

DEFENCE · THE SECTOR, READ · JUL 2026

The money is new. The map is not.

The Defence Investment Plan puts £298bn on the record. We read the UK defence buying record for the quarter to 30 June 2026 — 193 notices in our register read, method stated inside — and the reshaping the plan describes is already visible, line by line: where stated demand concentrates, which capability class opened, and where the buyer records, in its own notice, a capability degraded and a nine-month bridge bought.

ONE QUARTER · 193 NOTICES · LARGEST SINGLE LINE **£6.6BN** · NOT A PLATFORM

§00

THE READER
& THE PAIN

A capture
lead,
programme
director or
board
answering
one question
this week:
what does
the £298bn
mean for us?

— THE READER, AND THE PAIN

Everyone has read the plan. Almost no one has read the record.

This week you are being asked what the £298bn means — for your pipeline, your segment, your board paper. The plan gives you a number and a direction. It does not tell you **where stated demand already concentrates, which class of work opened, or where continuity has already broken**. Answering from the plan alone is answering from the press release.

This briefing answers from the base’s own record instead. We read the UK defence buying record for the quarter to 30 June 2026 — the Find a Tender and Contracts Finder notices in our register read (inclusion rule stated in Sources, S14), the gov.uk announcement layer, the Commons debate on the plan itself — end to end, deduplicated, every line re-checkable at a public URL.

AT A GLANCE The shape of the read, before the evidence.

193

NOTICES READ END TO
END,
THE QUARTER TO 30 JUN
2026

£6.6bn

THE LARGEST SINGLE
LINE —
AND IT IS NOT A
PLATFORM

9 mo

THE BRIDGE BOUGHT
WHERE CONTINUITY
BROKE

The figures above are established page by page below, each against a named public source or a stated derivation. Nothing here is estimated or projected.

WHAT THIS BRIEFING IS

A **worked read of the public buying record**, in the quarter running up to and including the day the Defence Investment Plan published. It states four findings, grades each to the published Lansary Standard, and names what only a scoped private read could still settle. It is **not a forecast**, not a market, price or return call, not investment advice, and not a conferred finding on any named party. Aggregates state their method; every named figure traces to a primary or official source.

Public
source
throughout

§01

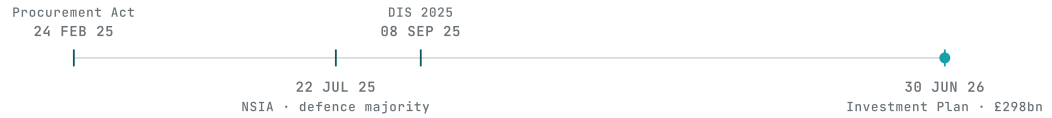
WHY NOW

Demand, strategy, buying tools and screening — all on the record before the money arrived.

— WHY NOW

The plan is the last layer of a stack already in force.

FIG Four dated layers; the money arrives last.



SOURCE — consolidated, S1-S4 (see Sources). Each is a rule or publication already in force on the date shown; none is a forecast.

The **Defence Investment Plan** (30 Jun 2026) commits £298bn over four years to 2029/30 — the demand signal, now on the record. It lands on a stack that was already in force: the **Defence Industrial Strategy 2025** (CP 1388) addresses security of supply and names a resilient UK industrial base among its priority outcomes; the **Procurement Act 2023** gives buyers new tools — including the defence special-case direct award this briefing shows in live use; and under the **National Security and Investment Act**, defence was **56%** of the notifications accepted or rejected in 2024-25 — so ownership moves prompted by the plan pass through that screen.

Parliament read the plan the day it landed: the Commons debated it on 30 June, and the regional arithmetic was quoted on the floor — defence contract spend of **£1,130 per head** in south-west England against **£340 in Wales** (figures as stated in the debate, S12). The plan is a national number; the base it lands on is not evenly laid.

None of this is a prediction. It means one thing for the reader: the questions that matter this week — where stated demand sits, what it buys, where continuity holds — are answerable from the record, not from commentary. The rest of this briefing answers them.



THE WORKED READ

One quarter of the record, end to end.

What follows is a single read of the whole window: where the stated money concentrates, the capability class that opened, what the buyer calls the old layer, and the notices in which a capability gap is admitted in the buyer's own words. Four findings, each graded, each re-checkable at a public URL. The anatomy of an Evidence Pack, at sector altitude.

