersal, mass storage and wartime expansion all require the retention of all existing assets. A number of sites are remarkably still in line for the axe. Bids for RAF Scampton were due in by March this year for announcement of sale in November, while Woolwich Barracks' future is uncertain.[xxii] This discrepancy between MoD policy and SDR direction is absurd. At the absolute minimum, all planned sales of MoD property need to be immediately halted, and the balance covered by central funding so cuts are not forced on the MoD.[xxiii]

- The sale of Reserves/Cadet centres is just one example of short termism that weakened the Defence footprint, hampering recruitment and retention. So too has the sapping of the Regimental System, and weakening of town and county ties.

This scrimping is part of the much wider issue of the general Defence budget shortfall that is forcing cuts and sales rather than addressing the issue wholesale. So let's address that elephant or rather mammoth in the room.

- **Estimating the overall budgetary shortfall.** Senior Defence sources suggest that the existing Defence deficit, coupled with pledges to spend on particular SDR commitments, results in an existing financial gap, even before we begin to consider meeting the SDR's recommendations and what the country actually needs. This is the Plimsoll Line of the simplest credibility. How much is that? According to briefings leaked to *The Times* in January 2026, **there is a £28bn gap in total over four years**.[xxiv] That report doesn't make it clear if that includes whatever needs to be spent on sorting out the mess with Ajax and a range of other areas where past cuts were made.

- The House of Commons Public Accounts Committee (PAC) witheringly reviewed the 2021 Defence Equipment Plan.[xxv] It noted the Plan itself had a funding "black hole" at its centre, potentially as big as £17.4bn. The MoD also faced additional cost pressures estimated at more than £20bn to develop future defence capabilities not included in the Plan. It reported: "The Department remains stuck in a cycle of focusing on short-term financial pressures. For example, it has sought to balance its annual budget by again deferring or descoping the development of capabilities, resulting in poor long-term value for money, and the use of all its contingency funds in 2020–21 to help offset funding shortfalls."

- In its report, the PAC observed that "this is highly destabilising for defence and must not continue". But of course, it did. Separately, in its own 2023 appraisal of the Defence Equipment Plan, the National Audit Office identified funding shortfalls "of between £7.6bn and £29.8bn, depending on whether risks or opportunities materialise." The top end figure looks suspiciously close to the £28bn.

With all these disjointed estimates floating around, the gap between the shortfall of planned capabilities and the financial gap covering ongoing deficits may turn out to generate a much larger figure – the difference between what Defence *should have* and what it *needs* simply to make what it already possesses remain functional.

Let's take the £28bn admission as a start point for subsequent debate on the Defence black hole, and what is driving the reduction of assets and capability including real estate: fixing that shortfall addresses those drivers and at least stabilises the situation, achieving what can be termed as Defence-lite. This, then, is our number-crunching baseline, even if the lack of detail on what is officially privately admitted as a "gap" frustrates external analysis.[xxvi]

What then of the risks and threats presenting themselves in relation to Core Defence?

- **The exposure of the UK to ballistic missile and drone threats or usage** has entered wider public consciousness due to the Iran war following from Ukraine. The UK policy response to date has been slender and incidental. We can contrast that approach with Germany, hardly (in traditional parlance) a post-Iron Curtain frontline state, which in December 2025 expanded its original deal with Israel relating primarily to the Arrow 3 system. The estimated total value comes to perhaps £5bn. This, however, constitutes merely an anti-ballistic counter, to which we also need to consider the cruise missile and drone threats – shorter range but able to be delivered covertly or by submersible.

- Consider Israel's interlocking defence networks; Iron Dome, David's Sling, Arrow and Thaad, without even considering drone threats. Iron Dome platforms which counter short range threats have an operational radius of only several miles. Israel is around an eleventh of the size of the UK, so even allowing for a generous spend by Whitehall decisions will need to be made on what constitutes core infrastructure and vital-to-protect centres.

- Drones present threats at scale and low price, needing to be countered with comparatively low tech, bulk, and cheap-to-use items. Otherwise the cost of destroying a handful of them uses up all the assets and all the budget.[xxvii] DragonFire and equivalent land-based versions of emerging directed energy weapons will be the ultimate solution here.

- Plugging this gap we tentatively suggest requires a spend that matches Germany's anti-ballistic commitment, embraces energy weapon R+D to accelerate in-service delivery, and proactively brings in Ukrainian skill sets to counter current drone formats. **Ballpark price tag for missile and drone defences: £7bn**.

- To defend the homeland, the best quick deterrent may be to purchase an off-the-shelf retaliatory ballistic non-nuclear capability, so that any strike on the UK meets with a near-immediate response, and cannot then be characterised by the aggressor as a costless PR win or used as an 'escalate to de-escalate' strategy. Israel's Jericho series is an example in point. Costs are classified; we might putatively suggest **a budget of £500m** to establish a sufficiently credible retaliatory capability for a simple deterrence function. This would supplement the deterrent effect of Tomahawk missiles that can be launched from Astute Class submarines, and that require being within 1,000 miles of a target.

- As added counsel, we would also invite review of whether and which RAF training aircraft could be fitted to fulfil an additional counter-drone role in a time of tension, noting this would detract from their current core function without additional airframes; and indeed if pods or packs might be developed to quickly modify requisitioned civilian sport aircraft.

The drones debate raises the question: have traditional weapons been made redundant, all the way down to the role of the infanteer? We would say not, and particularly so in a more built-up environment or one where the ground is shared with a civilian population.

Nevertheless it is clear that a major shift in offensive capability has arrived with drones and new generation robots that can be (among other features) mass produced cheaply, and easily controlled remotely by relatively quickly-trained individuals. Their advent in mass on the

battlefield requires a need to rethink core doctrine, training, and how Intelligence, Surveillance, Target Acquisition and Reconnaissance (ISTAR) (and as importantly counter-ISTAR) are deployed.

AI is an area deserving strategic analysis in its own right and where arguably only the US and potentially China are in the running to be dominant players, until AI itself becomes the player. In terms of this report however we can simply flag the short-term importance of recognising the importance AI has demonstrated in accelerating the targeting OODA Loop with the Israeli airforce, through systems such as Habsora and Lavender and also other specialist software.[xxviii]

The question is rather if private sector investors and developers are currently incentivised to look at UK Defence. We take the September 2025 partnership arrangement with Palantir and other announcements at face value in terms of ambition – while also noting there exists a parallel lobbying campaign to kick Palantir out of NHS contracts.[xxix]

- **MoD needs to focus on treating AI as an essential part of procurement.** AI is likely to be the next battleship issue, defining which countries lay claim to some measure of great power status, but at increasingly untenable costs. Crystal ball gazing, the long term (20+ years) future of the UK is perhaps pursuing sufficient capability to make it an essential adjunct to the United States's own exponential advances.[xxx] But we are not there yet. Pillar 2 of AUKUS provides a remarkable opportunity and prompt to collaborate towards this.

- KBR and Frazer-Nash Consultancy have estimated that the UK's military AI sector was worth approximately £285m in 2023, predicting it will stand at £1.2bn by 2028.[xxxi] This rather suggests we need not direct our crash funding here, though this certainly does not rule out strategic funding following on separately as divergence flows from potentially disconnected Defence and private sector priorities and needs.

Moving to the Royal Navy, it clearly isn't visibly functioning in its basic mission of protecting the home waters. Why is this and what needs to be done?

- **The lack of Naval assets is painfully obvious here.** We do not consider deploying the Navy as an obstacle to asylum seekers to be a sensible use of its vessels, at the very least its major ones. It has an existing role in fisheries protection through protecting the EEZ, but this done – delivered with appropriately sized and designed types operating alongside other assets operated by UK regional authorities. Typically, the post-2016 intention was to continue to decommission these River Class vessels at the point of Brexit transition when they would be most needed: a campaign delayed this and the very vessel saved was able to intervene in a Channel Islands dispute with the French.[xxxii] The example reminds us of Whitehall shortsightedness when confronted with utterly predictable events. The solutions suggested at the time also recommend themselves to us today: buying appropriate civilian vessels to re-role. The same principle as the concept behind the *sloop* in the World Wars.[xxxiii]

- Alternatively, after a rapid value for money analysis, smaller shipyards not overburdened with surge military builds might be tasked to build them based on existing civilian designs that fit most closely (accepting imperfections) to design requirements, for which they gain the sobriquet (slightly kinder to Navy ears) of *corvette*. How many extra sets of eyes and ears

would the Navy benefit from in Home Waters and for demonstrating its presence in its Overseas Territories and Crown Dependencies, particularly the Caribbean?

- We suggest that their primary purpose in home waters would still be to deter illegal cross-border migrants, though that would only function in connection with accompanying policies of detention and expulsion and the whole context of ECHR repeal. In such a circumstance we suggest a surge capability of, say, five vessels required to demonstrate the futility of individuals making the attempt over a couple of years while the legal challenges are settled. But those are not issues for the Defence budget. Obtaining say four sloops now which might operate in relatively benign environments, including the Sovereign Base Areas in Cyprus, would generate a visible footprint. Perhaps **we might assess this at a total cost of £100m**, accepting that as second-hand vessels their lifespan is reduced, their capability is limited, and their function is as a stopgap.

The wider Navy we review shortly, in the context of its function against the Russian risk. Moving to the Royal Airforce, how many aircraft does the RAF need?

- **Clearly the answer to that is *more aircraft***, since a proportion will be required to deploy overseas in any time of crisis while the RAF still constitutes the main defence of national airspace including against non-ballistic missile and drone attack. This is even before any consideration of conventional long-range bombers or maritime strike capabilities. The UK currently deploys two aircraft on standby to handle its Quick Reaction Alert needs. A single asset developing a critical system failure instantly reduces that capability by half. The additional complication to this question is if future vehicles even need to be crewed.

- The UK's F-35 fleet is presently not up to the task, despite the aircraft's capabilities, simply because they are too few in number. Air combat assets are triple or even quadruple-hatted in terms of how many parts of UK Defence rely on using them in case of a war. There are issues around pilot shortage (infamously exacerbated by misguided HR recruitment priorities), but also shortfalls in engineers and spares to keep the existing airframes going. Global Combat Air Programme/Tempest is incoming, but arrives in 2035 at the earliest.

- Is it now too late to plug the gap by ordering Typhoons? Whereas F-35s constituted the expeditionary element of UK air power, Typhoons provided a 'good enough for task' response to air threats in the home airspace. But BAE's Warton final assembly plant closed in July 2025, with the corresponding dissolution of the workforce and component elements that went along with it. It may just, still, be economically and professionally feasible to reverse that closure, albeit at some cost – the option at least merits swift audit.

