



Ministry
of Defence



UK Defence Footprint 2026

Rearm the country,
reindustrialise our communities





Ministry
of Defence

UK Defence Footprint 2026

**Rearm the country,
reindustrialise our communities**

Defence investment to back British businesses,
build good, well-paid local jobs and regenerate
towns and cities



© Crown copyright 2026

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

This publication is available at: www.gov.uk/official-documents

Pictured on the front cover is the K3 Scout – a high-performance, modular Uncrewed Surface Vessel (USV) designed and built by the British company Kraken Technology Group in Fareham.

Table of contents

Introduction	4
United Kingdom	6
Scotland	16
Wales	19
Northern Ireland	22
North East	25
North West	28
Yorkshire and the Humber	31
East Midlands	34
West Midlands	37
East of England	40
London	43
South East	46
South West	49
Glossary	54
Sources	56

Introduction

Defence is a national endeavour, but its benefits are felt in every community across the United Kingdom. From the shipyards of Barrow and the Clyde to the missile production lines of Belfast, from the artillery forges of Sheffield to the helicopter works of Yeovil, the strength of our armed forces has always depended on the strength of our industrial base. This publication sets out, region by region, how that partnership between defence and industry is delivering security and opportunity in equal measure. Defence is an engine for growth in every postcode, supporting high-quality jobs, skills, innovation and investment across the UK. It is central to the Prime Minister's drive to reindustrialise regions and rewire the state so that it works more effectively for people, communities and place.

We are living through a period of heightened threat. The first duty of any government is to keep its country safe, and that means investing in the capability our armed forces need, at pace and at scale. That is why we are committing £298 billion to defence over the next four years. The Defence Investment Plan delivers the vision set out in the 2025 Strategic Defence Review, with an emphasis on warfighting readiness alongside transformation. It also implements the Defence Industrial Strategy, which sets out how defence investment will strengthen the UK's industrial base, grow exports, and support the government's Industrial Strategy.

But investment in defence has never been only about deterrence. Economic growth from defence investment is one of three top departmental priorities, alongside deterrence and opportunity. Defence investment provides peace and security, which underpins all economic activity. Targeting that defence investment delivers long term economic growth through higher productivity and more competition. We therefore target defence investments towards research and development, frontier industries, better market competition, skills, and place in our growth framework. Pro-growth defence investment delivers cutting-edge capability such as Dreadnought, Future Combat Air System and Directed Energy Weapons, while creating export, commercialisation and dual-use opportunities.

Defence investment is also one of the most powerful engines of industrial renewal available to any government. Last year alone, Ministry of Defence (MOD) spending supported 274,000 jobs in UK industry, up 10% on the year before, and spent £34.1 billion with business based in the UK, from global primes to the small and medium-sized enterprises (SMEs) that form the backbone of our supply chains. This is money that builds careers, sustains apprenticeships and brings investment into towns and cities that have too often been overlooked.



Every nation and region of the UK brings something different to this effort, and this publication is designed to show that clearly. Scotland's shipbuilding and marine engineering, Wales's armoured vehicles and advanced optics, Northern Ireland's missile systems, the North West's submarines, the East Midlands's engines, the South West's helicopters: these are not abstract statistics, they are the jobs, skills and futures of people in every postcode. Our Defence Growth Deals in Plymouth, South Yorkshire, Scotland, Wales and Northern Ireland put that principle into practice, ensuring that national security investment is matched by local opportunity and shaped in partnership with local government, industry and academia.

We are also investing in the people who will sustain this industrial base for the future. Through the Defence Industry Skills Package and the growing Defence Universities Alliance, we are building the pipeline of engineers, technicians and innovators our national security will depend on for decades to come.

This is what it means to rearm the country and reindustrialise our communities: an approach to defence that recognises national security and national renewal as two sides of the same endeavour. This publication will hopefully give you a clear sense of what that investment looks like where you live and work, and of the scale of ambition behind it.

United Kingdom

Personnel as at 1 April 2026:



132,280
UK Regular Forces
in the UK



52,940
MOD civil servants
in the UK



28,890
Trained Future
Reserves 2020

In 2025 to 2026:

£34.1 billion

MOD expenditure
with UK industry
(up by **3%** from
last year)

£490

MOD expenditure
with industry for each
person living in the
UK (up by **£10** from
last year)

£1.3 billion

MOD direct
expenditure with small
and medium-sized
enterprises (SMEs)

Over 2,000

new contracts placed,
including over **500**
directly with SMEs

£298 billion

total planned spending
on defence over the
next **four years**

In 2024 to 2025:

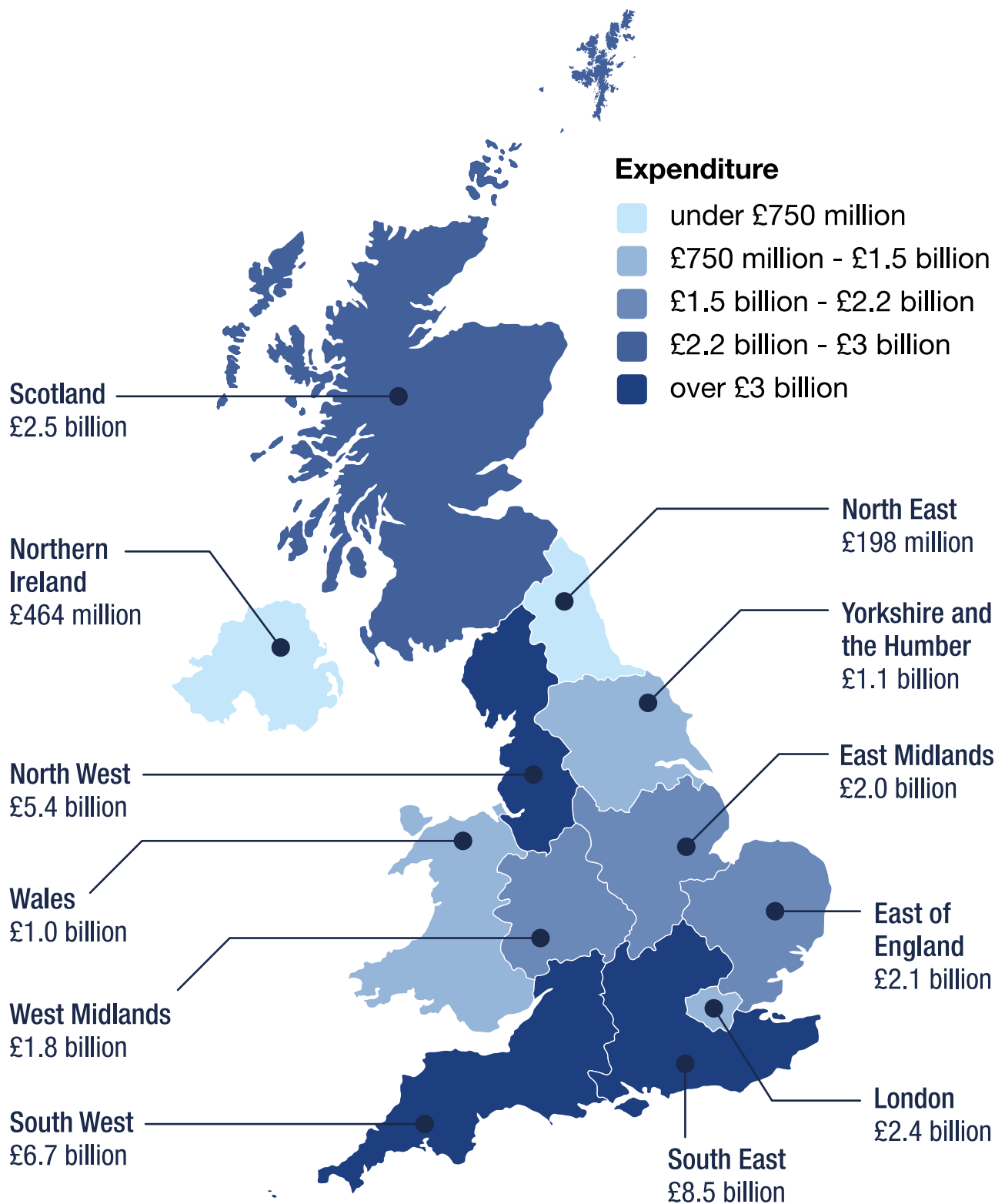


274,000
jobs in UK industry
supported by MOD spending
(up by **10%** from last year)

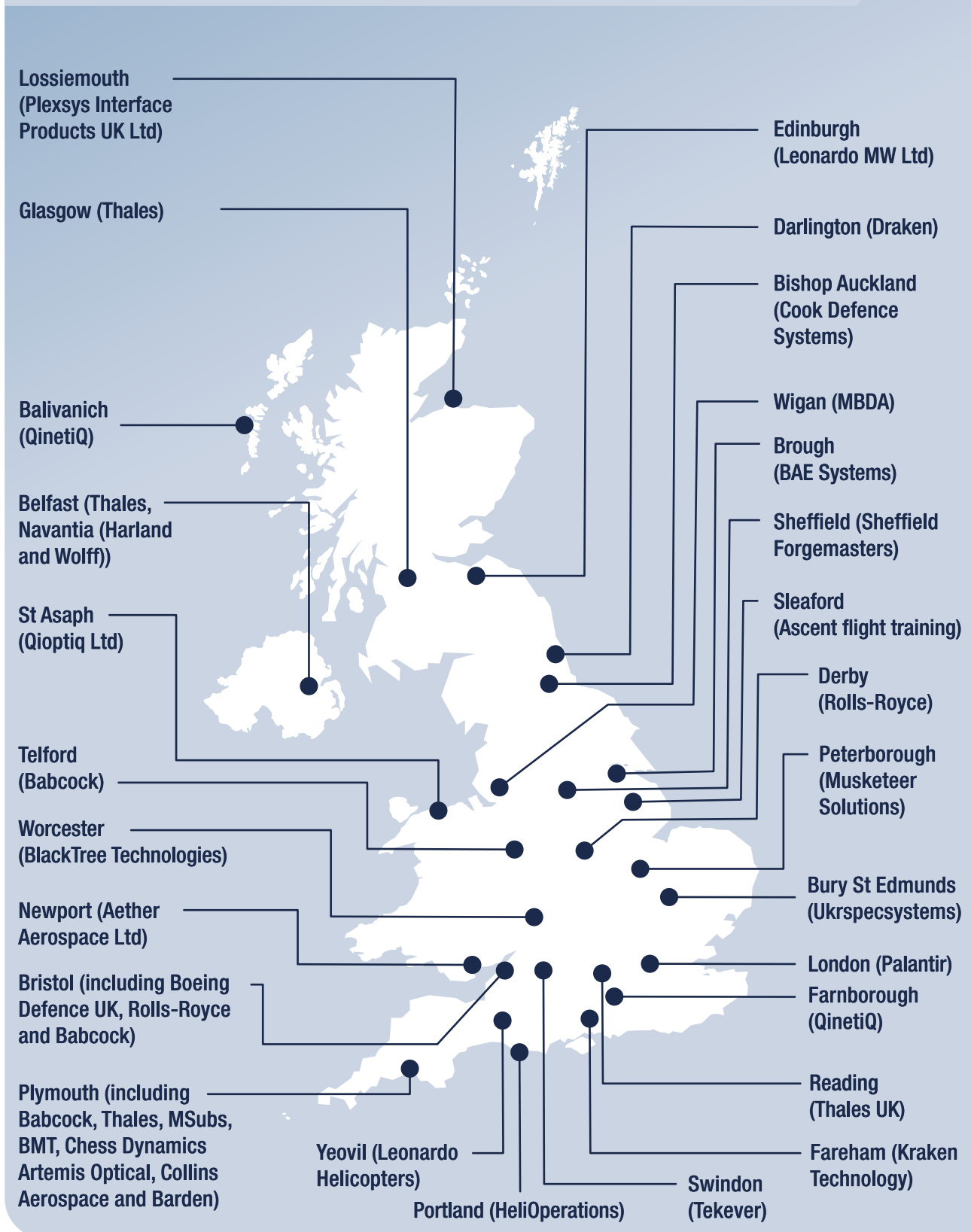


Over 24,000
MOD apprenticeships

MOD regional spend with UK industry, 2025 to 2026



Examples of defence suppliers operating around the UK





Defence Nuclear Enterprise

The Defence Nuclear Enterprise (DNE) is of vital importance to our national security and provides considerable economic benefits across the UK as a National Endeavour. Between the financial years 2026 to 2027 and 2029 to 2030, in excess of £20 billion more will be invested through the DNE compared to the previous four years, supporting a workforce of over 47,000, which is expected to grow to around 65,000 by 2030.

How defence nuclear is driving growth

- **Delivery phase 4 for the Dreadnought build programme.** The £8.4 billion government investment will support tens of thousands of jobs across the country, from Barrow to Bristol. It will see HMS Dreadnought, the first of the class, complete its sea trials and be ready to enter service with the Royal Navy in the early 2030s.
- **Team Barrow.** The launch of the 10-year transformation plan, backed by the £200 million Barrow Transformation Fund, recognises the critical importance of BAE Systems' Barrow shipyard. A £2.8 million fund will support Barrow's voluntary and community sector and a £400,000 grant scheme will help people overcome health challenges preventing them from working.
- **Team Plymouth.** A £50 million Defence Growth Deal, alongside an investment of £7 billion over ten years into HMNB Devonport, recognises Plymouth's vital role in the maintenance, modernisation, and disposal of our nuclear submarine fleet. Team Plymouth will improve local infrastructure and deliver thousands of new homes in support of a growing workforce.
- **£15 billion investment into the sovereign nuclear warhead programme (2025 to 2026, to 2029 to 2030).** This will include the development of the UK's replacement warhead, Astraea, and the modernisation of the associated infrastructure.
- **Sheffield Forgemasters is modernising and expanding its facilities to support defence manufacture and exports.** This is backed by over £420 million of additional funding announced in the 2025 spending review, taking total MOD investment to £1.3 billion. This major programme of work will secure over 700 skilled jobs and support the Forgemasters' apprentice programme.



Defence Growth Deals

Our government's five Defence Growth Deals are now live across the UK, anchoring long-term partnerships between defence, local leaders, industry and universities, and turning defence investment into jobs, skills, and regional opportunity, backed by £250 million over the next five years of investment.

In **Scotland**, the £50 million investment to strengthen Scottish defence capability includes:

- £5 million to the **Arrol Gibb Innovation Campus** at Rosyth, driving the adoption of emerging technologies across the marine and advanced manufacturing sectors
- £5 million to the **Clyde Engineering and Innovation Centre** near HMNB Clyde, driving advances in digital systems, data science and automation
- £10 million earmarked for up to two **Defence Technical Excellence Colleges** in the East and West of Scotland to create specialist training pathways into defence engineering, advanced manufacturing and maritime technology

In **Wales**, the £50 million investment focuses on:

- widening access to MOD test ranges across Wales
- investing in infrastructure so SMEs can access classified work directly
- bringing manufacturing of high-performance motors and drivetrains to Wales alongside the creation of a **Defence Technical Excellence College**

In **Northern Ireland**:

- the Defence Growth Deal will create a targeted programme to help SMEs and start-ups in Northern Ireland by making it easier for them to enter the defence supply chain
- a new Secure Innovation Hub facility will be established to provide secure research and development for new businesses and start-ups, creating a level playing field with major defence firms
- a defence-related skills initiative, such as engineering and technology, supporting vital defence industries and creating more opportunities for students to learn the skills of the future

In **South Yorkshire**:

- catalyse growth across the region by expanding defence-focused research and development capacity, strengthening supply chains, and accelerating the commercialisation of innovative technologies
- establish a South Yorkshire Defence Board, deepening collaboration between the government, South Yorkshire's mayoral authority, industry and academia, working hand-in-hand on making the Growth Deal as effective as possible while attracting long-term public and private investment

In **Plymouth**:

- the £50 million deal will expand on the National Centre for Marine Autonomy, making it easier for industry to develop surface and subsurface maritime drones by cutting red tape and providing access to waterfront innovation labs and state-of-the-art testing facilities
- establish the Plymouth Marine Autonomy Trials Authority to support start-up and marine autonomy businesses in testing and deploying maritime drones
- support Plymouth City College's skills hub, providing technical training facilities and teaching capacity at colleges and universities to have 60 new defence-related courses such as advanced manufacturing, engineering and technology, that directly meet the needs of Plymouth's defence industry



Defence Housing Strategy

A new Defence Housing Strategy was published on 3 November 2025. The strategy, backed by funding of **£9 billion**, sets out a vision for the future transformation of military homes; **90% of military homes will be upgraded**, renewed or rebuilt over a decade, while also unlocking the potential for building 100,000 homes of all types on developable defence land.