E1

FINDING 1

Values as published are a declared ceiling or signed value, not spend — which is why they map addressable demand.

— THE READ · WHERE THE MONEY LANDS

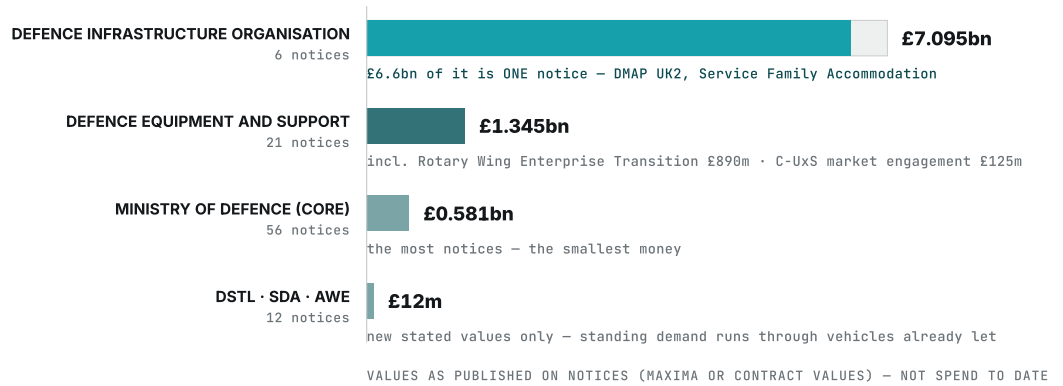
£6.6bn of the window's £9.0bn sits on one estate line.

THE READ · FINDING 1 OF 4

BASIS — FIND A TENDER / CONTRACTS FINDER, WINDOW READ, DE DUPLICATED BY OPEN-CONTRACTING ID (OCID)

E1 Finding 1 — stated demand concentrates in the estate, not the platform layer.

MOD-family buying organisations · 95 notices · values as published · captured 1 Apr - 30 Jun 2026, incl. in-window updates



SOURCE — published notices, Find a Tender / Contracts Finder, as captured in our daily register read over the window; deduplicated by OCID; values as published, maxima or contract values (S6, S7, S8, S14). Every notice re-pullable by its ID.

The quarter's MOD-family notices carry **£9.0bn of stated value** — and **£6.6bn of it sits on one notice: the Defence Maintenance Accommodation Project (DIO)** — repairs, refurbishment and regeneration of **Service Family Accommodation**, first declared September 2025 and refreshed, with a new industry-briefing version, the day the plan published. The register shows the competed, open-market layer — platform spend moves through channels that post no new notice — and that layer opens with the estate. (The other 98 notices are civil-buyer demand; Finding 2 holds the class-relevant ones.)

WHAT IT MEANS FOR THE READER

Competed demand concentrates in the estate — £6.6bn on one line — outside platform-priced pipelines.

■ ESTABLISHED · METHOD STATED

E2

FINDING 2

Ukraine’s hybrid-force lesson arriving as frameworks and packages — not as doctrine papers.

— THE READ · THE CLASS THAT OPENED

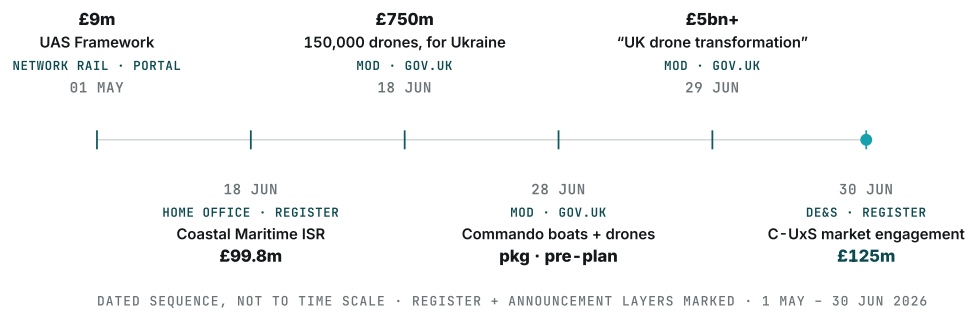
A £125m framework, £5bn+ signalled: uncrewed became a lane.