- Assuming such an option no longer exists, it means ordering more F-35s to plug the gap. We suggest these should overwhelmingly be F35As, since there is no requirement to fly them from aircraft carriers. The circa 150 combat aircraft currently held by the RAF need in our assessment to be expanded by a third to compensate for cuts in 2010 that retired the Harriers and GR4s, **suggesting an airframe bill of £5bn**. Even this barely keeps ahead of the curve, after scrapping of all but four of the 30 Tranche 1 Typhoons by 2025.

- Air Defence suppression is another identified shortfall due to the lack of missiles that allow any prospect of air dominance. SPEAR CAP 3 (the long range air-to-surface missile) was due for introduction in 2028 in limited numbers, but has been pushed to an indeterminate date in the 2030s. Subject to obvious questions around getting the F-35's systems to be able to handle the weapon, that decision needs to be reversed, and money spent now to equip the expanded air fleet. A ballpark estimate may be **an additional £200m**.

- Airbases will need expanding, existing airfields made useable to allow for greater dispersal (even if assets would still need to be more centrally technically maintained), and shelters sufficiently hardened. This has the potential for being open chequebook territory but **assigning £100m to the task** at least provides a marker for prioritisation and action.

- We also note the RAF does not have kinetic ground-based air defence systems, a gap felt in forward-deployed squadrons. Rapid Sentry and Orcus have demonstrated their value in anti-drone defence, but Sky Sabre exists in such limited numbers it is essentially limited by demands from the home front. The short-range issue we would address by expanding Starstreak capability (and the RAF Regiment can debate with 7 Air Defence Group who owns and operates the asset), at a **ballpark cost of £130m** for 100 Starstreak.

- Budget shortfalls have delayed the procurement of 14 Chinook helicopters with extended ranges. We assume these are covered in the shortfall corrective estimate, but this needs confirmation. There is also a known lack of air-to-air refuelling capacity for the Poseidon MRA1, Wedgetail AEW1, RC-135W Rivet Joint and C-17 Globemaster aircraft. They all lack in-flight refuelling probes compatible with the Voyager tanker fleet. Whether this can be addressed at all, or has to be accepted as an unfixable limitation, is a further unknown.

- Meanwhile, the UK commissioned only three Boeing E-7 Wedgetail out of five originally planned, leaving another vulnerability – including not being able to sustain 24-hour airborne early warning coverage. It is difficult to work out how much, if any, of the original unit cost might be recouped by returning to the original order whose reduction was another MoD classic false economy. If we follow the US DoD's route into buying Hawkeyes as substitutes, this generates new problems for training, maintenance and parts. Plugging that UK gap with those two airframes, plus incidental costs and parts, costs **£1.5bn**.

Wider Homeland Resilience is a massive topic that embraces all of Whitehall. Departments are expected to take the lead on the aspects of crisis and war management under their remit.

- **The National Defence Plan is work in progress.** Reports suggest different parts of the civil service are prioritising it more or less seriously. This is understandable in departments least exposed to international threats (including cyber), and where residual skillsets from Cold War planning have been entirely forgotten – which is a catastrophic mistake.

- Whether it is increasing capacity for Defence Medical Services; generating a stand up capability to protect physical perimeters (as a start point, putting barbed wire round them so demonstrators can't climb over low fences to throw paint over aircraft and put them out of

service); assessing how to legally and efficiently arm base protection units and police forces – all such considerations require forward planning, starting urgently.

- Jumping across our review of mechanisms for Defence, the UK used to excel at deception, which has its own deterrent value. Holding limited numbers of very high value assets, it becomes all the more important that they are not taken out early in any conflict. A number of interesting projects are ongoing to enhance survivability, and **we propose an increased spend here of an additional £100m**, half tactically and half strategically.

- Most funding aspects of the Critical National Infrastructure do not fall under Defence expenditure but as a necessary precursor to conflict must come from the national budget. If there is reticence, this will also deter private sector businesses that are facing the same risks of disruption, damage and even sabotage from conducting their own safeguarding preparations. Absent a public audit, costing the Civil Contingencies manpower and war-hardening structures and systems, the best we can do here is highlight the gap and **float a figure of £5bn to meaningfully address it**.

This figure seems a lot but is essential insurance cover. The UK over three years reportedly spent £20bn (in late 1990s money) on Y2K preparation.[xxxiv] At the 2025 Hague Summit NATO countries committed on top of the 3.5% Defence target of GDP by 2035 to spend another 1.5% to "protect critical infrastructure, defend networks, ensure civil preparedness and resilience, innovate, and strengthen the defence industrial base."[xxxv] Resilience is a perquisite to staying in any fight, as stated in Article 3 of the NATO treaty.[xxxvi] Or in short, ensuring that a country doesn't surrender because its civilian infrastructure has quickly fallen over first.

Scaling KPMG estimates on the **annual cost of significant cyber-attacks to the UK** put this at £14.7bn. Alma Economics separately assesses that cyber-attacks attempting theft of intellectual property and knowledge assets cost the UK between £1bn to £8.5bn in 2024. KPMG's figure is an extrapolation too far, and the latter is an absurdly wide estimate; but they were cited by MPs to argue that "cyber risk is pervasive and significant."[xxxvii]

In 2022 the National Cyber Security Centre (NCSC) said the UK was the third most targeted country for cyberattacks, with the MoD defending its networks from over 90,000 sub-threshold attacks in a two year period.[xxxviii] Public and private sector resilience go hand in hand in the era of just-in-time supply chains and globalised components. However, this has taken time to sink in, with the NCSC – unlike its US counterpart the NSA – under-scaled to offer cybersecurity support to much of Government let alone the private sector except on an ad hoc basis. Nor will this likely be addressed by the creation of a new National Wealth Fund, given the likely dissipation of its focus, and given that the then CEO of the NWF told a Treasury Select Committee precisely that he saw no benefit in including Defence as a strategic priority area.[xxxix]

Core Defence

The protection of the homeland and strategic centres. The nature of modern warfare means that threats exist at range from mainland UK. Critical Natural Infrastructure and civilian willpower are

as much potential targets as troops in theatre, and need safeguarding alongside home airspace and waters.

Capability	Explanation	Cost Estimate
Baseline gap	The officially acknowledged funding gap simply to sustain existing capabilities and hit the SDR's own baseline	£28bn
Missile Defence	Counter-missile capability	£7bn
Ballistic second strike capability	Retaliatory deterrent that allows for a rapid proportionate response	£500m
4 Sloops (or corvettes)	Reroled second hand (or new-build) commercial small vessels to quickly extend the Navy footprint support	£100m
50 F35s	Increasing the size of the RAF combat strength to generate force strength, particularly in a period of heightened tension at multiple points	£5bn
SPEARCAP 3	Air-Surface missiles to secure air superiority against air defence threats in forward roles	£200m
Airfield improvements	Hardening and increased options for dispersal: critical shortfall improvements	£100m
100 Starstreak	Point air defence with mobility	£130m
Two E-7 Wedgetails	Generating 24 hour coverage capability for the existing fleet	£1.5bn
Deception capabilities	Tactical and strategic mechanisms particularly for safeguarding assets from first strike	£100m
Civil Contingencies Planning	NOT part of this budgeting but part of ongoing UK resilience obligations under Article 3 of the NATO treaty and where Whitehall and local government in many cases has been falling short	£5bn

Theatre 2: East of Suez

Homeland Defence poses many of the most difficult – and expensive – questions. Let's now consider the issue of UK global intervention on a significant yet still restrained scale, operating to protect its vital interests and key allies, delivering significant but bounded support at some distance from the home base.

The retreat from Empire, the debacle of Suez, and in particular the Geddes Axe that fell in the 1970s as the UK struggled to shake off financial disaster, collectively led to a retreat from "East of Suez". The policy did not however expunge UK interests in parts of the wider world. We argue that the UK needs to have some relatively speedy deployability, operating under the core premise of quickly helping a friendly government at immediate risk of being overthrown.

This effectively means a brigade operating in a light role in order to be airmobile. This capacity already sort of exists: it is the declared function of 16 Air Assault Brigade, except it has been effectively sunk into the core Army owing to a lack of bulk in the core forces, and is bonded within NATO's European framework of deployability. At the very least it needs to be powered up; arguably Defence must revisit the pre-1999 separate roles of 24 Airmobile and 5 Airborne brigades, distinguishing between countering the operational enemy rear versus strategic deployment capabilities. This is a long-term task, so let's stick with the former.

Costing this generates the same general problem this report faces, since effective capability means having a vast range of individual items we cannot hope to checklist - from unknown potential shortfalls in, say, forklifts, to reintroducing jump training at any meaningful scale (currently, the UK is lucky if it can practice a couple of companies parachuting).

- Strategically, we should discount the deployment of Apaches in any immediate numbers, support only coming as part of a steady build up. This could be offset by spending on offensive drones in scale, and one might also consider a small number of turboprop close support aircraft as a more portable option to cover the initial week in theatre.

- Needless to say, the current disastrous shortfall in light guns needs to be addressed immediately **(£150m for 36 x 105mm guns**, based on Malaysia's experience, even accepting the limitations of the type).[xl]

- Deployable close range Air Defence and Anti-Tank should be supplied, deliberately *over*compensating the light scaling of initial elements through missiles (say, **£50m cost**).

- The critical capability gaps involve parachute capability and limited strategic transport, which suggests another eight A400Ms and two C17s (given availability and commitments) may be required to generate sufficient capability at range.[xli] The former figure in fact turns out to take the RAF's total holdings back to the original plan before subsequent cuts, and was estimated at **£750m** with the two C17s perhaps costing an **additional £400m**.[xlii] The shortfall has been particularly felt because the requested numbers were needed to cover a new shortfall arising from the retirement of the C-130J Hercules, so this is simply correcting a known deficiency rather than extending capability.[xliii]

- Once established, the operational running cost of a light role brigade is officially estimated at **£150m per year**, which is a subsequent recurring cost, though this excludes infrastructure, utilities and equipment.[xliv] The aircraft themselves will be expensive to maintain and subject to a separate support contract that will need to be budgeted for, perhaps an additional **£100m per year**.

This capability to project force extends to the maritime sphere, whether keeping critical shipping lanes open or deterring piracy. It is quite true that much of this work is today done in coalitions, but the UK has to have some assets and capabilities it can bring to the table if it expects a coalition to actually form around it. In the Eastern context, we can break this down into three aspects: Antipiracy, Antimines, and Shipping escort.

Antipiracy is a ready draw for any maritime partner nation including ones not normally enamoured of western-led operations. Combined Task Force (CTF) 151 operated under a UN mandate (UNSCR 2608 [2021]) incorporating at various times, alongside the RN, vessels from Bahrain, Brazil, Denmark, Japan, Jordan, Kuwait, Pakistan, Philippines, New Zealand, South Korea, Singapore, Thailand, Turkey and the US. EUNAVFOR and other states including China have run their own parallel operations. Here, the question is simply whether, considering all its commitments, the UK currently has enough (serious) generalist maritime assets to contribute.