In addition, in 2025, Defence Infrastructure Organisation awarded a **£237 million** contract to modernise the defence estate in the East Midlands, formed a partnership with Hounslow Council and Greater London Authority to deliver a regeneration project in Feltham, and completed the installation of over **1,370 roof mounted solar panels at Larkhill Garrison**. Work on our partnership project with the NHS on Catterick Integrated Care Centre is ongoing.



Skills

Defence is creating rewarding, highly skilled jobs and encouraging investment in every region of the UK. Defence makes a significant contribution to the UK skills base by being the single largest apprenticeship provider in the UK. The **British Army, Royal Navy and Royal Air Force (RAF)** were named as the **top three employers** respectively in The Sunday Times Top 100 Apprenticeship Employers 2026. Defence already offers an answer to some of the issues facing those that are not in education, employment or training (NEETs), another Prime Ministerial priority which MOD can help tackle more broadly. This advances government's wider commitment for 500,000 more youth opportunities and supports Alan Milburn's review to get Britain's 'lost generation' into education, employment or training.

40,000 young people across the UK will be offered opportunities and employment in skilled defence careers every year by 2030, rising to 50,000 by 2035, following the biggest ever agreement between government and business to expand routes into work, apprenticeships and training for young people in defence.

MOD spending with industry currently supports over **270,000 jobs in the UK**, and the spending announced in the Defence Investment Plan is estimated to create nearly **60,000 new jobs** by 2029 to 2030, compared to 2023 to 2024 levels.

A **£182 million** skills package over the next five years is strengthening pipelines into engineering and advanced manufacturing, including five new Defence Technical Excellence Colleges in England (in Plymouth, Yeovil, Lincoln, Blackpool and Rotherham), one in Wales, and up to two in Scotland.

We are also investing **£290 million in nuclear skills**. The Nuclear Skills Plan has delivered around 1,300 graduates and around 3,100 apprentices into defence nuclear in its first two years of operation, with the MOD and the Department for Energy Security and Net Zero investing £65.6 million over the next eight years to create over 500 PhD positions.



Defence innovation

Innovation and industrial power are central to deterrence and decisive factors in war. We will establish a ringfenced **annual budget of £400 million, totalling £1.6 billion of investment by 2030, for UK Defence Innovation (UKDI)**, with a clear mandate to bring innovative technology to the front line at speed. UKDI's Growth Services will provide business and investment support to help the businesses behind their innovations scale, grow and thrive.

As part of UKDI's launch, three key initiatives have been established:

1. A new Rapid Innovation Team (RIT) enabling innovation at 'wartime pace' by utilising commercially available dual-use technology to address the most urgent operational problems.
2. The Regional Engagement Team embeds specialists in each English region and devolved nation to identify and access innovation regardless of sector mobilising the whole of UK industry to propose solutions to defence and national security challenges.
3. Regional Defence and Security Clusters have been set up as locally-based ecosystems that provide a co-ordinated regional platform through which defence can engage industry, stimulate collaboration, strengthen supply chains and align innovation activity with national security priorities and regional economic opportunities.



Defence exports and collaboration

In 2025, the Defence Industrial Strategy stated:

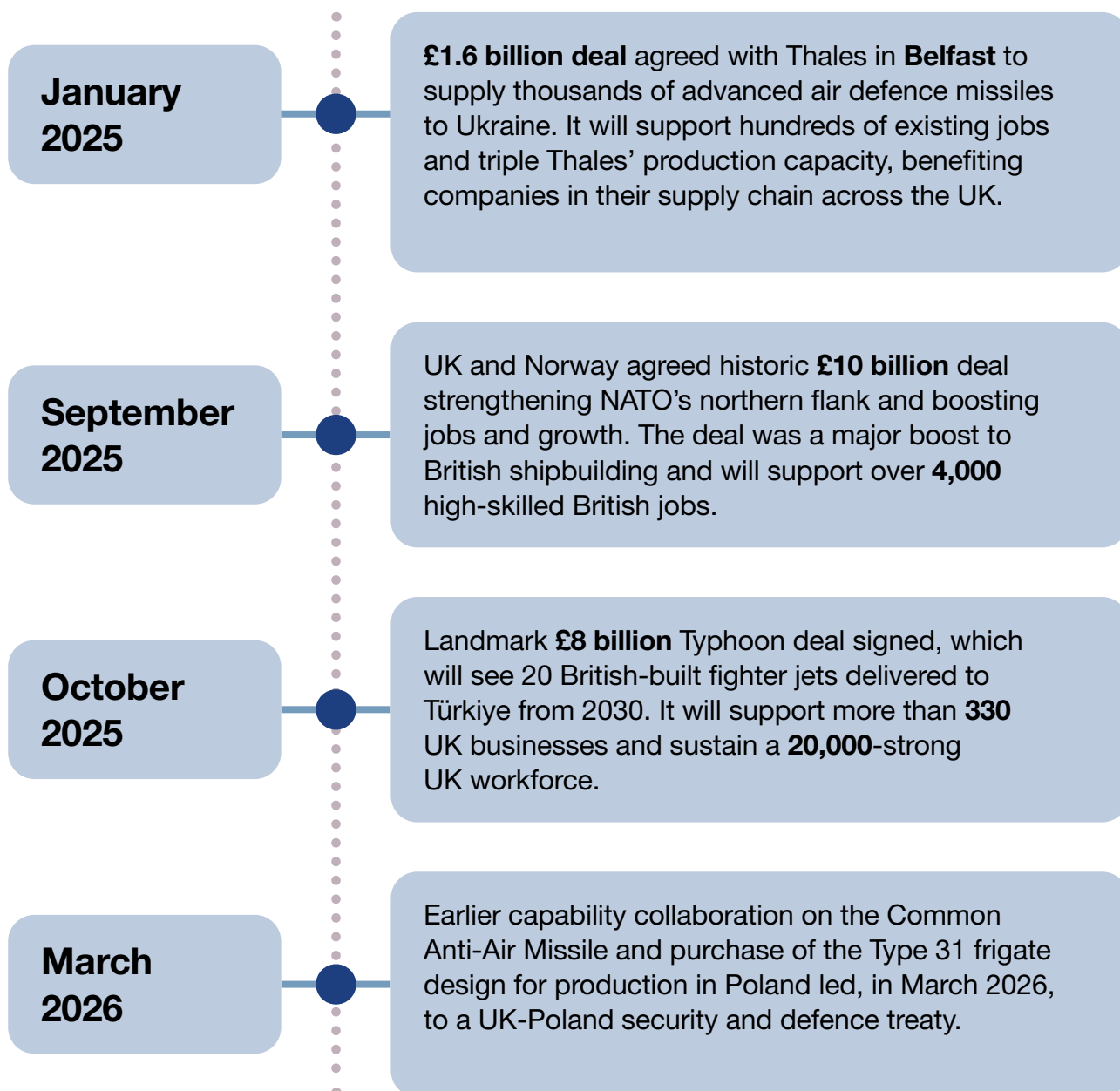
"A thriving and resilient UK defence industrial base, producing world-leading capability, not only guarantees our own security and prosperity, it will make us an even better partner and ally abroad."

A resilient, sovereign, and innovative defence industrial base assures the UK armed forces have world-class equipment giving them an operational advantage over adversaries.

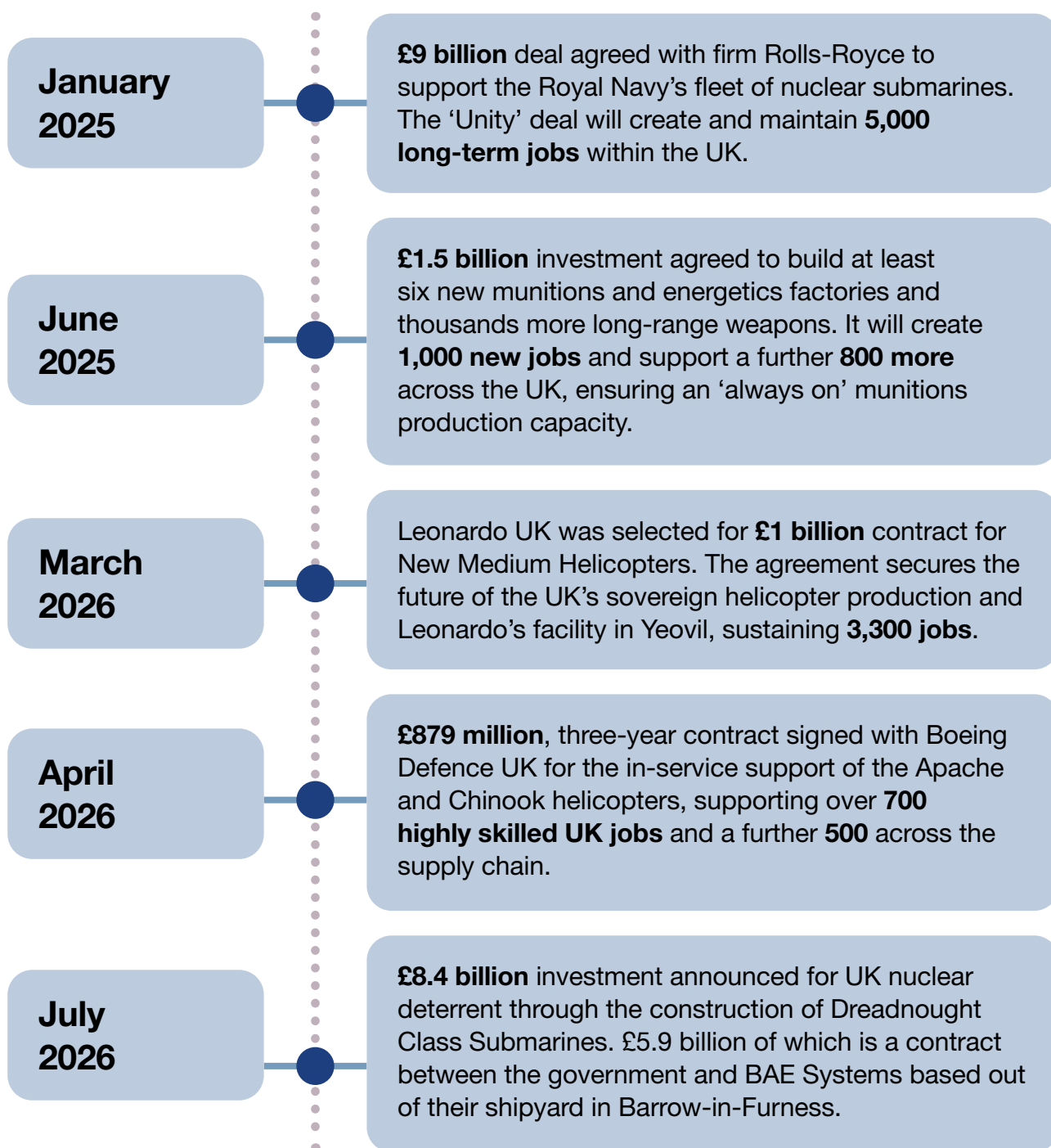
However, UK demand alone will not sustain the size and scale of defence industrial base we need for our national security. Consequently, exports and collaboration are of the utmost importance for defence and HM Government: they defend our national security – the first duty of government – strengthen our international alliances, bolster the UK economy and grow the industrial base throughout the whole country, supporting tens of thousands of well-paid, highly skilled jobs.

Major export deals

2025 is expected to have seen the highest British defence exports since records began, in a huge boost to workers and companies with deals such as the following.



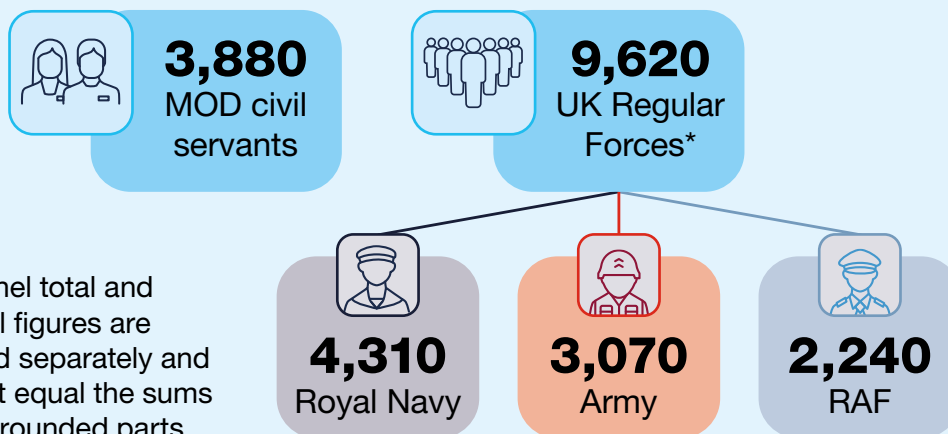
Recent major UK investments



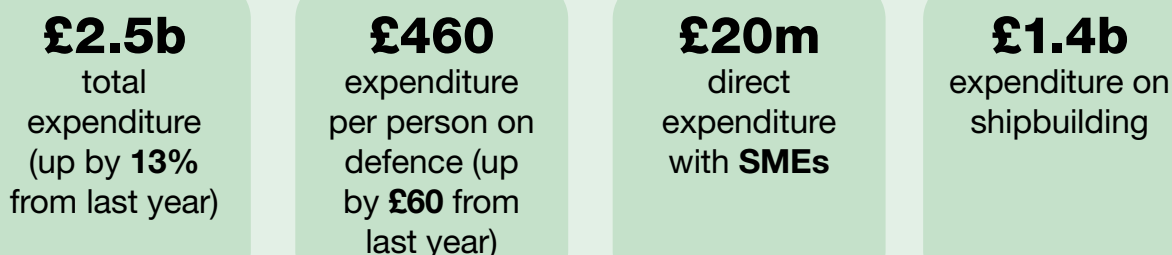
Each of the nations and regions in the UK have unique industrial strengths, skills capabilities and economic opportunities. The next sections provide key figures on how defence is actively contributing to employment, growth and security in your area.



