



UK DEFENCE  
**ESG CHARTER**



# ANNUAL REPORT

2026 EDITION  
ESG-ENABLED RESILIENCE



# FOREWORD: ADS GROUP CEO

A focus on industrial and societal resilience aligns to the growing Environmental, Social, and Governance (ESG) agenda, with responsible organisations needing to ensure they have sustainability as a non-negotiable component of long-term planning. The geopolitical environment brings new challenges, such as ramping up production for the UK's defence and security, that will have to be solved in tandem with driving down emissions and sustainable action. For signatories of the UK Defence ESG Charter who are leading the charge, this shift is inextricably linked to the stewardship of the resources and communities we rely upon. The work of our signatories amplifies this deeply important message.

Defence and sustainability are becoming more compatible, not less, and definitely resonating in the financial sector. In March 2025, the UK Financial Conduct Authority (FCA) confirmed that its sustainability rules do not preclude investment in or financing of defence companies. This comes after widespread narratives of support for national security, and it is important that we match this momentum with continued dialogue on environmental reporting, particularly as the financial regulator develops new requirements for Scope 3 emissions. Although transparency expectations can be challenging for sectors with sensitive operations, we remain committed to advancing meaningful disclosure and therefore clarity for all stakeholders.

As reporting frameworks evolve, it is crucial that they recognise the unique characteristics of defence and security work. In turn, this will allow responsible organisations in our sectors to continue to attract sustainable investment while meeting high environmental and social standards.

The 2026 Charter Annual Report will once again deliver a numerical update on the performance of headline stats set against the commitments of our signatories, as well as share case studies of these activities in action. As an evolution this year, and in response to the UK Ministry of Defence (MOD)'s Defence Industrial Strategy (DIS), we have aimed to focus this report on resilience, to align with the ambitions of the UK MOD through the work we are already progressing through the Charter, and the Charter community.



**Kevin Craven**  
CEO, ADS Group

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# INTRODUCTION

In 2026, the UK defence sector finds itself operating against a backdrop of continuous geopolitical volatility, not seen in a generation, which demands renewed clarity of purpose. The UK Government has spent the last year developing and publishing a series of policy decisions and strategy publications, alongside a review of existing approaches. With this strategic foundation now in place, the defence industry stands ready to support the nation's security objectives.

The latest challenge for the UK defence sector is no longer simply what to build, but how to build it in a resource-constrained world. As the threat environment has evolved, the alignment of priorities of the government and the priorities of this UK Defence ESG Charter has never been stronger. There is no route to a resilient industrial base that does not run through sustainable practice.

This report therefore serves a dual purpose. It is a record of industry's collective progress, but it is also a strategic bridge. In the following pages, we will explore the interlinkages between the commitments tracked by the UK Defence ESG Charter framework, and the policies proposed in the Defence Industrial Strategy (DIS). Charter signatories have more than doubled in the last year, accounting for over 60% of total industry turnover and over 55% of the UK's defence employees. The report outlines the practical mechanisms that can turn those ambitions into a resilient, growing, and secure defence industrial base.

Ultimately, this report is about equipping the UK for a future where economic security, environmental stability, and national defence are one and the same. It will visit the six pillars of the DIS, which was published in 2025, and offers a perspective on how ESG ambitions are embedded at the core of the approach. The DIS provides the strategic framework that underpins the chapters of this report that align with the following six pillars:

- Making Defence an Engine for Growth
- Backing UK Based Businesses
- At the Leading Edge of Defence Innovation
- A Resilient UK Industrial Base
- Fixing Defence Procurement
- Forging New Partnerships

# EXECUTIVE SUMMARY

## ECONOMIC HIGHLIGHTS FROM SIGNATORIES

TURNOVER FROM SIGNATORIES  
**£22.1** BN  
 IN 2024

CHARTER SIGNATORIES GENERATED MORE THAN 60% OF ALL DEFENCE INDUSTRY TURNOVER

**89%**

OF CHARTER SIGNATORIES' TURNOVER IS GENERATED BY DEFENCE



**101K** PEOPLE EMPLOYED IN DEFENCE BY CHARTER SIGNATORIES

## ENVIRONMENT

**13%**  
 REDUCTION

BETWEEN 2023 AND 2024

IN CHARTER SIGNATORIES' DEFENCE SCOPE 1 & 2 GREENHOUSE GAS EMISSIONS



EQUIVALENT EMISSIONS SAVINGS OF **1.3 MILLION TREES**



**23%**

CHARTER SIGNATORY ENERGY FROM RENEWABLES IN 2024

**4%**  
 INCREASE  
 2023-2024<sup>1</sup>

CHARTER SIGNATORIES INCREASED UK DOMESTIC SUPPLY CHAIN SPEND

## SOCIAL

**6%**  
 GROWTH  
 2023-2024

IN WOMEN EMPLOYED IN DEFENCE BY CHARTER SIGNATORIES



**7.4K** APPRENTICES EMPLOYED BY CHARTER SIGNATORIES

**14%**  
 INCREASE  
 2023-2024

**22%**

OF SIGNATORY WORKFORCES ARE UNDER 30

**ALL**

CHARTER SIGNATORIES ARE PART OF:



**88%**

ALSO SIGNATORIES TO:



GENDER PAY GAP IN 2024 WAS:



## GOVERNANCE

**94%**  
 CHARTER SIGNATORIES

ARE CYBER ESSENTIALS+ CERTIFIED

**88%**  
 OF CHARTER SIGNATORIES

HAVE PUBLISHED A DEDICATED MODERN SLAVERY STATEMENT





# STRATEGIC ALIGNMENT: UK DEFENCE CHARTER & DEFENCE INDUSTRIAL STRATEGY

- MAKING DEFENCE AN ENGINE FOR GROWTH
- BACKING UK BASED BUSINESSES
- AT THE LEADING EDGE OF DEFENCE INNOVATION
- A RESILIENT UK INDUSTRIAL BASE
- FIXING DEFENCE PROCUREMENT
- FORGING NEW PARTNERSHIPS

# MAKING DEFENCE AN ENGINE FOR GROWTH

The 2025 Defence Industrial Strategy (DIS) is underpinned by the recognition that defence spending is a driver of national prosperity and economic growth. With resilience as a core theme of the DIS, signatory efforts on ESG are validated as a key component of growth and the future success of the UK defence industry.