We will come back to this subsequently, because it is the same question raised by the requirements needed to generate other shipping escort, which ties in with the overall basic needs of the Royal Navy which simply cannot be everywhere all at once. Admittedly, this is a familiar problem that has been the case since Nelson chased Villeneuve across the Atlantic, or when the *Prince of Wales* and *Repulse* sailed past Singapore.

- But we can at least plant a tiny policy advance here of supplying small scale, half section strength, detachments of kinetically-authorised Royal Marines to accompany Red Ensign flagged vessels as a deterrent to piracy, and also as a commercial incentive for deterring vessel owners (via insurance or simple safety considerations) from using flags of convenience (**a notional £10m**, which might in any event be recouped).

Whether the UK would be inclined in the future to rerun Armilla Patrols to escort oil tankers out of the Gulf, or simply demonstrate a presence in friendly Gulf states, might be an issue of debate but for the existing commitment so evidently demonstrated by the Naval Support Facility in Bahrain. It does highlight a need for assets in those waters that can competently defend themselves from local threats, equating to proper modern warships.

Either an area is of strategic importance for the UK, along with the Singapore Straits, or it is not; if so then the Fleet needs to have enough assets to permanently demonstrate a credible presence and to surge into the area. We would suggest a standing presence of one warship and one RFA vessel (particularly to support any surge) would be a baseline for both locations: recommended fleet totals and costs are reflected in subsequent calculations later.

Antimining capability we can usefully assess in full here. The UK long had a lead in this field and to some extent still does and is innovatively exploring remote sensing using RFA vessels. These are, however, more likely to be removed from a theatre that is heating up.

We have already tentatively costed the generation of a commissioned civilian sloop class for home waters, including acting as a remote platform guidance base for assessing damage or threats to underwater infrastructure (£25m each).

- The RN currently has six Hunt Class vessels, made out of glass-reinforced plastic hulls, a design somewhat unlikely to find its counterpart already existing in the commercial sector, reminding us that in some areas capability shortfalls do require brand new builds. The UK also has just one remaining Sandown Class vessel from 12 originally, also made from specialist fibre-reinforced plastic. That constitutes a recent drop in asset count of two thirds. Even allowing for increased capability with new technology, mines constitute a relatively simple way to close a shipping lane to vessels requiring insurers.

- At the very least we would suggest we need six equivalents back – the Estonian Navy has three it has decided to retain, as have the Saudis, with the other surplus Sandown Class vessels obtained by Romania and Ukraine which remind us of the Black Sea threat. The surviving Sandown is due to reach its end-of-life extension this year, so timing seems appropriate to address this, at a putative cost of **£650m for six**.

East of Suez

The defence of national interests in the Middle and Far East through bounded power projection undertaken at some speed. The UK has key national interests and vital allies beyond its immediate neighbours. Rapid support and deployment at some scale can serve to pre-empt major threats from developing into full crises. The UK currently has shortfalls with its airborne and air-portable capabilities.

Capability	Explanation	Cost Estimate
6 air-portable light guns	For local fire support	£150m
Air Defence and Anti-Tank missiles	To initially compensate for light role deployment	£50m
Eight A400Ms	Generating enough platforms for personnel deployment and airdrop capability	£750m
Two C17s	Strategic airlift to deliver heavy equipment including armour	£400m

Royal Marines anti-piracy detachments	To kinetically deter attacks on UK-flagged vessels	£10m
Six mine countermeasure vessels	To maintain commercial access through maritime choke points	£650m

Theatre 3: Africa

China and Russia have begun their own Scramble for Africa, through aggressive investment practices, ruthlessly exploiting malicious contracts, bribery, elite capture, and by Private Military Company's (PMCs). The West cannot ignore it.

To some commentators, the UK has legacy baggage that disqualifies it from even trying. This is nonsense and a narrative to be aggressively challenged.[xlv] We would argue that having a capable and potentially interventionist military goes some way to redressing the balance of respectability. So, what is needed to deliver on that?

Many of the above assets can double role, and airborne capability obviously reaches parts of a massive continent that other elements could never reach. Crucial here is the reinforcement of the now whittled-down Royal Marines (RM) brigade - even now being tellingly renamed - and giving it the capabilities it needs to be the nation's projectile launched by the Navy.

The state of affairs already caused MPs alarm in 2018.[xlvi] Institutional expertise of a kind almost unique globally (excepting really only the USMC) was in jeopardy as key capability was being phased out, and which "would be yet another step away from full-spectrum capability."

- Currently the RM has around 5,700 personnel, excluding reservists. In 2011, the baseline we should aim for, the figure was 7,400. That is a shortfall of 1,700 marines who now need to be recruited and equipped with everything from Jackal to Polaris via BV206 and the new FATVs. This also has a basing consequence. **The cost for fixing this gap can be expected to run at upwards of £250m**.

There are also the specialist maritime assets. These historically have included

- LPD (Landing Platform Dock) eg the Albion class and the retired Fearless class
- LSD (Landing Ship Dock), a version of which is the UK's Bay class from the RFA
- LPH (Landing Platform Helicopter), of which the retired HMS Ocean was the sole exemplar
- LHD/A (Landing Helicopter Dock/Assault) combining features of the above and found in the French Mistral class and American Wasp class
- LST (Landing Ship Tank) for delivering larger and heavier vehicles.
- With the retirement of HMS Albion, HMS Bulwark, and HMS Ocean, the concept of Royal Marines actually getting ashore into a hostile littoral crisis point seems fanciful. They correspondingly need two vessels to deploy from by sea, and a third vessel for the horizontal dimension.[xlvii] By this, we mean it can either supply a dedicated heli capacity to land at a critical location away from the port, or it could supply very limited maritime air cover. HMS Ocean helped enable Apaches to support insurgents during the Libya campaign in 2011, but also had a heli-lift capability. It could not operate as a platform for VTOL though so an alternative option is to revisit the Invincible Class escort carrier and the potential (though with its complexities) of operating a small number of F-35Bs from it. We are realistic enough not to

ask for both. **It would cost around £1bn to purchase two Mistrals** from France to plug our current gap.

- It may be possible, based on plenty of precedent, to generate an escort ship around an existing commercial design, accepting a loss of capacity; £750m might then cover the cost of the escort vessel along with the main cost of either five additional Task Force-specific F35Bs or a selection of heli aviation. **That makes an extremely ballpark £1.75bn** for regenerating the maritime assets and light air support to help quickly dominate the ground and impose a narrative of clear superiority at the moment of intervention.

- This does not however take into consideration the need to more fully update the armoury of these forces with light guns, ISTAR and attack drones, and close defence systems to compensate for the lack of significant armour, and as per previous airborne example we would budget another **£200m** to ensure this light force is capable of handling itself against more heavily armed insurgents or militias.

That addresses the prospect of major intervention, but not influence operations the UK may wish to mount. We will cover the need to rethink national policy on PMCs in a quite separate paper, and that has no financial implications on the subject here at hand.

What we ought to further develop is strategic doctrine on the role of the UK's new Ranger battalions. These constitute the potential for a deep understanding of local environments, a mechanism for defence diplomacy, and a counterweight for hostile players seeking to influence these vacated spaces. There is a real opportunity here of not simply finding new Richard Francis Burtons or other latter day Great Game players to serve in uniform, but perhaps more importantly creating them in the UK private sector among veterans establishing themselves in subsequent civilian careers. This approach requires individuals to develop the deep expertise and local knowledge that army career paths and current manning levels in those units rather undermine. Service in these units can only be delivered by creating a cadre of deep specialists, effectively meaning something approaching a standalone career path.

- We suggest that the unit needs to double in size, which from establishment costs **we would estimate to perhaps come in at £170m.**[xlviii] Crucially this should not come at the expense of manning levels from elsewhere in the existing army, an issue however which we consider separately.

- Defence Diplomacy is often an under deployed tool and an early casualty of cutbacks. Again, this merits a separate paper on the long term value provided for instance by supporting foreign students at Sandhurst, Shrivenham, Cranwell, Britannia and so on; standing PIDs (employment slots) for military attachments; or the unusual example of No12 Squadron and the Qatar Emiri Air Force. Here we recommend a dedicated budget of **£10m for regimental defence diplomacy**, half set aside for the Indian subcontinent. This would facilitate social and exchange contacts between British units and their counterparts which have historic ties, particularly shared battle honours.

Africa

The defence of national interests in Africa with particular emphasis on the maritime expeditionary role, and with some mission interchangeability with Theatre 2 assets depending on geography and circumstances. In certain circumstances rather than airborne delivery the natural route is via the projection of maritime force. Cutbacks have reduced UK credibility in this role, and these need to be replaced.

Capability	Explanation	Cost Estimate
36 readily deployable light guns	For local fire support (similar to Theatre 2 forces)	£150m
Air Defence and Anti-Tank missiles	To initially compensate for light role deployment (similar to Theatre 2 forces)	£50m
1700 Royal Marines plus equipment	Regenerating minimum necessary manpower for an expeditionary capability	£250m
Three expeditionary vessels	Two landing ships plus a third vessel for limited close air support	£1.75bn
Increasing Rangers' scaling	Bolstering an underdeveloped capability for local influence building	£170m
Regimental Defence Diplomacy	Quick wins to build personal rapport and interunit camaraderie based on historical ties only shared with the UK	£10m

Theatre 4: Russia

The sad truth of our time is that the Soviet Union has gone but Russia is once again a threat. It has an aggressive policy to its near abroad, which includes NATO countries. It conducts what we might now style 'implausibly deniable' activity against its opponents, including attempting to subvert and indeed overthrow the governments of European countries. It invaded a neighbour (Ukraine) with whom it had a Friendship Treaty. Its military posture involves reckless behaviour towards foreign aviation in particular.

Western powers have responded to this aggression by military support in Ukraine and bolstering forces in eastern NATO states at least to the level of generating a speed bump that triggers some measure of a full Article 5 response.

But the UK military is not configured and certainly not scaled to engage in a major land war in Europe. Our starting point determines how we address this shortfall.

Does Russia directly threaten UK forces? Yes, even if only due to a possible miscalculation. There is a realistic possibility of Russia blundering into an armed conflict with NATO countries, particularly by supporting elevated 'dissidents' to undermine the credibility of local democracy, but even simply by its seeking, as it already does, to disrupt western economies through grey zone operations, or through a misjudged encounter – around Baltic airspace, off disputed Crimean waters, or near Kaliningrad. Domestic political insecurity might find a misjudged outlet. While unlikely himself to be falling out of any windows, President Putin is 73 years old; Russia's economy is dependent on strategic reserves; and there has been a well-publicised coup attempt with the Wagner Group joyride on Moscow in 2023.