Personnel as at 1 April 2026:



In 2025 to 2026:

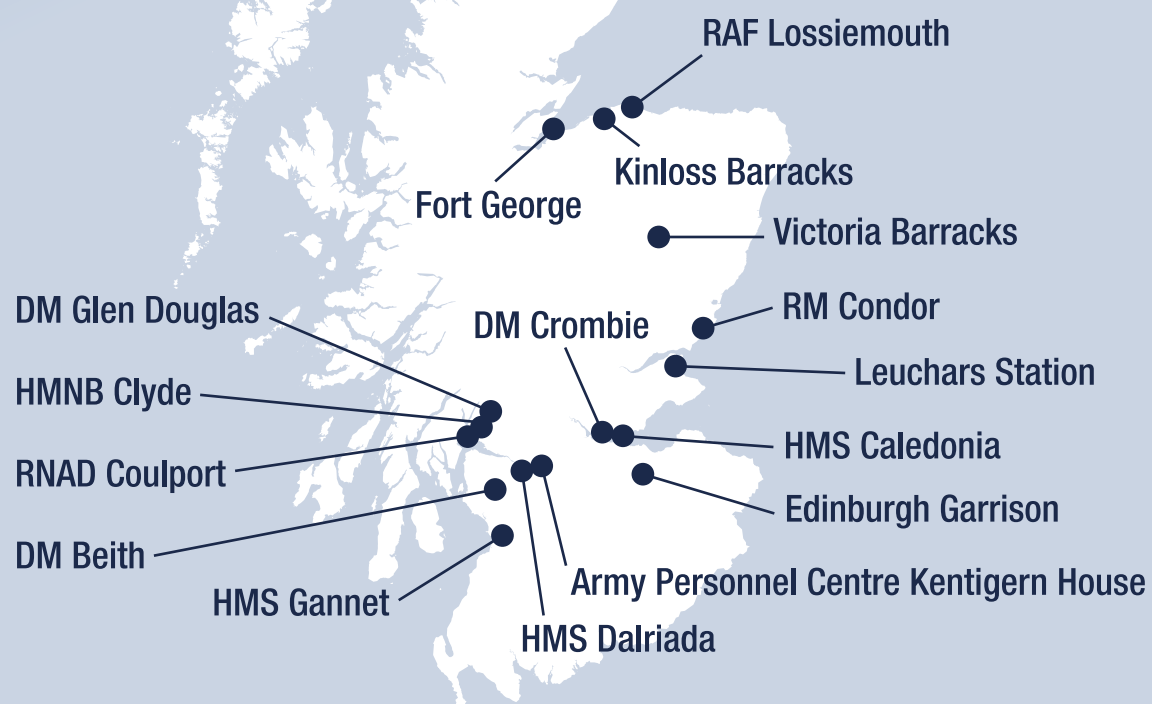


Industry in Scotland

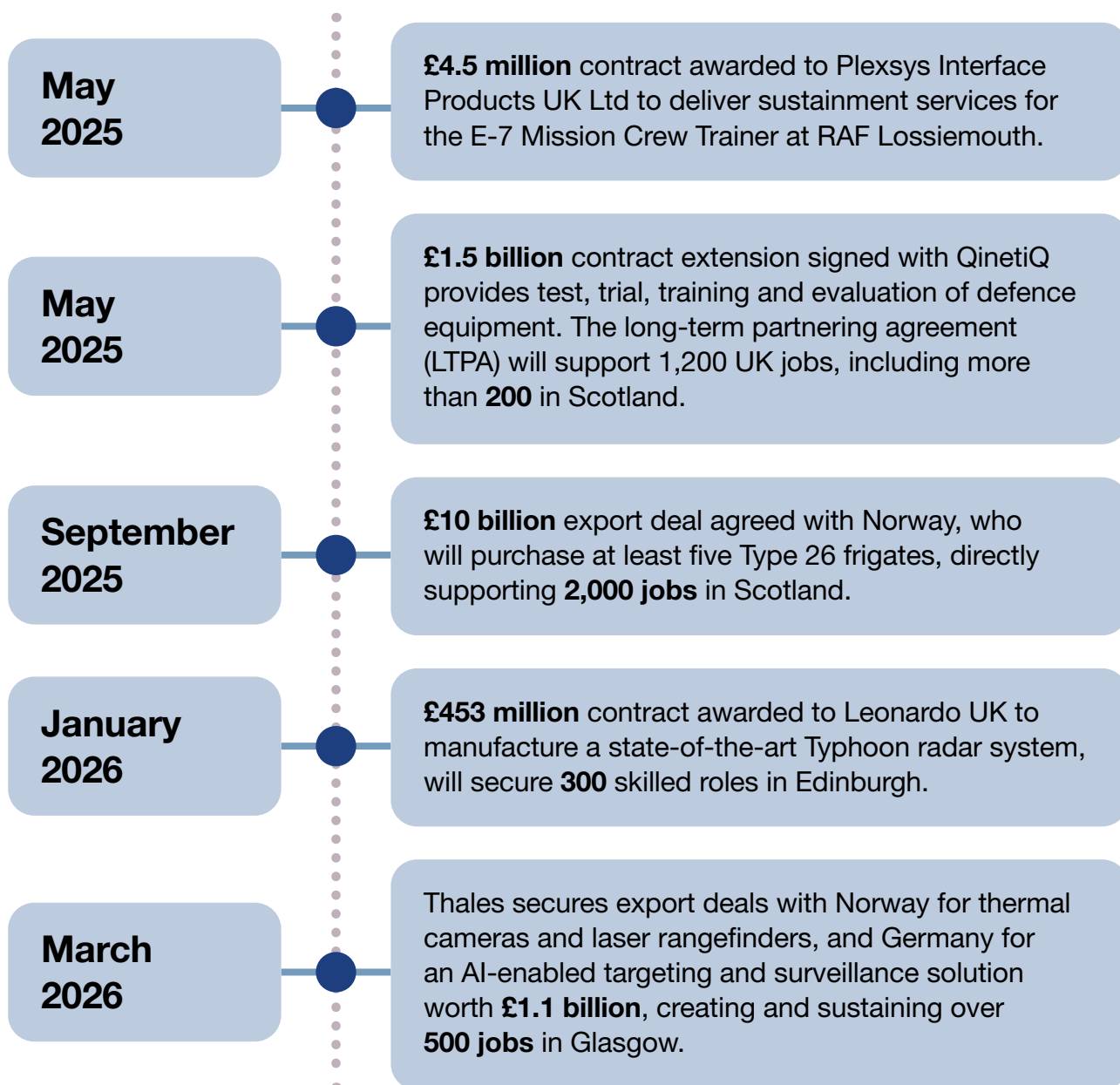
A wide range of defence suppliers are located in Scotland. These include: **Leonardo MW Ltd** providing surveillance radars and countermeasure systems from Edinburgh; **Boeing Defence UK** supporting the operation of Poseidon P-8A maritime patrol aircraft at RAF Lossiemouth; **Thales SA** providing electro-optical systems from their base in Glasgow; and **Babcock International** and **BAE Systems** operating shipyards in Rosyth and the Clyde. Local SME **Copernicus Technology** has successfully bid for two contracts providing visual recognition training material and a comprehensive, groundbreaking Defence Systems Approach to Training (DSAT) compliant training management system, along with a partner micro-SME, **Aquila Learning**. Prestwick Aerospace in South Ayrshire is home to Scotland's largest aerospace hub and emerging space cluster.

12,200
directly
supported
industry jobs,
2024 to 2025
(up by 7% from
last year)

Selected MOD sites in Scotland



Recent major investments in Scotland



Investment in skills in Scotland

Universities of Edinburgh, Glasgow and Strathclyde have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

Through the Defence Growth Deals, MOD are investing in up to two **Defence Technical Excellence Colleges** in Scotland.



Personnel as at 1 April 2026:



920
MOD civil
servants



1,920
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



170
Royal Navy



1,360
Army



390
RAF

In 2025 to 2026:

£1.0b

total
expenditure
(down by **12%**
from last year)

£310

expenditure
per person on
defence (down
by **£50** from
last year)

£17m

direct
expenditure
with SMEs

£478m

expenditure on
weapons and
ammunition*

* Includes armoured fighting vehicles

Industry in Wales

A number of our strategic suppliers have established locations across Wales. These include **Thales UK Limited** providing digital trust and cyber resilience from their base in Ebbw Vale and **QinetiQ** providing testing of aerial systems at their base in Aberporth. **BAE Systems** in Glascoed supplying approximately 80% of the 'general munitions' consumed by UK armed forces for training and for front line operations. **General Dynamics**, which has its UK headquarters near Caerphilly and provides assembly, integration and testing of armoured fighting vehicles from their base in Merthyr Tydfil. **Qioptiq Ltd** in Denbighshire, north-east Wales, an SME which specialises in the manufacturing of radiation stable micro-sheet cover glass for the space industry and can trace its expertise in space technology back to 1970 – the Denbighshire site also supports the defence market in avionic, surveillance, target acquisition, land vehicle and dismounted soldier products.

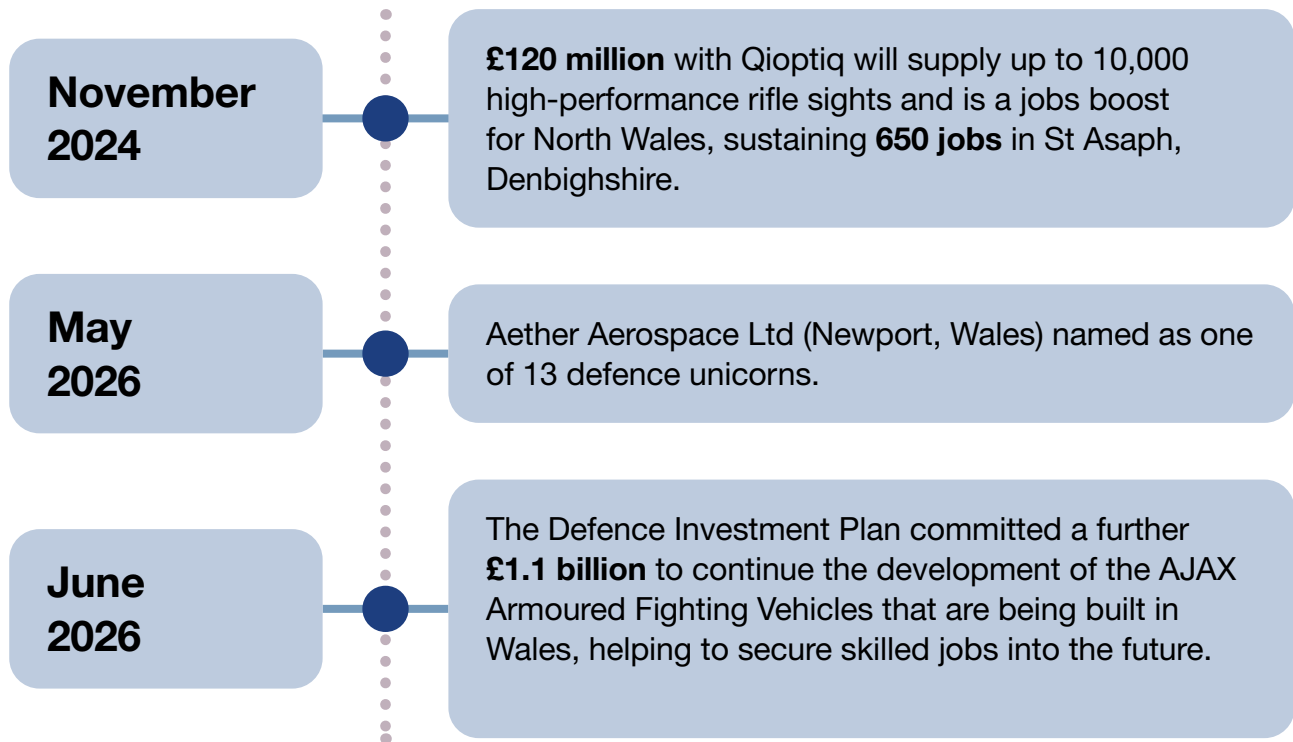
4,900
directly
supported
industry jobs,
2024 to 2025
(up by **26%** from
last year)

Selected MOD sites in Wales





Recent major investments in Wales



Investment in skills in Wales

Universities of Swansea and Cardiff have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

Through the Defence Growth Deals, MOD are investing in a **Defence Technical Excellence College** in Wales.

Northern Ireland



Personnel as at 1 April 2026:



740
MOD civil
servants



1,220
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



10
Royal Navy



1,160
Army



50
RAF

In 2025 to 2026:

£464m
total
expenditure
(up by **63%**
from last
year)

£240
expenditure
per person on
defence (up
by **£90** from
last year)

£2m
direct
expenditure
with **SMEs**

£201m
expenditure on
weapons and
ammunition*

£200m
on
shipbuilding

* Includes armoured fighting vehicles

Industry in Northern Ireland

Thales has a significant presence in Northern Ireland with a 60-year heritage, employing more than 700 people across the defence and space sectors. Belfast is home to the global Space Electric Propulsion Integration Centre, a joint venture between Thales and Thales Alenia Space, which is jointly owned by the Italian defence company Leonardo and the Thales Group. **Harland and Wolff (part of Navantia UK)**, have over 159 years of maritime engineering experience in Belfast, and are part of Team Resolute, a UK consortium consisting of Navantia UK and BMT, which support the Fleet Solid Support Ships programme. **The Advanced Manufacturing Innovation Centre** is a flagship advanced manufacturing research and innovation facility based at Queen's University Belfast.

1,000
directly
supported
industry jobs,
2024 to 2025
(up by **25%** from
last year)

Selected MOD sites in Northern Ireland



Recent major investments in Northern Ireland

**March
2025**

£1.6 billion deal with Thales to supply thousands of advanced air defence missiles to Ukraine. The deal will create **200 new jobs** and support **700 existing jobs** at Thales in Belfast, which will manufacture more than 5,000 lightweight-multirole missiles for Ukraine's defence.

**October
2025**

New **£350 million deal with India** will support hundreds of jobs in Northern Ireland and supply India, a key strategic partner, with air defence missiles and launchers. The contract is set to deliver UK-manufactured Lightweight Multirole Missiles built in Belfast to the Indian army. **It secures over 700 jobs in Northern Ireland** as the air defence missiles and launchers due to be manufactured for the Indian army are the same as those currently being manufactured in Belfast for Ukraine.

Recent investment into the UK's industrial base from **Navantia UK** will provide opportunities for work at Harland and Wolff's shipyard.

Investment in skills in Northern Ireland

Queen's University Belfast have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

North East



Personnel as at 1 April 2026:



190
MOD civil
servants



920
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



10
Royal Navy



410
Army



500
RAF

In 2025 to 2026:

£198m

total expenditure (up by
6% from last year)

£70

expenditure per
person on defence
(**unchanged** from
last year)

£96m

direct expenditure
with **SMEs**

Industry in North East

A number of defence suppliers have established themselves in the North East of England. **BAE Land Systems UK** has a long tradition in the North East of forging, machining and treating of large calibre mortar, artillery, and tank munition in Washington, Tyne and Wear. Ship repair and conversion specialist, **A&P Group**, has the largest commercial dry dock on the east coast of England, and is a major centre for supporting the Royal Navy. A&P Tyne has delivered a range of high-profile fabrication projects including blocks for the Queen Elizabeth class carriers and our Astute submarines.

900

**directly
supported
industry jobs,
2024 to 2025**

(**unchanged**
from last year)

Selected MOD sites in the North East





Recent major investments in the North East

**January
2025**

A **£173 million** MOD training contract with British business Draken will boost Teesside International Airport and support more than **200 jobs** across Teesside, Bournemouth and the Midlands. The new contract will deliver armed forces training for responding to a range of threats, including air-to-air combat, electronic warfare and missile attacks.

**August
2025**

125 jobs are to be supported in the North East through a new agreement with Cook Defence Systems to supply spare tracks for the British Army's armoured fighting vehicles. The three-year deal, worth up to **£125 million**, will see the company supplying spare parts for all the Army's principal combat vehicles including its new Challenger 3 tanks.

Investment in skills in the North East

**June
2026**

As part of the **£182 million** Defence Industry Skills Package, the Universities of Durham, Teesside and Newcastle received a share of **£9.2 million** of investment to increase the student capacity on defence related engineering and computing courses.