THE READ · FINDING 2 OF 4

BASIS — FTS / CF NOTICES + GOV.UK ANNOUNCEMENT LAYER, DATED, LAYERS MARKED

E2 Finding 2 — six dated records, three unconnected public buyers, one window.

The uncrewed / counter-uncrewed class entering the buying record · 1 May - 30 Jun 2026 · register and announcement layers marked



SOURCE — FTS 061458-2026 (C-UxS PME, £125m, 30 Jun); gov.uk announcements 18 / 28 / 29 Jun 2026; FTS 057578-2026 (Home Office, £99.8m); Network Rail portal ref NR-SR31258 (£9m, as read). S8-S10.

A capability class institutionalises when it stops appearing as pilots and starts appearing as **procurement infrastructure**. The register crossed that line in this window: a **£125m closed framework** for counter-uncrewed systems opened market engagement the day the plan published, and the **Home Office** opened £99.8m of coastal maritime ISR — while Network Rail listed a £9m UAS framework on its portal. The announcement layer moved the same week: a **“drone transformation”** backed by more than **£5bn**; **150,000 Ukrainian-produced drones for Ukraine** in one £750m package; the Commando re-equipment announced under the plan, two days ahead of it.

WHAT IT MEANS FOR THE READER

The field formed **in this window**, **across three buyers** — entry now is read against unknowns.

■ ESTABLISHED · SIX DATED RECORDS

E3

FINDING 3

“Enterprise Transition” is the buyer’s own phrase, on a published £890m contract notice.

— THE READ · THE OLD LAYER

An £890m “transition”, in the buyer’s own title.

THE READ · FINDING 3 OF 4

BASIS — FTS NOTICES, DE&S; TITLES, VALUES AND TERMS AS PUBLISHED

E3 Finding 3 — the crewed enterprise consolidates while the new layer forms.

The rotary-wing enterprise · and the support tails the register shows beneath the crewed layer

THE BUYER’S OWN WORD, ON A PUBLISHED LINE ITEM

“Rotary Wing Enterprise Transition Phase”

Defence Equipment & Support · contract value £890m, signed 28 Mar 2026 · notice published 27 Apr 2026
 FTS 060285-2026 · CONTRACT DETAILS NOTICE · 3-YEAR TERM

AND HOW LONG THE OLD LAYER RUNS — TWO SUPPORT TAILS, ON THE REGISTER

LIVE FIRE MONITORING EQUIPMENT

in service since 1991 · support re-bought for a term from 1 Apr 2027

FTS 058283-2026

FC BISA (ARMY FIRE CONTROL)

in-service support contracted through to out-of-service, 2035

FTS 057790-2026

SOURCE — FTS 060285-2026 (Rotary Wing Enterprise Transition Phase; contract value £890m, signed 28 Mar 2026; notice published 27 Apr 2026); FTS 058283-2026 (LFME, in service since 1991); FTS 057790-2026 (FC BISA support to 2035). S6, S11.

While the uncrewed lane opens, the crewed enterprise is being managed toward **fewer, bigger, longer arrangements** — and the buyer says so in its own titles. The £890m contract DE&S placed on the record calls itself an “Enterprise Transition Phase” — three years bought to restructure how the rotary fleet is supported, a consolidation the market watched arrive on the New Medium Helicopter. The register also shows how long the old layer runs: a live-fire monitoring system **in service since 1991** with support re-bought from 2027, and fire-control support contracted **through to 2035**. Consolidation at the top; decades-long tails beneath — both datable, named, re-checkable.

WHAT IT MEANS FOR THE READER

Consolidation is in the buyer’s own title — an £890m “transition” — while support tails run for decades.

■ ESTABLISHED · AS PUBLISHED

E4

FINDING 4

s.41 / Sch 5 §20: the defence special case — direct award where necessary to enhance or maintain operational capability. The urgency here is stated in the notice itself.

— THE READ · WHERE CONTINUITY BROKE

A capability degraded. Competition was suspended.

THE READ · FINDING 4 OF 4

BASIS — MOD TRANSPARENCY NOTICES, VERBATIM; PROCUREMENT ACT 2023

E4 Finding 4 — the anatomy of a capacity gap, in the buyer’s own notice.