One might hope for a steady transition towards more restrained figures within United Russia, but the system survives by suppressing any credible and moderate opposition. Russia remains one of several regimes that seeks to undermine the social coherence of the UK – a policy decision it embraced long before RT and Sputnik were banned from Western airwaves, and which for many years now has gone far beyond raising legitimate mainstream questions around Western establishments' socially liberal standpoints.

Our next question then is where our role sits with respect to other NATO powers, especially if Poland, Germany and other states are ramping up their own land warfare capabilities for confrontation with Russia. Poland alone has four divisions and seeks to generate two more (compare this with the UK's one-and-a-bit, at a stretch). The calculus in the Cold War was very different, with reluctance to let West Germany fully rearm, and with the French semi-detached.

Our assessment is that the UK does need to be able to generate land forces at pace, even if significantly short of the Corps strength of BAOR days. There are several reasons for this: the deterrent value it offers; the prospect of an expeditionary war merely being the precursor to a large stabilising presence in a country of genuinely major strategic national interest; and, contentiously, the principle that it is easier to persuade foreign taxpayers on both sides of the

Atlantic to cover your Eastern flank if you have demonstrable assets of your own to show they are not carrying all of the burden.

- That means having a fully up-to-strength division, which is not dependent on the expeditionary assets we have already identified, plus a credible skeleton of a second division that could be brought up to strength using Reserves and the early elements of mass mobilisation. **We assume that the £28bn capability gap to generate these that we encountered earlier encompasses this known cost**, though we take this somewhat at risk. We do not, however, recommend surging the UK's divisional warfighting capability beyond this.

There are also expectations for the UK to continue to assume two other historic roles.

The first is UK support of Scandinavian states particularly in the **High North**. This has centred on defending Norway against Russia. If our assessment is a malign actor is operating in our North Sea backyard, then defence of the Norwegian littoral and wider state is indeed in the UK interest. This also has the corollary effect of leading by example in NATO by backing commitments up. We might further add that Scandinavia constitutes a longstanding area of friendship, alliance and fraternity. Our resolve to support the Royal Marines is already from the above a given, so the additional costings here relate to winterisation, specialist theatre kit, and training.

Accepting this premise, there was already an observed shortfall in 2018.[xlix] The limited number particularly of maritime assets long-term deployable to this region (still today, as then, one icebreaker – HMS Protector) were in demand at the other end of the planet. The deterrent value of publicised under-ice deployment of submarines off Norway was also noted.

Even if we choose to accept a reduced UK back yard presence, this still leaves us with the need to continue with our other historic role: **protecting the GIUK Gap** and maritime approaches extending to within strike range of the British homeland. In practical terms this means first and foremost having a functional anti-submarine capability.

- SDR 25 recognised this through the development of Atlantic Bastion, including the use of sensors and uncrewed vessels. While the adoption of such technology is to be welcomed, our observation is that this generates a possible risk of dependence on mere observation rather than shadowing and intimidating, which itself has implications for when assets are needed to interdict or even (in time of war) destroy the element in question.

- Much of the Homeland Resilience package was covered earlier, but there are aspects which are worth briefly reflagging here – ensuring that strategical national infrastructure in the marine environment or on the sea floor is safeguarded. In practice that means cables, pipelines, and also the North Sea platforms themselves (whether manned or unmanned). We note here the role of RFA Proteus, and the assessment already made under SDR 25 that this threat required a Multi-Role Ocean Survey ship and fleets of autonomous vehicles to counter subsea threats. We also assume that sufficient low profile assets are tasked with the protection of platforms. Our bid for four 'sloops' we have already raised.

The carrier numbers we recommend kept as they are, with no aspiration either to mothball or to add a HMS Prince George.[l] We do however flag two shortfalls that need addressing:

- The first involves air defence systems, which were planned for mounting and have even now yet to be fully installed. The ship does have Phalanx and 30mm guns but not the planned missile systems, leaving too much to point defence and forgetting the lessons of the Falklands.[li] Given the shortfall in escort vessels, **providing vessels with the planned ability to defend itself in a layered manner seems like a sensible idea, which Sea Ceptor could provide at an expansion of current naval usage costed at £500m.** Noting we need to also add it to all the new build platforms that we shortly discuss.

- Additionally, there is the matter of airborne early warning capability on board the vessels. Japan and France are amongst those that deploy the E2 Hawkeye which seems the logical stopgap, and even purchasing a second hand system, redundant E-2Cs being replaced by the new generation build would plug the gap. **Three E-2Ds instead as a longer-term investment would cost perhaps £1.8bn.**

The carriers are already exposed when deployed. Here we hit another set of core shortfalls.

- The UK does not have enough attack submarines. It does not have enough General Purpose Frigates. And it does not have enough Destroyers. In the case of the attack submarines, there is a commitment to build “up to” twelve replacements for the seven Astute class in service, and with a gradual roll out, and only within current expenditure plans (that is to say, ignoring the shortfall).[lii] Given track records, none of that inspires confidence, though it is nice to see a headline ambition at least acknowledged.

Which takes us back to the earlier point about projecting power and the total assets needed; the core question is basically whether the UK has enough to cover all its commitments so that it can also project power globally, avoiding double- or triple-hatting and the wishful thinking and reliance on chance accompanying this. In terms of current capability, the head of the Royal Navy himself seems to think it has its work cut out even on its basic wartime function, which is a bit of a combat indicator. Speaking to the Swedish newspaper *Svenska Dagbladet* at the close of March 2026, General Sir Gwyn Jenkins RM said the Navy would go to war if it needed to as a military duty but that he thought it was not “as ready as it should be”.[liii]

The Ministry of Defence said it expected the new class would see a submarine built every 18 months. It has also stated that the construction programme would see a "major expansion of industrial capability" at BAE Systems' shipbuilding site in Barrow-in-Furness, Cumbria, plus the Derby site of Rolls-Royce, which makes nuclear reactors. We accept this at face value, in conjunction with our call to plug the £28 billion gap which would otherwise be a driver to cancel or delay production (while also increasing end costs): we do so hesitantly only because there is already a bun fight over who gets dibs on AUKUS submarines as they roll out, and we are disinclined to complicate maintenance by purchasing additional vessels of different type. We would rather that current build plans be accelerated as quickly as possible.

- We recommend the current gap is plugged by extra maritime aircraft. What would that require? The UK only has nine Poseidon P8-As, intended to cover not just the waters around the UK but also the EEZ waters around our overseas territories, some additional 2.3 million square miles in total. The Nimrod example demonstrated that ISR capabilities also served a purpose in support of land ops (indeed, this author was attached to a platform on one such task in Iraq). In the mid-1990s, 21 platforms were seen as appropriate. Buying another 12 Poseidons to return us to that number and help plug the anti-submarine gap would mean **a bill of perhaps £2.4bn**.

It is worth remembering that in time of major conflict, the UK would be reliant upon shipping lanes, particularly across the Atlantic, and quite plausibly involving the restoration of the convoy systems. We forget at our peril the critical supply lines and reinforcement routes not just leading to home waters but at choke points around the world, where overwatch will be vitally important. Which raises then the question of how many frigates and destroyers the UK needs if it is to be able to defend itself and also demonstrate a credible global presence.

The 1990 Options for Change review reduced the frigate/destroyer number from 48 to 40, with the end of the Soviet threat. This was cut to 32 ships by the 1998 Strategic Defence Review, and to 25 by the 2004 White Paper. Currently, the Royal Navy has 12 Type 23 frigates and six Type 45 destroyers, which is hardly a credible number. For comparison, it is worth recalling that the commander of the French Navy, Adm. Nicolas Vaujour, has said that while the budget gave him 15 frigates, he needed 18 frigates for a "coherent format."[liv]

- We would argue the 1998 SDR provides us with an absolute minimum target of 32 – meaning **a shortfall of 14 platforms** – and the actual shortfall lies somewhere in between that and the post-Soviet estimate. We accept that individual vessels can be inherently more powerful and indeed larger than their predecessors, but we also note a tendency to cut end capability by subsequent cost savings.

The Type 26 provides anti-submarine and carrier protection capability, with modular missile capability. The Type 31 (currently being built) is more general purpose and less capable, and should not be counted upon to act as a credible stopgap beyond the immediate. Nevertheless, it is being seen as the more globally deployable of the two, presumably anticipating counter piracy and humanitarian relief roles. The very minimum that can be argued for here is ensuring they are ready fitted with Mark 41 VLS launch capability for anti-shipping missiles, which at present is merely a reserve option. The Batch 2 Type 31s (Type 32s) are already seen as the way forward, and focus should concentrate here the delivery of the speculated five platforms.

- Type 26 is already capturing export markets. We would suggest doubling planned RN holdings from 8 to 16, given that these vessels are intended to be the "backbone" of the home fleet out to 2060, at **an estimated £6.8bn**, to secure home waters £5bn total.

- The Type 32s appear to be tremendously cost effective for the presence and naval diplomacy missions, at the estimated £300m per unit. Our recommendation is that HMG puts in an immediate commitment to ten of these at **a cost of £3bn**.

The current Type 45 is meanwhile being replaced with the new Type 83. There are still many unanswered questions around this vessel, which is due to start to enter service from 2035 and so does not constitute a ready fix to the lack of Daring Class assets. Equally however, the last Type 45 was built 15 years ago and there isn't really the capability to simply roll a couple more out the shipyard. We must reluctantly accept this as a capability gap and regret the failure to stick with the original order.

Quite where these assets will come from, and in what timeframe, is an open question. They obviously cannot be conjured out of thin air, though they might be plausibly supplied by allied nations. We note that the Royal Australian Navy and Royal Canadian Navy have also put in domestic production orders for Type 26s, but Australia reduced its order from nine to six in 2024, which implies there may be some existing flexibility amongst suppliers. Ultimately, the issue is not merely being able to magic up a platform from some global shipyard, but the vessel being up to par with task, sufficiently defended, with suites that do not interfere with one another internally, but also (the difficult part) generated in a way that ensures the long term survival of the national shipbuilding industry is sustained as an ongoing asset.

We meanwhile assume (though perhaps we shouldn't) that the high proportion of naval equipment, which was found to be inoperable, at a level which was described by General Houghton to be "quite disturbing", would be redressed under the £28bn figure; the threshold to consider this a successful fix would be the need to avoid routinely cannibalising other assets, permanently grounding or completely mothballing them. Elsewhere, there have been delays in developing the Dreadnought Class ballistic missile submarines, now apparently due to enter service in 2032. The impact on the Vanguard Class means extra strains and costs to extend their lifespan. Such issues are classified, and we might choose to assume these costs are already included this figure and are not an additional burden risking cuts elsewhere.