The Universities of Durham, Newcastle and Northumbria have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

North West



Personnel as at 1 April 2026:



1,840
MOD civil
servants



1,470
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



310
Royal Navy



1,040
Army



120
RAF

In 2025 to 2026:

£5.4b

total expenditure (up by
10% from last year)

£700

expenditure per
person on defence
(up by **£60** from
last year)

£24m

direct expenditure
with **SMEs**

Industry in North West

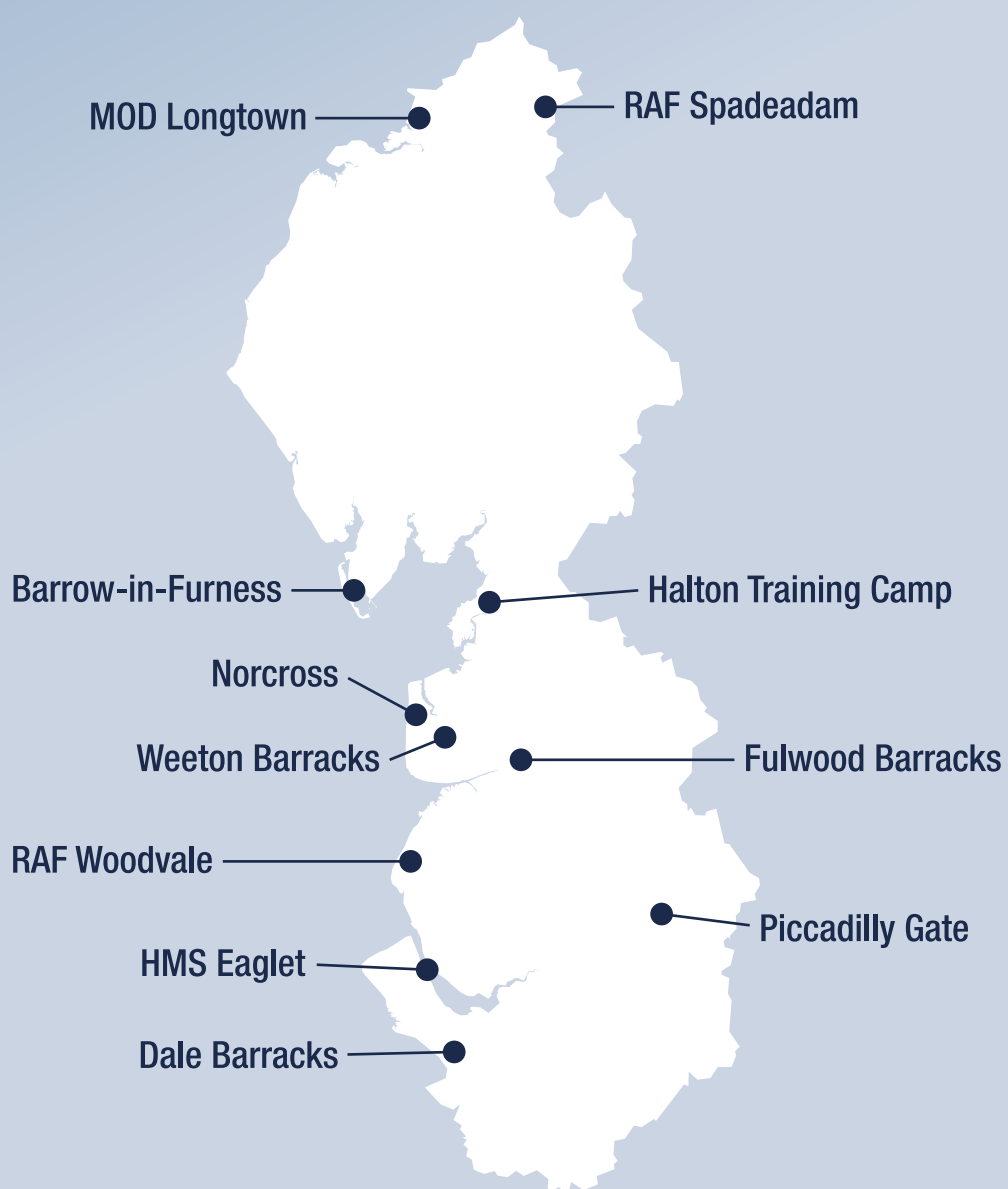
The North West of England is home to a number of defence suppliers. These include **Raytheon UK** providing cyber security expertise from Salford and **BAE Systems Maritime**, from where the Royal Navy's new Dreadnought class submarines will be built in Barrow. Local SME **Northern Diver**, based in Wigan, design and manufacture dive wear solutions which are in use by militaries around the world.

23,400

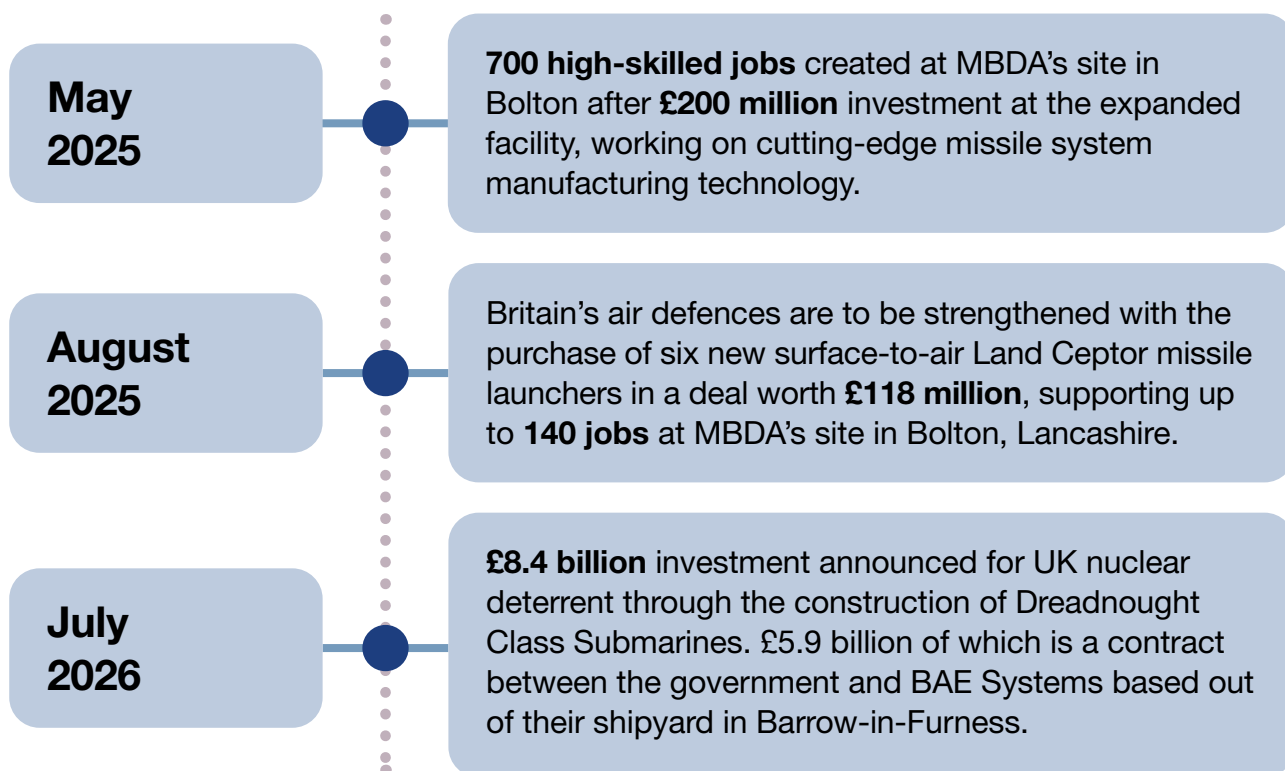
directly
supported
industry jobs,
2024 to 2025

(up by 20% from
last year)

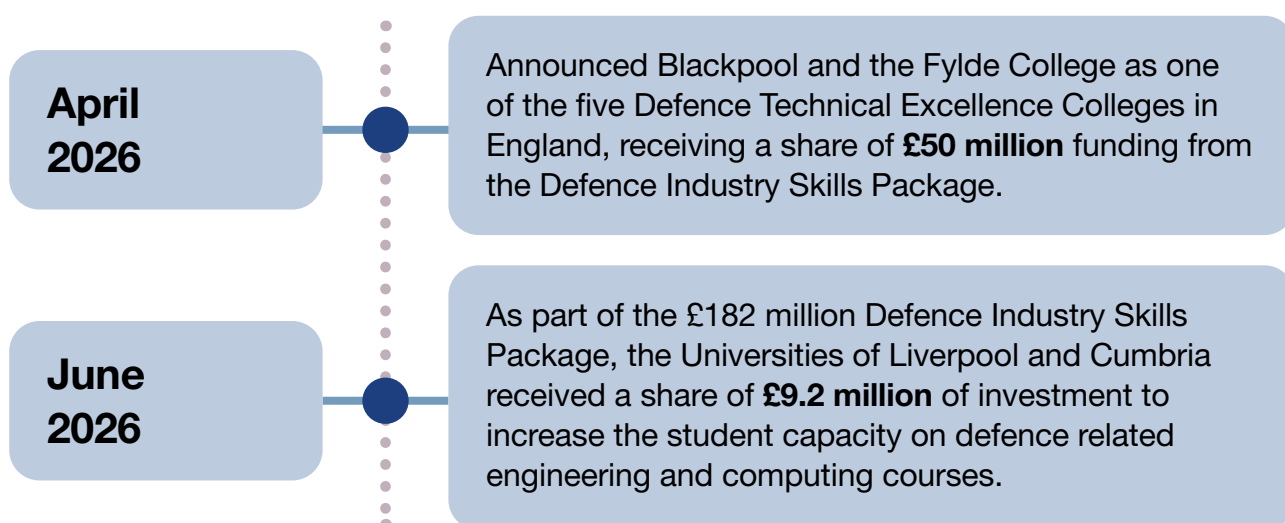
Selected MOD sites in the North West



Recent investments in the North West



Investment in skills in the North West



The Universities of Cumbria, Lancashire, Liverpool, Manchester and Lancaster University have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

Yorkshire and the Humber



Personnel as at 1 April 2026:



1,730
MOD civil
servants



12,350
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



80
Royal Navy



10,790
Army



1,480
RAF

In 2025 to 2026:

£1.1b

total expenditure (up by
4% from last year)

£190

expenditure per
person on defence
(up by £10 from
last year)

£90m

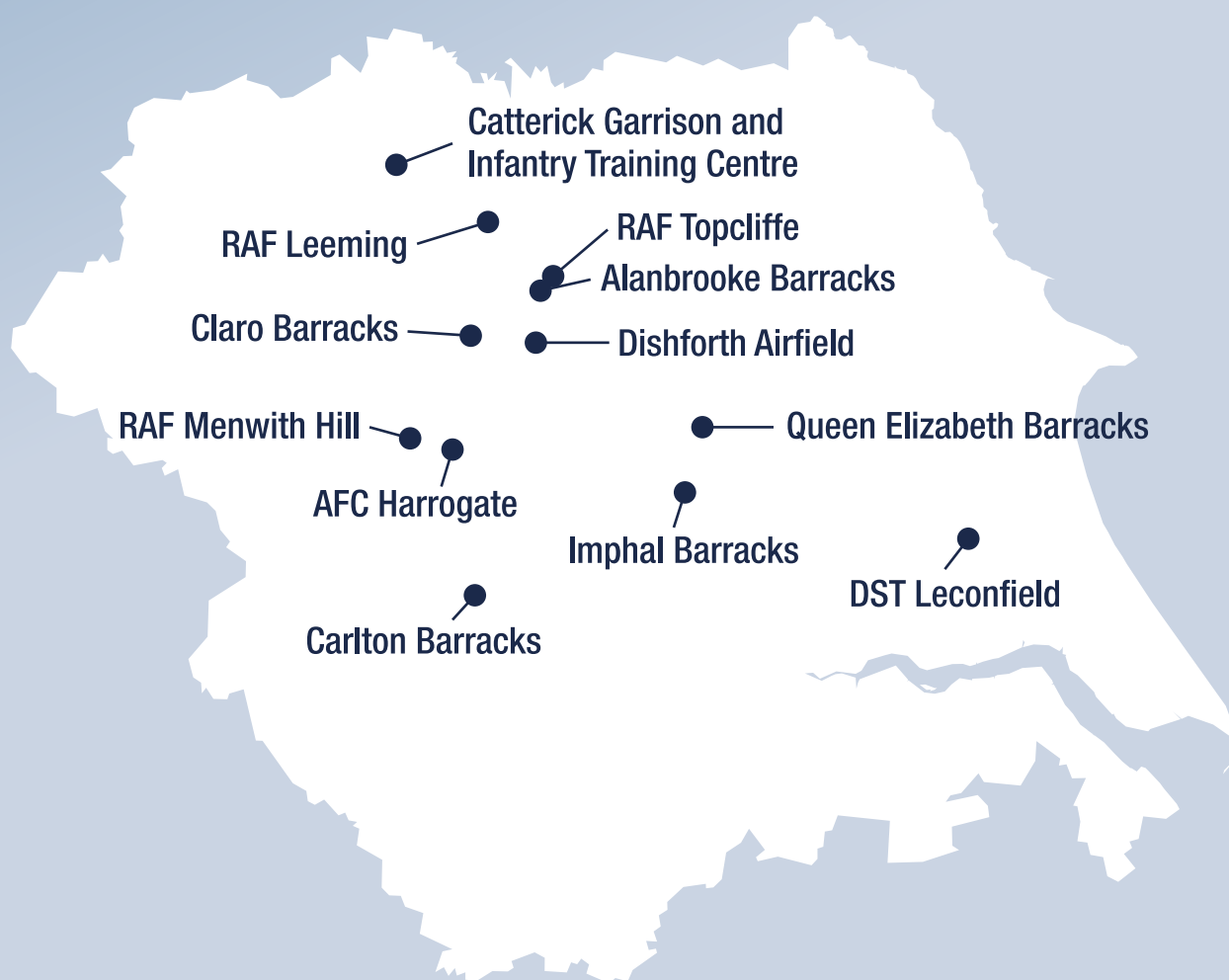
direct expenditure
with **SMEs**

Industry in Yorkshire and the Humber

BAE Systems facility at Brough, East Yorkshire has maintained a vital role in the company's military aircraft business. It has been the engineering centre for the BAE Hawk trainer, many hundreds of which remain in service with air forces throughout the world today, as well as the UK Centre for Military Aircraft Structural Testing. RAF Fylingdales, North Yorkshire is the home to **Serco** which provide operations and maintenance support to the Solid State Phased Array Radar, part of the UK/US Ballistic Missile Early Warning. **Sheffield Forgemasters** is a fully accredited supplier of steel castings and forgings for the global defence and marine industries, and provides critical components for the UK's defence nuclear programmes. **Magtec (Rotherham/Sheffield)** provides hybrid-electric drive technology for MOD's armoured vehicle hybridisation programmes.

