

A Paper on UK Sovereign Capability

SMI Maritime Autonomous Systems Group Council

Executive Summary

Maritime Autonomous Systems (MAS) are central to the UK's defence transformation, industrial growth, and future naval capability. As the shift toward a Hybrid Navy accelerates, MAS will shape force structure, procurement, and operational effectiveness. Clarifying sovereign priorities is critical to maintaining freedom of action in key areas such as autonomy software, integration and data exploitation, whilst still leveraging global innovation. With declining industrial capacity, unclear demand signals and evolving policy frameworks, clarification and analysis of what needs to be sovereign will help guide investment, strengthen the supply chain, and inform Government industry collaboration at a pivotal moment for UK maritime capability.

This paper contends that:

1. MAS is at the heart of a transformation in naval capability

Autonomy is central to the UK's transition toward a Hybrid Navy¹, enabling a shift from reliance on large, crewed platforms to smaller, more numerous systems. MAS will enhance persistence, scalability, and operational resilience across intelligence, mine countermeasures, logistics, and strike support in a complementary role to traditional crewed assets. Lessons from recent conflicts and strategic reviews reinforce the urgency of this transformation, with MAS underpinning the future naval force design. The development of a mature, sustainable industrial base capable of supporting mass production, deployment, integration, and through-life support is critical to achieving a long-term strategic advantage. The window for this competitive advantage in the UK is closing. By not embracing this shift now, there is a danger of collapse of the UK supply chain.

2. Selective sovereignty is essential

A targeted, pragmatic definition of sovereignty must be made within the MAS supply chain. Platforms, vehicles, and sensors are increasingly commoditised within a global market, and careful consideration should be given to *what needs to be sovereign*. The freedom of action and quality of solutions, and focusing efforts to retain sovereignty through the autonomy stack (C2, secure communications, cyber hardening, integration and deployment expertise) will enable competitive advantages. Sovereignty should also extend to specialised effectors and exploitation expertise, particularly where global supply cannot be assured. This selective approach will allow the UK to concentrate resources on high value differentiators whilst leveraging innovation in global markets.

3. Global market access remains critical

Many industrial players are global companies with a UK footprint whose supply chains are already international. A closed market will not sustain a British supply chain, opportunity for growth lies with export potential. It is critical to maintain this openness in order to access a global talent pool, technological development, and competition to drive innovation, reduce costs, and accelerate delivery. A model of "resilient independence" with trusted partners will enable the UK to move at pace whilst strengthening its industrial position.

¹ <https://www.iiss.org/online-analysis/military-balance/2025/12/the-uk-royal-navys-future--hybrid-high-stakes/>

4. Scale and pipeline clarity are vital

Clear forward demand signals and funded pipelines are the primary enablers of industrial investment and growth capacity. Given that MAS is a transformational and evolving capability area, industry confidence depends on transparent planning, realistic assessment of future demand, and early procurement action. Without this clarity, investors and suppliers will prioritise markets with firmer commitments, risking atrophy of UK capabilities.

5. The Government's intelligent customer function is inadequate

Delivering sovereign MAS capability requires a strengthened and better resourced Government customer function with deeper technical expertise, agile industry collaboration, and improved procurement functions. Current structures and policy are not yet sufficient to manage complex autonomous programmes or to sustain a competitive industrial base. A more engaged, expert, and iterative partnership model with industry will be essential to implement the Defence Industrial Strategy effectively. Further, legislative changes will also likely be required to enable procurement action to be fully informed by industrial strategy

6. Data exploitation is the hidden advantage

Possibly the most decisive sovereign capability is in-mission data exploitation and post-mission analysis. However, this can only be exploited if there is a mastery of data infrastructure, analytics and AI-enabled insight, strengthening decision making and operational advantage across missions. These capabilities are already hard to deliver and poorly served by traditional acquisition models. Sustained investment, data access, and specialised expertise is needed to assure the advantage. By prioritising data dominance within MAS development, the UK can position itself as a leader in AI-enabled maritime operations and deliver enduring strategic value.

Our recommendations

Immediate action needs to be taken by both Government and industry; this starts with a clear definition of what needs to be sovereign. From industry the need is: communication on what sovereign capability already exists; better visibility of company investment and development plans; and, a dialogue on how foreign-owned and multinational companies view their place in a sovereign supply chain.

