WHAT THE DEFENCE INVESTMENT PLAN SHOULD CONTAIN

BY ANDREW FOX

HJS Henry Jackson Society

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CENTRE FOR THE FUTURE OF WARFARE

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About the Author

Andrew Fox is a research fellow at the Henry Jackson Society. He served for 16 years in the British Army, leaving the Parachute Regiment with the rank of Major. He completed three tours in Afghanistan, including one with US Army Special Forces, as well as additional tours in Bosnia, Northern Ireland and the Middle East. He was a senior lecturer at the Royal Military Academy Sandhurst, teaching in the War Studies and Behavioural Science departments. In 2024, he visited Gaza twice, as well as Hezbollah tunnels in Lebanon. In 2025, he was the first independent observer to visit the Gaza Humanitarian Foundation distribution sites and spent time on the front lines in Ukraine. Andrew has been featured on the BBC and Sky News, is a regular Middle East commentator on GB News, TalkTV and LBC radio and has been published in *The Spectator*, *The Sun*, *Spiked*, *The Daily Telegraph*, *The New York Post* and *The Tablet*, among others.

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The **Centre for the Future of Warfare** exists to provide politicians and policymakers with a deeper understanding of the changing face of warfare and how to navigate both its opportunities and its profound challenges.

Scope and source note

The Defence Investment Plan is the delivery instrument that should connect threats, wartime tasks, readiness, industrial surge and funding. The strategic diagnosis and six-point package are grounded in peer-reviewed journal literature.[1] The cost section uses official budget, parliamentary and audit sources where exact cash baselines are required; those figures are kept separate from the strategic argument rather than presented as peer-reviewed evidence.

Strategic diagnosis

The delay is a symptom. The deeper problem is a recurring British pattern in which declaratory ambition outstrips the funded force structure, delivery authority and stockpile depth. The UK has experienced weak central direction, disconnects between departments, budget-ambition misalignment, incomplete implementation and a tendency to present strategic concepts before they become usable capability.[2]

The plan should therefore answer six questions: which tasks the armed forces must perform first; which risks are being accepted; which capabilities are immediately in short supply; which industrial lines must be kept warm or ramped up; which people model will sustain wartime establishments; and which lower-priority commitments will be stopped, paused or narrowed if funding is insufficient.[3]

[1]Jamie Gaskarth, Maeve Ryan and William Reynolds, "British Strategic Defence Reviews: The Jellyfish Model of Policymaking," The British Journal of Politics and International Relations (2026), https://doi.org/10.1177/13691481261445754; Timothy Edmunds, "The Defence Dilemma in Britain," International Affairs 86, no. 2 (2010): 377–394, https://doi.org/10.1111/j.1468-2346.2010.00887.x.

[2]Gaskarth, Ryan and Reynolds, "British Strategic Defence Reviews"; Trevor Taylor, "The Limited Capacity of Management to Rescue UK Defence Policy: A Review and a Word of Caution," International Affairs 88, no. 2 (2012): 223–242, https://doi.org/10.1111/j.1468-2346.2012.01068.x; David Morgan-Owen, Aimée Fox and Alex Gould, "Sources of Military Change: Emulation, Politics, and Concept Development in UK Defence," The British Journal of Politics and International Relations 26, no. 3 (2024): 864–885, https://doi.org/10.1177/13691481231191916.

[3]Timothy Edmunds, "Complexity, Strategy and the National Interest," International Affairs 90, no. 3 (2014): 525–539, https://doi.org/10.1111/1468-2346.12125; Paul Cornish and Andrew M. Dorman, "Complex Security and Strategic Latency: The UK Strategic Defence and Security Review 2015," International Affairs 91, no. 2 (2015): 351–370, https://doi.org/10.1111/1468-2346.12239.