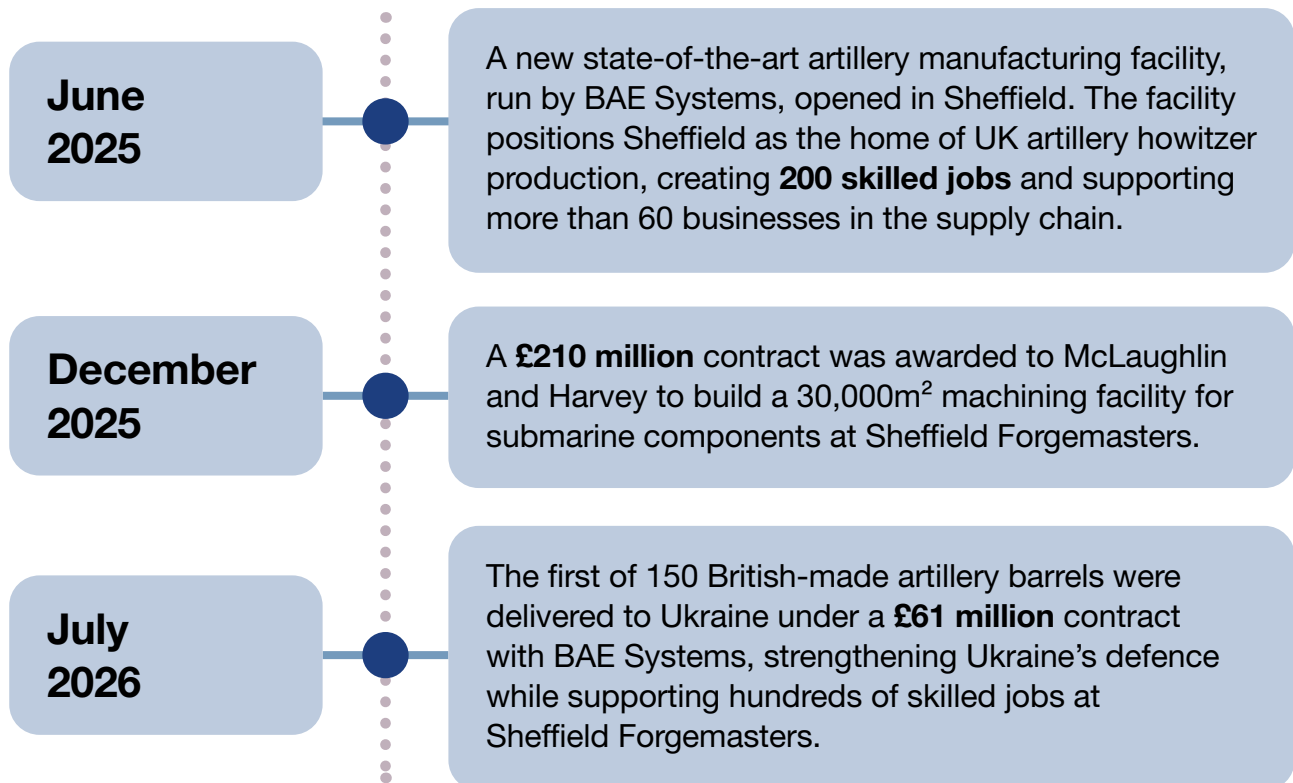
5,500
directly
supported
industry jobs,
2024 to 2025
(up by 49% from
last year)

Selected MOD sites in Yorkshire and the Humber

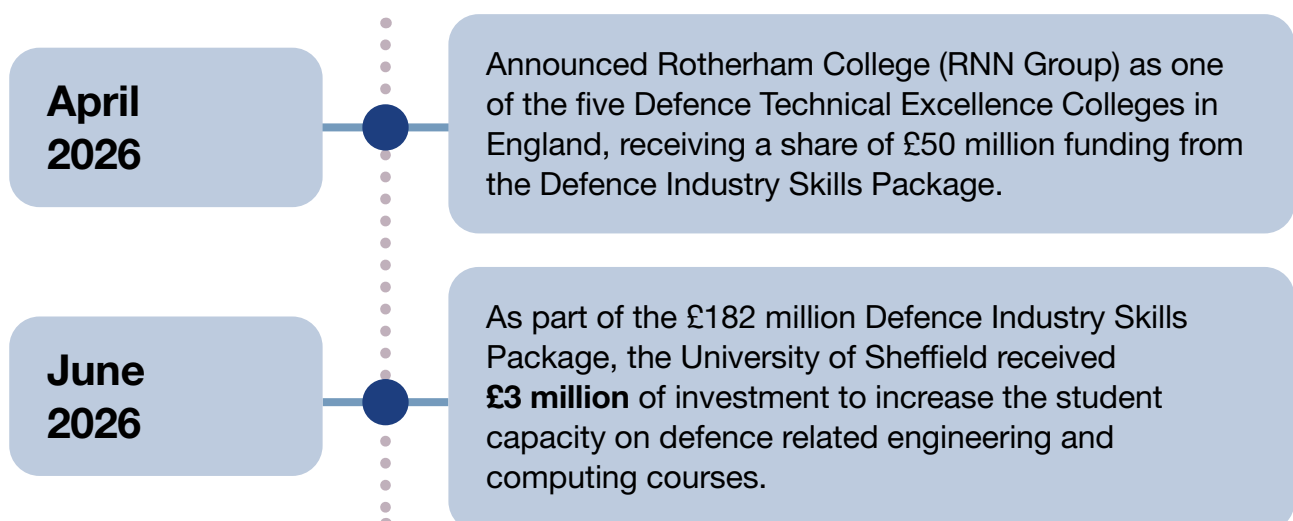




Recent investments in Yorkshire and the Humber



Investment in skills in Yorkshire and the Humber



The Universities of Sheffield, York and Huddersfield have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

East Midlands



Personnel as at 1 April 2026:



1,650
MOD civil
servants



7,960
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



140
Royal Navy



2,160
Army



5,650
RAF

In 2025 to 2026:

£2.0b

total expenditure
(up by **21%** from
last year)

£390

expenditure per
person on defence (up
by **£70** from last year)

£28m

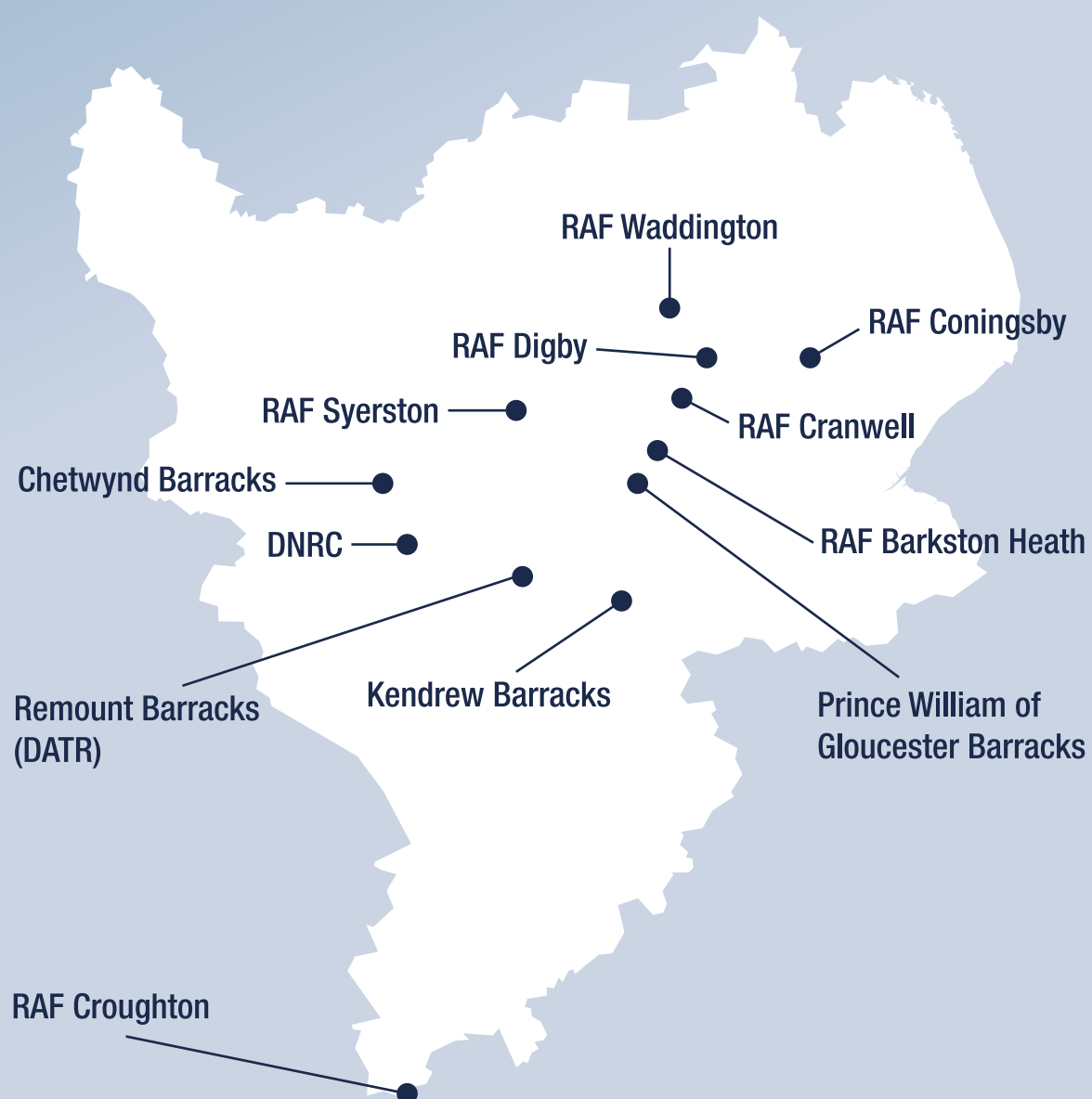
direct expenditure
with **SMEs**

Industry in East Midlands

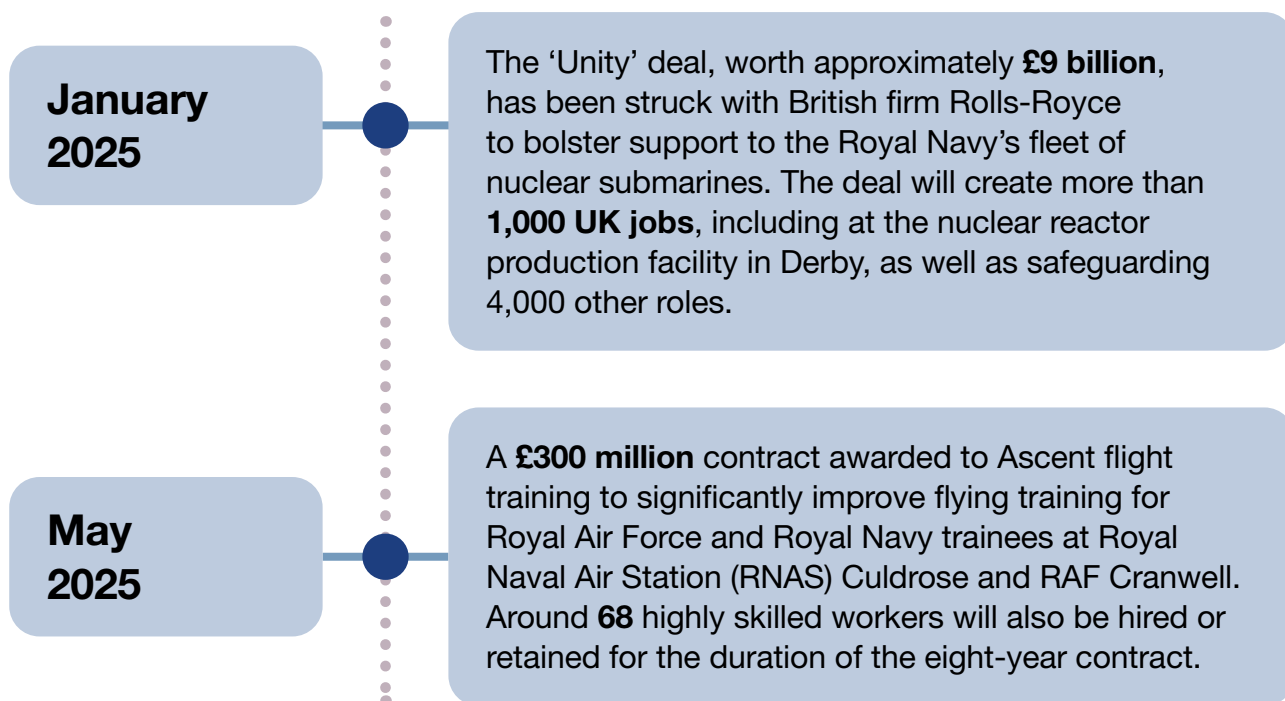
The East Midlands can boast some of the most cutting-edge defence manufacturing and service delivery organisations in the country. **BAE Systems** is partnering with MOD to maintain and support the RAF fleet of Typhoon aircraft at RAF Coningsby in Lincolnshire. **Leonardo's** Lincoln site offers a dedicated facility to provide Electronic Warfare Operational Support. The location also includes Leonardo's Training Academy which educates technical specialists from the UK and internationally within the Cyber and Electromagnetic Activities domain. Derby is home to **Rolls-Royce**, one of the world's best-known engine and nuclear component manufacturers, providing a range of solutions for defence. Nottingham-based SME **Nexor** is a cyber security company with 30 years' experience in secure information exchange. They have delivered high assurance cyber security solutions to defence, security, and finance organisations around the globe. One such high-profile customer has been NATO Headquarters in Brussels, for which Nexor has designed and built Coalition interoperability demonstrators for the European Defence Agency.

8,400
directly
supported
industry jobs,
2024 to 2025
(up by **20%** from
last year)

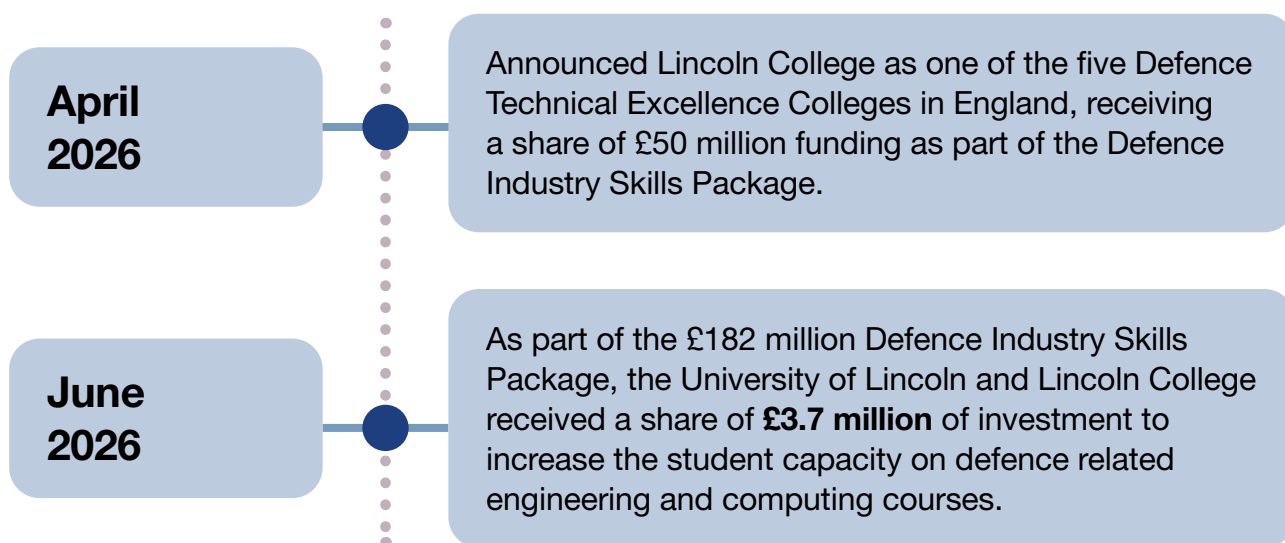
Selected MOD sites in the East Midlands



Recent investments in the East Midlands



Investment in skills in the East Midlands



The Universities of Lincoln, Nottingham and Loughborough have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

West Midlands



Personnel as at 1 April 2026:



2,500
MOD civil
servants



7,620
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



490
Royal Navy



4,380
Army



2,750
RAF

In 2025 to 2026:

£1.8b

total expenditure (up by
3% from last year)

£290

expenditure per
person on defence
(**unchanged** from
last year)

£107m

direct expenditure
with **SMEs**

Industry in the West Midlands

The West Midlands has established itself at the very centre of manufacturing for the UK's armed forces. **Rheinmetall BAE Systems Land**, based in Telford, designs, manufactures and supports military vehicles used by the British Army and international customers. **Leidos'** Defence Fulfilment Centre at Donnington, near Telford, is the driving force behind delivering effective logistics for MOD.