For Government the need is: a funded pipeline with short term commitment to long term demand; the establishment of an expert-led, well-resourced customer function; increased effort to address regulatory challenges; work to assure supply chain resilience; and, much more active support to the realisation of export opportunities.

Introduction and focus of this paper

1. The Society of Maritime Industries (SMI) Maritime Autonomous Systems Group (MASG) Council's mission is to "be the voice of industry" in representing SMI members by advising Government and other stakeholders on improvements to the business environment. MAS has become a broad-stroke term capturing robotic systems operating on or below the water's surface autonomously or remotely controlled. Whilst some MAS technology has been used for the past 30+ years, recent technological developments have seen the sector grow rapidly to address a wide range of applications.

2. The impact of these developments has been felt globally. UK Government and industry was initially quick to adopt but has been slower to embrace a widespread use of MAS in day-to-day operations and this, coupled with a decline in shipbuilding activity, has impacted the local supply chain available to produce *MAS en masse*.

3. Recognising this reality and responding to the ambition articulated in the recent UK Strategic Defence Review (SDR)², the 2025 Defence Industrial Strategy³ (DIS) is a significant and ambitious document in terms of setting a direction of travel, in stating priorities and high level goals. But it is not yet accompanied by sector level detail and the timetable and goals proposed do not extend to the generation of this detail. The DIS recognizes the importance of partnerships as part of a national endeavour, an explicit recognition that Government alone cannot achieve the scale of change proposed without active and ongoing consultation with industry. This document is intended to inform such a consultation, addressing the detail related to the UK MAS industry. Specifically focussing in on naval applications, the intent is to explore the topic of sovereign capability, viewing this through an industrial strategy lens and addressing a number of questions:

- Why should we be concerned with our MAS industrial capacity?
- How is MAS being applied in defence?
- What does our national supply chain look like today?
- What do we mean by sovereignty and where should we focus on maintaining and developing sovereignty in the MAS supply chain?
- What actions are required by Government and industry?

4. The next few years will be critical in the development of UK MAS industry and its associated supply chain. This paper sets out what is required, covering the full range of MAS from small, compact systems to larger naval systems.

Why should we be concerned with our MAS industrial capacity?

5. The UK growth agenda⁴ set out clearly in wider national industrial strategy⁵ establishes the imperative to unlock economic growth and new skilled jobs through an embrace of AI enabled technologies such as MAS. Beyond growth, there is an urgency recognised in Defence in the need to move to a "Hybrid Navy," as outlined in 1SL General Sir Gwyn Jenkin's address at the *First Sea Lord's Sea Power Conference* in December¹. This builds on a longer standing determination by the UK and other navies to pivot more towards MAS (as outlined in the 2020 SDR), regaining mass and responding to the more recent lessons from the wars in Ukraine and Iran. But, in order to satisfy this

² [UK Strategic Defence Review 2025.](#)

³ [Defence Industrial Strategy 2025: Making Defence an Engine for Growth.](#)

⁴ The growth potential of the UK MAS sector is addressed elsewhere, notably in the NSO/NPL commission report by Stehr Consulting.

⁵ [UK National Industrial Strategy 2025.](#)

ambition, industrial capacity, and the freedom of action and resilience it affords, need to be in alignment. As such, there is particular interest in directives to (and from) the National Shipbuilding Office (NSO) as they update the National Shipbuilding Strategy (NSS) with the forthcoming Shipbuilding and Maritime Technology Action Plan (SMTP). As MAS shifts naval capability away from traditional, crewed capital ships toward smaller, more numerous, and more software-defined platforms, this directly impacts how shipbuilding and the maritime sector is organised, funded, and sustained.

How is MAS being applied in defence?

6. Naval applications for MAS span force protection, warfighting, intelligence, and logistics. The objective of many Navies in creating MAS capability centres on persistence, risk reduction, scalability, and cost efficiency compared with crewed platforms. The related operating concepts seek not to replace crewed capabilities but to enhance them by increasing efficiency and closing resource gaps. MAS is currently being used in or developed for:

- Intelligence, Surveillance & Reconnaissance (ISR)
 - Autonomous surface and sub-surface vessels provide persistent maritime domain awareness. This is particularly valuable for monitoring submarine activity, grey-zone operations, and illegal or covert maritime behaviour.
- Anti-Submarine Warfare (ASW)
 - MAS can deploy distributed sonar networks, including USVs towing arrays and UUVs conducting search and classification. This enables wide-area ASW coverage at lower cost and risk, complicating adversary submarine operations and supporting crewed frigates and maritime patrol aircraft.
- Mine Countermeasures (MCM)
 - One of the most mature use cases. Autonomous systems conduct mine detection, classification, and neutralisation in high-risk waters without exposing crews to the risks inherent with operating inside the mine field.
- Force Protection, Escort, & Harbour Security
 - Autonomous patrol craft monitor naval bases, ports, and anchored vessels, detecting intrusions, divers, or small hostile craft. They support layered defence concepts and free crewed assets for higher-end missions.
- Decoy, Deception & Attrition
 - MAS can act as expendable or low-cost platforms to confuse adversary sensors, draw fire, simulate fleet movements, or saturate enemy defences.
- Logistics & Resupply
 - Autonomous vessels can conduct uncrewed resupply, fuel transfer, or stores delivery between ships or to austere forward locations, reducing risk to crews and enabling distributed maritime operations.
- Strike Enablement & Targeting Support
 - While often unarmed, MAS can support strike operations through target detection, tracking, battle damage assessment, and cueing for missiles or aircraft.
- Strike Capability

- Uncrewed surface vehicle/vessels (USVs) and uncrewed underwater vehicles (UUVs)⁶ are actively being used as “one-way effectors” to strike enemy positions. Further developments are being made to introduce large-scale strike packages on future large USVs and UUVs.

7. Overall, MAS has significant potential to underpin a shift toward distributed, resilient naval forces, enabling navies (including our potential adversaries) to do more with the same or less people while maintaining presence and deterrence in contested maritime environments.

What does our national supply chain look like today?

8. The UK’s supply chain supporting MAS encompasses a broad set of technological and operational capabilities built on its longstanding maritime and defence expertise. At its core, this includes autonomy and navigation software. These providers are enabling unmanned or remotely operated surface and sub-surface vessels to perceive, plan, and execute missions safely in dynamic marine environments. Closely linked are simulation and assurance tools and methods for testing and validating autonomous behaviours against safety standards, such as collision avoidance and international navigation rules (e.g. COLREGs).

9. Complementing autonomy are sensor manufacturers, integration and data service providers (including geospatial and oceanographic inputs) that inform autonomous decision-making and route planning. National data providers contribute high-resolution bathymetry, tidal and current datasets that autonomous vessels need to navigate coastal and offshore waters.

10. Regulatory and standards frameworks also form an essential part of the chain. The UK industry via the MCA has developed codes of practice for MAS that support manufacturers and operators in meeting safety assurance expectations ahead of formal laws.

11. On the R&D and defence side, national research laboratories, defence innovation bodies and universities invest in concepts of operation, joint testing environments, and early prototypes for persistent autonomous undersea and surface systems as part of future naval capability development.

12. Nevertheless, *significant* gaps persist. The UK supply chain struggles with fragmented and slow regulatory approval processes, which is forcing developers to test autonomous vessels abroad. There is also a shortage of specialised skills in sector⁷, particularly in autonomy software, cyber security for maritime platforms, alternative energy systems, and integrated testing facilities; this is further exacerbated by a lack of clear development standards and training pathways. It is anticipated that a number of these challenges will be the focus of the forthcoming National Shipbuilding Office (NSO) authored Shipbuilding and Maritime Technology Action Plan (SMTAP) and a separate SMI MASG paper on the topic of regulation.

13. Lastly, the relative absence⁸ of well-established mass production and high-volume manufacturing capacity for autonomous marine hardware constrains scaling, especially when compared with more established defence manufacturing sectors. This limits the UK’s ability to transition from prototypes and trials to sustained commercial output at scale.

⁶ Also referred to variously as autonomous underwater vehicles and unmanned underwater vehicles.

⁷ The UK as a whole possess considerable skills in AI/ML development as well as development of safety critical software and human computer interfaces, there are however located in other sectors principally games development and creative industries, healthcare and fintech

⁸ Notwithstanding recent UK investments by a number of companies such as Helsing and Kraken.

What do we mean by sovereignty and where should we focus on maintaining and developing sovereignty in the MAS supply chain?

14. The DIS does not define sovereignty, but its intent regarding autonomous systems and next generation maritime capabilities as sovereign capabilities (pages 10 to 11) is clear:

'This Government is committed to investing in and onshoring the necessary industrial capabilities we need for our sovereign national security and those we should foster and support to boost the UK economy. UK-based businesses are at the heart of this strategy.'