RFA Fort Victoria is the only RFA solid stores ship. It has too often stood at reduced readiness due to personnel shortages. Replacements are due to enter service from 2028 onwards. Our proposal to increase the size and deployability of the fleet by necessity implies that the RFA itself needs expanding across all its capabilities. We suggest this means the following.

- First, retaining and committing to replacing the three Bay Class Landing Ships (RFA Lyme Bay, Mounts Bay and Cardigan Bay) that are due early in the 2030s. This is a future financial commitment which we exclude from costings here. Secondly, the Tide Class tankers: there have been four on the books, of which two have in effect been moribund. We suggest that the current two needs to be six under the new scaling. As before, we suggest commercially available designs or existing builds may be fit for purpose. In any event we suggest **a total price tag of £600m**.

- Three new fleet solid support ships (FSS) are due to enter service to replace the rather overworked Fort Victoria; we suggest that ought to be five, suggesting **an additional price tag of £1bn**. The plans around the survey and ice patrol vessels we leave unchanged.

- The casualty ship RFA Argus provides a 100-bed capability. Plans to sell it off have been reversed and so do not need to be addressed.

- The Royal Navy's Merlin HM2 fleet has only 30 aircraft and has long been seen as over-tasked, responsible for anti-submarine warfare missions and Airborne Surveillance and Control taskings. We relieve the latter considerably (and improve the effectiveness drastically) by purchasing the E-3s (per above). But an additional 10 Merlins would reduce strain, **at a combined basic price tag of £25m**.

Russia

Mitigating the risks from and of conflict with a peer power in the near abroad. Russia is the country with which the UK is most likely to find itself in an inadvertent war with. Limiting escalation and reducing the risk of it happening in the first place is as critical as ensuring that any conflict is not lost within the opening days. Critical shortfalls need to be filled to redress the balance of power.

Capability	Explanation	Cost Estimate
SeaCeptor for aircraft carriers	Close range independent air defence for the carriers and for new builds	£500m
Three E-2Ds	Carrier-borne early warning cover	£1.8bn
Twelve Poseidons	Anti-submarine maritime patrols pending the planned regeneration of the submarine force	£2.4bn
Eight Type 26	Doubling the size of the backbone of the home fleet	£6.8bn
Ten Type 32s	Increasing the global footprint of the Navy and for lower intensity expeditionary support	£3bn
Four Tide Class tankers	Matching increased fleet size and range with independence of action	£600m
Two fleet solid support ships	Matching increased fleet size and range with independence of action	£1bn
Ten Merlins	Increased capability for a helicopter workhorse	£25m

Theatre 5: China

The Yangtze Incident during the Chinese Civil War in 1949, and the limited force deployment set at one brigade in the Korean War in the early 1950s, framed the new postwar reality of UK power in China's back yard. That shifted further with the handover of Hong Kong in 1997.

It has not, however, meant total disengagement by the UK, merely establishing boundaries to practical expectations and demonstrating that the UK's limited power is best deployed at a little distance from any conflict zone that may develop between China (or more accurately perhaps, the Chinese Communist Party) and the West.

The obvious suggestion is that this lies in backfilling for any US military shift into the Taiwan region and US Pacific bases; and supporting Commonwealth allies in closing the trade route chokepoints that China and others will depend on. We note also the residual UK presences in the Sultanate of Brunei and Singapore as well as in Malaysia in support of the Five Powers Defence Arrangements along with New Zealand and Australia in addition to AUKUS.

Active participation in any such confrontation and even the prospect of it would place the UK in the early grey zone conflict (to all intents and purposes, given current hostile Chinese activity we already occupy it).[lv] This takes us back to the need referenced in the Homeland section to ensure that both the UK's cyber defences and capabilities in GCHQ are fully funded.

- The National Cyber Security Centre (NCSC) was formed in 2016 by combining parts of government, MI5 and GCHQ. It leads the UK's defence against the most advanced cyber threats, whatever their source. The nature of strategic failure here should be perfectly obvious. It has a budget of around £1.9bn but is known to bound its engagement with the private sector owing to capability restraints. Additional funds such as £2m for Queen's University Belfast's Cyber AI Hub to develop better ties and professional development are welcome but limited: throwing money at a new establishment risks waste and diversion. Looking at the US model we suggest there is a shortfall in providing outreach to the private sector.[lvi] Correspondingly we would suggest **£200m constitutes a credible expansion** in the defence of the economy, even if it will take some time to bring in the expertise.

- GCHQ has a critical global capability and is a significant reason behind why the UK is treated seriously in the Five Eyes arrangement. Money spent here and across the wider intelligence community is a fundamental boon. Without breaking it down, we would recommend that between them Cheltenham, Vauxhall Cross and Thames House are given a sum of **£500m to expand capability and increase resilience** to cover any potential transition to war which would be a point of considerable stress.

In the Far East, it is the UK's submarine force that provides our greatest deployable asset and we have left consideration of these needs to this natural point. The availability of SSNs has dropped as a result of delays in the Astute-class attack submarine building programme. Even once all seven Astutes are in service, it is questionable whether the force will be able to sustain their current tasks and the additional deployments to Australia and wider region from 2026 onwards.

Yet submarines constitute the prime deterrent against hostile maritime activity, from the North to the South China Seas via the South Atlantic.

Our assessment is that purchasing submarines outside of the AUKUS arrangement is a strategic distraction and may even undermine the treaty. The question rather is whether the future SSN-AUKUS programme can be accelerated, given the platforms are in heavy demand from all three participating states. In a very recent development, the UK now aims to produce a submarine every 18 months, following heavy spending to upgrade Barrow and Derby production sites. We are not sure that this can be cost-effectively improved upon, though what might be considered is whether any new, credible and trusted parties may be brought in as associated partners to the arrangement.

- In any event, the commitment to buy "up to 12" AUKUS submarines needs to be translated into an unambiguous commitment to buy that number and will be **met by future budgets**. The question of finding credible partners also brings in the associated question of increasing tie ins with regional powers. That includes greater engagement with China's southern competitors/neighbours, especially India, but also finding the right level of R&D association with Japan and South Korea.[lvii]

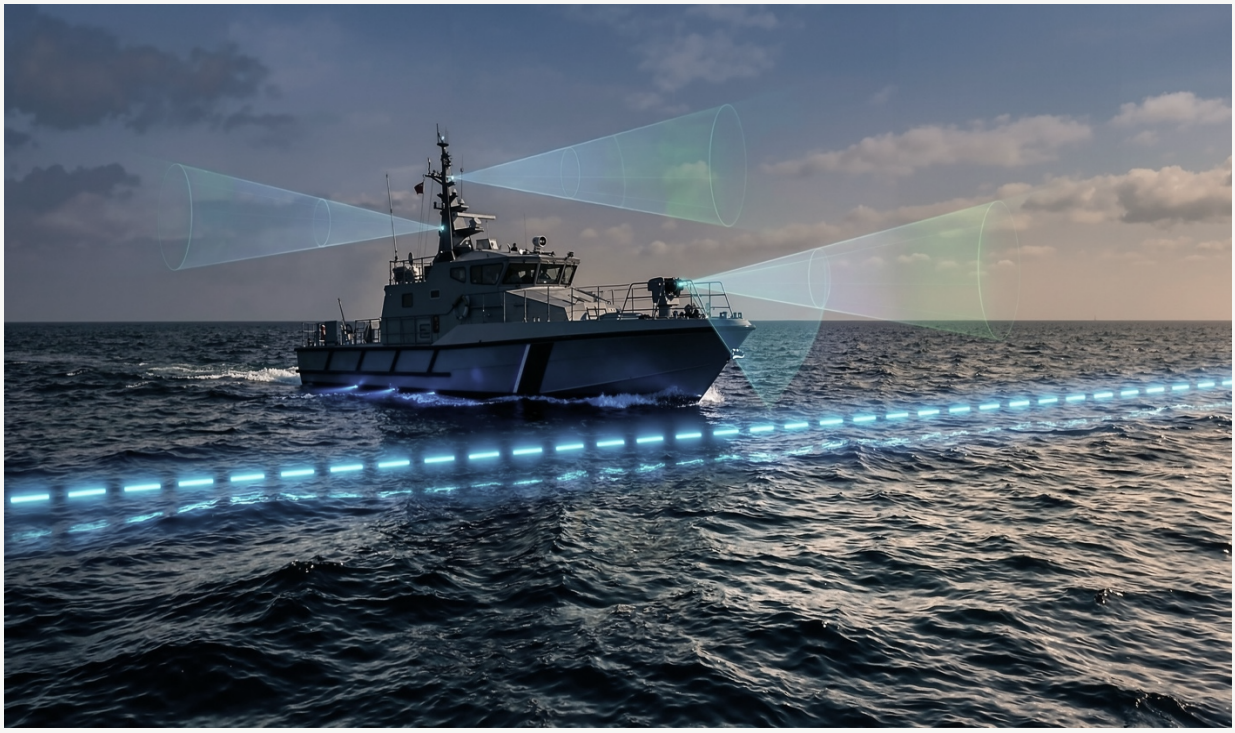
China also seems the right threat scenario for us to consider the Space domain, as a country asserting itself in that field, not least through not just developing but actually field-testing satellite killers. UK Space Command is a new formation and has yet to establish its credibility amongst peers. It is still trying to work out what it needs to own, where it just needs to collaborate, and what it needs proper access rights to. Obviously, space assets can provide critical C2, support ISTAR, serve as a precursor to missile defence capability, and be a key adjunct to effective expeditionary capability. The UK conceded peer status when it gave up the Black Arrow programme, and has struggled even to justify Defence activity thanks to the unscrutinised costs of Zircon. Nevertheless, opportunities exist thanks to UK research and industry holdings in microsatellites such as Boralis, and some joint work, for instance, was announced with Canada on an orbiting short-wave infrared camera.[lviii]

- Our suspicion is that the UK's Defence Science and Technology Laboratory (DSTL) would disproportionately benefit by very early phase funding to dip into more technology demonstrator programmes to explore novel space domains, particularly if the money is provided at risk and with no guaranteed expectation of the work generating an end product: **£30m is our suggested figure**. A cheap satellite killer may be one item to look at.

China

Mitigating the enhanced risks arising from a conflict involving China and the West. The UK (via Hong Kong) no longer has a land border with China. But it does have strategic interests in the region, and an AUKUS alliance and a Five Power Defence Agreement also in play. China's tech gains generate specific risks if the UK were to play any supporting role in any conflict, alongside aggressive espionage and diplomatic stances, and these need to be countered.