1. Make the DIP a binding threat-task-resource contract

The DIP should begin with a finite set of planning cases rather than a broad catalogue of aspirations. The five cases should be: a sustained NATO Article 5 crisis or war in Europe; simultaneous attacks on the UK homeland and critical national infrastructure; coercive Russian grey-zone activity below the threshold of open war; a prolonged support mission for Ukraine or another European partner; and the long-horizon AUKUS and Indo-Pacific technology task. For each case, the plan should set out the assigned force elements, readiness deadlines, stockpile assumptions, enabling dependencies, allied assumptions and funded risk.

The governance mechanism should be explicit. The plan should establish a capability-risk ledger that shows what the UK can do now, what it can do only with allied support, and what it cannot do until specified investment is delivered. It should have a single senior owner for each outcome, annual parliamentary reporting, and a Treasury-approved rule that efficiency savings count only after they have been delivered and banked. This is the main safeguard against the familiar review cycle of ambition, underfunding and partial execution.[4]

2. Put Euro-Atlantic deterrence by denial and homeland defence first

The first priority for investment should be the defence of the UK, the North Atlantic and NATO Europe. The plan should make clear that the diffuse global posture is subordinate to the ability to deter and, if needed, fight a high-intensity European war. That means greater emphasis on readiness, survivability, munitions, air and missile defence, anti-submarine warfare, seabed and undersea security, port and airbase protection, long-range fires, electronic warfare, engineers, logistics, medical support and protected command networks.

For the Army, the DIP should fund the enablers that make a brigade- or division-level contribution credible: artillery depth, counter-battery systems, short-range air defence, electronic warfare, combat engineering, protected mobility, maintenance and battlefield logistics. For the Royal Navy and Royal Air Force, it should fund persistence and survivability: escort availability, mine countermeasures, maritime patrol, undersea surveillance, airbase dispersal and hardening, tanker and lift resilience, and layered defence against missiles and drones. The test is whether the UK can help deny an adversary success in Europe rather than simply signal presence.[5]

[4]Gaskarth, Ryan and Reynolds, "British Strategic Defence Reviews"; Taylor, "The Limited Capacity of Management to Rescue UK Defence Policy"; Bence Nemeth and Nicholas Dew, "'Build the Golf Course First': An Organisational and Strategic Management Perspective on UK Defence Reviews," Defence Studies 24, no. 1 (2024): 25–45, https://doi.org/10.1080/14702436.2023.2213654.

[5]Kristin Ven Bruusgaard, "Deterrence Asymmetry and Strategic Stability in Europe," Journal of Strategic Studies 47, no. 3 (2024): 334–362, https://doi.org/10.1080/01402390.2024.2354322; Roy Allison, "Averting Acute Escalation in Russia's War against Ukraine," International Affairs 101, no. 5 (2025): 1769–1791, https://doi.org/10.1093/ia/iiaf137; Cornish and Dorman, "Complex Security and Strategic Latency."

3. Move from procurement to mobilisation

The DIP should treat industrial depth as a warfighting capability. It should divide acquisition into three categories: sovereign capacity that must be retained in the UK; allied-assured capacity that can be generated through NATO, European and AUKUS arrangements; and global commercial capacity suitable for lower-risk items. Sovereign lines should include the most sensitive nuclear, cryptographic, undersea, munitions, secure communications, selected interceptor, cyber and repair capacities. Allied-assured lines should be linked to binding production, stockpile and surge agreements rather than informal expectations.

The plan should publish, at least in aggregated form, multi-year demand signals for missiles, shells, interceptors, torpedoes, uncrewed systems, spares, engines, batteries, secure electronics and repair capacity. It should include surge clauses, warm production lines, framework contracts for attritable systems, and supply chain war games for energetics, propellants, microelectronics, and machine tools. The key change is to stop treating munitions and spares as an afterthought to platform procurement. In a sustained war, replenishment and repair rates will be as consequential as the initial order of battle.[6]

4. Scale autonomous, counter-autonomous and electronic-warfare kill chains

Ukraine has reinforced a hard lesson: cheap, expendable systems do not remove the need for high-end platforms, but they do change attrition, sensing, targeting and defence. The UK should not respond by buying a small boutique fleet of exquisite uncrewed systems. The DIP should fund families of low-cost, mid-tier, and high-end uncrewed air, land, surface, and subsurface systems with open architectures and rapid payload replacement. The plan should provide units with routine budgets to buy, test, and lose systems during training.