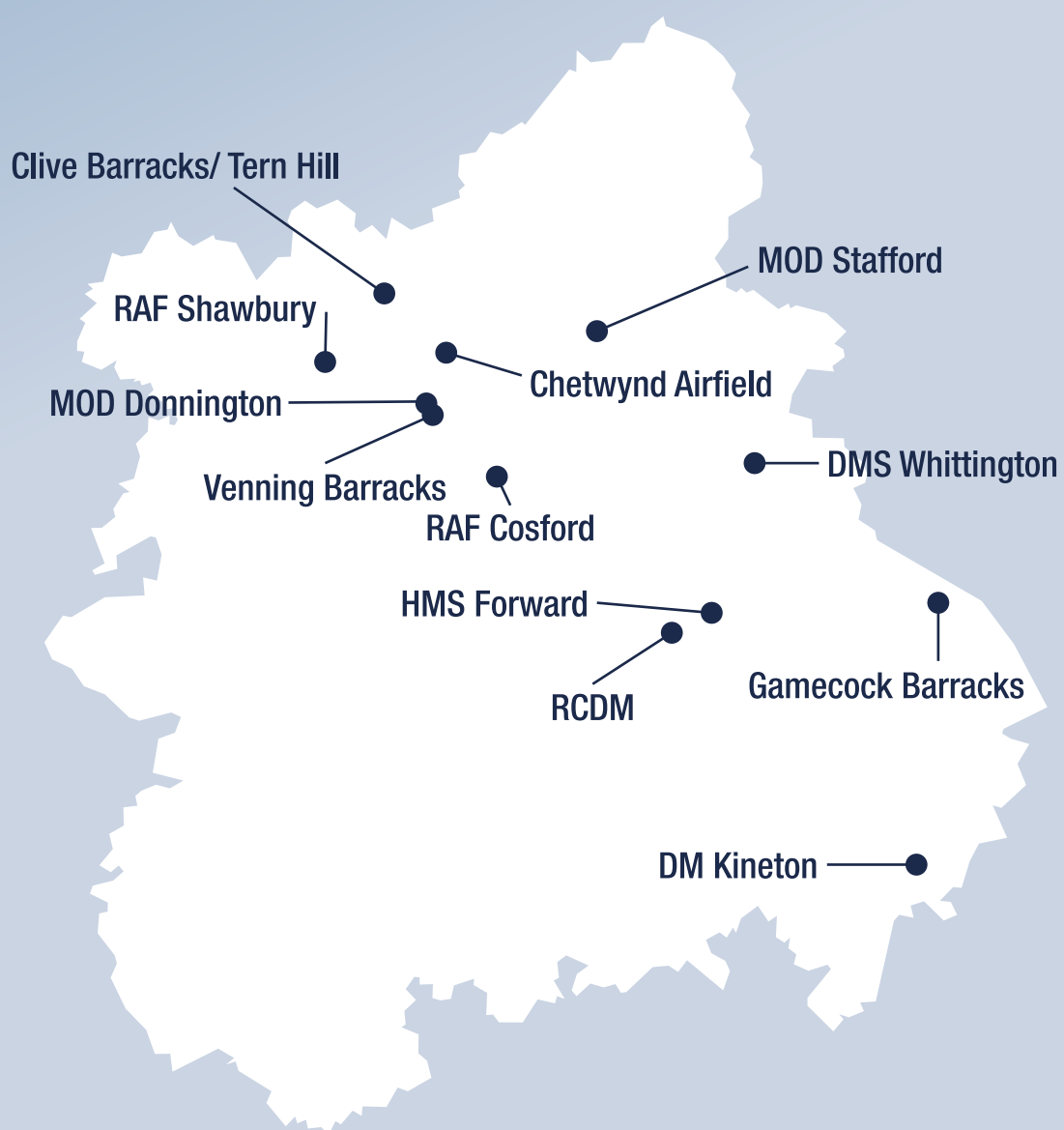
Level Peaks Associates, a Hereford based SME, supply a whole range of equipment to MOD, as well as UK police forces and our NATO allies.

7,900

directly
supported
industry jobs,
2024 to 2025

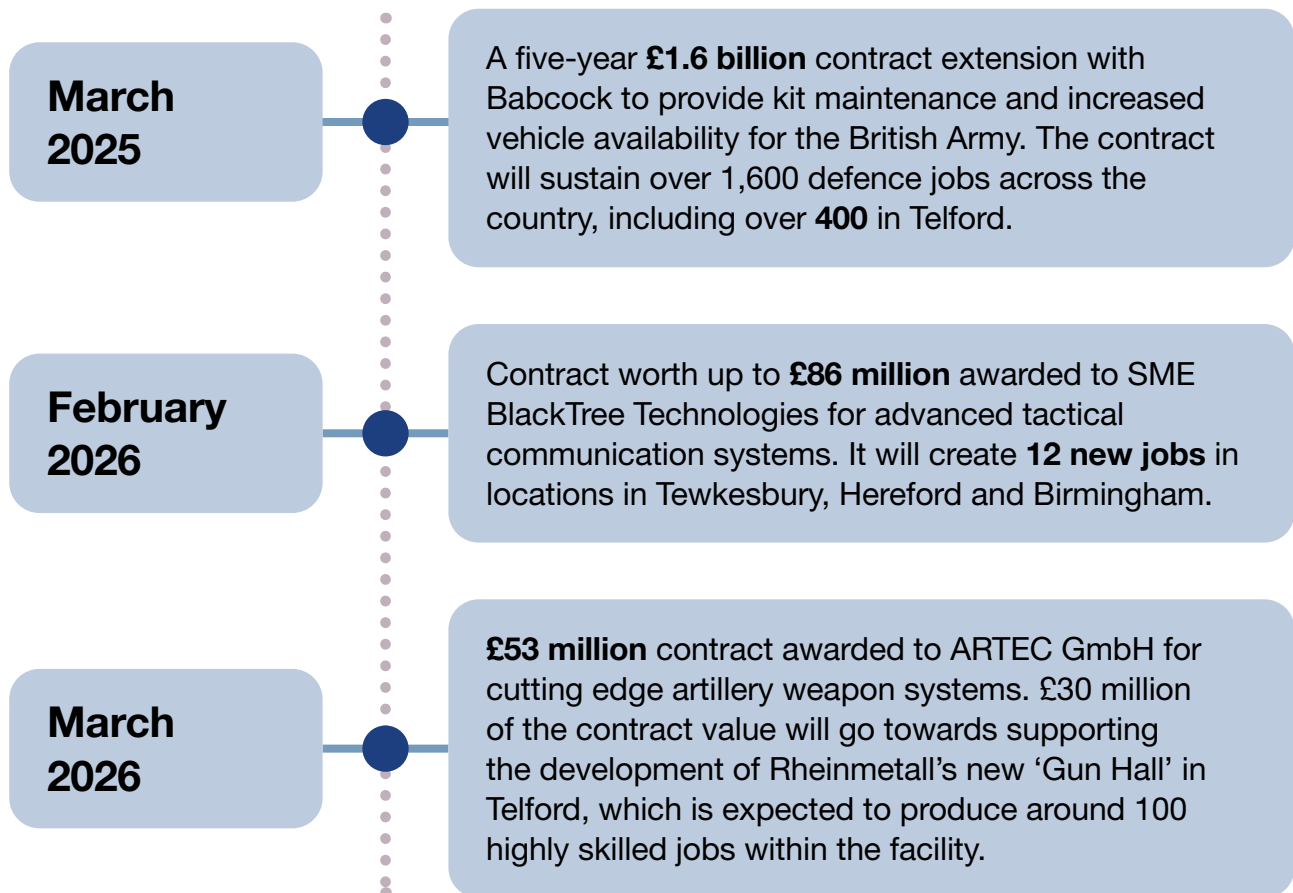
(down by 2% from
last year)

Selected MOD sites in the West Midlands

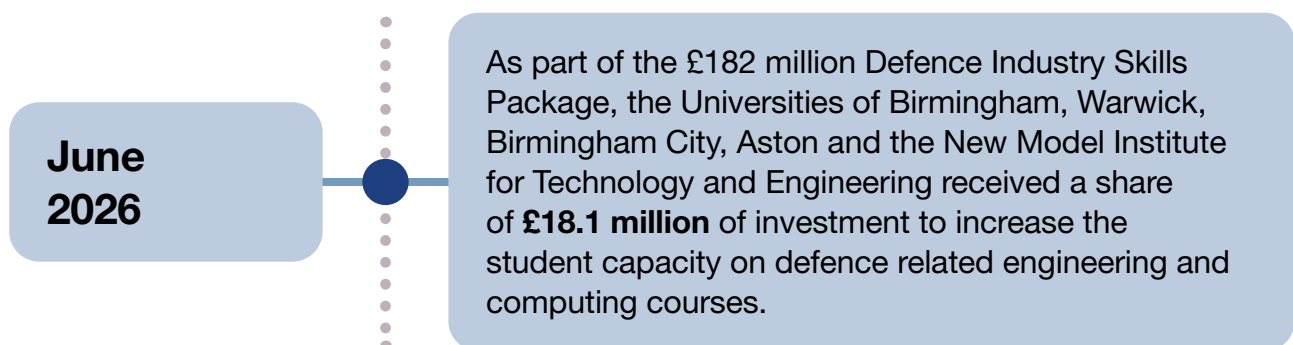




Recent investments in the West Midlands



Investment in skills in the West Midlands



The Universities of Birmingham, Warwick and Aston have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

East of England



Personnel as at 1 April 2026:



3,280
MOD civil
servants



12,720
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



1,130
Royal Navy



7,600
Army



3,990
RAF

In 2025 to 2026:

£2.1b

total expenditure
(up by **25%** from
last year)

£320

expenditure per
person on defence
(up by **£60** from
last year)

£74m

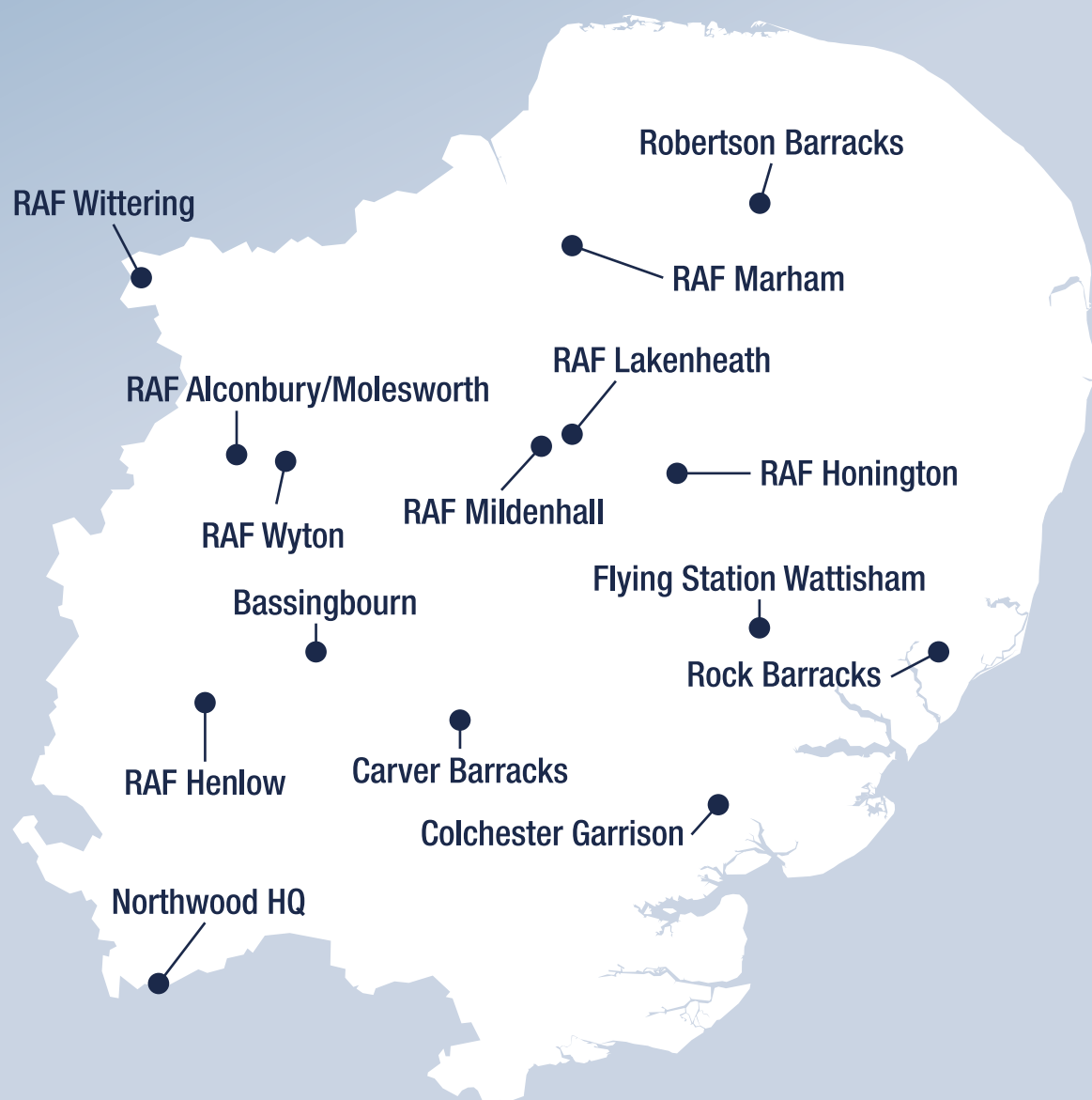
direct expenditure
with **SMEs**

Industry in the East of England

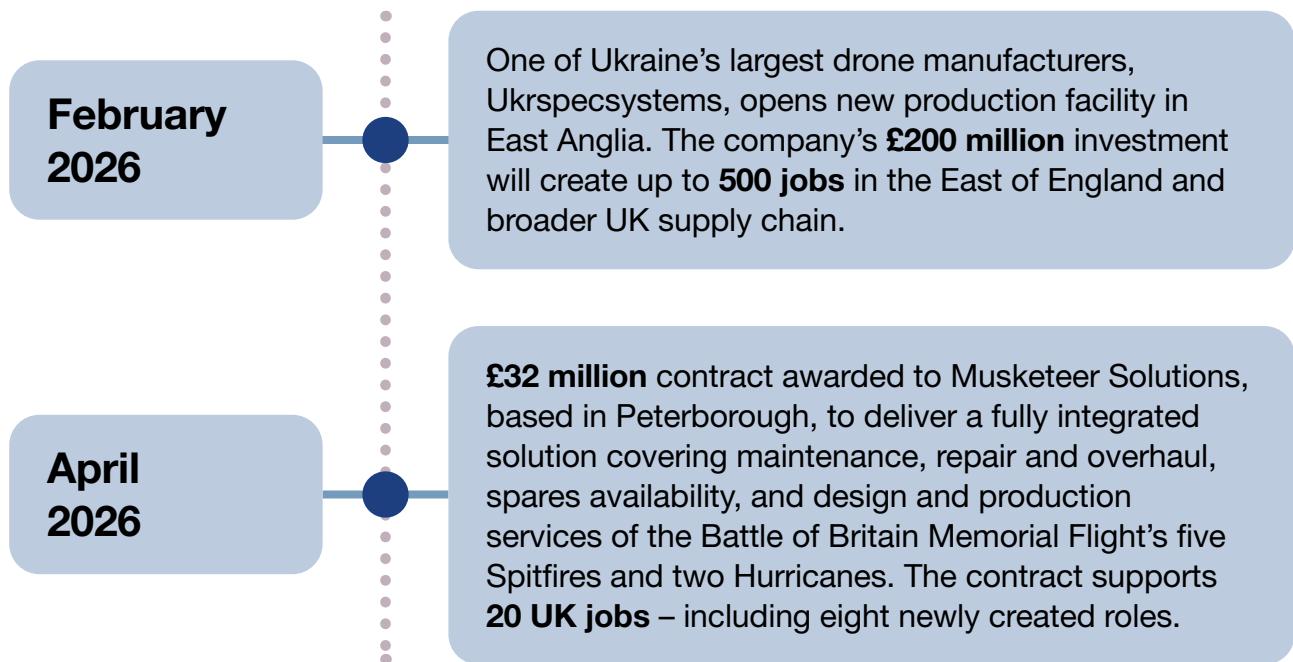
The region hosts major defence suppliers including **Lockheed Martin UK** at Ampthill, **MBDA** and **Airbus** delivering ground-breaking missile, space and electronics technologies and **Raytheon** has its UK Headquarters in Harlow, Essex. The company is focused on four key areas: airborne intelligence, surveillance and reconnaissance; precision weapons; cyber and intelligence; and mission critical systems. Norwich based **MSI-Defence Systems** is a world-leader in the supply of small and medium calibre gun systems and has been at the forefront of naval gunfire control technology for over 100 years.

