

Guns or Gigabytes

What the Ministry of Defence (MoD) has bought since the Strategic Defence Review, and what the Budget means for technology suppliers



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Introduction

In the Budget on 28 October 2026, Chancellor John Healey [confirmed](#) that the Defence Investment Plan (DIP) is now fully funded. The plan, published on 30 June 2026, sets out £298bn of investment over four years, including £15bn of extra funding, but at the time the Treasury [had found](#) only £10.3bn of that £15bn. The Budget covers the remaining £4.7bn by reprioritising capital budgets, and confirms targets of 3% of GDP on defence by 2030 and 3.5% by 2035.

With the funding settled, we looked back at what the Ministry of Defence (MoD) has actually bought, and at what is likely to come next. We analysed the 1,382 contracts the MoD and its delivery bodies awarded through public notices between July 2025 and September 2026, along with every live MoD pipeline notice.

By number of contracts, technology is now the largest category the MoD buys through public notices. Technology contracts tend to be worth less than contracts for equipment or support, so most of the money still goes on buying military equipment and keeping it running. Contract awards also slowed sharply in 2026. The DIP arrived in June, months later than the government had promised, and part of its funding stayed unconfirmed until the Budget. With that gap now closed, the MoD has the funding certainty to award the contracts it held back.

WHAT THIS REPORT COVERS

Technology covers IT services, software, communications, cyber and military electronic systems such as radar and command and control. We analysed Stotles data on the award, tender and pre-tender notices published by the MoD and its delivery bodies. Stotles ingests data from thousands of sources to provide the most complete public sector procurement dataset in the UK. Single-source, classified and exempt contracts are rarely published, so major weapons programmes such as the nuclear enterprise and the Global Combat Air Programme (GCAP) are largely outside these numbers.

Key takeaways

29%

Technology leads on volume

of MoD contracts, and 12% of their £15.0bn value

£388k

Contracts are small

is the median technology contract; 85% are under £5m

37%

Buying slowed

fewer awards in January to September 2026 than a year earlier, as the DIP arrived months late

64%

Frameworks are the route in

of technology call-offs go through G-Cloud 14 or TePAS 2

£2bn

Work is waiting

of technology opportunities in the pipeline; £2.7bn of contracts end by October 2028

£4.7bn

The plan is now fully funded

the DIP’s last funding gap, closed in the 28 October Budget

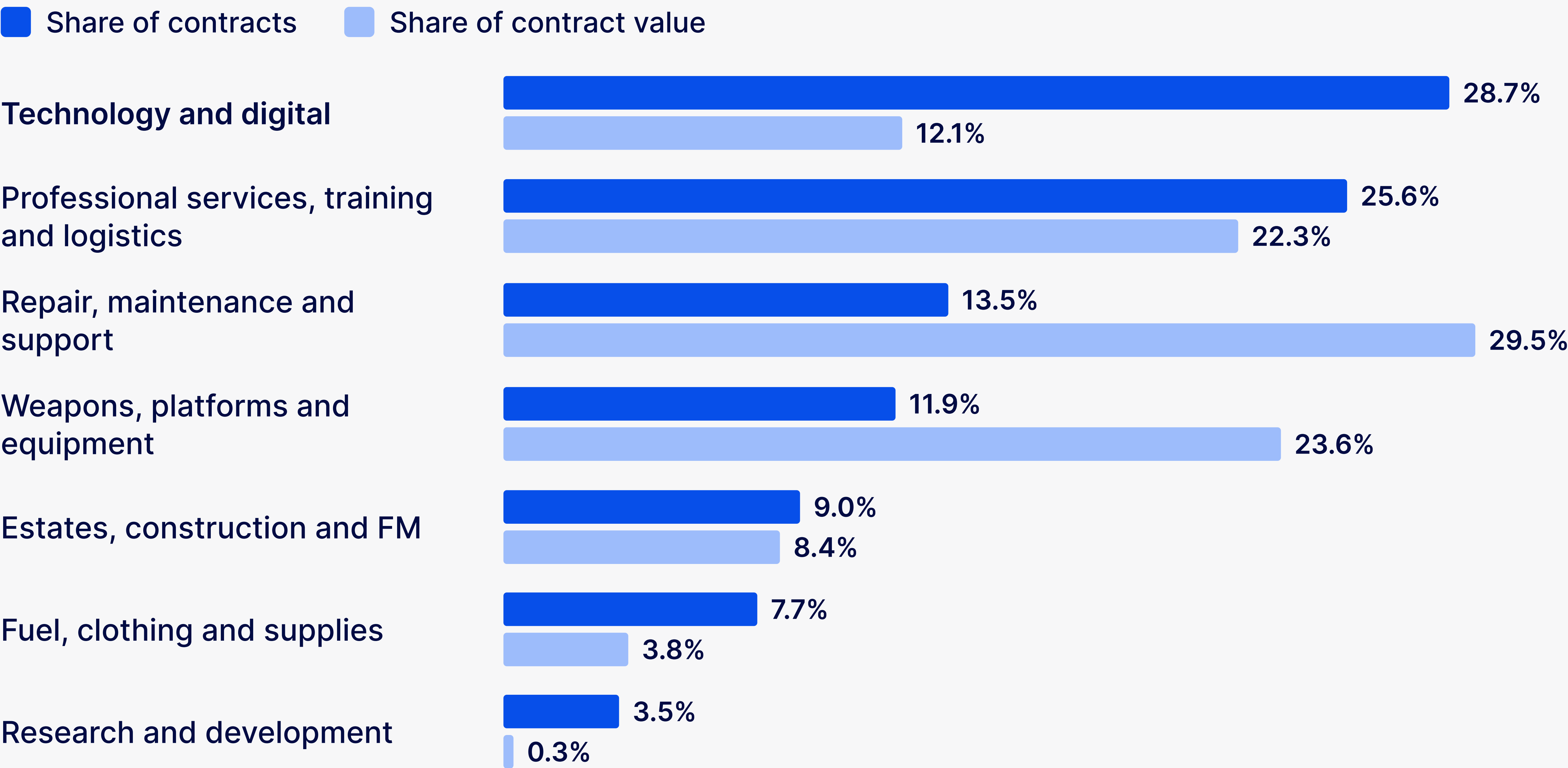
What the MoD bought, July 2025 to September 2026