Counter-autonomy should have equal status. Sensors have advanced to the point that almost nothing on the face of the earth can now be hidden. All future defence planning must now account for deception and concealment. The plan should fund counter-UAS sensors, jammers, decoys, guns, low-cost interceptors, and directed-energy options where proven, as well as hardened communications, deception systems, and defensive electronic warfare down to unit level. It should also create a joint experimentation authority able to move a system from trial to fielding in months, with clear rules for data, safety, human command responsibility, and interoperability. Multi-domain integration should be a funded technical and training architecture, not a slogan.[7]

[6]Matthew R. H. Uttley and Benedict Wilkinson, "A Spin of the Wheel? Defence Procurement and Defence Industries in the Brexit Debates," International Affairs 92, no. 3 (2016): 569–586, https://doi.org/10.1111/1468-2346.12605; Taylor, "The Limited Capacity of Management to Rescue UK Defence Policy"; Bryan Mabee and Joakim Berndtsson, "The Politics of the Market and the Return of Swedish Total Defence," European Journal of International Security (2026): 1–19, https://doi.org/10.1017/eis.2026.10065.

[7]Dominika Kunertova, "Drones Have Boots: Learning from Russia's War in Ukraine," Contemporary Security Policy 44, no. 4 (2023): 576–591, https://doi.org/10.1080/13523260.2023.2262792; Tobias Kollakowski, "War in the Black Sea: The Revival of the Jeune École?" Journal of Strategic Studies 48, no. 4 (2025): 898–930, https://doi.org/10.1080/01402390.2025.2471067; Morgan-Owen, Fox and Gould, "Sources of Military Change."

5. Put people, reserves and civil mobilisation on the funded line

The plan should set out the personnel model required for wartime establishments and peacetime service generation. It should fund retention, housing, healthcare access, family support, technical pay, lateral entry, reserve integration, and career tracks for cyber, AI, engineering, nuclear, medicine, logistics and space operations. Recruiting recovery should be treated as a capital-enabling programme because ships, squadrons, cyber teams and logistics units cannot be generated without trained personnel.

Reserve reform should be specific and adequately resourced. The DIP should define reserve roles for homeland protection, airbase and port security, medical surge, engineering repair, logistics, cyber, space support and defence-industrial backfill. It should also include employer compensation, mobilisation exercises, reserve equipment sets, individual readiness standards and a database of former regulars with critical skills. Total defence should be framed as a practical mobilisation system linking the armed forces, industry, local authorities and critical infrastructure operators, rather than as a rhetorical whole-of-society label.[8]

6. Fund the connective tissue: cyber, space, grey-zone resilience and AUKUS delivery

Likely future tasks will include activity below the threshold of declared war: cyber operations against infrastructure, sabotage and coercion, political warfare, attacks on data and energy systems, pressure on undersea cables, and attempts to degrade space-enabled command and intelligence. The DIP should fund standing MoD contributions to the protection of critical national infrastructure, including exercises with private owner-operators in energy, ports, telecoms, data centres, finance and transport. It should align offensive cyber options with defensive resilience, as the armed forces depend on civilian networks and private infrastructure.