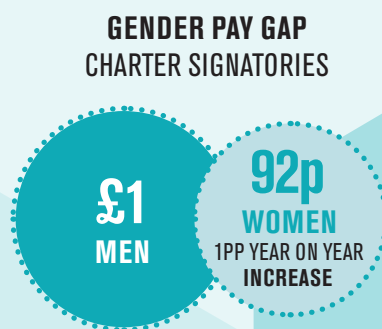
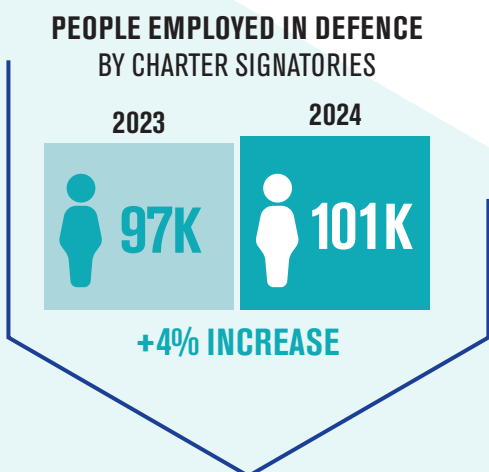
## ECONOMIC CONTRIBUTION

In this report, social value is used to describe the positive contribution an industry makes to society, the economy, and the environment. On that basis, the defence sector's scale of employment and strong economic impact demonstrate clearly how it generates social value. In 2024, the sector employed more than 181,500 people, making its highly skilled workforce integral not only to communities across the UK but also to public sector receipts. Charter signatories have played a critical part in this story, reflected in annual turnover growth across more than two-thirds of signatories. The DIS rightly recognises that the sector "fuels productivity [...] and regional opportunity", a point underscored by the industry's continued and growing provision of high-value output.

## FUTUREPROOFING GROWTH

The defence industry's commitment to early careers initiatives has helped to ensure that the sector is training the workforce which will be driving growth into the 2040s. The proportion of the current signatory workforce who are aged between 16 and 21 provides an indicator of diversity from the perceived view of the defence industry possessing an ageing workforce. The current and next generation intake of workers will be integral for the sector's longevity, as well as its ability to absorb and operationalise the long-term 10-year Defence Investment Plan as outlined in the DIS.

Women employed by Charter signatories now earn, on a median hourly basis, 92 pence for every pound earned by men. Closing this gap is strategically important for the defence sector, as a more equitable pay environment strengthens the industry's competitiveness in attracting the skilled workers it urgently needs, particularly amid increased technical demand across programmes. Pay equity is also a key lever for widening the talent pool in a sector where women remain under-represented, thus strengthening long-term economic resilience. Industry is therefore consciously working towards widening the available talent pool through new pathways and targeted upskilling from within its existing workforce.



# BACKING UK BASED BUSINESSES

Delivering the ambition of reinforcing the UK's position as a global defence industrial leader by 2035 is rooted in a strong domestic industrial base. The DIS commitment to an "improved procurement framework focused on jobs and skills" and a "a social value model that works for defence" (DIS Action 4.2.2.1) is crucial in this regard. Charter signatories are investing in people, technology, and capability in a way that continues to provide exceptional value to the UK, both economically and socially.

A major part of backing UK business is ensuring that opportunity and high-value skills are available in communities across the country. Apprenticeships and graduate programmes remain essential recruitment routes, but they also play a wider role: helping more people access high-quality careers and supporting local areas to grow their own talent. These programmes serve as a key vehicle for transferring advanced engineering capabilities into communities. On average, a staggering 39,263 training hours were delivered per company in 2024 alone. To put that volume into perspective: this represents over 18 years of continuous work dedicated solely to keeping employees fully trained.

AVERAGE TRAINING HOURS DELIVERED  
PER CHARTER SIGNATORY IN 2024



**39,263 HOURS**  
=20 YEARS OF WORK

**7,400**  
APPRENTICES

**14%**  
INCREASE  
2023-2024



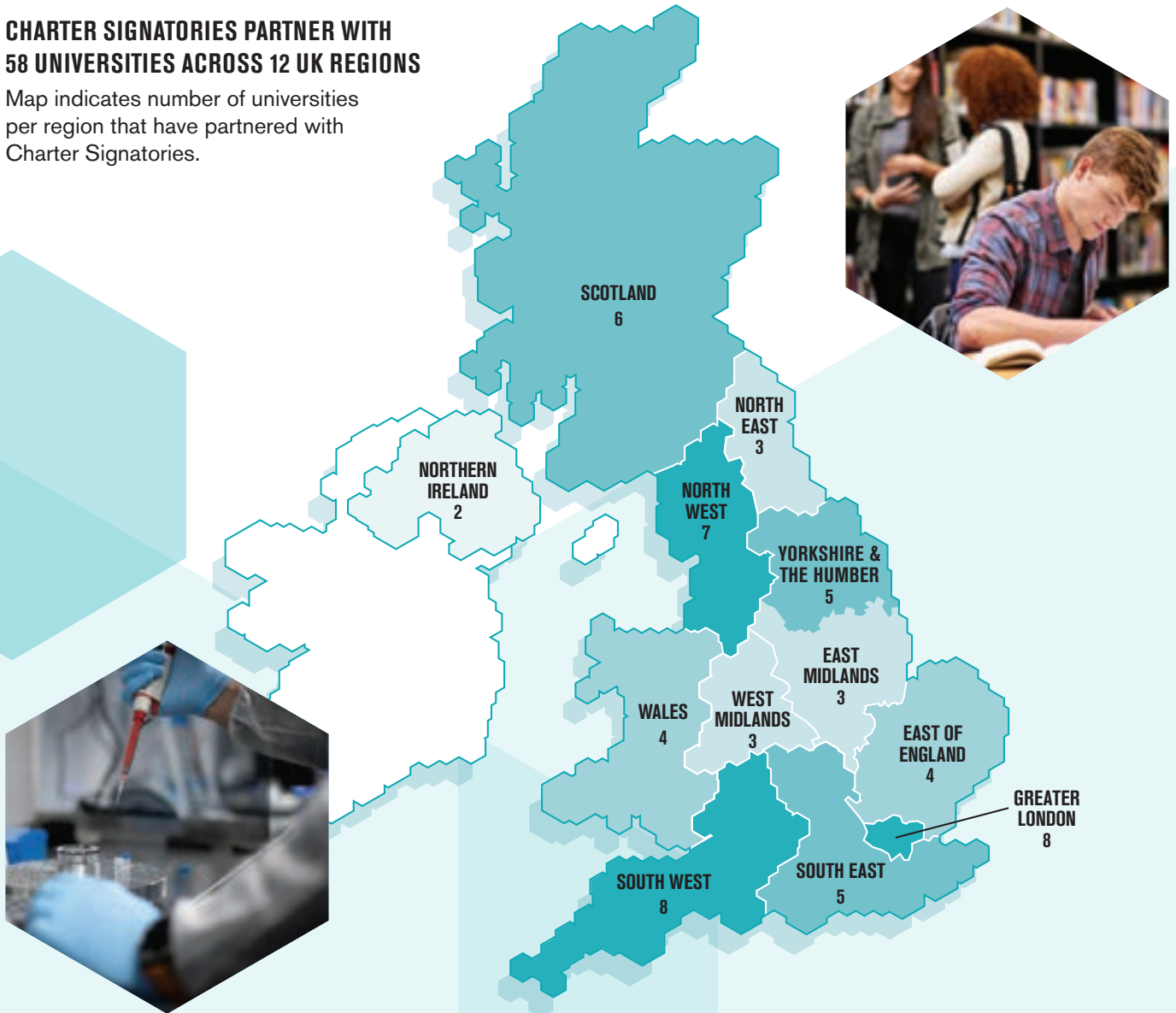
# AT THE LEADING EDGE OF DEFENCE INNOVATION