Technology leads on volume, equipment on value

Share of MoD contracts and contract value, by category

Contracts awarded through public notices, 1 July 2025 to 30 September 2026 (1,382 contracts). Framework agreements excluded. Full figures by category are in the annex.



Technology is the MoD’s most frequent purchase, but it accounts for a much smaller share of the money, because 65% of technology contracts are worth less than £1m. The value sits with platforms and the contracts that keep them running, which are fewer and far larger.

For technology suppliers, that points to a market of frequent, smaller opportunities, many of them within reach of small and mid-sized firms. A few very large contracts also shape the split: set aside the six worth £500m or more, and technology’s share of what remains rises to about a fifth, close to new equipment and support.

Most of the money keeps existing equipment running

Repair, maintenance and support took £4.4bn, and these are also the largest contracts, with a median value of £1.9m. The biggest went to Boeing Defence UK for the Rotary Wing Enterprise transition phase (£890m, March 2026), General Dynamics UK for Ajax support (£833m, transparency notice, November 2025) and Babcock for Field Electrical Power Supplies support (£515m, February 2026).

New weapons, platforms and equipment took £3.5bn, led by Leonardo’s £989m New Medium Helicopter contract (March 2026) and TEKEVER’s £220m Project Corvus uncrewed air system (July 2026).

The largest technology contracts and who won them

The largest technology awards were software and enterprise agreements, led by Palantir’s £240.6m MOD Enterprise Agreement in December 2025.

SUPPLIER	CONTRACT	VALUE	AWARDED
Palantir Technologies UK	MOD Enterprise Agreement	£240.6m	Dec 2025
IBM UK	Defence Equipment Engineering Asset Management Service (DEEAMS)	£188.5m*	Sep 2025
BAE Systems Surface Ships	NJORD air defence radar mitigation for offshore wind farms	£95.0m	Feb 2026
Systematic	SitaWare battle management software	£76.6m	Jul 2026
Phoenix Software	Value Added Software Agreement	£75.0m	Sep 2025
SRC UK	SERPENS close find radar	£74.4m	Apr 2026
BT	IUS further service period	£56.2m	Nov 2025

Source: Stotles analysis of MoD award notices, contracts awarded 1 Jul 2025 to 30 Sep 2026. *Two notices for DEEAMS give different values: £188.5m on Contracts Finder and £12.4bn on Find a Tender. Stotles uses the lower figure, because the higher one would on its own equal more than 80% of the value of every other contract in this analysis.

Below these sits a long tail: almost 250 suppliers won at least one MoD technology contract in the period. Resellers and IT services firms won most often, with Boxxe winning 15 contracts, CGI 11, AtkinsRéalis 10, and Gartner and Akhter Computers nine each.