Cyber Mission Data, lots 1-5 · direct award · £3.55m across lots · nine-month term



CYBER MISSION DATA · LOTS 1-5 · MOD TRANSPARENCY NOTICES, 30 JUN 2026 · FTS 060988 / 060994 / 060998 / 061169-2026
SCH 5 §20 PERMITS DIRECT AWARD WHERE NECESSARY TO ENHANCE OR MAINTAIN OPERATIONAL CAPABILITY — THE URGENCY IS THE NOTICE'S OWN

SOURCE — MOD transparency notices, 30 Jun 2026: FTS 060988 / 060994 / 060998 / 061169-2026, Language verbatim; Procurement Act 2023 s.41 & Sch 5 para 20 (S5, S4).

“The expiry of the previous contracts has resulted in a material and ongoing degradation of Defence’s cyber detection and response capability.”

MOD TRANSPARENCY NOTICE · FTS 060998-2026 · 30 JUN 2026 · JUSTIFICATION FOR DIRECT AWARD, VERBATIM

The case is small in money and large in meaning. The Act permits a Sch 5 §20 direct award where it is necessary to enhance or maintain the operational capability, effectiveness, readiness for action, safety or security of the armed forces. What makes this case a capacity read is the notice’s own words: the buyer states the degradation, states that immediate restoration by direct award is necessary, and buys a **nine-month bridge** — the minimum time it says it needs to run a real competition. Read the register as an instrument and it is a **continuity gauge no survey can give you**. No supplier is named in it; the finding is about the field, not a firm.

WHAT IT MEANS FOR THE READER

Where continuity broke, the buyer bought a nine-month bridge — in writing.

■ ESTABLISHED · VERBATIM

§03

THE FINDING

Four findings, one instrument: the base's own record, read end to end.

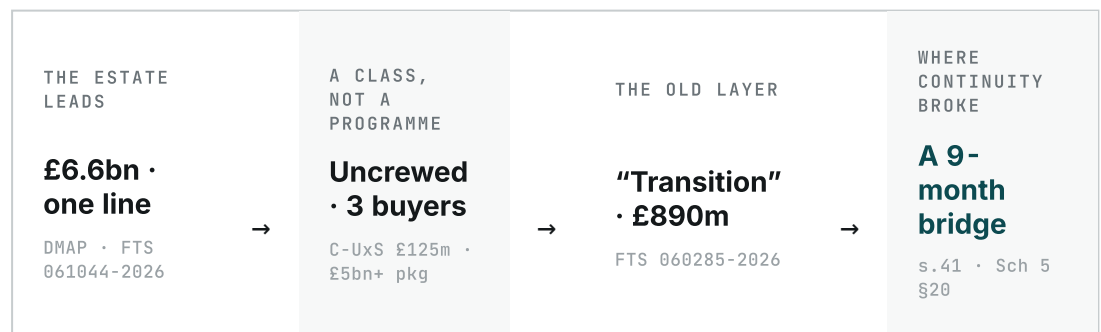
— THE READ · THE FINDING

The finding, stated plainly.

The £298bn does not land on a blank page. It lands on a base whose record already shows the reshaping under way: **the estate leading the competed layer (£6.6bn on one line); a new class institutionalising across three unconnected public buyers; the crewed enterprise consolidating under the buyer's own word, "transition"; and where continuity broke, the buyer buying around the market to bridge it** — in its own words, at a public URL. Read the plan for the number. Read the record for the map.

One more line, held at its own grade: in April's trader register, at the arms-parts layer more UK-registered traders were importing than exporting (HS 9305: 35 against 12; trader counts, not volumes — S13), while at ammunition the direction reverses. A count, not a balance — but a line worth holding as the money lands.

None of this required privileged access — that is the point of a worked read. What it required is reading **the whole record as one instrument**: notices, announcements, Hansard and the trade register together, deduplicated, dated, graded. One notice is an anecdote. A quarter of them, read end to end, is the industrial base describing itself.



DESCRIPTIVE, NOT PREDICTIVE

Nothing here says any programme, class or firm is bound for any outcome. Every statement is a dated, structural fact, cited; the read locates demand, consolidation and strain — it does not forecast their course. A consequence is one that **can** follow, never a prediction that it must.

E5

GRADED TO
THE
STANDARD

Four grades:
Established,
Indicative,
Still to
establish,
Out of
scope. The
reader
always knows
how far a
line has
been taken.

— THE READ · HOW FIRMLY IT STANDS

Every line, graded. Nothing important left unsaid.

E5 The whole read, held to the published four-grade Standard.