The DIS recognises that bridging the gap between academic research and industrial application is essential. As part of Action 5.2.2.3, it calls for enhanced industry access to innovation funding and advice, and stronger strategic partnerships between industry and universities to accelerate development. Instead of relying on transactional project funding, the goal is an integrated ecosystem where industry and academia operate as a single coordinated unit focused on pace and agility. Across the Charter community, innovation is increasingly demonstrated by rapidly turning promising ideas into deployable capability. Companies are pushing iterative test-and-evaluate cycles and simulation-led development to shorten time-to-capability and de-risk programmes, as demonstrated by the case studies contained in this report.

These industry-driven shifts complement the growing links with the UK's academic base. In 2024, signatories reported partnerships with 58 UK universities, with nearly half partnering with multiple Charter signatories. Cranfield University alone works with six signatories, illustrating how concentrated collaboration can accelerate innovation and capability.

## CHARTER SIGNATORIES PARTNER WITH 58 UNIVERSITIES ACROSS 12 UK REGIONS

Map indicates number of universities per region that have partnered with Charter Signatories.



# A RESILIENT UK INDUSTRIAL BASE

Resilience and defence have long been closely linked. However, since Russia's war on Ukraine began, the meaning of resilience for both defence and the UK industrial base has evolved. In one of the purist forms, resilience is understood to mean the number of active reservists, the national nuclear deterrent, stockpiles of complex weapons and ammunitions, as well as the strategic role of sourcing critical minerals.

As soon as resilience is viewed more broadly than military assets alone, the conversation quickly evolves into a dialogue on economic security and the stability of supply chains. This ultimately includes the cost of energy and the overall resilience of national infrastructure. In 2026, true resilience means more than flexible production lines; it requires limiting Critical National Infrastructure's exposure to global energy price shocks and geopolitical risks. A reliable, secure energy supply is no longer simply an environmental objective but a prerequisite for operational sovereignty.

The DIS, through Action 6.2.2.2, recommends that the UK Government improves its means to prepare and respond to escalating threats by reducing over-reliance on all external critical inputs, including energy. By transitioning to UK-generated renewable energy sources such as solar and offshore wind, the defence sector is taking greater control of its energy security. A 13% emissions reduction from 2023 to 2024 from Charter signatories' defence activity strengthens its ability to survive and maintain operations during geopolitical crises.

Industry reporting its emissions and signing up to the Charter demonstrates that disclosure is the gateway to cutting emissions. With net zero firmly established as a priority on page 94 of the DIS, robust emissions data becomes an enabler of resilience and net zero in the context of government priorities.

## DEFENCE-GENERATED SCOPE 1 & 2 GHG EMISSIONS

**222.9**  
ktCO<sub>2</sub>e  
IN 2024

**13%**  
REDUCTION  
2023-2024



## RENEWABLES CONSUMED BY CHARTER SIGNATORIES

  
**23%**  
IN 2024



# FIXING DEFENCE PROCUREMENT

The defence landscape evolved in February 2025 with the full implementation of the Procurement Act 2023 which places greater emphasis on accelerating procurement while maintaining value for the public. Article 12(1)b of the Procurement Act introduces a statutory objective of maximising public benefit, reflecting the broader outcomes that defence procurement is expected to support. Within this context, areas such as social value and ethical supply chain practice are now recognised as core elements of commercial decision making. This shift aligns closely with the aims of the Charter.

Having a publicly disclosed Modern Slavery Statement now forms a core element of social value scoring in tenders. The DIS feels like a refreshing approach of linking defence procurement outcomes to broader societal benefits that recognises how defence contributes to national resilience. This evolution mirrors the ambition of the UK Defence ESG Charter, where strong governance and responsible supply chain practices are central to long-term sector competitiveness. Demonstrating that a supply chain is free from exploitation not only reinforces the standards expected of Charter signatories but also supports the MOD's confidence in the resilience and integrity of its industrial partners.

Action 7.2.3.3 of the DIS calls for a “segmented approach” to procurement where we see rapid commercial exploitation of goods like novel uncrewed systems and digital software. As the nature of the threat evolves and therefore how we tackle that threat, by holding Cyber Essentials+ (like over 90% of Charter signatories today), defence firms can amplify their own cyber security credentials in an increasingly agile defence procurement landscape.

## CHARTER SIGNATORIES CYBER ESSENTIALS+



**94%**  
CERTIFIED

## CHARTER SIGNATORIES MODERN SLAVERY ACT



**88%**  
PUBLISHED  
STATEMENTS

# FORGING NEW PARTNERSHIPS

The UK's 2025 Strategic Defence Review established the defining principle of "NATO First" and the sixth chapter of the DIS serves as the industrial codification of that directive. A NATO first approach moves beyond the traditional export dynamics and moves the UK towards a coordinated deep structural integration with our closest allies.