*'Across the range of capabilities the UK requires for warfighting, this Strategy outlines our national security industrial priorities, where varied levels of autonomy in the UK is required:; our supply chain priorities.....; and our frontier industries: **next generation land and maritime capabilities, quantum technologies, drones and autonomous systems**..... We will establish, maintain and sustain the necessary elements of these subsectors by investing through our new segmented commercial approach to the market, and interventions.....'*

15. The UK MAS sector delivers both autonomous systems and next generation capabilities and is therefore both 'frontier' and 'sovereign'⁹. But in practice, more detail is required to make this meaningful, not everything can or should be considered sovereign. This paper sets out an industry view of that detail, noting that, while the MAS supply chain can inform a pragmatic definition of sovereignty, the authority to define legal, operational, and technological sovereignty ultimately sits outside our remit.

16. UK MAS is part of a global industry¹⁰ where there is vibrant competition, driving innovation and suppressing costs; the source of much of this innovation has been a very large and growing offshore and ocean science sector. Whilst military applications are far from new, only relatively recently has there been significant global growth in naval programmes, further driving industry investment. Retaining access to this global market is key¹¹ if the UK is to move at pace and to secure advantage, furthermore, many of the UK industrial actors are global companies, albeit with significant and valuable UK footprints; their internal supply chains are already global. By targeting what we see as sovereign, we can retain this wider access, whilst also signalling strongly to industry where UK sovereign capability must be developed and maintained. This signalling, combined with a pipeline of potential forward 'sovereign' business will give industry the confidence to invest, encouraging active UK collaboration, both across industry and with Government. Managed well, this process can also sustain a level of competition for sovereign aspects at a national level.

17. This approach alone is only part of a DIS implementation. Stating an intent to stage robust competitions for those aspects not considered sovereign does not remove an expectation that UK businesses should be at the fore in meeting such needs. Similarly, the DIS places a significant responsibility on Government to develop UK exporters to meet similar needs around the world. And UK sovereign capabilities should provide compelling components as part of this UK export offer, albeit under appropriate governance. This paper does not address these aspects beyond noting that they

⁹ This judgement was recently confirmed in a Parliamentary Question addressing the supply chains for autonomous systems, including MAS. <https://questions-statements.parliament.uk/written-questions/detail/2026-01-13/HL13564>

¹⁰ This paper notes that industry is term which spans a wide range of entities, from SMEs to multinationals; it is a broad and amorphous group. SMI represents a significant subset of MAS industry and seeks to represent its members' views, but across the sector there will be a range of perspectives. Furthermore, industrial policy must address a range of factors beyond just ensuring the maintenance of sovereign aspects.

¹¹ Notwithstanding this focus on COTS and MOTS, there will be aspects of MAS capabilities that will not be well served by the market and which will require Government investment – this is likely to be the case where naval use cases diverge significantly from commercial applications; at a high level, these are addressed in this paper.

will require a closer level of engagement and transparency on future plans (by both Government and industry) than seen to date.

So, what in MAS should be sovereign?

18. Building on the approach outlined above, a key premise of this paper is that UK advantage will come from leveraging a huge global market in vehicles and payloads, holding only those things that are key to UK freedom of action and qualitative edge as sovereign.

19. Whilst it is always tempting to start with the robots, the reality is that UUVs and USVs, the vehicles, are in places approaching a commodity; *if* one is able to integrate them with current systems and sensors, there is an abundance of choice. Assurance of supply and of the supply chain matters, but currently it is not constraining;¹² so, the starting point of this paper is that vehicles are not sovereign, but this is a judgement that will vary across vehicle sizes and which needs to be regularly reviewed. A key factor will be the degree to which there is a genuine global market of proven solutions in place; where this is not yet truly the case (extra-large diameter UUVs might be a good example), a case for sovereignty could be made.¹³ Furthermore, any judgement needs to address future capacity needs and the importance attached to being able to scale rapidly in times of tension or war; this requires a careful examination of the resilience and capacity of supply-chains in any potential conflicts. For smaller systems in particular, lessons from Ukraine point to the need to sustain very high volumes and to adapt designs continuously to counter very rapid threat evolution. Of its own, this does not mean that manufacture of any such systems has to be onshore - albeit it does need to be assured from a trusted source, but as a minimum, it will require UK delivery of some elements of assembly and engineering. So, whereas other areas offer clear choices regarding sovereignty, vehicle manufacture and assembly is a difficult area, requiring careful analysis and regular review.