	WHAT THE READ ESTABLISHES	GRADE	RE-CHECKS / WHAT IT RESTS ON
■	Window read: 193 notices, 83 buyers; MOD-family £9.0bn of stated values.	ESTABLISHED	Derived, method stated (S14).
■	£6.6bn DMAP — the largest line; first pub 19 Sep 2025, updated 30 Jun 2026.	ESTABLISHED	FTS 061044-2026 (S7).
■	Register layer: C-UxS £125m PME + Home Office £99.8m ISR.	ESTABLISHED	FTS 061458 / 057578-2026 (S8, S10).
■	Announcement layer, dated: £5bn+; 150,000 drones (Ukraine); Commando pkg.	ESTABLISHED	gov.uk 18 / 28 / 29 Jun 2026 (S9).
■	"Material and ongoing degradation" + 9-month direct-award bridge.	ESTABLISHED	FTS 060988-061169-2026, verbatim (S5).
■	£890m "Enterprise Transition" contract; support tails to 2027+ / 2035.	ESTABLISHED	FTS 060285 / 058283 / 057790-2026 (S6, S11).
▣	Network Rail £9m UAS framework — portal listing, as read 1 Jul 2026.	INDICATIVE	NR-SR31258, portal (S10).
▣	More arms-parts importers than exporters (HS 9305: 35 vs 12); ammunition reverses.	INDICATIVE	Trader counts, not volumes (S13).
▣	£1,130 vs £340 per head, as quoted in the Commons.	INDICATIVE	Hansard, 30 Jun 2026 (S12).
□	Who is present and positioned in the opening lanes; your exposure against the current field.	STILL TO ESTABLISH	A scoped private read — under NDA.

§04

BRING US
THE
DECISION

A free
worked read
shows the
map; a paid
Evidence
Pack settles
your
position on
it.

— FROM THE SECTOR TO YOUR DECISION

You have just read the sector. Your decision is smaller than the sector — and sharper.

THE SAME DISCIPLINE, RUN ON YOUR QUESTION

This read answered the DIP question at sector altitude, from records anyone can pull. Your question is not the sector — it is a bid you must price, a lane you must enter or concede, a portfolio you must answer for.

The same discipline runs private on that question: **which of the opening lanes you can credibly enter** and what the field looks like where you would bid; **where your positions sit against the consolidating layer; whether the thin places in the base are your risk or your opening.** We settle it as a single, defensible **Evidence Pack**: graded to the same Standard you have just seen in use, every line re-checkable, the open lines named with what would close them. Run private, under NDA. Not a score. Not a forecast. Not your names, ever, to anyone.

Name the decision the £298bn just put in front of you. —
lansarydefence.com

A sector read is one of the defence decisions we settle as an Evidence Pack — alongside a bid's supply chain, a second source, a teaming partner, or a counterparty to screen. The instrument is the same; only the altitude changes.

§05

THE
PUBLISHED
BAR

Sourced,
graded,
scoped,
open, plain,
independent,
descriptive,
confidential
,
reproducible
, of record.

— THE STANDARD · AND WHAT WE WITHHOLD

The bar is published. The method is not.

You have just seen the Standard in use at sector altitude: every line sourced or derived by a stated method, every line graded, what is open named with what would close it. Anyone can read that bar — it is what separates evidence of record from commentary.

What you have **not** seen is the method: which records are read daily, how they are joined into one instrument, how a window is fenced and deduplicated, and how the same instrument runs against your own field rather than the public sector picture. You can tell an intelligence house by what it refuses. **You see the standard and the evidence; the method stays ours.**

 THE STANDING FENCE

The **Lansary Standard** and **Verdict** are the published bar this work is built to meet — **not yet adopted as an external mandate**. This read is a demonstration on public records, **not a client Verdict conferred on any named party**. Buying organisations and programmes appear only as subjects of cited, public, structural facts; nothing here is a finding about any firm's conduct, quality or prospects — no supplier is named in the capacity finding at all. No client, case study, testimonial or count in this briefing is invented; there are none.

§—

EVERY
FIGURE
TRACEDFind a
Tender ·
Contracts
Finder ·
gov.uk ·
Hansard ·
HMRC ·
legislation.
gov.uk.

— SOURCES

Every figure, traced.