80% of Charter signatories now maintain a physical presence in another NATO country or have cemented business relationships with partners from NATO countries. With NATO integration a core part of Charter signatories' businesses, they provide the perfect example of how a pan-NATO industrial ecosystem already thrives, with UK activity firmly at the centre of it.

Charter signatories are continuously working to deepen understanding of real operational environments, employing more veterans brings exactly this insight, which strengthens both capability development and day-to-day delivery. Charter signatories have long been key employers of UK veterans, collectively employing more than 2,500 veterans across the sector. That figure represents a robust 7% year-on-year increase, alongside a sustained 100% adherence to the Armed Forces Covenant for at least two consecutive years.

Social value is also not the driver here. Instead, the value lies in the direct capability transfer that aligns with Action 3.2.3.3 on improving mid-career access to defence roles. Bringing end-user expertise into industry allows veterans to act as technical translators, providing frontline experience that theoretical engineering often lacks. When design teams include personnel who have delivered capability in the field, the result is consistently more robust and better suited to operational reality.

## VETERANS FULL-TIME EMPLOYED BY CHARTER SIGNATORIES

**7%**  
INCREASE  
2023-2024

**2,500+**



## CHARTER SIGNATORIES ARMED FORCES COVENANT SIGNATORIES



**ALL**  
SIGNATORIES



# CASE STUDIES THAT REFLECT OUR CHARTER COMMITMENTS TO:



## ENVIRONMENT

### Commitment to climate transition and clean technology

- Decarbonising the industry's supply chain
- Contributing to clean and innovative technologies
- Increasing supply chain resilience on critical mineral resources



## SOCIAL

### Commitment to societal impact

- Improving diversity, equality and inclusion at all levels
- Helping address the STEM skills shortage in the UK
- Strengthening and building meaningful partnerships



## GOVERNANCE

### Commitment to improvements in governance and ethics

- Building greater cyber resilience
- Sustaining comprehensive export control systems
- Sustaining and growing sovereign capabilities



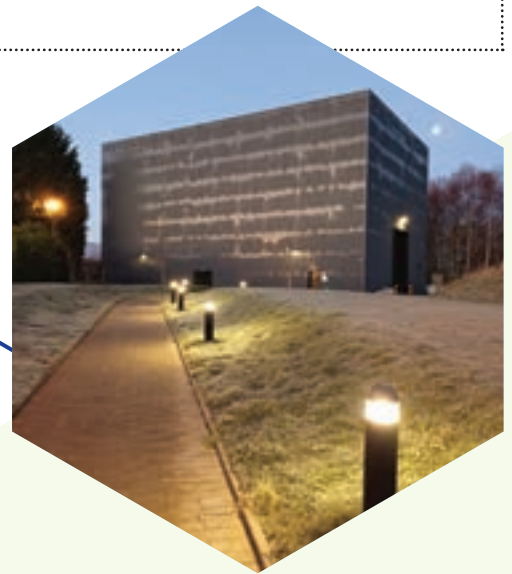
# ESG CASE STUDIES IN ACTION: ENVIRONMENT

## DECARBONISING THE INDUSTRY'S SUPPLY CHAIN

### CASE STUDY: RHEINMETALL UK PIONEERING SUSTAINABLE DEFENCE TESTING WITH THE RBSL TURRET TEST RIG

RBSL's state-of-the-Art Turret Test Rig (TTR) is transforming defence testing by combining technological rigour with strong environmental stewardship. This multi-million pound capital project is a cornerstone of RBSL's strategy to achieve unprecedented levels of turret maturity and reliability during the development phase, fundamentally transforming traditional testing methodologies.

The TTR is designed to de-risk production by rigorously simulating real-world operational environments before systems are deployed to the field. This capability directly eliminates the need for resource-intensive, traditional field reliability trials conducted on 'Battlefield Day'. These conventional methods typically consume vast volumes of diesel fuel and other critical resources. By shifting testing into a controlled environment, the TTR cuts emissions across the lifecycle, saving 1.71 tCO<sub>2</sub>e of fuel per test phase, eliminating transport emissions from moving vehicles to remote ranges, and avoiding the carbon associated with producing and replacing spare parts, like filters, chains and belts, typically required during intensive field trials. The purpose-built facility reinforces the sustainability focus, operating on a hybrid energy system powered by on-site renewables like photovoltaics and groundwater heat pumps, and supplemented by certified renewable electricity. Together, these innovations show that critical defence capabilities can align with robust ESG objectives.



### CASE STUDY: SAFRAN UK 10-YEAR POWER PURCHASE AGREEMENT (PPA) WITH ENGIE

In April 2025, Safran UK signed a 10-year Power Purchase Agreement (PPA) with ENGIE, marking a tangible departure from standard procurement practices. Securing a dedicated supply of UK-generated solar energy allows Safran to insulate its operations from grid volatility while addressing the urgent need for emissions reduction.

Thanks to the agreement, Scope 1 & 2 greenhouse gas emissions across the Group's UK portfolio are projected to halve. Such a reduction is a major headline achievement as part of the company's global target to decarbonise at least 50% of its total emissions by 2030 (the baseline being emissions in 2018). This long-term commitment to renewable energy infrastructure also sends a powerful signal to Safran's UK supply chain, showcasing a blueprint for resilience. Véronique Bardelmann, Safran VP Europe and ADS VP for Aerospace comments: "We are very proud of this innovative deal with Engie. Our commitment to buy renewable energy over the next ten years illustrates our proactive approach to combating climate change".

## CONTRIBUTING TO CLEAN AND INNOVATIVE TECHNOLOGIES

### CASE STUDY: MBDA UK DRAGONFIRE HIGH ENERGY LASER SYSTEMS

DragonFire is a laser directed energy weapon (LDEW) demonstrator. DragonFire can deliver a high-power laser over significant ranges in varied weather conditions, with pinpoint accuracy for tracking and pointing. LDEW systems are of significant interest to defence because they are expected to provide military useful effect at reduced costs when compared to other weapon systems.

Having demonstrated that the technology is credible, there is a defence push to solve system integration challenges and place the capability in the hands of the user. LDEW systems emit precisely targeted light; this means that there is less likelihood of collateral damage, and no possibility of unexploded ordnance (except if an enemy weapon is targeted).

LDEW can complement conventional defensive capabilities but can reduce the need for forces to use alternative forms of ammunition, providing an option which can respond to mass requirements and ensure in-theatre resource efficiency. Depending on the power of the system, LDEW are expected to be effective against a wide range of threats from unmanned aerial vehicles (UAV) to anti-ship missiles.