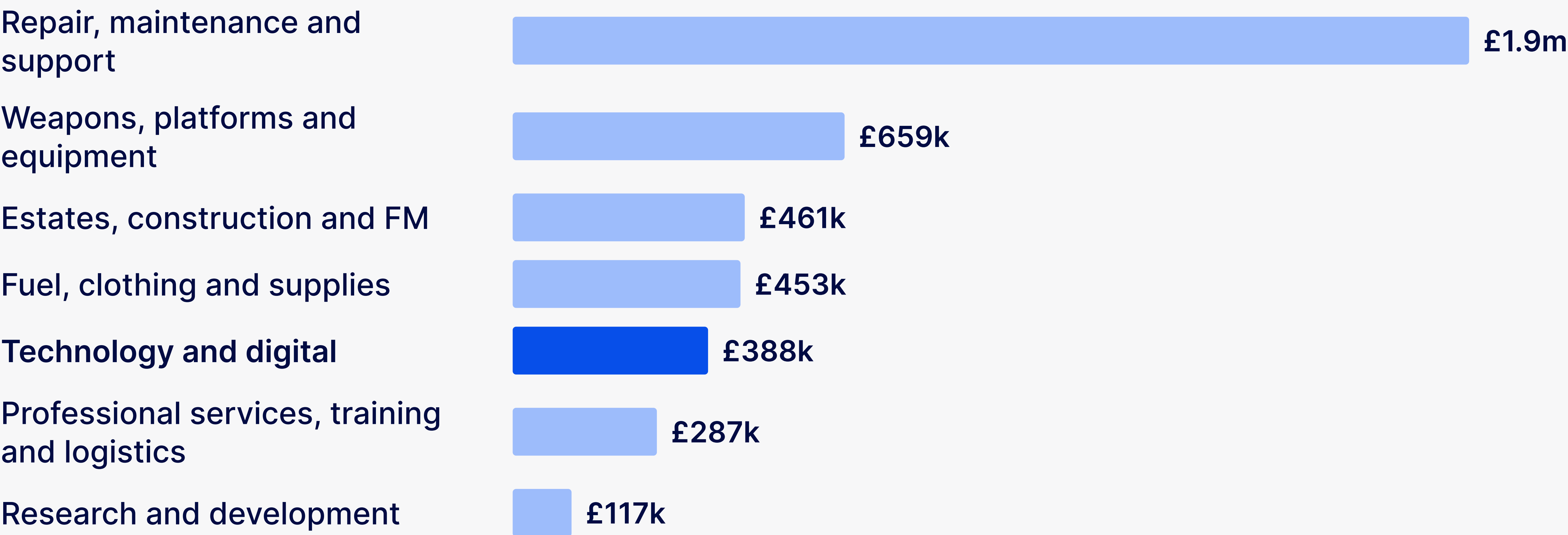
The MoD is also opening routes for newer AI suppliers. In January 2026, it awarded places on its Digital Decision Accelerators for Defence (DDAD) agreement to 26 suppliers, including Faculty, Helsing, Anduril, Mind Foundry and Roke.

Half of MoD technology contracts are worth less than £388,000

The median MoD technology contract is worth £388,000: 65% of technology contracts are under £1m and 85% are under £5m. That compares with a median of £659,000 for new equipment and £1.9m for support contracts.

Median MoD contract value, by category

Contracts awarded through public notices, 1 July 2025 to 30 September 2026. Framework agreements excluded.



Contracts of this size are within reach of small and mid-sized technology companies, especially those already on the frameworks the MoD uses. The MoD has also [committed to spending £2.5bn](#) with small and medium-sized enterprises (SMEs) by May 2028.