8,900
directly
supported
industry jobs,
2024 to 2025
(up by **13%** from
last year)

Selected MOD sites in the East of England



Recent investments in the East of England



Investment in skills in the East of England

Cranfield University has joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

London



Personnel as at 1 April 2026:



4,470
MOD civil
servants



3,550
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



470
Royal Navy



2,050
Army



1,030
RAF

In 2025 to 2026:

£2.4b

total expenditure
(down by **20%** from
last year)

£260

expenditure per
person on defence
(down by **£70** from
last year)

£133m

direct expenditure
with **SMEs**

Industry in London

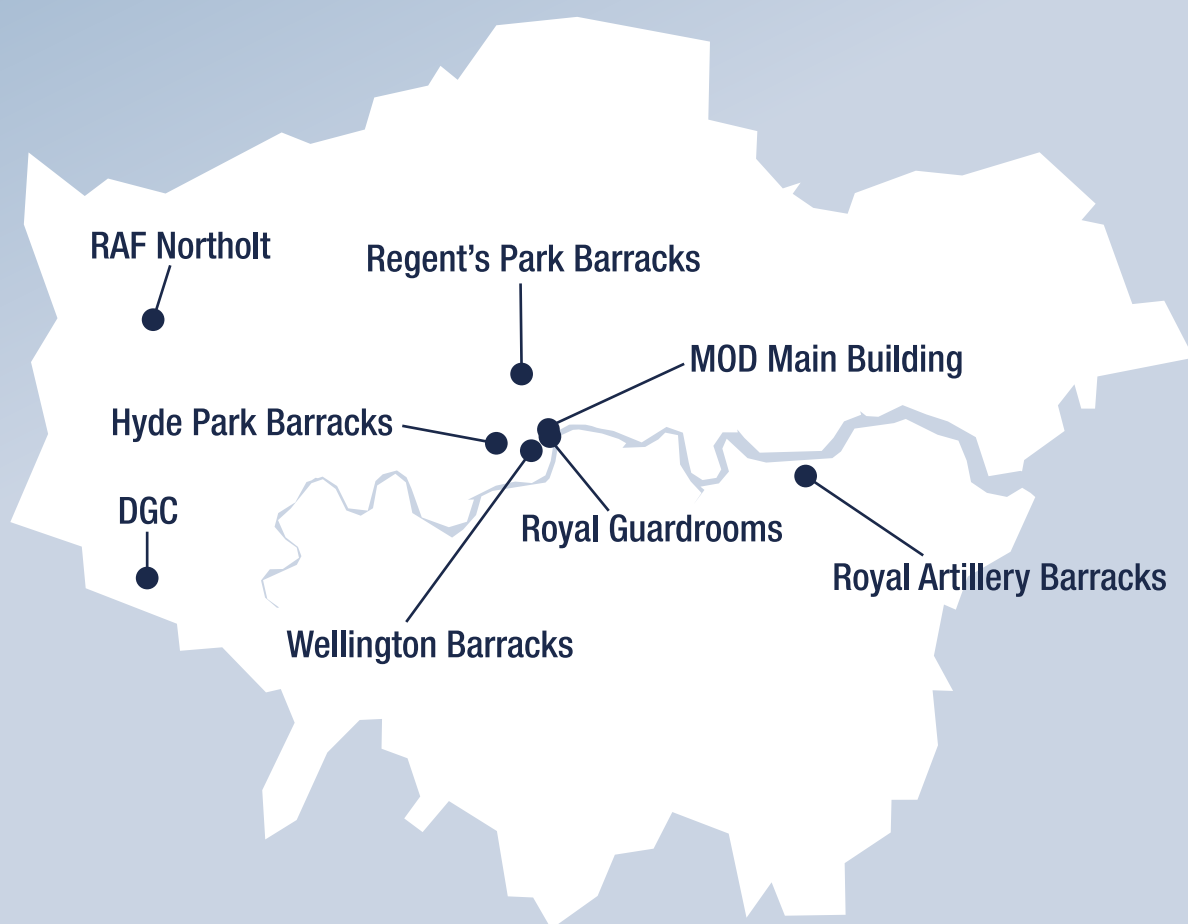
London is home to the global and regional headquarters of many of the MOD's largest suppliers including **Airbus, MBDA, Capita and Boeing UK**. It is a global hub for the kind of technological development that will be essential for equipping our armed forces in the future and for ensuring the UK's national prosperity through an internationally competitive defence industry. Suppliers include **BAE Applied Intelligence** who are developing world-leading technologies with defence and wider applications. **Stream Defence** is a UK SME supplier specialising in design and engineering heating, ventilation and air conditioning and associated disciplines. Operating from London, the south coast, and East Anglia, the company integrates different disciplines to resolve human environment challenges.

12,900

directly
supported
industry jobs,
2024 to 2025

(up by **32%** from
last year)

Selected MOD sites in London



Royal Guardrooms includes Buckingham Palace, St James's Palace, Tower of London and Windsor Castle.



Recent investments in London

**September
2025**

Strategic partnership with Palantir to help the UK military develop the latest digital tools and harness AI technology. Palantir will invest up to **£1.5 billion** to make the UK its European headquarters for defence and create up to **350 new high-skilled jobs**.

Investment in skills in London

**June
2026**

As part of the £182 million Defence Industry Skills Package, The University of Westminster and St Mary's University Twickenham received a share of **£3.3 million** of investment to increase the student capacity on defence related engineering and computing courses.

King's College London, University College London, Kingston University and Queen Mary University of London have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

South East



Personnel as at 1 April 2026:



9,480
MOD civil
servants



37,560
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



11,430
Royal Navy



16,470
Army



9,660
RAF

In 2025 to 2026:

£8.5b

total expenditure
(up by **3%** from
last year)

£870

expenditure per
person on defence (up
by **£20** from last year)

£253m

direct expenditure
with **SMEs**

Industry in the South East

The South East of England has strong links to defence. **BAE Systems** operates the naval base in Portsmouth, home to the flagship HMS Queen Elizabeth Aircraft Carrier. **Airbus** has its headquarters for helicopter activity in the UK at Oxford Airport. **AWE** designs, manufactures and maintains the UK's nuclear warheads at its two main sites in Berkshire: Aldermaston and Burghfield.

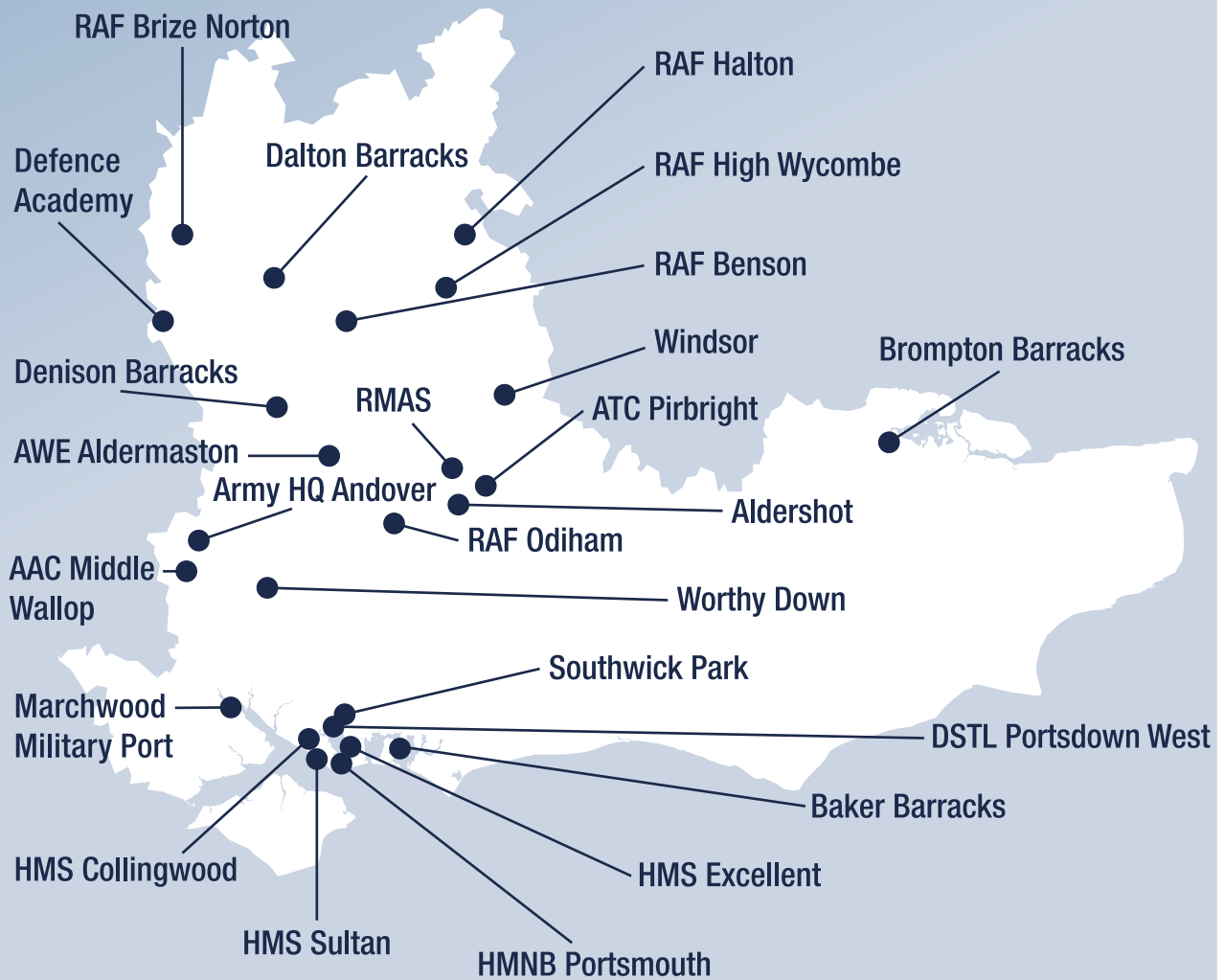
RAF Brize Norton in Oxfordshire hosts **Airtanker** which provides safe and effective operation of the RAF's fleet of Voyager military transporter aircraft. Farnborough is the headquarters of **QinetiQ**, a leading science and engineering company operating primarily in the defence and security markets and employing over 5,000 people in the UK. **2iC**, an SME based in Southampton, are global leaders in providing digital interoperability in the battlespace; **D3A Defence Ltd** (an SME in Bournemouth) specialises in the development and delivery of training solutions to the military; and **4GD** (an SME in London) offers measurable close-combat virtual and reality training at its 4GD SmartFacility™.

41,300

directly
supported
industry jobs,
2024 to 2025

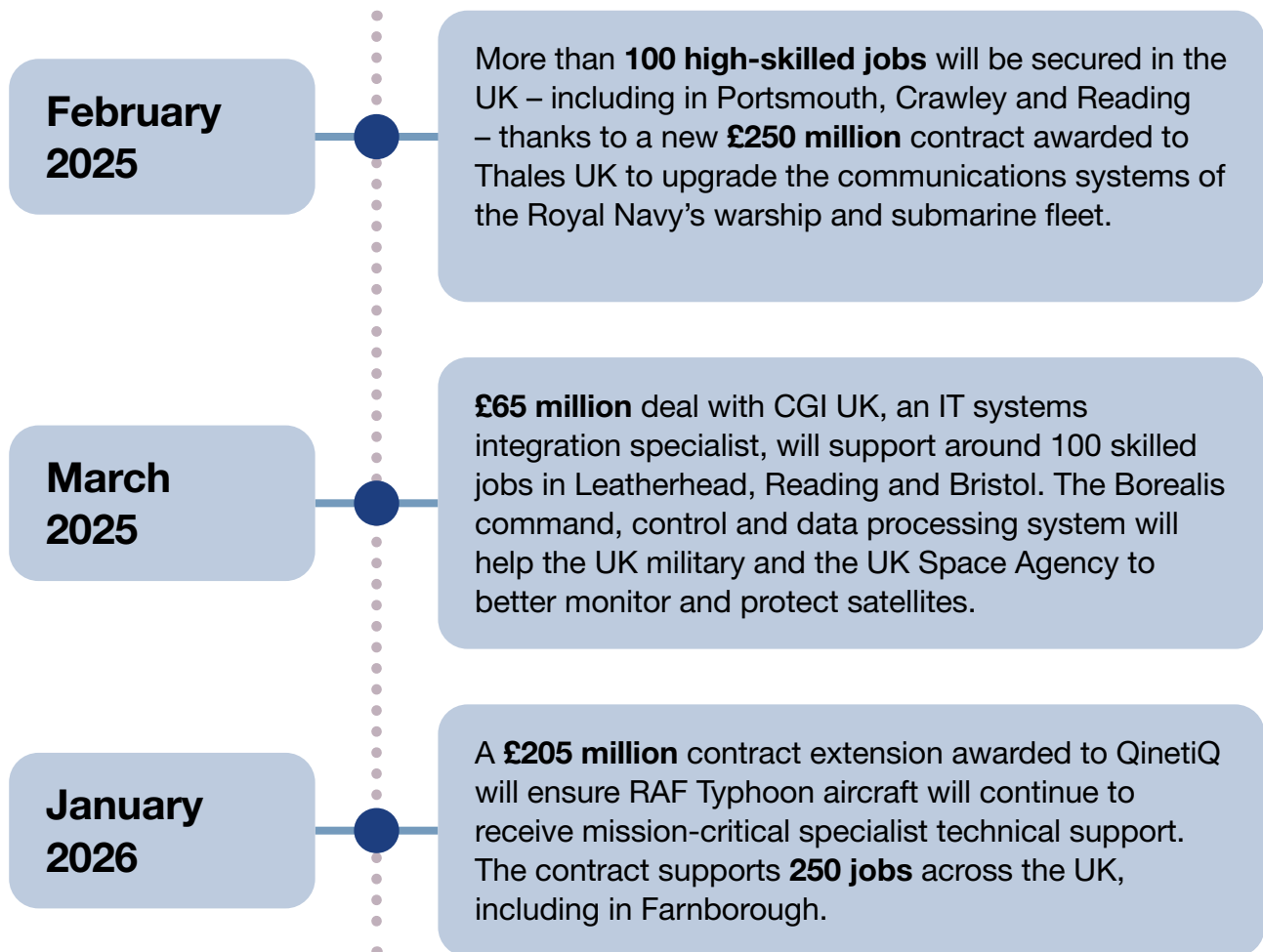
(up by **8%** from
last year)

Selected MOD sites in the South East

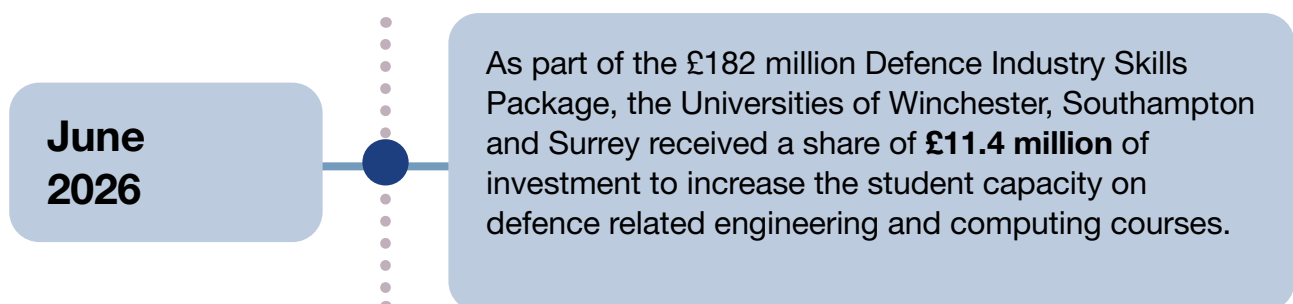


Aldershot contains Aldershot Garrison, Home Command and Regional Command. Windsor includes Combermere Barracks and Victoria Barracks.

Recent investments in the South East



Investment in skills in the South East



The Universities of Surrey, Portsmouth and Oxford have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.