Whilst the power used by the systems is not insignificant, it could in theory be generated by sustainable means. The logistic chain for LDEW is short compared with many weapon systems, meaning fewer emissions will be emitted because of transportation. Further trials will aim to reduce the system's size, weight and power requirements, which will reduce pressures upon defence logistics operations and ensure fewer emissions as a result of DragonFire transport and use.

### CASE STUDY: HYBRID AIR VEHICLES PIONEERING NET ZERO CAPABILITIES WITH AIRLANDER

Decarbonising is a critical strategic challenge in both civil and military aviation, requiring solutions that align with the UK's Net Zero trajectory without compromising on operational advantages. Hybrid Air Vehicles is answering this call with Airlander 10, a highly innovative aircraft with the potential to decouple defence capability from greenhouse gas emissions. Utilising a combination of buoyant lift from helium and aerodynamic lift, Airlander will deliver up to a 90% reduction in emissions relative to comparable aircraft once type certified, with a robust pathway to offer an all-electric configuration by 2030. Beyond its net zero credentials, Airlander excels in the defence landscape due to the unique combination of high payload and long endurance, providing a force-multiplier effect. It is resilient, scalable and ultra-cost effective (up to 10x less cost per flying hour), operating with minimal ground infrastructure and deployable without host nation support for up to 30 days. Airlander's cabin is completely configurable by the customer, so can facilitate many military applications from ISR to the movement of people and goods.

Crucially, this is a story of industrial implementation, not just R&D. As the only company in the world to have flown a full-scale prototype hybrid aircraft, Hybrid Air Vehicles is working with South Yorkshire to bring 1,200 high-skilled green jobs to their aerospace cluster. With the aircraft approaching entry into service, it stands as a powerful testament to the UK defence sector's ability to drive green growth, proving that sustainability and operational resilience can go hand in hand.



# ESG CASE STUDIES IN ACTION: ENVIRONMENT

## CASE STUDY: AIRBUS DEFENCE & SPACE TRACE

As part of Airbus' ambition to address the climate impact of our products and the wider aerospace industry, the company is deeply and transnationally engaged in research aimed at reducing the uncertainty in the current understanding of the impact of non-CO2 emissions on the climate. The TRACE project (Technologies to Reduce and Assess Contrail Effects) harnesses the UK-based expertise and technical skills needed to build upon this research. A multi-partner research project co-funded by Innovate UK, TRACE draws together experts from Airbus Commercial Aircraft, Airbus Defence and Space and Imperial College London, and comprises four main work packages that span from data analysis to fuel specification to technology development. One key work package, led by Imperial College, seeks to deliver improved representation of the impact of air traffic on contrail formation using open-source academic publications and models on contrail microphysics, wake vortex and overlapping trails. Better, smarter models and understanding of contrail formation and behaviour will help to inform aircraft avoidance and mitigation strategies and technology. Some of the more product-orientated work within TRACE is led by Airbus Defence and Space and will support the development of on-aircraft humidity sensors to enable in-flight detection of ice-saturated regions of the atmosphere where persistent contrails are most likely to occur. This capability has a dual-use potential of helping aircraft avoid both the creation of a warming contrail and a flight path which could be detected by unfriendly forces. Non-CO2 emissions is a problem that cannot be solved by one player alone. It requires an unprecedented level of industry collaboration and adoption of solutions. Airbus is proud to leverage the best of the UK to reduce uncertainty around the climate impact of non-CO2 emissions for the benefit of Airbus and the entire industry.

## INCREASING SUPPLY CHAIN RESILIENCE ON CRITICAL MINERALS

### CASE STUDY: BABCOCK HYDROGEN DERIVED FROM WASTEWATER AT HMNB DEVONPORT

Babcock International Group (Babcock) collaborated with partners to trial a pioneering clean energy solution. The team developed a small-scale hydrogen production plant that converts polluted water, such as rooftop rainwater and river water, into carbon-free hydrogen fuel.

At the heart of the project was an on-site demonstrator system at Babcock's Devonport facility designed to produce, store, and use green hydrogen to supply green power. Using the HydroStar System, wastewater was transformed into 98% pure hydrogen through a hydrolysis process. The aim was to assess the feasibility and cost-effectiveness of scaling up this method to create a drop-in hydrogen alternative to HVO diesel.

The trial demonstrated that hydrogen could help reduce Scope 3 emissions across Babcock's Devonport facility and shoreside power applications, while also supporting clean shipping fuel and improving water efficiency across operations. It provided valuable insights into the costs of on-site hydrogen production and enabled comparisons with commercial pricing for locally manufactured, zero-emission energy.

The University of Plymouth validated the environmental, economic, and social impacts through life cycle assessments and economic analysis. Key findings included reduced reliance on white diesel, lower nitrogen oxide emissions, and opportunities to enhance biodiversity, prevent river pollution, improving air quality, protecting resources, the environment and energy security.

This innovation highlights the potential of a maritime circular economy where wastewater becomes a valuable resource to power dockside infrastructure and vessels. The project not only proves the viability of zero-carbon hydrogen fuel production but also lays the groundwork for its future use in Babcock's dockyard operations. Babcock won the Net Zero Resource Efficiency category at this year's Ministry of Defence (MOD) Sanctuary Awards with this project.

# ESG CASE STUDIES IN ACTION: ENVIRONMENT

## CASE STUDY: LEONARDO UK SHOWCASING WASTE REDUCTION STRATEGIES

Cleantech start-up Uplift360 and leading aerospace company Leonardo, have successfully transformed an end-of-life helicopter rotor blade into a prototype drone arm, marking a significant advance in critical materials recovery for aerospace and defence. Using its proprietary low-temperature chemical recycling process, ChemR, Uplift360 extracted high-quality, reusable carbon fibre from a rotor blade taken from a EH101, the forerunner of the AW101. Once destined for incineration or landfill, the reclaimed fibres were repurposed into a structural component, proving the performance and potential of chemically recycled aerospace-grade composites.

The project began under an R&D contract with Leonardo in May 2025 and focused on testing ChemR's ability to process complex composite waste. Uplift360 exceeded the brief — not only recovering the material but also validating its use in manufacturing, showing how end-of-life components can re-enter the value chain. This collaboration directly supports the UK's Strategic Defence Review focus on strengthening supply chain resilience. Carbon fibre is critical to aerospace and military systems, yet the UK lacks sufficient recovery infrastructure. ChemR helps close that gap turning waste into a secure, domestic resource.