How MoD buying has changed since 2023

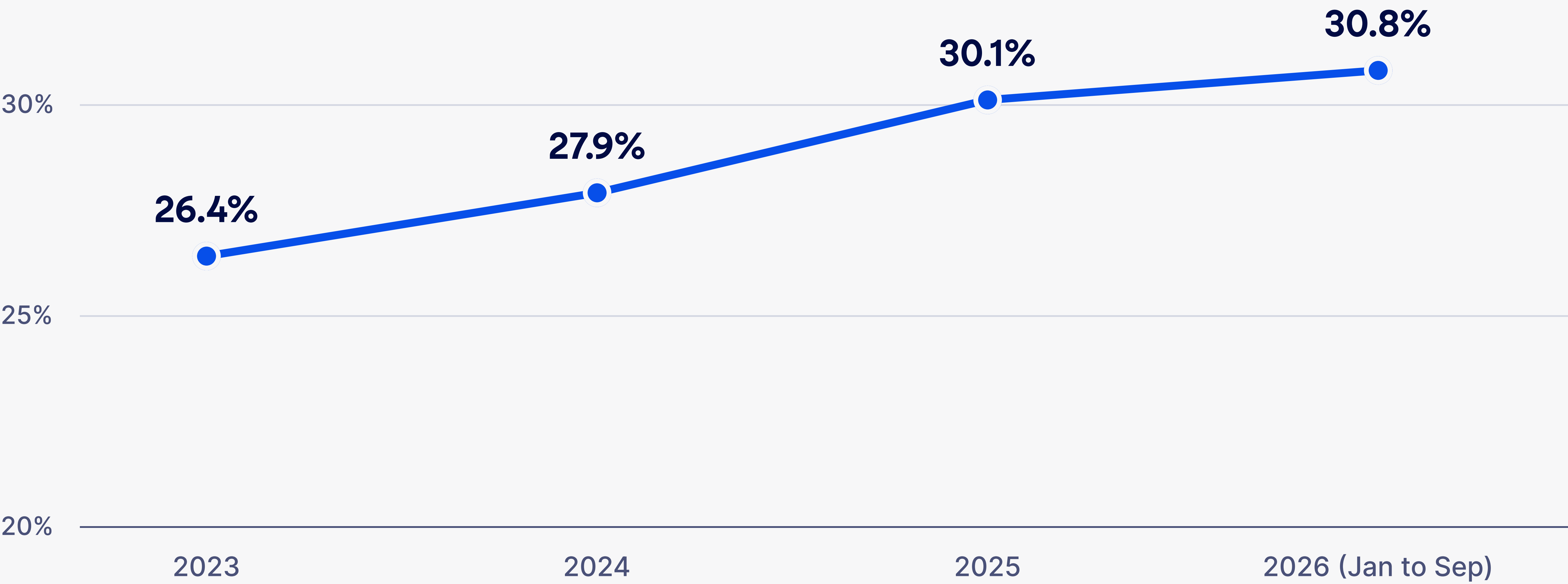


Technology’s share has risen every year

Technology’s share of MoD contracts has risen every year, from 26% in 2023 to 31% in the first nine months of 2026. The number of technology contracts has fallen too, by 48% between January to September 2023 and the same months of 2026, while equipment contracts fell faster (55%) and the total fell by 53%.

Technology’s share of MoD contracts, 2023 to 2026

Share based on volume of contracts, including contracts awarded through public notices, 2023 to 30 September 2026. Framework agreements excluded. Single-source, classified and exempt contracts, which include many weapons programmes, rarely appear in notices and are not counted.