South West



Personnel as at 1 April 2026:



22,060
MOD civil
servants



35,380
UK Regular
Forces*

* Personnel total and subtotal figures are rounded separately and may not equal the sums of their rounded parts.



13,070
Royal Navy



20,840
Army



1,460
RAF

In 2025 to 2026:

£6.7b

total expenditure (down
by **3%** from last year)

£1,130

expenditure per
person on defence
(down by **£40** from
last year)

£416m

direct expenditure
with **SMEs**

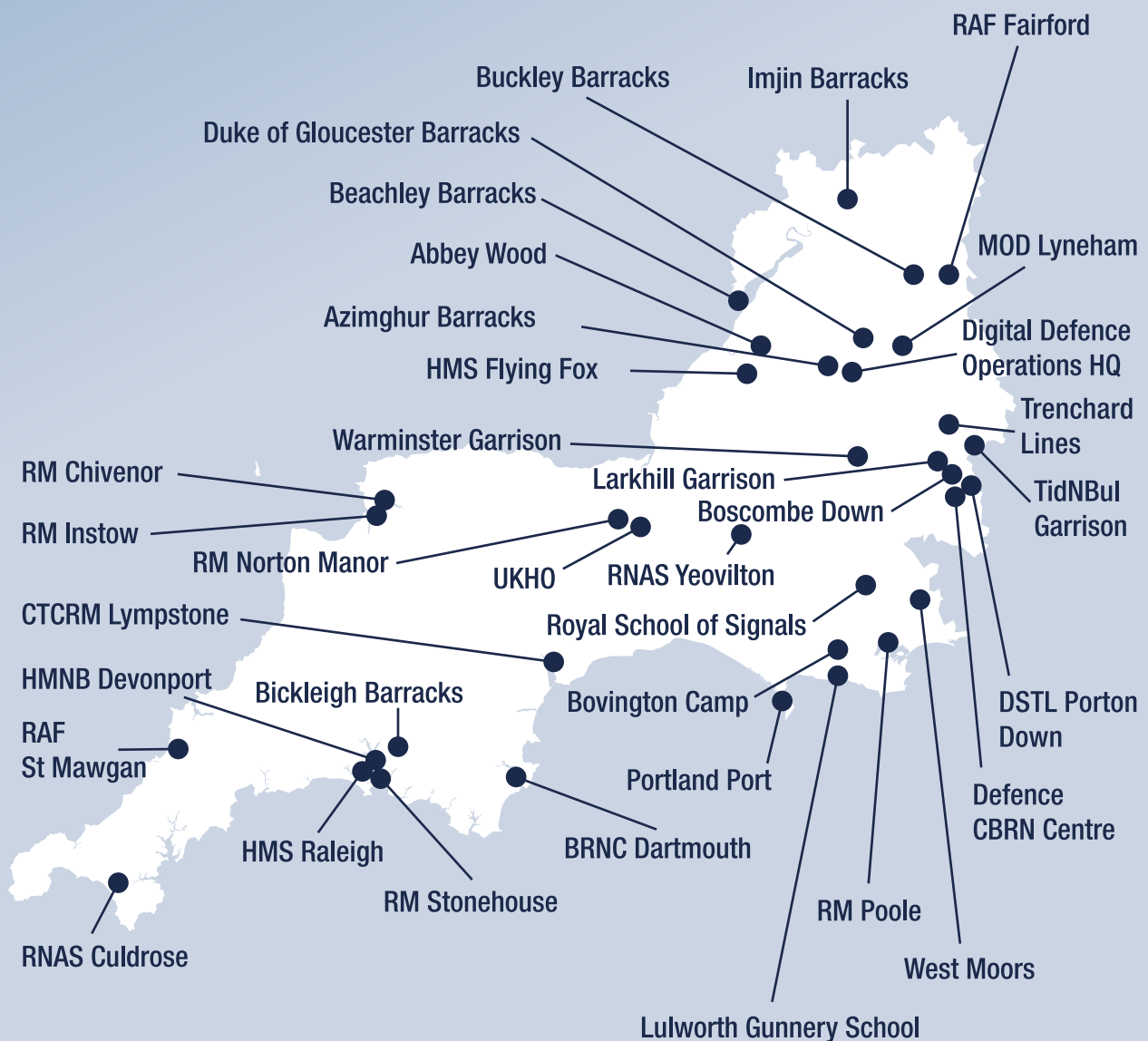
Industry in the South West

The South-West is host to several defence suppliers. These include **Leonardo Helicopters Yeovil** which build helicopters such as the Wildcat and Merlin, the **Raytheon Cyber Innovation Centre** in Gloucester which is responsible for research, software development and global cybersecurity, and **Rolls-Royce** in Bristol, who build and maintain many of the Royal Air Force, Royal Navy and Britain's international allies gas turbine engines for combat and transport aircraft and ships. **Babcock International Group** also has a significant presence in the South West with locations in both Bristol and Devonport. **SME XI systems** are based in Somerset and deliver open systems digital integration services to UK defence by bringing together hardware, software, and communications in high-risk environments and mission critical scenarios.

36,700
directly
supported
industry jobs,
2024 to 2025

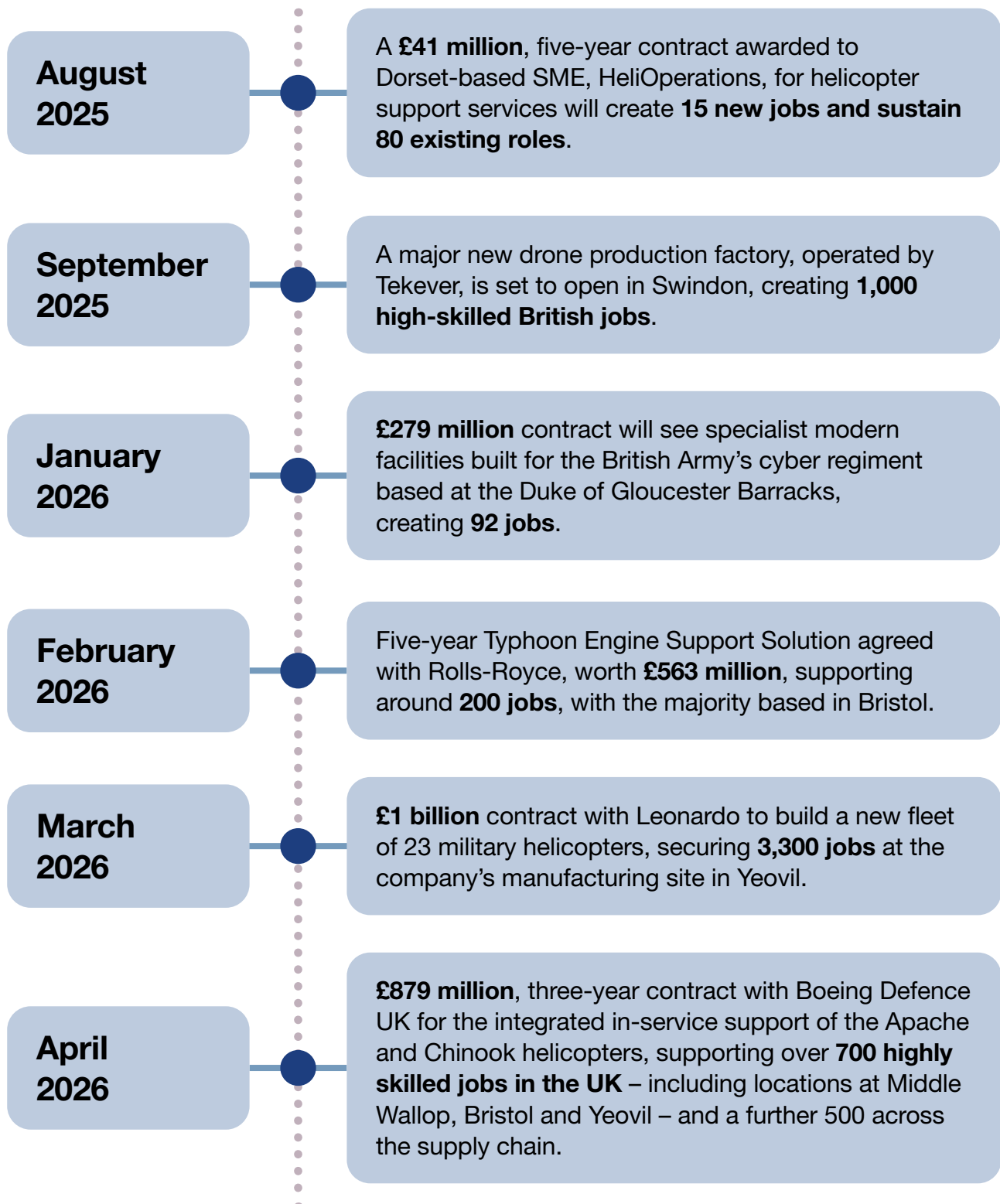
(up by **1%** from
last year)

Selected MOD sites in the South West

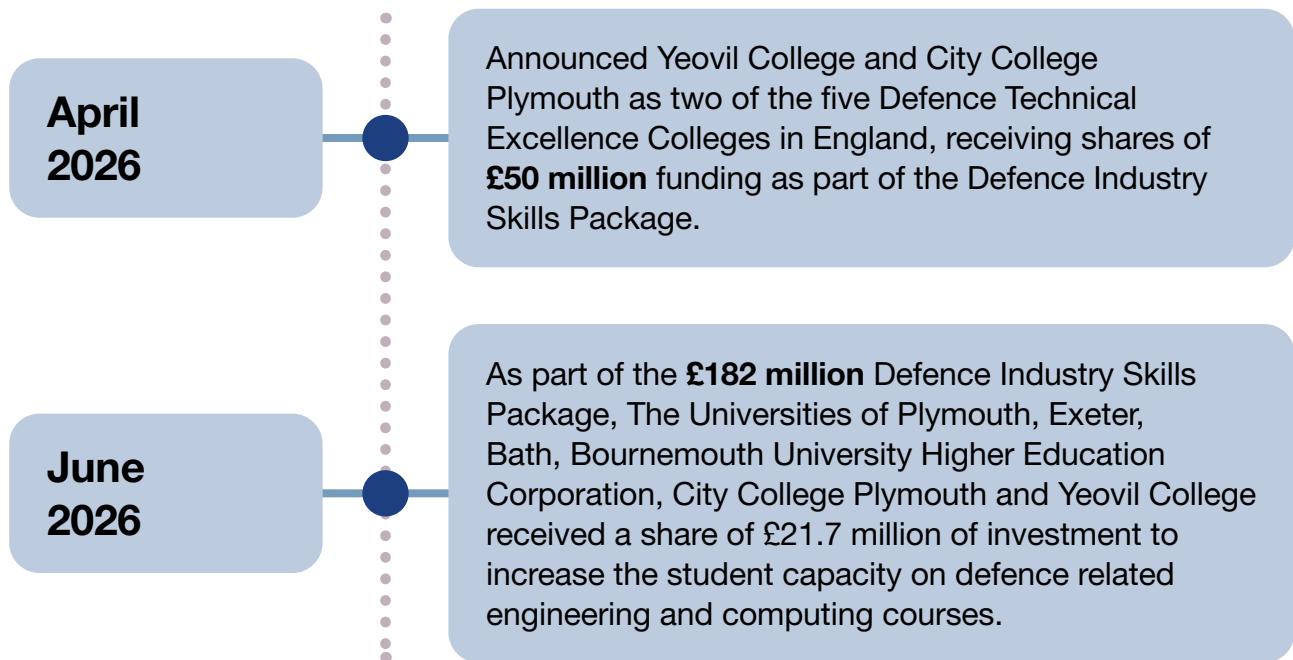




Recent investments in the South West



Investment in skills in the South West



The Universities of Bath, Bristol, Exeter and Plymouth have joined the Defence Universities Alliance showing their commitment to growing defence research and supporting the pipeline of skilled students into careers in the defence industry and wider sector.



Glossary

Scotland

DM	Defence Munitions
HMNB	His Majesty's Naval Base
HMS	His Majesty's Ship
RM	Royal Marines
RNAD	Royal Naval Armament Depot

Wales

IBS	Infantry Battle School
OLTC	Outdoor Leadership Training Centre

North East

DSTL	Defence Science and Technology Laboratory
------	---

Yorkshire and the Humber

AFC	Army Foundation College
DST	Defence School of Transport

East Midlands

DATR	Defence Animal Training Regiment
DNRC	Defence and National Rehabilitation Centre



West Midlands

DM	Defence Munitions
DMS	Defence Medical Services
RCDM	Royal College for Defence Medicine

London

DGC	Defence Geographic Centre
-----	---------------------------

South East

AAC	Army Aviation Centre
ATC	Army Training Centre
AWE	AWE Nuclear Security Technologies
DSTL	Defence Science and Technology Laboratory
RMAS	Royal Military Academy Sandhurst

South West

BRNC	Britannia Royal Naval College
CBRN	Chemical, Biological, Radiological and Nuclear
CTCRM	Commando Training Centre Royal Marines
DSTL	Defence Science and Technology Laboratory
RNAS	Royal Naval Air Service
UKHO	UK Hydrographic Office

Personnel

MOD civilian personnel in the UK: Location statistics for UK Regular Armed Forces and civilians 2026, Table 2.1a in associated open data.

UK Regular Forces, by service: Location statistics for UK Regular Armed Forces and civilians 2026, Table 2.1b in associated open data.

Future Reserves 2020: Quarterly Service Personnel statistics: 1 April 2026.

Expenditure

MOD expenditure with UK industry: MOD regional expenditure statistics with industry 2025 to 2026, Tables 2, 4, 8 and 9 in associated data tables.

Employment

Jobs supported by MOD expenditure: MOD supported employment estimates 2024 to 2025, Table 1 and 3 in associated data tables.

Apprenticeships: MOD annual report and accounts 2025 to 2026, page 56.

Industry in the nation / region

Information on the suppliers and type of work taking place in each nation and region was provided by Defence Commercial. It provides an example of industry in the region and isn't exhaustive of all suppliers operating in the region.

MOD sites by nation / region

The sites included are illustrative of the broader defence footprint in the region and not an exhaustive list of every site. Selection was based on a combination of physical size of establishments using data from the Defence Infrastructure Organisation, personnel numbers at establishments provided by the Analysis Directorate, and other SME input provided by sources within MOD.

Background notes

This publication is intended as a light-touch, top-level overview of defence's footprint in each region. Data is presented by International Territorial Level 1 UK boundaries.

Different time points have been used in this booklet.

Royal Navy includes Royal Navy and Royal Marines. Civilian personnel includes those working in MOD Main and the four executive agencies (Defence Equipment and Support, Submarine Delivery Agency, UK Hydrographic Office, and Defence Science and Technology Laboratory).

Military personnel deployed on operations and temporary assignments are counted against their permanent stationed location in regional personnel figures.

Figures in this publication have been rounded. Personnel figures are rounded to the nearest 10, with numbers ending in a '5' rounded to the nearest multiple of 20 to prevent the systematic bias caused by rounding numbers upwards. Totals and sub-totals are rounded separately and may not equal the sums of their rounded parts. Expenditure figures have been rounded to the nearest million, excluding figures over a billion which are presented to the nearest 0.1 billion.

Definitions

UK Regular Forces includes both trained and untrained personnel and comprises full-time service personnel, including nursing services, but excludes full-time reserve service personnel, Gurkhas, Military Provost Guard Service and mobilised reservists.

Future Reserves 2020 includes volunteer reserves who are mobilised, high readiness reserves and those volunteer reserves serving on full-time reserve service and additional duties commitment.

SMEs refers to an enterprise or business with fewer than 250 employees and an annual turnover of less than £44 million.

Directly supported industry jobs are defined as those supported within companies receiving payments for goods and services directly from MOD.



Produced by Analysis Directorate

Designed by Design102

© Crown Copyright 2026

Published by Ministry of Defence

This document is available at [GOV.UK](https://gov.uk)