## CASE STUDY: LEVEL PEAKS CLOSING THE LOOP ON CRITICAL MINERALS

Securing the supply chain for modern tactical equipment demands a responsible approach to the entire product lifecycle. Level Peaks Associates is addressing this challenge through its 'Through Life Management' scheme, which supports the objectives of the UK Government's Critical Minerals Strategy to create a circular economy and lower the impact of external shocks by increasing recovery and reuse rates for critical minerals. The advanced systems Level Peaks supplies, from UAVs to thermal sights and soldier-worn power, are reliant on essential minerals like Lithium for high-density batteries, Germanium for thermal lenses, and rare earth elements for the permanent magnets in drone motors. By actively managing the return of used goods, Level Peaks ensures that these complex assets to national resilience are not simply discarded. Instead, they are assessed for repurposing or specialist recycling, allowing valuable high-grade materials to be recovered rather than lost to landfill. It acts as a practical demonstration of how SMEs can drive sustainability, ensuring that the defence equipment of today helps secure the resources needed for tomorrow.

## CASE STUDY: SBR REDUCING MANUFACTURING WASTE

Southbourne Rubber (SBR) is tackling the industry-wide challenge of manufacturing waste by shifting the focus to adopting a preventative approach where material efficiency is maximised from the get-go. It starts right on the production line, where SBR has tightened up moulding parameters and invested in sharper tooling. By refining these processes and bringing in automation, the SME has not only been able to drastically reduce the scrap and defective product output that would otherwise end up on landfills but also minimise the generation of hazardous waste from cured elastomer compounds.

Where hazardous waste is unavoidable, SBR applies strict handling procedures and dedicated and monitored waste streams to ensure safety and full traceability through licensed contractors. For non-hazardous materials, SBR has expanded resource recovery initiatives by separating recyclables at the source and introducing reusable packing. Performance is continuously monitored through data-driven measurement, enabling the company to track waste trends, assess the effectiveness of initiatives and identify new opportunities for improvement.

Together, these actions demonstrate how SBR's practical and disciplined approach supports the goals of the UK Defence ESG Charter to contribute to a more sustainable, efficient and resilient defence manufacturing sector.

# ESG CASE STUDIES IN ACTION: SOCIAL

## IMPROVING DIVERSITY, EQUALITY AND INCLUSION AT ALL LEVELS

### CASE STUDY: QINETIQ UNLOCKING TALENT IN THE MILITARY FAMILY

Getting back on the career ladder when partners serve in the military is notoriously challenging. Frequent moves and solo parenting often mean CV gaps that traditional employers might shy away from. QinetiQ has been tackling this head-on by partnering with Recruit for Spouses to run paid, three-month placements specifically for this community. It is designed as a genuine bridge back into the professional world, giving talented individuals the space to rebuild confidence and update their skills without the fear of being sidelined.

The real gamechanger here is the baked-in flexibility. Participants complete 21 hours of paid work a week and have the ability to customise their working schedules to fit around other life responsibilities, with the option to take school holidays off entirely. Moreover, with a dedicated QinetiQ Buddy and a specialist coach at hand, spouses and partners get valuable networking opportunities and guidance on interviews, turning a short-term placement into a launchpad for a long-term career.

“My placement with QinetiQ—made possible through the brilliant support of RfS—has opened so many doors for me. I feel incredibly lucky to be part of two such inspiring organisations. Both teams have been unbelievably welcoming and encouraging, and their support has genuinely helped me grow and reach my potential as a military spouse. I’m truly grateful for this experience and the incredible people behind it.”

Sarah Bamber, Military Spouse

### CASE STUDY: RINA TECH UK SUPPORTING RESERVISTS WITHIN THE WORKFORCE

In 2024, following the reconciliation of RINA Consulting Defence Ltd with RINA Tech UK Ltd, the new joint single entity successfully retained its MOD Employer Recognition Scheme Gold Award status. Working together closely with the MoD Regional Defence Relationship Management team in South West England, RINA Tech UK has been a proud supporter of the Armed Forces Covenant.

As part of RINA's engagement strategy to ensure a strong relationship with reservists, veterans, and their families, the engineering consultancy has actively supported both sponsorship and charity activities in 2024. RINA, as gold sponsors, supported the Educational and Training Services Branch of the Army as they undertook the World's Toughest Row event in 2024, successfully finishing in Antigua in January 2025. We also remain long-term supporters of charities such as SSAFA and the White Ensign Association.



# ESG CASE STUDIES IN ACTION: SOCIAL

## HELPING ADDRESS THE STEM SKILLS SHORTAGE IN THE UK

### CASE STUDY: WHITETREE STRUCTURED COMMUNITY CAPABILITY SUPPORT

As an SME operating within the UK aerospace and defence sector, Whitetree is committed to delivering responsible and measurable ESG impact. Recognising that many Voluntary, Community and Social Enterprises (VCSEs) face barriers when accessing funding, particularly in bid development, outcome articulation and governance structuring, Whitetree operates a structured, application-based support initiative.

Each year, a limited number of organisations are selected through a defined and transparent application process, with priority given to initiatives demonstrating clear community benefit and development potential. Selected organisations receive focused advisory sessions designed to strengthen funding and grant applications, improve impact measurement and performance articulation, enhance governance and programme structuring capability, and build internal confidence and repeatable skills. The support is targeted and time-bound, ensuring meaningful capability uplift rather than dependency. By focusing on knowledge transfer and practical tools, participating organisations are better equipped to secure future funding and sustain their operations independently. Through this structured model, Whitetree contributes to greater organisational resilience within the third sector, stronger local delivery capability, improved access to funding for community-led initiatives and long-term skills development aligned with broader STEM and employability objectives. This approach reflects Whitetree's belief that effective ESG delivery combines measurable social value with commercial sustainability and governance discipline.

### CASE STUDY: THALES BUILDING JOB-READY ENGINEERING SKILLS THROUGH AN ACADEMY MODEL

The UK defence and security sector has a need for more people with specialised engineering skills to ensure the longevity of its supply chain. Employers are facing difficulties in the recruitment of specialised skillsets which can result in a skills gap across the industry. This is why there is a need now more than ever to convert local talent into a workplace ready capability, at pace. To tackle this challenge, Thales in the UK are paving the way with their Academy model which operates across the UK and globally, but the core of this activity all started in Belfast in 2023.