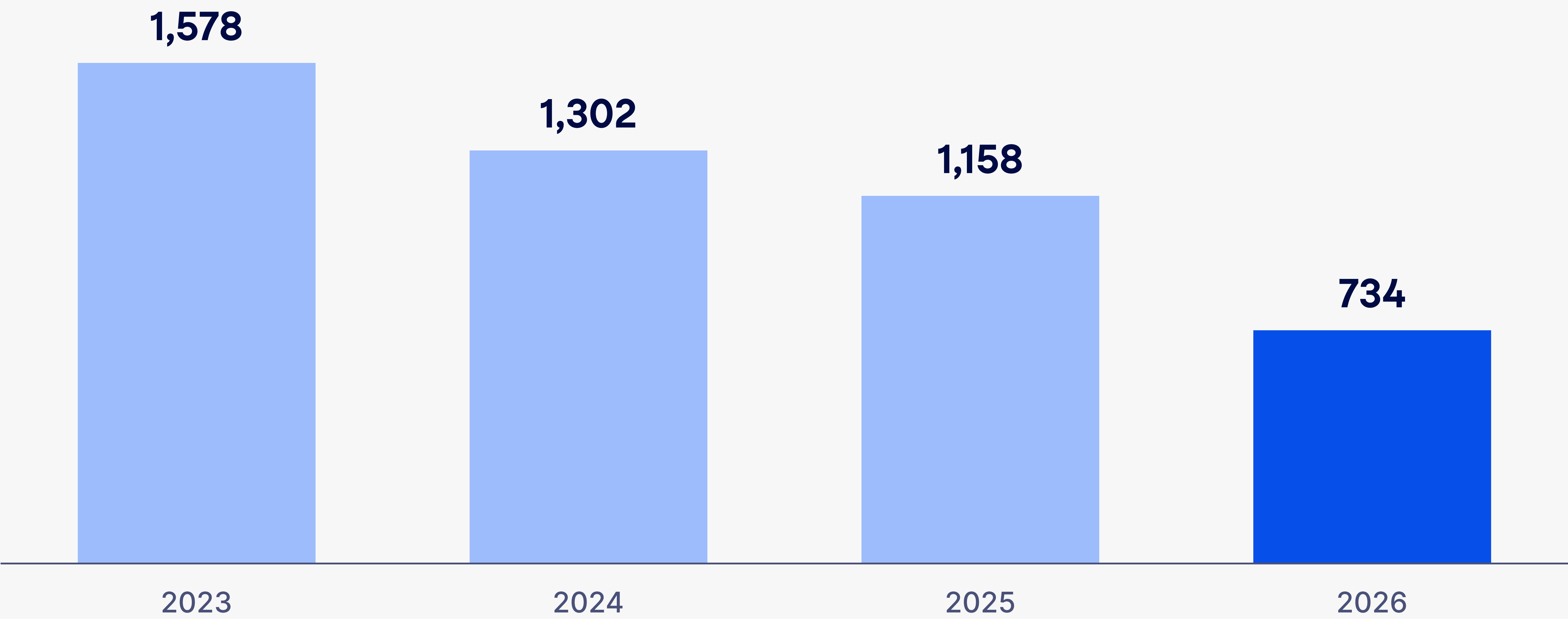


Awards fell 37% while the spending plan was delayed

The MoD awarded 734 contracts between January and September 2026, 37% fewer than in the same period of 2025 and 53% fewer than in 2023.

MoD contracts awarded, January to September each year

Contracts awarded through public notices. Framework agreements excluded.



The fall lines up with the delay to the DIP, which the government had promised for autumn 2025 and published in June 2026. In a [techUK survey](#) of 45 defence technology suppliers carried out in May 2026, 73% said they had had a contract suspended or cancelled in the previous six months, 87% had experienced funding delays or cuts, and 62% named the delayed DIP as the leading cause of harm to their business. In March 2026, industry bodies ADS and Make UK Defence told [Breaking Defense](#) that the wait had stalled procurement and left smaller suppliers short of cash.

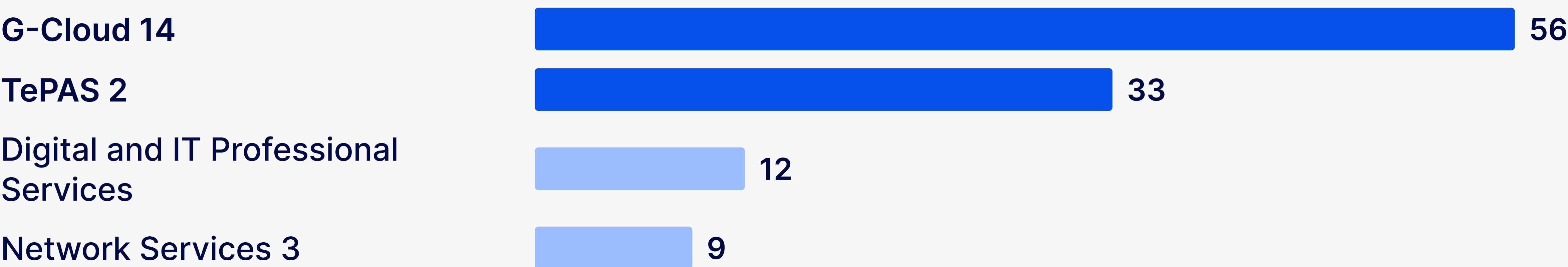
Between 2023 and 2025 the fall was concentrated in contracts worth under £1m, while contracts of £1m or more rose from 385 to 458 in the January to September period. In 2026 contracts of every size fell, to 422 under £1m and 264 of £1m or more. Other changes may also affect the count, including the new notice types under the Procurement Act 2023 from 24 February 2025 and the move of DE&S, DIO, Dstl and Defence Digital into the National Armaments Director (NAD) Group. Some awards are published weeks after they are made, so recent months may rise slightly.

Frameworks carry most MoD technology buying

Technology accounts for 139 of the 292 framework call-offs in the period (48%), far more than any other category, and almost two-thirds of those technology call-offs went through two frameworks: G-Cloud 14 (56) and Technology Products and Associated Services 2 (TePAS 2, 33). Digital and IT Professional Services (DIPS, 12) and Network Services 3 (9) came next.

Technology call-offs by framework

MoD technology call-offs, 1 July 2025 to 30 September 2026.



SPOTLIGHT

Drones and uncrewed systems

£5bn

for autonomous systems in the DIP, over four years

£256m

awarded through public notices since June 2025

86%

of that value is one contract, TEKEVER's Project Corvus

Since June 2025 the MoD has published 15 awards for drones and uncrewed systems. Apart from Project Corvus they are small, from Kraken Works' £10.3m Project Beehive uncrewed surface vessels to two £5m one-way effector contracts.

The DIP's £5bn for autonomous systems runs over four years from 2026/27, so most of it has yet to reach the market, and some drone buying through rapid or exempt routes may not appear in public notices. The next contracts are taking shape: the MoD is running a £125m Counter-Uncrewed Systems framework competition and has published market engagement on medium uncrewed surface vessels, an extra-large uncrewed underwater vehicle and low-cost uncrewed aerial vehicles.