20. Beyond the vehicles, what enables real capability and the shift to greater mass is a mix of trusted autonomy, proven integration at vehicle and system level and robustness to countermeasures. So, whilst vehicle supply itself might not be routinely sovereign, the following aspects should be:

- **Vehicle and mission autonomy software**, including collaborative autonomy.
- **Vehicle support and integration.**
- **Secure navigation and communication.**
- **Cyber hardening** – and ensuring there are no built-in cyber vulnerabilities.
- **Command and control (C2)** – the ability to integrate across systems and internationally. This requires Government, supported by industry to be able to define (or at least manage) and assure the architectures and standards so that heterogeneous MAS can be adopted, configured, and integrated into mission packages. The choice of platforms, sensors, or effectors that are attached to the architecture then becomes largely irrelevant - unless they are highly specialised or exquisite¹⁴. An increased focus on C2 architectures and standards would position the UK to define interoperability frameworks for allied MAS operations - as we have done for ASW and other pan-NATO capabilities. This provides strategic influence and ensures UK systems remain central to coalition operations as part of NATO and AUKUS (Pillar 2), aligning with the DIS emphasis on partnerships as part of national endeavour ("NATO first and first in NATO").

¹² Noting that in some areas, particularly batteries, there is a cross sector need (well beyond MAS) to develop supply chain diversity, removing a dependency on China.

¹³ Noting that as vehicle size grows (for USVs this includes emerging plans in the US and UK for >50m), so the platforms themselves will increasingly tend to be drawn into the well-established discussion on shipbuilding pipeline.

¹⁴ At which point many of the advantages of MAS over crewed platforms are lost.

- **Test and evaluation** – the ability to analyse and assure end to end performance at system and system of system level.

21. Turning to MAS sensors and payloads, this paper would contend there is no obvious reason to select this as a general area for protection¹⁵, it is a global market place where commercial solutions for civil applications have wide military utility; however, there are some areas where the market cannot be assured or cannot be relied on to develop and sustain the required capabilities, this is specifically true in the world of effectors:

- Expertise in **shaped charge and warhead design**, together with understanding of damage mechanisms.
- Design and manufacturer of **deep-water effectors**.
- **Influence sweep** (for mine countermeasures (MCM)) design and manufacture.
- **Exploitation expertise** (for MCM and seabed warfare).

22. Beyond effectors, in ensuring a robust and effective sensing capability, there are sovereign aspects associated in ensuring that delivered systems genuinely deliver the required outcomes:

- Expertise in **evaluation, assurance and optimisation of advanced sensors**.
- Assured access to **data infrastructure** such as cloud services and storage.
- **Data exploitation expertise & post-mission analysis**. These are significant differentiators for the UK and offer real scope for operational advantage through data dominance; investment creates an asymmetry that is difficult for adversaries to replicate and positions the UK as a leader in AI-enabled maritime operations. As the single most important area of focus, it deserves a special focus, particularly as it is challenging to deliver in the traditional acquisition model.

23. Finally, fielding and sustaining credible capabilities is about much more than just delivering working and effective equipment. Resilience and the means to deploy, sustain and regenerate are key, making **support and mounting arrangements** as sovereign as any of the underpinning technologies. Whilst it is logical to consider this on a programme-by-programme basis, there are also significant synergies from taking a UK wide enterprise perspective, particularly with infrastructure¹⁶. This could be building on or extending the existing operating hubs and centres, albeit noting that naval bases are heavily optimised for complex ships and submarines, not MAS. Beyond infrastructure, learning from experience over recent programmes has also underlined the importance of retaining a significant margin in system numbers to allow for maintenance, repair, upgrade and attrition. Scale brings many other benefits to both customer and industry, enabling efficiencies and cost reduction as well as a clear line of sight down the supply chain, facilitating planning and targeted action to address vulnerabilities. This can be accounted for in acquisition planning.

How British does something have to be to qualify as sovereign?

24. There are no easy answers to this question; as previously touched on, the market is international and so is industry. In practice, the answer will hinge on what it takes to secure UK freedom of action, this will be a mix of: workforce expertise and capacity; specialist facilities; and, access to (and in places, control of) intellectual property. Some imprecision is inevitable, but not addressing this question, area by area will leave industry unsure on what is required, removing a level

¹⁵ As MAS expands to address wider use cases, with a potential need for higher end sensors, so this judgement will need to be reviewed.