Capability	Explanation	Cost Estimate
National Cyber Security Centre (NCSC)	Expanding the capacity of the state to support cyber defence in parts of the private sector	£200m
MI5, SIS, and GCHQ	Supporting work on resilience and deterrence	£500 m
UK's Defence Science and Technology Laboratory (DSTL)	Targeted pilot projects accepting risk of innovative failure	£30m



Field Army: Some Overarching Issues

As we have underlined, the sources within the MoD who highlighted the existence of a starting deficit of £28bn did not spell out to the press what the shortfall consists of. While we take that figure as encompassing spend that would restore core warfighting capability to the UK's land forces, that assumption comes at a risk and it is worth briefly setting out here the nature of the problem confronting Defence planners.

Obviously fighting power isn't measured by numbers alone; but if numbers are cut for reasons of economy rather than equivalence, then they do become a pointer.

In 2003, as declared under the terms of the Conventional Forces in Europe agreement, the Army had 560 tanks (with a permitted treaty limit of 843); 2,361 armoured combat vehicles; and 441 heavy artillery pieces.[lix]

By contrast, in 2023, the Army had 288 MBTs, 845 Armoured Personnel Carriers; 1,480 Protected Mobility Vehicles (ie designed to counter mines); 882 Armoured Fighting Vehicles; and 212 general artillery pieces.[lx]

This last figure is particularly deceiving, with the AS90 essentially now out of service and replaced by a mere 14 Archer guns bought from Sweden – a purchase that incidentally took just 8 weeks to accomplish, at least boding well for some areas of speedy procurement.[lxi]

The replacement RCH-155 self-propelled howitzer doesn't have a deadline, or an end delivery figure attached. The risk here then is of a significant capability gap over an extended period, for which the obvious solution is to increase numbers of Archer, forcing us to consider it here as additional to the SDR costings: another **42 Archer guns would cost around £350m**.

The army in 2023 also had 148 Engineering Equipment pieces; for context however, this left it unable to bridge any substantial river. A previous surge in medical support units was also now being reversed, problematic if medical reservists are potentially largely already double hatted in their day jobs in an NHS that will also have to deal with mass casualties either in their role of rear echelon hospitals or because of civilian casualties. It currently has 288 Main Battle Tanks, of which at best only half are reported to be functional (75 were acknowledged to be in formal storage, for cannibalisation), which coincidentally also equates to the number (148) being upgraded to Challenger 3 standard. In 1990, for further reference, it had 1,200. It may not need 1,200 today but it needs enough to make what it does deploy hit hard.[lxii]

In terms of simple comparison, that means the modern British Army compared with its counterpart twenty years ago has a quarter of the functional armour, a third of the battlefield armoured vehicles, and an echo of the artillery punch. Of course it has gained some mitigation, for instance through Apache, and an expansion of some elements particularly intelligence. But these are limited compensation compared with the scale of the reductions.

The result is a shortfall of those assets that would make an armoured division punch its weight. Rectifying this will be capital intense – indeed, a recent report by the Institute for Fiscal Studies

shows that across the past five years even within current boundaries current spending already is.[lxiii] With the Snatch saga and shortfalls in body armour still in military minds, it is imperative that gaps are filled with kit that is sufficient in scale but also in quality. This requires addressing failures identified by the Defence Select Committee in 2021 – obsolescent assets that were at risk of being quantitatively and qualitatively overmatched by peer adversaries; and a total formation that was understrength by a brigade.

Addressing this requires properly expanding on artillery support. It means affiliated Air Defence. It means buying APCs that don't deafen you or make you want to vomit when you travel in them. It means having sufficient cross country soft skinned vehicles for the appropriate role. It means enough MBTs. It means enough aviation to provide the lift, and sufficient Apache to provide the close combat support (the 50 AH-64E are correspondingly welcome, though this is down from the 67 when the helicopter was first introduced).

Of course, it also means operational use of drones as a combat asset, applying all the lessons learned in Ukraine and getting enough numbers together of basic models to plug the OODA Loop gap in drone tech advances once conflict begins: the USMC's planning here is based around getting 10,000 cheap, locally modifiable platforms and ensuring a large proportion of its force know the principles of working them.[lxiv] Or looking ahead, we might consider modular deployable drone factories that can 3D print drones and their components. Our confidence in the UK delivering this capability has lately been dented. We note the extraordinary official sluggishness towards a UK startup company in the Midlands, Skycutter, which won a $200m US DoD contract yet due to a lack of MoD interest is looking at relocating abroad.[lxv]

Stocks and stockpiles are another known gap. Planners around medical reserves are already aware that they can avoid waste by working with the NHS to ensure rotating stock from MoD shelves through the NHS in order to avoid expiry dates.

More of a concern is generating sufficient munitions stockpiles, so we tentatively offer **a £1bn additional cost here** to at least enter this factor onto the scales for subsequent wider discussion. This obviously becomes additionally important if the number of assets capable of firing munitions is being increased. There is also the question of where to securely store them to avoid putting too many eggs into a single strike-inducing basket. In BAOR days, munition stockpiles were estimated to run out after only 7-10 days full combat, though by that stage it was assumed that a major land conflict in Europe involving the superpowers would have gone nuclear. Estimates for artillery round usage in Ukraine were 5,000 a day in February 2023 (equivalent to a smaller European country's annual order in peacetime). By contrast, today's British Army is not considered able to sustain high intensity operations for more than a week.[lxvi]

As a final comment on UK shortfalls, we note the importance of Special Forces as strategic assets. We have already recommended an increase of capability for the Rangers, and assume it is sufficiently resourced to do their current jobs (though we are tempted to set aside £1bn to give them Spectre gunship capability in a close support role). We meanwhile remain concerned with the low focus on the UK's messaging and influence capabilities, and the potential need for a strategic Information Operations capability: **we would suggest £50m here** for specific existing Whitehall and MoD capabilities requiring development.

Field Army

Capability	Explanation	Cost Estimate
42 Archer Guns	RCH-155 have recently been ordered but batch 1 delivery is at risk and the field army has only a dozen operation guns	£350m
Munitions stockpiles	Enabling the UK to fight any war for slightly longer than the current week to ten days	£1bn
Info Ops	Strategic and tactical messaging in PR support of UK interests and commitments	£50m

Procurement Dynamics: Comparison with Poland

Comparison with Poland is in many ways instructive – attitudinally, institutionally and in costs. Naturally, Poland has its own particular history and geopolitical circumstances including sharing a land border with a Russian exclave, meaning that its priorities lean towards a land-based focus and not an expeditionary one.

Warsaw's response shows what can be delivered (and what shortfalls still exist) by bulk buying off the shelf, in what timeframe, and for what budget.

Over 2022-3, its Defence budget went up by a half, through 4% and heading towards 5%. Financing went on a range of equipment from tanks to satellite communications, air defence to Apache, light recce to cyber.[lxvii] Poland is ordering 360 K2 tanks and 366 Abrams tanks, plus 26 recovery vehicles and 17 bridge-layers. An important learning point is where to get kit in a hurry; the K2 are from South Korea and a third of the Abrams are USMC surplus. Its Leopard 2s are being upgraded and turned into a strategic reserve in storage. Poland's plan is to order around 1,350 new variant locally produced Infantry Fighting Vehicles. Around 360 155m self-propelled guns have also been ordered from South Korea. Over half of Poland's Defence budget will correspondingly now be spent on these kinds of capabilities.

Even accepting that Poland has the additional driver of having to replace all its legacy Cold War equipment, the surge is impressive and instructive even – it is enough to ensure Warsaw could do more than General Sir Richard Barrons's admonition about British counterparts being able merely to "seize a small market town on a good day".[lxviii]

And to maintain it? This is a crunch question, best covered in a separate paper on procurement generally. Deloitte's take as its baseline scenario is that maintenance costs for Warsaw will be around twice the purchase price spread across 30 years: we take this as our own starting estimate behind sustaining increased UK capability.[lxix] It also notes the prospect of savings arising on procurement through economies of scale (and might have added: consistency in contractual requirements); preferring domestic production where choice existed; and cooperation with allies over servicing and training.

The State of Play with Procurement

The UK's Defence procurement system faces many problems. These include: semi-monopolies amongst domestic suppliers; too-big-too-fail economics; association with regional politics; poor cost-estimate processes; lack of business skill sets; excessive tendency to change fixed contracts; deceitful departmental bidding processes associated with Whitehall budgetary disputes; development partnerships with countries that cut their own orders; EU objectives of concentrating production at the cost of national capabilities; security of supply; failure to develop apprenticeships; disjointed procurement sign offs — and the list goes on. An important further factor that needs wider understanding amongst ministers is how HMG has been relying on P50 costing estimates rather than P75 or P90 - that is to say, a set of end-costings with an assessed probability of only 50% of being met, in order to massage figures unrealistically downwards. The end result, half the time, means running out of funds. **We will cover these in much greater depth in another paper.** For the moment, it is enough to note our assessment is that capability regeneration is nevertheless possible, though the many risks associated with any surge (particularly if domestically built and thus particularly subject to Whitehall's own inputs and leisurely whims) need to be aggressively grasped.

Reformers have been trying to fix the MoD's procurement mess for decades. There have been some successes – the military was, for example, called in to help the NHS cope with its management failures during Covid, but a comparison across Whitehall is hardly a ringing endorsement when known structural failings have not been touched. For now, let's simply flag some dynamics that are problems to factor in with any Defence fix at speed.

A rather fundamental starting point is the Defence Readiness Bill. This is intended to provide the legal framework for a 'whole-of-society' response to a major war but also frames the earlier structural preparation in peacetime. But while the bill was meant to be introduced early in 2026 it won't appear before mid-2027 at the earliest. Even worse is the delay in producing the Defence Investment Plan. As we shall see in our case studies, the signal this delay has given to Whitehall and also to the private sector is serious and already risks destroying the credibility of parts of the rearmament package as it currently exists.

What short term shifts might UK suppliers have to swallow in order to get kit delivered to the forces as quickly as possible? The Poles have shown that part of the answer, if UK industry cannot be built up quickly enough in time (which is also an end state strategic objective), does involve foreign purchasing. Effective procurement can get what works to plug current gaps, and which is also probably cheaper; recommends going for the off-the-shelf rather than the bespoke; buying in bulk, up front, with clear agreement to pay for it in full.

The strategic need for reliable access to domestic production will require subsidy – not costed separately here but already included in the SDR concept. A variable here is whether what is built can also be exported. A more outward-looking and expeditionary posture might, possibly, be linked with a more aggressive sales opportunity for these industries and more grateful friends. We are still though living in a political culture burned by the Pergau Dam incident and allegations of corruption behind the astonishingly large (£40bn) al-Yamamah deal, and we need to get past this into a more hardnosed outlook.