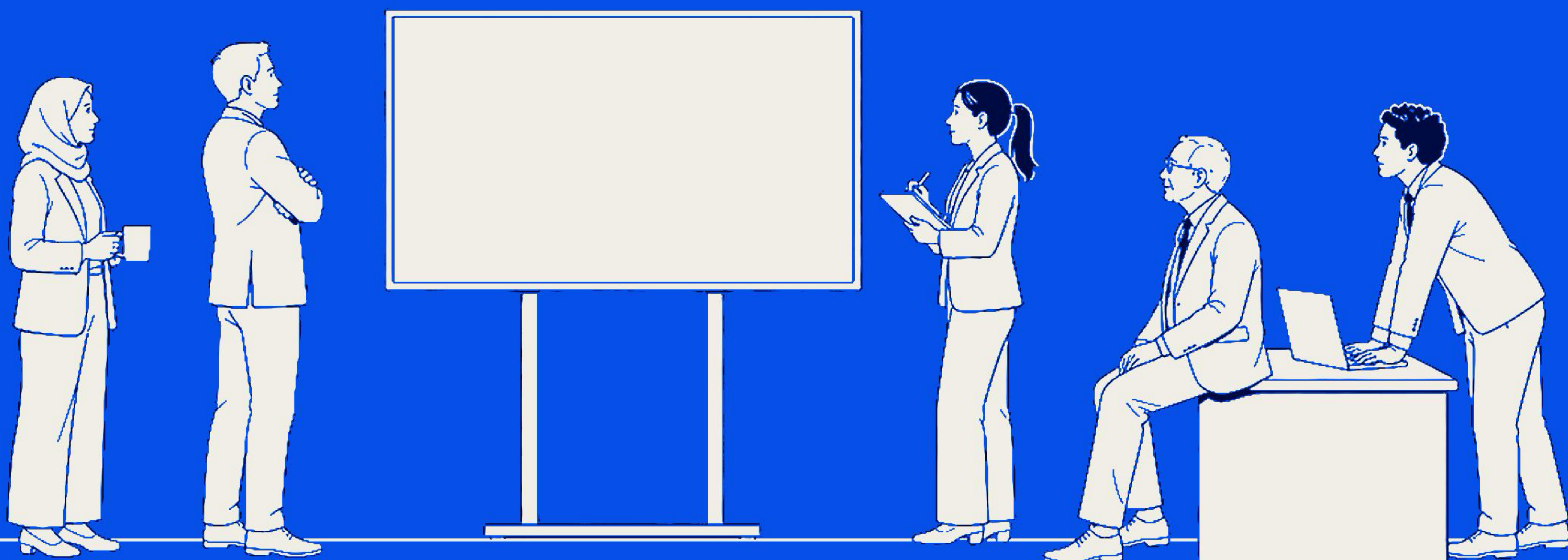
STOTLES TIP

The MoD's buyer profile in Stotles brings together every award, tender and pre-tender notice from the MoD and its delivery bodies, alongside documents such as its strategies and plans. Buying intent signals show when demand for what you sell starts to build, so you can engage before a tender is published.

[See the MoD's buyer profile →](#)

What the Budget means for MoD technology buying

The Budget confirmed the DIP's funding in full and set out how the government will pay for it. Here is what it announced for defence, what the plan commits to technology and the work most likely to move first.



What the Budget announced for defence

1

The plan is fully funded.

The [Budget](#) covers the £4.7bn left unfunded in June through a 1% cut to departmental capital budgets from 2027-28, worth £3bn, and £1.7bn from the Treasury's capital reserve. With the funding confirmed, the MoD has the certainty to award the contracts it held back in 2026, when awards fell 37%.

2

Targets of 3% of GDP by 2030 and 3.5% by 2035.

The government will set out the route at the 2027 Spending Review. The DIP takes defence spending to 2.7% of GDP in 2027-28, so reaching 3% by 2030 will need more money than the current plan provides. That gives a longer-range signal for programmes such as the digital backbone and targeting web, which Janes reports will receive at least £17bn between 2030 and 2035.

3

Up to £5bn of finance for defence and dual-use firms.

The National Wealth Fund and British Business Bank will deploy up to £5bn over four years into defence, dual-use and other national security sectors, and a new Innovative Defence Finance Taskforce will look to bring in more private and international finance. This is investment in firms rather than MoD contracts, but it matters for growing defence technology companies that need capital to scale.

4

Faster and more joint buying.

The government will start treaty negotiations on the Multilateral Defence Mechanism, which aims to speed up defence investment and joint procurement across NATO allies. The MoD is also working to cut the time to first contract for major platforms by two-thirds, from six years to two, a target [set out in the DIP](#). Both could shorten the wait between a pipeline notice and an award.