¹⁶ Recognising that this enterprise perspective also needs to touch on resilience and redundancy, avoiding single points of failure or creating new vulnerabilities.

playing field and discouraging investment. To be clear though, this paper contends that, subject to the provisos set out, foreign-owned companies should be able to be part of a UK sovereign construct.

What actions are required by Government and industry?

25. As a start point in this conversation it is important to acknowledge that all options carry risk and cost. Doing nothing means sovereign capabilities are not assured and industry will make choices based on other considerations (which includes responding to the sovereign demands of other nations); Government cannot direct industry to maintain capacity if it is not funded and funded capabilities that are not utilised properly are likely to become unfit and inefficient. Equally, taking action and managing sovereign capabilities requires an overhead to ensure they are fit and ready to meet a challenging world (as set out in the recent SDR), it demands sufficient throughput and activity, even when other factors may not require ongoing procurement action.

26. Building on this observation, the key to success is in establishing a clear-eyed view of likely future demand, including what it might take to meet likely war and transition to war scenarios (and likely notice periods to respond to a shift to a war footing). This, combined with an analysis of 'what is sovereign' allows a judgement of what must be held at near or immediate readiness, and what industrial capacity is required. This in turn informs procurement action¹⁷ and pipeline planning, noting that there is a likelihood that further legislative change will be required to enable UK authorities to exclude non-UK suppliers in any competitive procurement. Further, in doing this work, as was noted earlier, there is a balance to be struck. Pragmatism is required, and, in places, there will be a need to accept 'resilient interdependence'¹⁸ over full autonomy. This means being open to collaboration with trusted international partners as part of an overall strategy and pipeline plan.

27. Overall, such an approach is far from new, it has informed stockpile management and previous generations of defence industrial strategy (noting that recent years have seen many nations, including the UK adopt a more laissez-faire stance). But, as MOD seeks to implement the DIS, a key difference to consider is the degree to which MAS is new and transformational – there is little in the way of a steady state programme and there is much about the current programme which is likely to change¹⁹. This means forward planning is difficult and in some areas there may be a need to plan and establish *ab initio* sovereign capabilities, not just to sustain and protect what exists already. Getting this right is likely to be an iterative activity. The need for 'new build' can in part be met through industry investment, but only if industry is confident on the return; investors are already lined up to capitalise on growing defence budgets across Europe, but they have a choice as to where to invest and are wary of getting caught out by a 'say-do' gap. Doing the analysis and clearly communicating intent is important, but translating this into a funded pipeline (with short term action) will ensure industry moves quickly to be ready.

28. Done well this pipeline approach can be constructed to ensure MOD choice and some competitive leverage, at least in most areas. But it cannot be done by half measures, otherwise key areas risk atrophy or will not develop, or stale monopolies will emerge. Excepting those areas where the market demand is high, partnerships with industry, including collaboration across industry partners will naturally tend to closed-shops and lock-in unless MOD manages matters. Keeping throughput, including supporting export (and actively working partnerships in NATO and AUKUS to achieve this) can help sustain vibrancy and reduce pressure on UK budgets, but the inescapable observation is

¹⁷ Noting that, to be complete, this must span all procurement pathways, including contractor owned and/or operated solutions and indirect demand from Government service providers.

¹⁸ https://www.weforum.org/stories/2026/01/race-for-tech-sovereignty-is-a-balancing-act/?utm_source=linkedin&utm_medium=social

¹⁹ A shift to bigger vehicles, increased autonomy, more collaboration across systems and an expanding range of applications.

that this requires a level of engagement and action. This is a significant step up for UK procurement authorities, requiring an enduring, expert and well-resourced intelligent customer function (including in the NSO and National Armaments Director Group (NADG)); this function is not yet in place. Further, it may require use of levers hitherto used rarely or not at all, thereby ensuring industry and investors make profits in line with expectations (otherwise investment will flow elsewhere); as an example, single source regulations currently limit industry profit and discourage industry investment.

29. Looking beyond developing the pipeline, the customer function and a more active collaboration with industry, success also requires a careful review of supply chain resilience and addressing the significant gaps identified in this paper, it is hoped that the latter is an area where the SMTAP will secure real progress.

Next steps

30. This paper is intended to generate debate and inform a dialogue in industry and with Government. The ultimate goal is to help shape more detailed implementation plans. We would therefore welcome comment and input and would be happy to support focused workshops or meetings on the areas covered.

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