In Northern Ireland, the Academy links academic learning with on-the-job training. This helps to support recruitment and retention into high value roles including engineering. Since 2023, the Academy in Belfast has recruited 120 Future Talent roles consisting of graduates, apprentices and interns. The Academy works with both South Eastern Regional College (SERC) and University of Ulster (UU) to offer a range of professional qualifications from Level 2 to Level 7 apprenticeships with the aim to develop, upskill and grow the talent pipeline across the business, not just during the years of an Early Career cycle.

The Academy in Belfast has an extremely high retention and success rate with all 21 of the first cohort of Future Talent degree apprentices sitting on a 1st class honours through UU. With 51 members of senior staff currently working with the Academy and a 20% increase of female external hires, it's clear that this model is working to help bridge the skills gap and create a more diverse and inclusive workplace. This model is part of Thales Group's learning culture and global skills development programme and includes other academies across the UK in Glasgow and England to provide upskilling in sonar, electronic warfare and electro-optics, providing professional growth and maintaining Thales employees' expertise at the highest level.



# ESG CASE STUDIES IN ACTION: SOCIAL

## STRENGTHENING AND BUILDING MEANINGFUL PARTNERSHIPS

### CASE STUDY: SAAB UK SAAB INNOVATION NETWORK

With the Saab Innovation Network, anchored at Imperial College London's White City Campus, Saab UK has taken a different approach to attracting the UK's human capital pipeline. At the heart of this initiative is the 'Triple Helix' model, a symbiotic arrangement of academic, industry and government.

Each of the up to 10 PhD candidates funded by the network so far have been given the opportunity to link up their innovative research areas in emerging technologies with Saab's own research capabilities. For instance, Saab has installed the UK's first Digital Control Tower at Cranfield University, which provides an excellent setting for research into radar technology. Overall, the network is a win-win situation with Saab benefitting from the UK's vast STEM network to grow its product portfolio through new UK IP, while supporting finance and expertise to local talent.



### CASE STUDY: BAE SYSTEMS LOCAL IMPACT BAE SYSTEMS IN BARROW

Barrow-in-Furness is home to BAE Systems' submarine operations. One in three people of working age in the town works for BAE Systems or a business in its supply chain. This number is set to increase as requirements for new and more advanced submarines double the capacity of the current facilities.

To support the delivery of the submarines and the transformation of the town and the surrounding area, in 2024 the Team Barrow partnership was formed. This collaboration between the UK Government, BAE Systems, and Westmorland and Furness Council will help oversee the delivery of £200m through the Barrow Transformation Fund. The Fund will focus on investments in new housing, renewal of the town centre and education projects.

The submarine programmes at Barrow have already led to investments in engineering and manufacturing skills, education outreach focusing on science, technology, engineering and maths (STEM) and community outreach and recruitment services. This work aims to upskill the local workforce and equip young people to work at BAE Systems or at a supplier.

In 2018 the Company invested £25m opening the Submarine Academy for Skills and Knowledge (SASK). The facility supports the professional development of around 2,500 people a month and acts as a hub for lifelong learning, including apprentice and graduate schemes.

A new community space, The Bridge, at the town centre's Portland Walk Campus is providing education outreach as well as information about local employment and training with BAE Systems, the Submarine Delivery Agency and other employers.

Work on the Portland Walk Campus is taking place alongside the creation of the Barrow Learning Quarter which includes the University of Cumbria's new university campus with upgraded and expanded facilities at Furness College's Sixth Form. The Company is also sponsoring bespoke scholarships in Mechanical Engineering and Computer Science, working in partnership with the university.

# ESG CASE STUDIES IN ACTION: GOVERNANCE

## STRENGTHENING AND BUILDING MEANINGFUL PARTNERSHIPS

### **CASE STUDY: RED SCIENTIFIC REPLY PROVIDING UP-TO-DATE TRAINING TO EMPLOYEES ON EXPORTS CONTROLS**

Governance in the defence sector is often synonymous with scrutiny, yet for RED Scientific Reply, the mandate was clear. The expert defence engineering consultancy embarked on a journey to continually improve its export controls and staff training. This training ensured all personnel in the SME understood export regulations, protecting sensitive technologies and national interests while maintaining compliance with government and Export Control Joint Unit (ECJU) licensing requirements. Implementing this vision was an efficient process, delivered through a structured, multi-faceted programme that blended online learning with face-to-face workshops and rigorous, step-by-step technical run-throughs tailored to exports.

The shift has been palpable. Staff members quickly developed an even stronger sense of awareness of controlled items, end-use verification, and international trade restrictions. In return, compliance audits improved, and the threat of potential breaches could be significantly reduced. With a strengthened reputation for reliability and compliance, the eligibility for government and defence contracts became a less time-consuming task. In an era where reputation is as critical as capability, RED Scientific Reply has demonstrated that investing in the “G” of ESG is a vital route to securing long-term government partnerships and sustaining responsible business practices.



# UK DEFENCE ESG CHARTER COMMUNITY

The latest UK Defence ESG Charter Community Event kindly hosted by Leonardo UK on 16 Dec 2025 brought together Charter signatories, senior industry leaders and policymakers to reflect on industry progress to date and to explore how ESG can support delivery of the Defence Industrial Strategy. The session featured keynote speeches, a fireside chat with Leonardo UK Chair and CEO and ADS VP for Defence Clive Higgins, signatory sustainability showcases and dedicated networking to strengthen collaboration across the Charter community.