We also have a shortage of technical skills: Babcock had to import 300 specialist welders from the Philippines to fill a gap.[lxx] This should very much be considered as much a cross-Whitehall apprenticeships and productivity opportunity as it is a problem, even if (and especially if) it triggers a political argument with any devolved governments. Meanwhile, we accept at face value assurances that digital tech, quantum and AI do not need subsidy to get additional kit over the line given the state of private sector growth in the UK – but these do merit rolling strategic review given the pace of development.[lxxi]

The lesson should have been learned a hundred times over, and again with the adaptation of RFA Proteus from its former life as a logistics vessel in the private sector – if a civilian equipment solution works, then buy civilian. And again, buy surplus from other countries if that will plug a gap while factories gradually come online. Accept that temporary fills will not be peerless but will be at scale to be a meaningful capability. Ensure that kit that needs to talk to the Americans can do so. But also, be creative: the CANZUK campaign group has suggested the long-term innovation of partner countries specialising in builds of particular type and size of vessel in individual countries, with all buying from the same production type to ensure continuity and savings of scale.

Procurement example

Delays in locking down the Government's declared strategy on procurement are already having a real-world effect. The example of one company's attempt to supply the UK's demand for 120mm mortars shows the opportunities that do exist for plugging these gaps in a way that generates enduring supply capability, but also the need for the UK Government to grip policy drift immediately if they want to see delivery happen

ST Engineering is headquartered in Singapore, a UK ally. It is a multinational technology and engineering business that works across all domains of Defence (armoured vehicles, weapons, munitions, shipbuilding) as well as aerospace, tech and security sectors including for the UK, US and NATO countries. It has 27,000 employees across the world: it is a credible supplier, looking to refocus on foreign markets as Singapore's population drops. Because of its geography, it is unlikely to be asked to supply its own domestic market in a land war at the same time the UK is engaged in one.

The company operates under a "partnership and localisation" strategy, teaming up with domestic companies to sell into a given market. This happens to coincide with the SDR's and Defence Industrial Strategy's objectives, encouraging FDI and secure domestic production, while also allowing access to the home Singapore supply chain.

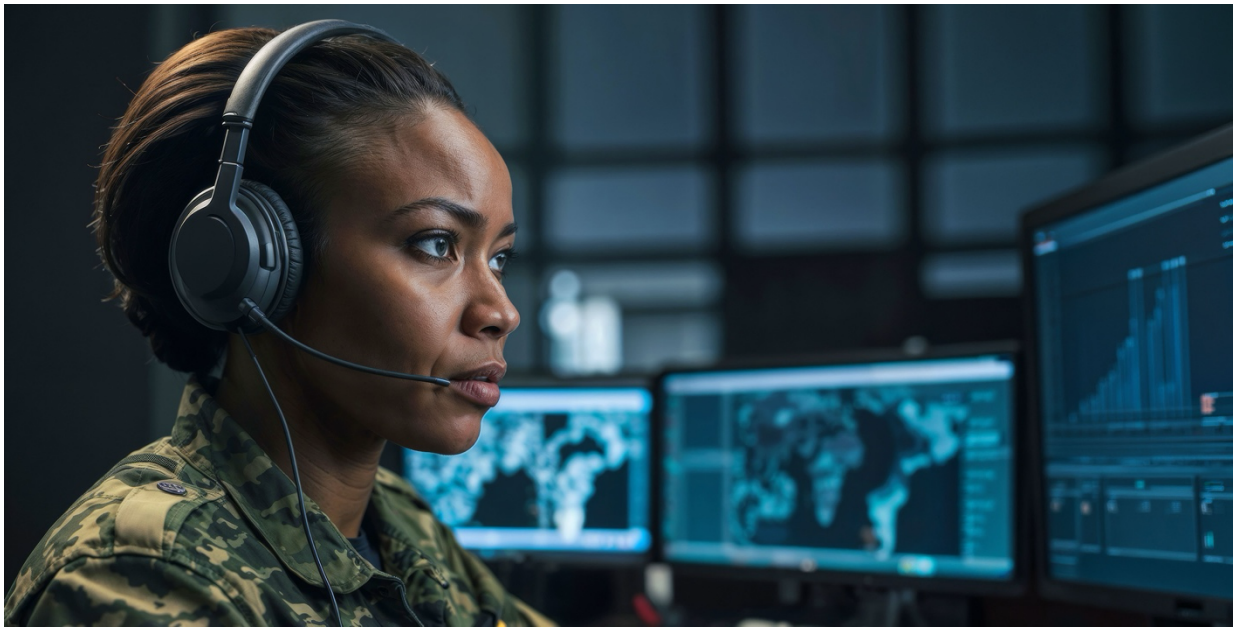
The company has teamed up with Babcock with a project to build 120mm mortars in Devonport. It is also seeking to build a munitions plant in Scotland, which also significantly incorporates plans for storage and new infrastructure access (tying in with the Scottish Government). It is separately looking at teaming up in other specific procurement fields where the MoD is looking to plug gaps, and has a strong commitment to R&D.

It is also, notably, not asking for subsidy. But we suggest it ought to reasonably expect some measure of official clarity over whether projected orders will definitely start to come in after the factory has been built. We see across the private sector that risk appetite is finite if the UK Government itself dithers over whether pledged orders will ever go ahead; if parts of the civil service do not seem as convinced as the Secretary of State for Defence on timeframes and scale; or if Whitehall is not capable of taking things in the round, spotting a good deal, and pushing through delays because of a structural lack of innovation.

Compliance testing also has to make sense if there is to be delivery at pace. If existing designs have already been tested, does a Singapore barrel need to go through every test because of a lack of local cold weather facilities, or can at least some of the previous assurance be taken at face value? All adding to delays in procurement.

Remarkably, Maj Generals and Lt Generals are not resourced to decide or deliver on such questions. Perhaps a period of surge should also allow greater devolution of authority to this level, taken at recognised risk.

Contractually, we would like UK surge spending to take place in the UK, or at least in countries likely to reciprocate with future Defence purchases of their own. In the absence of comprehensive data about contractual elasticity in build programmes or factory establishment turnaround times, it is impossible to assess how much reliance there will to be on off-the-shelf stop-gap purchases. What is painfully clear is that if we cannot fix delays such as appear in case studies like this one, then not only will contracts go abroad but future build capability and the emerging Defence industry will too.



Conclusion

The shortfalls identified in this report, and the structural issues that continue to complicate addressing them, create a terrible starting point for arriving at any kind of war footing.

The Public Accounts Committee has estimated that the MoD's 2025–26 budget of about £62.2bn equates to roughly 2.2% of GDP. To reach 2.6% by 2027–28 would require roughly an additional £9bn (around £71bn total in 2027–28, based on current GDP figures) while reaching 3% in the next parliament would require spending of roughly £85bn in current prices.

Those commitments have been made by the Government. From our speedy audit in this paper, we suggest that unless the shortfalls we have identified are specifically addressed in forthcoming spending plans, the figure in each case needs to be corrected upwards – **because the Government's ambitions certainly do not cover our £70.3bn identified gap.**

Opposition parties are starting to offer their own solutions. The Conservatives stated that they would reinstate the two-child benefit cap and reassign that £3 billion to increase army manpower – costed as generating 6,000 regulars and 14,000 reservists as well as paying for their accommodation and equipment. They have also said that they would reallocate £17 billion from Government R&D and Net Zero projects to create a new Sovereign Defence Fund, investing in British defence start-ups, protecting our supply chains and delivering drone technology. These are only partial solutions, though they are concretely identified.

Clearly the spending surge now needed will cause intense political difficulties. The issue always has – the commitment to build battleships was a major party dividing line in the January 1910 General Election.

With the capabilities flagged in this paper, one still has to ask where do we find the manpower, meaning how do we swiftly shift the system to incentivise recruitment and retention, and how do we get them through the recruitment process at speed? We can merely flag these as issues for planning teams to also confront, and rank as the top priority those capabilities that deliver on Homeland Defence.

We can brutally contextualise it further: where in a civil crisis (and particularly one happening at the same time as a global one) would the civil authorities find the manpower reserves to maintain law and order? Could even OP BANNER levels of support be provided in a Northern Ireland scenario? Again, in 2020, MI5 revealed it had 43,000 people who posed a potential terrorist threat to the UK.[lxxii] Where are the military reserves that can be called up, in a sensible timeframe, if civil strife escalated beyond the ability of the civil authorities to handle it?

But production also needs to be sustained. That means not only a level of domestic production on rolling scale rather than in a single surge, but also winning the export orders to match. Societal attitudes towards the arms industry need to change – societal attitudes towards a lot of things need to change, requiring statesmanlike leadership from political representatives.

Happily we have Canadian politicians who are themselves rethinking their long retreat from British ties after the Liberal over-assertion of their independent identity which has come at the cost of a level of dependency on the US. Pierre Poilievre has latterly been offering some

tantalising policy directions of deepening ties with the deepest friends of Canada, by offering privileged access in times of world crisis to a new national strategic materials reserve.

Related to this is the macro question of how closely we wish to align with foreign powers, particularly the US and EU. That will really have to wait for another paper; but essentially both competing alignments carry risks and baggage, and the EU far more because of its openly declared federalist ambitions, with treaties expressly authorising the ambition of a "Common Defence", and with a large civil service pursuing that very objective.

We are fortunate meanwhile to have the Polish example. In 2025, the country passed into law a Special Act on Defence Investments specifically to sidestep bureaucracy, including over issues around environmental protection but also rules over procurement law. We would probably do well to send a team from Whitehall to pick up tips, or even better ask for some Polish staff as consultants or on exchange placement.

Red tape is as much a risk to speedy Defence regeneration as the lack of money. Poland's response reminds us we need to have drafted some fairly comprehensive legislation involving war measures acts. But also undertaken the sort of preparatory work that Government was quietly getting on with in the UK from around 1936. Today's prerequisites are political hot potatoes, because they demand a legal revolution some politicians run scared of – binning the ECHR, ending any risk of lawfare, accepting the risks of hot war Rules of Engagement, utterly deprioritising the absurdities of global warming, shifting from Health and Safety into adopting a culture of tolerated risk, and focusing on fairness rather than chasing the statistics of diversity.

For all our talk of necessary reform to make a dash for security actually happen, ultimately it comes down to money. The long term security of this nation depends on wealth, and growing GDP. An increased Defence budget does generate a hit, even if money is recirculated by being spent predominantly on domestic production and even if export markets are successfully found for that workforce. The money spent is of course an insurance policy, the spending of which saves a hundred times more needing being spent later. To accommodate it the economy does need to grow, the deficit ended, and debt to shrink. Fundamentally, the Defence Budget will only be secure if the country as a whole undergoes a massive set of economic and institutional reforms: everything is interlinked.