The Budget did not announce changes to the plan's technology lines, so they stand as published in June.

What the DIP commits to technology

The [Defence Investment Plan](#) sets out £298bn of investment over the next four years, £15bn more than the previous Spending Review settlement, and annual defence spending is projected to reach [nearly £80bn by 2029](#), around 2.7% of GDP. Its four-page summary lists these technology lines:

£5bn+	for autonomous systems over four years
£2.5bn	for the cyber and electromagnetic domain
£1.8bn	for a Digital Targeting Web
£1.6bn	for UK Defence Innovation (UKDI) over four years
£200m	for Taskforce RAID, an AI investment fund, and Project FRONTIER

Defence intelligence publisher [Janes](#) reports that the MoD expects to invest around £5.5bn in its digital backbone, and at least £17bn on the backbone and targeting web between 2030 and 2035. The government has also [directed the MoD](#) to spend 10% of its equipment budget on novel technologies. The rest of the plan is weighted towards traditional capability, including £11.1bn for munitions and weapons and £8.6bn for the Global Combat Air Programme (GCAP).

The work that moves first

The MoD has 300 live pre-tender and open notices with a combined stated value of £24bn, and 37 of them, worth about £2bn, are for technology. Programmes funded by the DIP are appearing first as UK1 pipeline notices and UK2 preliminary market engagement notices, often with no value attached. Estates make up the largest part of the pipeline, with 111 notices worth £14.8bn, including a £12bn Defence Hard Facilities Management programme for the UK estate.

300

Live pipeline

MoD pre-tender and open notices, worth £24bn

37

Technology notices

worth about £2bn

OPPORTUNITY	BUYER	STATED VALUE	PUBLISHED
Space and ISTARI portfolio (preliminary market engagement)	DE&S / NAD Group	£800m	May 2026
Cisco Enterprise Agreement reseller partner	Ministry of Defence	£666.7m	Aug 2026
Defence Support Sustainment Provider (legacy support applications)	DE&S / NAD Group	£295m	Sep 2026
Project FORTIS (Land Training Information System support)	Ministry of Defence	£92m	Jun 2026
DHS Systems Solution (cloud platform for service family accommodation)	Defence Infrastructure Organisation	£55m	Jan 2026
Defence Support Service Integration	Ministry of Defence	£30m	May 2026

Source: Stotles pre-tender and tender notices from MoD buyers, live on 13 Oct 2026. All six are at pre-tender stage.

Technology contracts expiring by October 2028

350 MoD technology contracts with a combined value of £2.7bn are due to end between October 2026 and October 2028. Alongside new programmes, the MoD will have to replace or extend each one, and buyers start planning replacements well before the tender. The largest are listed below.

350

Contracts ending

MoD technology contracts end by October 2028

£2.7bn

Up for renewal

combined value to be replaced or extended

CONTRACT	CURRENT SUPPLIER	VALUE	ENDS
Microsoft Enterprise Agreement 2025 to 2028	Boxxe	£401m	Apr 2028
Future Operational Service Management (FOSM)	Capgemini	£161m	May 2027
Oracle licences, cloud, hardware and support	Oracle	£157m	May 2027
Dstl End User Services and Applications	Capgemini	£132m	Sep 2027
Royal Navy Software House	Digi2al	£100m	Jun 2028
Dstl Networks and Hosting Services	Sopra Steria	£90m	Sep 2027

Source: Stotles award notices from MoD buyers with an end date between 13 Oct 2026 and 12 Oct 2028. End dates as published; contracts may be extended.

How to be ready

We recommend four steps. Each one is based on work that is already visible, so you can start now that the plan is fully funded.



64%

of published MoD technology call-offs go through G-Cloud 14 or TePAS 2

STEP 1

Get onto the frameworks the MoD uses

A place on G-Cloud 14 or TePAS 2 is the most direct route into MoD technology work. Check which one fits what you sell, and when it next opens to new suppliers.

STOTLES TIP

Stotles shows which frameworks a buyer uses, the suppliers on each one and the call-offs placed under them, so you can see the MoD’s preferred route for your kind of work before you apply.

[Explore G-Cloud 14 →](#)

£2.7bn

of MoD technology contracts end by October 2028

STEP 2

Use expiring contracts to engage early

Start tracking these contracts 18 to 24 months before they end, while the buyer is still planning what comes next.

STOTLES TIP

Every published contract carries an end date, and Stotles shows it alongside the incumbent and the buyer’s history, so you can start the conversation before the replacement is tendered.