Space investment should cover sovereign and allied access to imagery, secure satellite communications, resilient position, navigation and timing, protected ground stations, commercial surge arrangements and defence data processing. AUKUS should have a ring-fenced delivery line covering nuclear skills, shipyard capacity, regulatory capacity, submarine supply chains and Pillar II technology. The plan should make clear that AUKUS is a long-horizon strategic-industrial project and that its technology agenda must also strengthen near-term Euro-Atlantic tasks, including undersea surveillance, autonomy, cyber, electronic warfare and secure communications.[9]

[8]Patrick Bury and Sergio Catignani, "Future Reserves 2020, the British Army and the Politics of Military Innovation during the Cameron Era," International Affairs 95, no. 3 (2019): 681–701, https://doi.org/10.1093/ia/iiz051; Helen McCartney, "The Military Covenant and the Civil–Military Contract in Britain," International Affairs 86, no. 2 (2010): 411–428, https://doi.org/10.1111/j.1468-2346.2010.00889.x; Timothy Edmunds, "British Civil–Military Relations and the Problem of Risk," International Affairs 88, no. 2 (2012): 265–282, https://doi.org/10.1111/j.1468-2346.2012.01070.x; Jan Angstrom and Kristin Ljungkvist, "Unpacking the Varying Strategic Logics of Total Defence," Journal of Strategic Studies 47, no. 4 (2024): 498–522, https://doi.org/10.1080/01402390.2023.2260958.

[9]Vladimir Rauta and Sean Monaghan, "Global Britain in the Grey Zone: Between Stagecraft and Statecraft," Contemporary Security Policy 42, no. 4 (2021): 475–497, https://doi.org/10.1080/13523260.2021.1980984; Kristan Stoddart, "UK Cyber Security and Critical National Infrastructure Protection," International Affairs 92, no. 5 (2016): 1079–1105, https://doi.org/10.1111/1468-2346.12706; Sarah Backman and Tim Stevens, "Cyber Risk Logics and Their Implications for Cybersecurity," International Affairs 100, no. 6 (2024): 2441–2460, https://doi.org/10.1093/ia/iiae236; Bleddyn E. Bowen, "British Strategy and Outer Space: A Missing Link?" The British Journal of Politics and International Relations 20, no. 2 (2018): 323–340, https://doi.org/10.1177/1369148118758238; Aaron Bateman, "Information Security in the Space Age: Britain's Skynet Satellite Communications Program and the Evolution of Modern Command and Control Networks," Journal of Strategic Studies 47, no. 1 (2024): 5–28, https://doi.org/10.1080/01402390.2023.2265072; Eglantine Staunton and Jack Holland, "'BrOthers in Arms': France, the Anglosphere and AUKUS," International Affairs 100, no. 2 (2024): 711–729, https://doi.org/10.1093/ia/iiae016.

Investment sequencing that should appear in the DIP

The DIP should divide investment into three horizons and publish sufficient detail for Parliament to see whether money is being shifted from aspiration to force generation. The amounts should be provided by the government. The priorities below identify the lines that should receive first claim on additional funding.[10]

Horizon	Main investment lines	Delivery test
Immediate 2026 to 2028	Munitions, spares, air and missile defence, counter-UAS, electronic warfare, deployable logistics, airbase and port resilience, urgent retention measures, reserve readiness, classified CNI resilience exercises.	Can the UK deploy and sustain assigned NATO forces, defend key UK nodes, and replenish the most consumed weapons and spares?
Medium term 2028 to 2032	Long-range fires, layered air defence, uncrewed systems at scale, undersea surveillance, mine countermeasures, hardened command networks, space ISR and secure communications, industrial surge contracts, technical career structures.	Can the UK sustain denial operations in Europe while maintaining homel and protection and support to partners?
Long term 2032 and beyond	SSN-AUKUS delivery, nuclear enterprise skills, shipyard and reactor capacity, next-generation combat air integration, resilient space architecture, strategic stockpiles, full total-defence mobilisation architecture.	Can the UK maintain a credible high-end force without hollowing near-term readiness?

[10]Uttley and Wilkinson, "A Spin of the Wheel?"; Mabee and Berndtsson, "The Politics of the Market"; Angstrom and Ljungkvist, "Unpacking the Varying Strategic Logics of Total Defence."