THE FRAME — THE STACK THE PLAN LANDS ON

- | | |
|-----------|---|
| S1 | The Defence Investment Plan — MOD / HM Government, gov.uk, 30 Jun 2026. £298bn (£297.7bn TDEL) over four years FY26/27–29/30. |
| S2 | Defence Industrial Strategy 2025: Making Defence an Engine for Growth , CP 1388 — MOD, gov.uk, 8 Sep 2025. Security of supply and supply-chain resilience named as priorities. |
| S3 | National Security and Investment Act 2021 — Annual Report 2024–25 — Cabinet Office, 22 Jul 2025. Defence = 56% of notifications accepted or rejected. |
| S4 | Procurement Act 2023 (c.54) — s.41 (direct award in special cases) and Sch 5 para 20 (defence: necessary to maintain operational capability, effectiveness, readiness or security of the armed forces) — legislation.gov.uk; in force 24 Feb 2025. |

THE READ — NAMED NOTICES (ALL RE-PULLABLE BY ID)

- | | |
|------------|--|
| S5 | Cyber Mission Data, lots 1–5 — MOD transparency notices, 30 Jun 2026: FTS 060988-2026 (lots 1 & 3, £2,424,009), 060994-2026 and 060998-2026 (lot 2, £877,760 — one award, two notices), 061169-2026 (lots 4 & 5, £249,585); £3.55m together. Degradation language and 9-month term verbatim in the notices. |
| S6 | Rotary Wing Enterprise Transition Phase (PP2) — DE&S, FTS 060285-2026 (contract details notice, published 27 Apr 2026, updated 26 Jun 2026); contract value £890m, signed 28 Mar 2026, 3-year term. |
| S7 | Defence Maintenance Accommodation Project (DMAP UK2) — DIO, FTS 061044-2026; first published 19 Sep 2025, updated 30 Jun 2026 (industry-briefing version); stated max £6.6bn; scope: responsive repairs, refurbishment, regeneration, compliance and grounds maintenance of Service Family Accommodation. |
| S8 | Counter-Uncrewed Systems (C-UxS) Closed Framework — DE&S / National Armaments-Material, FTS 061458-2026 (preliminary market engagement; framework estimated 2027–2035) + pipeline notices 061339 / 061364-2026, 30 Jun 2026, stated max £125m. |
| S9 | gov.uk announcement layer — MOD: £750m package incl. 150,000 Ukrainian-produced drones for Ukraine (18 Jun 2026); Commando Force high-speed boats and drones under the DIP (28 Jun 2026, ahead of the plan's publication); "UK drone transformation... backed by more than £5 billion" (29 Jun 2026). |
| S10 | The same class, other buyers — Home Office, Coastal Maritime ISR Service, FTS 057578-2026, 18 Jun 2026, £99.8m; Network Rail, UAS Framework, portal reference NR-SR31258, 1 May 2026, £9m (Network Rail procurement portal listing, as read 1 Jul 2026 — not on FTS/CF). |
| S11 | The support tails — DE&S: Live Fire Monitoring Equipment (in service since 1991; support from 1 Apr 2027), FTS 058283-2026; FC BISA in-service support to out-of-service 2035, FTS 057790-2026. |

COLOUR, PANELS & METHOD

- | | |
|------------|---|
| S12 | Hansard — HC Deb, 30 Jun 2026, Defence Investment Plan: defence contract spend per head £1,130 (SW England) vs £340 (Wales), figures as stated by the Member for Dwyfor Meirionnydd. |
| S13 | HMRC uktradeinfo trader register , April 2026, chapter 93 — counts of UK-registered importing / exporting traders by HS4, as read 1 Jul 2026. Trader counts, not volumes or values. |
| S14 | Window-read method — Find a Tender / Contracts Finder notices captured by our daily register read, 1 Apr – 30 Jun 2026 (final pull 1 Jul 2026): notices published or updated in-window where the buying organisation is MOD-family or the notice is coded / titled to defence-relevant supply (incl. security and civil-resilience demand). Deduplicated by open-contracting ID (OCID; where one OCID carries multiple values, the award-stage value is carried); buying organisations normalised; values as published (maxima or contract values); 3 of 95 MOD-family notices are non-GBP (EUR 37.8m, 2 × BZD 0.24m) and carried at face value. Aggregates are derived figures re-checkable notice by notice. |

Figures are as stated in the cited source; verbatim language is from the notice named; derived aggregates state their method. No figure is estimated or projected.

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