[Find upcoming contract expiries →](#)

£2bn

of technology opportunities
across 37 MoD pipeline notices

STEP 3

Read pipeline and market
engagement notices

Programmes funded by the DIP appear first as UK1 pipeline and UK2 preliminary market engagement notices, often with no value attached, so read them as they’re published.

STOTLES TIP

If you use Claude, ChatGPT or Copilot, connect the Stotles MCP and ask questions such as “Which MoD technology contracts worth under £5m expire in the next 12 months?” to get answers from live procurement data.

[Connect the Stotles MCP →](#)

4

organisations now sit in the
NAD Group

STEP 4

Map the MoD’s new buying
organisation

DE&S, DIO, Dstl and Defence Digital have moved into the National Armaments Director (NAD) Group, which was [fully established in April 2026](#). Check who now owns the budget and the requirement for your area before you engage.

STOTLES TIP

Stotles Contacts helps you find the people behind a buyer: who runs procurement, who owns the budget and who to talk to before a tender is published.

[Find MoD decision makers →](#)

WHAT NEXT

Next steps

With the DIP now fully funded, the MoD has the certainty to award the contracts it held back in 2026, and suppliers already on the right frameworks and talking to the right teams will be best placed.

See the MoD opportunities relevant to you

Book a call with our team to walk through the buyers, frameworks and contracts that fit your business.

[Book a call →](#)

Want a custom report?

Our research team can analyse the buyers and markets you sell into, using the same Stotles data behind this report.

[Talk to our research team →](#)

Read our Budget 2026 round-up

Find out what the Autumn Budget means for public sector suppliers beyond defence.

[Read the analysis →](#)

About this analysis

ABOUT THE DATA

We analysed Stotles data on the award, tender and pre-tender notices published by the MoD and its delivery bodies, including DE&S, DIO, Dstl, Defence Business Services and DECA. This report uses contract data to 30 September 2026, the DIP as published in June 2026 and the Budget documents published on 28 October 2026. We counted one contract per procurement process, excluded framework agreements (64 in the period, with combined ceilings of £26bn) and used values as published, which are often whole-life or maximum values. Categories come from each notice’s CPV codes and title, with every contract of £100m or more checked by hand. Single-source, classified and exempt contracts rarely appear in notices, so these figures describe the part of defence spending that reaches the open market. The full method is available on request.

Sources

01	<u>Budget 2026, HM Treasury, 28 October 2026</u>
02	<u>Budget 2026: breathing space for today, hope for the future, HM Treasury press release, 28 October 2026</u>
03	<u>Defence Investment Plan four-page summary, GOV.UK</u>
04	<u>The UK Defence Investment Plan: what to watch, Clifford Chance, 2 July 2026</u>
05	<u>UK DIP 2026: additional £1.8bn allocated for Digital Targeting Web, Janes</u>
06	<u>UK MoD told to spend 10% of equipment budget on innovative tech, Army Technology, 26 March 2025</u>
07	<u>Survey of defence tech suppliers, techUK, 2 June 2026</u>
08	<u>Investment plan delay hurting key suppliers, Breaking Defense, March 2026</u>
09	<u>Defence funding update (HCWS165), HM Treasury written statement to Parliament, 30 June 2026</u>
10	<u>MOD targets two-year contract deadline for major platforms, UK Defence Journal, 3 September 2026</u>
11	<u>Andy Start departs MoD after completing procurement restructure, Civil Service World, 13 April 2026</u>

Annex: Contracts by category

Contracts the MoD and its delivery bodies awarded through public notices between 1 July 2025 and 30 September 2026, by category.

CATEGORY	CONTRACTS	SHARE OF CONTRACTS	VALUE	SHARE OF VALUE	MEDIAN CONTRACT
				VALUE	
Technology and digital	397	28.7%	£1.8bn	12.1%	£388k
Professional services, training and logistics	354	25.6%	£3.3bn	22.3%	£287k
Repair, maintenance and support	187	13.5%	£4.4bn	29.5%	£1.9m
Weapons, platforms and equipment	165	11.9%	£3.5bn	23.6%	£659k
Estates, construction and facilities management	124	9.0%	£1.3bn	8.4%	£461k
Fuel, clothing and supplies	107	7.7%	£0.6bn	3.8%	£453k
Research and development	48	3.5%	£0.05bn	0.3%	£117k
All contracts	1,382	100.0%	£15.0bn	100.0%	£427k

Source: Stotles analysis of MoD, DE&S, DIO and Dstl award notices, contracts awarded 1 Jul 2025 to 30 Sep 2026. Framework agreements are excluded and framework call-offs are included. Value is stated for 1,194 of the 1,382 contracts. Single-source, classified and exempt contracts, which include many weapons programmes, rarely appear in notices and are not counted. Shares may not sum to 100% because of rounding.