Indicative cost envelope and funding profile

Costing source boundary. The strategic diagnosis and six-point package above are grounded in peer-reviewed journal literature. The cost envelope below draws on official budget, parliamentary, and audit sources because exact public spending baselines, named SDR commitments, and Equipment Plan deficits are not all open-source data. All amounts are order-of-magnitude current-price estimates unless a cited public source uses a different basis.[11]

Central estimate. A serious Defence Investment Plan should plan for an additional £120-170bn over ten years, above the already funded path, with £150bn as the working figure. That is a sustained funding path, not a one-off bill. It would cover readiness, stockpiles, sustainment, personnel, reserves, infrastructure, industrial surge, cyber, space and undersea resilience, as well as named equipment lines.[12]

GDP rule. The fiscal test should be whether the plan credibly moves core defence toward about 3.5% of GDP by 2035, while distinguishing NATO-qualifying expenditure from MoD DEL. The distinction should be explicit because NATO accounting can include wider security and intelligence lines that do not automatically generate deployable force elements.[13]

Why the floor is high. The lower bound should not be set by adding only the publicly named SDR commitments. Those commitments already include large lines, such as the sovereign warhead programme, munitions, autonomous systems, directed energy and accommodation. They do not, by themselves, close historical affordability gaps, wider readiness deficits, AUKUS enabling costs, air and missile defence depth, counter-UAS and electronic-warfare needs, people and reserves, or the industrial surge capacity required for a European war scenario. [14]

[11]Costing note: the revised cost envelope uses public fiscal and audit documents for cash baselines and already announced commitments. The peer-reviewed journal sources in the main brief remain the basis for the strategic diagnosis and force-planning logic.

[12]HM Treasury, Spending Review 2025 (June 2025), Security section, stating that NATO-qualifying defence spending will rise to 2.6% of GDP by 2027 and listing Defence Investment Plan-related commitments including £15bn for the sovereign warhead programme, nearly £1bn for directed-energy weapons, over £4bn for autonomous systems, £6bn for munitions and at least £7bn for military accommodation, https://www.gov.uk/government/publications/spending-review-2025-document/spending-review-2025-html.

[13]House of Commons Library, UK Defence Spending, Research Briefing CBP-8175, 10 October 2025, explaining the NATO definition of defence expenditure, the UK commitment to 2.5% of GDP by 2027 or 2.6% when additional security and intelligence spending is included, and the subsequent commitment to reach 3.5% of GDP by 2035, https://commonslibrary.parliament.uk/research-briefings/cbp-8175/.

[14]House of Commons Committee of Public Accounts, UK Defence: No Credible Government Plan to Deliver Desired Military Capabilities, 8 March 2024, noting that the real deficit could be £12bn larger than the NAO figure if all parts of the Armed Forces included full expected capability costs on a consistent basis, https://committees.parliament.uk/committee/127/public-accounts-committee/news/200289/uk-defence-no-credible-government-plan-to-deliver-desired-military-capabilities/.

Table 1. Cost layers to be recognised in the Defence Investment Plan

Layer	Approximate scale	Meaning for the DIP
Named public SDR/SR lines	£35-40bn this Parliament	Already announced or publicly signalled lines: warhead, munitions and energetics, autonomous systems, directed energy, accommodation and selected infrastructure. This is not the full bill for the six-point plan.
Minimum credible repair package	£70-100bn over ten years	Covers the old equipment gap, stockpiles, spares, readiness, reserves, counter-UAS, electronic warfare, logistics, repair capacity and protection of key ports, bases and depots.
Full six-point plan	£120-170bn over ten years	Adds mobilisation depth, larger munitions and interceptor reserves, homeland defence, persistent cyber and space resilience, undersea capacity and AUKUS/ industrial enabling investment.