As a final observation, this paper risks becoming redundant as soon as it comes out, and every comment on it at the same speed. The development of Anthropic's Claude Mythos model shows that AI risk and opportunity are developing at such a pace that Defence will struggle to stay ahead of advanced competitors in its OODA Loops. Tech Defence is a core part of Home Defence, and human operators are not enough: indeed, Anthropic is sat on by its creators because of the risk of widespread system destruction if it became an open source tool.[lxxiii]

In the private sector, from IT coders to legal experts to analysts working for SMEs supporting financial services are finding their clients can get most of their product from AI alternatives. The scale and pace of change is astonishing, and it seems no one is surfing the curve on which sectors are most likely to be supplanted in the short term. Even being able to answer that question will give a nation's military an operational advantage. And how do you budget for that?

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With thanks to: CMS Strategic, Samir Puri, Felix Morris and Christopher Howarth for their assistance and insights in preparing this report.

End Notes

[xxi] https://publications.parliament.uk/pa/cm201617/cmselect/cmdfence/973/973.pdf
[xxii] https://www.bbc.co.uk/news/articles/c9qpr2481wxo; https://www.bbc.co.uk/news/articles/c78w83pg81zo Our presumption is that everything sold off will be classified as *Non-current Assets Held for Sale and Discontinued Operations*, since to classify them otherwise would be to acknowledge a policy failure, and come under the budget heading of *Income Other – proceeds from the sale of property, plant, equipment and intangible assets*. This generated £139m in 2024-25 and £408m the preceding year.
[xxiii] https://assets.publishing.service.gov.uk/media/6909c86b14b040dfe829220f/Ministry_of_Defence_annual_report_and_accounts_2024_to_2025.pdf p192
[xxiv] https://www.thetimes.com/uk/defence/article/senior-military-chiefs-warn-keir-starmer-of-28bn-defence-shortfall-mb6pjkkl3
[xxv] https://committees.parliament.uk/committee/127/public-accounts-committee/news/152776/new-defence-money-potentially-lost-in-funding-black-hole-at-centre-of-uk-defence-equipment-plan/
[xxvi] Subsequently the claim has been made by ministers that £10bn of this £28bn has been found by making savings in the Defence budget. But this is merely partially shifting the deficit from a financial into a capital gap, with loss of materiel and capability once considered essential that now needs to be backfilled. The original figure correspondingly still here stands, and indeed is likely to be significantly exacerbated by the disruption of prior spending commitments and contracts.
[xxvii] And possibly also cost-effective anti-ballistic capability, if Fire Point's capabilities match its ambitions and it can find the right partners
[xxviii] https://www.setav.org/en/gaza-as-a-testing-ground-israels-ai-warfare - the report in question challenges issues around oversight, but with human oversight of target packs these are normal targeting concerns
[xxix] https://www.gov.uk/government/news/new-strategic-partnership-to-unlock-billions-and-boost-military-ai-and-innovation
[xxx] We put here to one side the concerns many scientists raise, and which we share, on how *AI itself* will come to view matters
[xxxi] https://committees.parliament.uk/writtenevidence/127789/pdf/
[xxxii] https://www.defenceprocurementinternational.com/news/sea/jersey-standoff-what-do-we-know-about-hms-severn-and-hms-tamar
[xxxiii] By Neptune's Grace: Strategic Maritime Planning for Brexit, Veterans for Britain, Sherryl Murray MP/ Rr Admiral Roger Lane-Nott/ Dr Lee Rotherham
[xxxiv] https://www.computerweekly.com/feature/Was-Y2K-a-costly-non-event
[xxxv] https://www.nato.int/en/what-we-do/introduction-to-nato/defence-expenditures-and-natos-5-commitment
[xxxvi] https://www.nato.int/en/what-we-do/deterrence-and-defence/resilience-civil-preparedness-and-article-3
[xxxvii] https://www.gov.uk/government/publications/independent-research-on-the-economic-impact-of-cyber-attacks-on-the-uk/summary-of-research-on-the-economic-impact-of-cyber-attacks
[xxxviii] https://committees.parliament.uk/publications/48694/documents/255330/default/
[xxxix] Contrast p46 of https://committees.parliament.uk/publications/50252/documents/271547/default/ with https://www.nationalwealthfund.org.uk/news-and-publications/news/national-wealth-fund-to-drive-more-than-100-billion-into-the-uk-economy/
[xl] https://defencesecurityasia.com/en/malaysia-rm697-million-tender-105mm-light-guns-lg1-boran/#google_vignette
[xli] https://www.army.mod.uk/news/army-and-raf-demonstrate-joint-airborne-capability/
[xlii] https://www.janes.com/osint-insights/defence-news/defence/uk-scraps-additional-a400m-buy-as-unaffordable
[xliii] See p25 of https://committees.parliament.uk/publications/43178/documents/214880/default/
[xliv] https://questions-statements.parliament.uk/written-questions/detail/2022-07-04/29944/
[xlv] Including, this author has previously argued, by the generation of a Patriotic Film Fund that channels (by selective subsidy embracing private sector donations) the spirit of Powell and Pressburger. In the event the Russian state has gotten there first.
[xlvi] https://publications.parliament.uk/pa/cm201719/cmselect/cmdfence/622/622.pdf
[xlvii] As MPs unambiguously noted, "The Ocean has repeatedly shown her worth, being at the centre of the UK's engagements in Sierra Leone, Iraq, Afghanistan and Libya. Her disposal without replacement is a serious loss to the amphibious fleet and is rightly criticised throughout the evidence we have received" (op cit. p25). We do not consider

the QE class carriers to be credible alternative platforms for expeditionary warfare; and the Bay Class to be at best stop gaps which we might consider here but only at risk of generating a new standard.

[xlviii] https://www.forcesnews.com/news/new-army-ranger-regiment-what-we-know-so-far

[xlix] https://publications.parliament.uk/pa/cm201719/cmselect/cmdfence/388/388.pdf

[l] If the premise is that carriers are no use in a modern major peer war, then the corollary is also true that they can be extremely useful for power projection until then.

[li] The arguments for and against leaving this for escort vessels are coherently set out in https://www.navylookout.com/should-the-royal-navy-aircraft-carriers-be-fitted-with-their-own-missile-defences/

[lii] https://www.bbc.co.uk/news/articles/c4g2jr1m49no

[liii] https://www.independent.co.uk/news/uk/home-news/us-iran-war-uk-royal-navy-b2949806.html

[liv] https://www.defensenews.com/global/europe/2026/04/03/france-orders-its-fifth-and-final-fdi-frigate-from-naval-group-completing-fleet-plan/?utm_source=sailthru&utm_medium=email&utm_campaign=dfn-dnr

[lv] It also, obviously, exposes the folly of signing off on the Chinese plans around their UK embassy. Any arrangement should be reciprocal based on the exact square footage expansion allowed to the UK, particularly mindful of the detail that the starting point was that the Western diplomatic quarter was bulldozed by the Chinese in the first place.

[lvi] See in particular https://www.dhs.gov/sites/default/files/2024-04/2024_0318_cybersecurity_and_infrastructure_security_agency.pdf and additional breakdowns explained in https://industrialcyber.co/critical-infrastructure/us-federal-budget-for-fy-2025-boosts-cybersecurity-investments-amid-escalating-threats/

[lvii] Japan in particular is an undertapped resource for high tech cooperation but where the UK, in aircraft research at least, is ahead of the game. Rattled by Trump, US allies eye Japan's biggest arms opening since WWII

[lviii] https://des.mod.uk/des-awards-contract-for-new-uk-made-space-system-to-help-protect-military-satellites/ and https://www.gov.uk/government/news/uk-and-canada-announce-satellite-collaboration

[lix] https://publications.parliament.uk/pa/cm200203/cmselect/cmdfence/321/321.pdf

[lx] https://www.gov.uk/government/statistics/uk-armed-forces-equipment-and-formations-2023/uk-armed-forces-equipment-and-formations-2023

[lxi] https://www.gov.uk/government/news/british-army-announces-new-artillery-deal-with-sweden#:~:text=The%20purchase%20of%20the%20Archers,of%20our%20commitment%20to%20NATO.

[lxii] The four (sic) Danish Leopards at the GOC's disposal in Basrah around 2004 proved to be a surprisingly disproportionate deterrent against militias.

[lxiii] https://ifs.org.uk/publications/uk-defence-spending-composition-commitments-and-challenges. The report also makes the following salutary observation, which has a bearing on the need for political bravery in addressing the shortfall: "When defence spending was last at 3.5% of GDP, in 1987–88, health spending stood at 4.0% of GDP. We project that by 2035 – when defence spending is planned to return to 3.5% of GDP – health spending could stand at 9.2% of GDP."

[lxiv] https://defensescoop.com/2026/01/02/marine-corps-drones-training-procurement/

[lxv] https://www.bbc.co.uk/news/articles/c5yvlk146mzo

[lxvi] https://committees.parliament.uk/publications/43178/documents/214880/default/ p28. The report also contains some useful observations on the nature of resupply bottlenecks, particularly those facing SMEs.

[lxvii] https://euro-sd.com/2024/09/articles/40091/polands-future-armed-forces-take-shape/#:~:text=The%20military%20is%20currently%20expanding,2023.%20This%20unit%2C%20named%20the

[lxviii] We also note from the example that Poland is having some problems recruiting the manpower for the expanded force, which is a further disincentive for the UK to seek to match it.

[lxix] https://www.deloitte.com/content/dam/assets-zone2/ce/en/docs/industries/government-public-services/2025/ce-Poland-investments-in-Defence-202501.pdf p8

[lxx] https://www.scottishconstructionnow.com/articles/lack-of-welders-sees-defence-giant-recruit-from-the-philippines

[lxxi] https://www.ey.com/en_uk/newsroom/2025/06/london-leads-europe-in-tech-foreign-direct-investment

[lxxii] https://www.thetimes.com/uk/article/terrorism-in-the-uk-number-of-suspects-tops-40-000-after-mi5-rechecks-its-list-pqm6k62ph

[lxxiii] https://au.news.yahoo.com/why-anthropic-most-powerful-ai-101323932.html?guccounter=1&guce_referrer=aHR0cHM6Ly93d3cuZ29vZ2xlLmNvbS8&guce_referrer_sig=AQAAAJXvEtYoSHPD_bmE-6mwpZkkTMvjcquw8B1WXOR6x7xLY1mV38KqRTrYOlh6wNSFqcQzNSBBCWcABu-vs7K01nJt0eUDEHNlthGmhYu_o4N_Ukfmp5IspSN9OvLB-dgLm6XXeXzsZaiIuQL8q5csqX778ZXe0ZOB3F566ahjdcp8

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