Allocation across the six-point plan

The DIP should publish cost ranges rather than false precision. The ranges below are a planning allocation for the additional ten-year funding, not a substitute for programme-level cost assurance. The public document should also separate near-term force repair from long-horizon platform commitments.[15]

[15]Ministry of Defence, Defence Industrial Strategy: Making Defence an Engine for Growth (September 2025), especially the sections on resilience, industry wargaming, munitions, energetics, scalable production and supplier-resilience requirements, https://www.gov.uk/government/publications/defence-industrial-strategy-making-defence-an-engine-for-growth.

Table 2. Indicative ten-year additional cost by plan item

Plan item	Ten-year additional cost	Main cost drivers
1. Binding threat-task-resource contract	£0.2-0.5bn	Delivery authority, programme controls, risk ledger, independent cost assurance and classified implementation architecture.
2. Euro-Atlantic deterrence and homeland defence first	£35-50bn	Readiness, logistics, air and missile defence, anti-submarine warfare, airbase and port hardening, NATO reinforcement and protected command-and-control.
3. Procurement to mobilisation	£25-35bn	Munitions, interceptors, spares, energetic materials, repair capacity, stockpiles, second-source suppliers and industrial surge contracts.
4. Autonomous, counter-autonomous and EW kill chains	£15-25bn	Uncrewed systems, counter-UAS, sensors, jammers, low-cost interceptors, software-defined upgrades, experimentation units and electronic-warfare training ranges.
5. People, reserves and civil mobilisation	£15-25bn	Retention, accommodation, healthcare access, technical pay, reserve roles, medical and logistics surge, employer support and training infrastructure.
6. Cyber, space, grey-zone resilience and AUKUS delivery	£30-45bn	Secure networks, cyber resilience, space access and ground protection, undersea infrastructure, nuclear skills, SSN-AUKUS enabling capacity and protected data systems.
Total planning range	£120-180bn	Use £150bn as the central planning figure; £120bn is the hard floor and £170-180bn is the higher-assurance version.

Spending profile and fiscal discipline

The profile should be front-loaded, with operational risk already visible. Roughly £20-30bn should be allocated to the first three years for munitions, spares, readiness, repair capacity, counter-UAS, electronic warfare and accommodation. A further £45-60bn should be allocated to years four to six for industrial surge, air and missile defence, logistics, undersea and reserve capacity. The remainder should fund years seven to ten, when AUKUS, GCAP-related choices, space resilience, cyber resilience and enduring homeland defence mature.

Cost rule. If ministers cap the DIP near the existing 2.6% path, the plan should explicitly cut tasks or programme scope. Plausible trade-offs would include a narrower discretionary Indo-Pacific posture, lower carrier strike availability, delayed or descoped long-horizon platform choices, or reduced stockpile depth. The DIP should not count unproven efficiency savings as spending power, nor should it describe unfunded risk as transformation.16

Decision rules for the final plan

1. Fund readiness and stockpiles before adding new discretionary commitments.
2. State the accepted risk in plain language, including any tasks that cannot be met without allies.
3. Do not count unproven efficiency savings as spending power.
4. Protect near-term NATO and homeland outputs from being cannibalised by long-horizon prestige programmes.
5. Use multi-year contracts for munitions, interceptors, drones, spares and repair capacity.
6. Publish an annual implementation update linking money, milestones, readiness and risk.

The central judgement is simple. The DIP should be judged less by the number of named platforms and more by whether it creates a force capable of mobilising, replenishing, absorbing losses, protecting the homeland, operating with NATO in Europe, and sustaining advanced cyber, space and undersea tasks. If the money is insufficient, the plan should reduce tasks rather than disguise the gap. That is the main test of whether the delay produces a real investment plan rather than another declaratory review.

[16]The £120-170bn range is an analytical synthesis of the public budget path, named SDR/SR commitments, the NAO/PAC affordability gap and the six investment lines in this brief. It should be treated as a planning range for parliamentary scrutiny, not as a programme-level estimate certified by MoD cost assurance.

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