## A VIEW FROM THE TOP...

*“In a time of increased uncertainty and growing awareness of the need to bolster defence, it is easy to ignore the excellent opportunities that thinking along ESG lines offers. From recycling to diversified supply chains to new materials, looking through an ESG lens, as this conference does, adds great value and potential for new markets and dual use technologies – defence, sustainability and even resilience.”*

Lt Gen Richard Nugee CB CVO CBE (Non-Executive Director for Climate and Sustainability, MOD)

*“The ESG Charter Community continues to show the value of collaboration in turning ambition into action. I had the pleasure of discussing how we can drive sustainable growth in the context of the Defence Industrial Strategy with Leonardo UK Chair and CEO and ADS VP for Defence, Clive Higgins. This community is valuable in bringing together voices from across the sector to share practical insight, build momentum, and demonstrate how collective leadership can drive meaningful progress on ESG priorities.”*

Samira Braund (Defence Director, ADS Group)

*“Peer-to-peer learning and community support is an incredibly important part of working life. The opportunity to share best practice, to work through challenges and to gain valuable insights from others is one of the benefits that our members value most. The ESG Charter Community demonstrates the power of industry convening with a shared sense of responsibility. Events like this are vital for turning ambition on ESG into collective action, learning and real-world impact.”*

Sarah Mukherjee MBE (CEO, Institute of Sustainability and Environmental Professionals)



# UK DEFENCE ESG CHARTER COMMUNITY

## **CLIVE HIGGINS, LEONARDO UK CHAIR AND CEO AND ADS VP FOR DEFENCE SHARED HIS THOUGHTS ONLINE...**

It was a pleasure to speak to Samira Braund MBA earlier this week during the ADS Group Ltd workshop focused on the UK Defence ESG Charter, in which I had a chance to address the topic of driving sustainable growth, within the context of the Defence Industrial Strategy (DIS).

As Primes, we have a collective responsibility, working in collaboration with Defence Equipment & Support (DE&S), to cascade information and best practices to and through our supply chains, ensuring they are resilient and can address strategic concerns such as skills, cash and growth. By having the right mechanisms in place, it will allow us to respond to the demands of tomorrow as well as those of today.

Regional growth deals are invaluable to supply chain growth and development. With the Government having to balance various economic pulls and burdens, we need to start being a little more targeted – in terms of capabilities and inward investment. Let's think strategically about how we spend the UK Pound, and what we do in the regions to support growth and the skills pipeline.

I was encouraged by the Chancellor's recent announcement about the change of approach to energy pricing, and it was good to see energy security and resilience as a theme in the DIS, a message reinforced by Air Chief Marshal Sir Richard Knighton this week. At Leonardo, our helicopter business in Yeovil is a big consumer of electricity. We are building a local solar farm which will secure energy usage for a significant amount of time going forward, provide increased resilience and reduce our draw from the grid. We're looking at doing this at other UK sites too and discussing with our supply chain companies about how some of them could benefit from such initiatives.

Major programmes like the Global Combat Air Programme (GCAP) provide an incredible opportunity to build upon the technology and innovation being developed. By bringing them back into our products and services, they can be exploited hugely across the civil sector and into the sustainability environment. There is industrial base that sits behind GCAP, and we have an opportunity to develop best practices in many areas, including the circular economy and reducing energy and carbon emissions.

Finally, looking at social value, there must be more robust governance structures. The defence sector is going through a significant amount of change currently and this will continue for some time. Therefore, I hope the Government grasps the opportunity to adopt a holistic and consistent approach to social value expectations and targets.

Projects such as these are examples of how companies like Leonardo can deliver back into our local communities and to the UK as a whole. To further expand the benefits of social value, I would encourage the introduction of more robust governance structures through which the defence sector can support the future prosperity of our country. Our sector is going through a significant amount of change currently and this will continue for some time. Working in partnership with the Government, our supply chain and communities, I hope we can grasp the opportunity to add value from early career pathways and SME partnerships to measurable commitments that create lasting impact. We're committed to making social value meaningful, accountable and aligned with the real needs of defence and society.





## ADS GROUP: FARNBOROUGH INTERNATIONAL AIRSHOW'S CARBON FOOTPRINT

Tracking carbon reporting is a vital element of Farnborough International's Destination Zero focus. With most of the Farnborough International Airshow's carbon footprint coming from travel and accommodation, which accounts for 85% of total emissions, understanding and measuring these emissions helps the organisation identify where the biggest environmental impacts occur and where action can be most effective.

Transport is a major climate challenge nationally, with domestic transport responsible for around 30% of UK territorial greenhouse gas emissions in 2024, largely due to petrol and diesel road vehicles. By tracking visitor travel emissions, Farnborough International can better align with wider UK climate goals and develop strategies to reduce its impact.

Initiatives such as the implementation of the Green Circle Solutions Visitor Travel Calculator, which is being used across Farnborough International events portfolio and ADS Group to report on staff travel, provide valuable data on how visitors travel to the event.

This data enables Farnborough International to make informed decisions and embed sustainability into event operations, treating it as a core element of long-term success rather than an add-on.

For further information, please visit: [www.farnborough.com/sustainability-destination-zero/](http://www.farnborough.com/sustainability-destination-zero/)

*“Long-term event success comes from treating sustainability as operational excellence, not a bolt-on. Visitor travel is one of the biggest contributors to our carbon footprint, which is why we launched the Green Circle Solutions Visitor Travel Calculator for Farnborough International Airshow 2024. Achieving a remarkable 60% response rate, it's giving us the insight we need to support meaningful action at scale.”*

Sarah Lindsay, Assistant Director of Sustainability and Customer Experience,  
Farnborough International Limited

# ADS GROUP: HOW WE CAN HELP

## SUPPORTING CONTINUOUS ESG IMPROVEMENT ACROSS THE DEFENCE SECTOR

The UK Defence ESG Charter forms part of a wider portfolio of ADS initiatives designed to support defence organisations in strengthening their environmental, social and governance (ESG) performance. Alongside the Charter, ADS provides a range of sector-led frameworks, networks and practical guidance to support members at different stages of their ESG journey, helping organisations move beyond compliance towards more strategic and impactful ESG delivery.



## SUPPLY CHAIN SOLUTIONS (SCS) FRAMEWORK

ADS also supports ESG capability building through workshops, webinars and specialist working groups that enable peer learning and knowledge sharing across the sector. In addition, the Supply Chain Solutions (SCS) Framework includes a dedicated ESG Pillar designed to help organisations understand and respond to current and emerging ESG requirements commonly reflected in voluntary reporting.

This support includes ADS' Greenhouse Gas (GHG) emissions guidance, developed specifically for the aerospace and defence sectors. The guidance sets out a practical framework for greenhouse gas emissions reporting in line with the Greenhouse Gas Protocol, supported by an illustrative example that shows how the approach can be applied within existing organisational reporting arrangements.

SMEs engaging with the ESG Pillar and completing the ADS ESG Assessment receive tailored support to navigate the complexities of sustainability reporting and compliance. The free self-assessment generates a bespoke report with actionable recommendations to help improve ESG practices and identify next steps. Organisations are encouraged to complete the assessment as a starting point.

For further information visit [www.scsframework.org.uk/esg](http://www.scsframework.org.uk/esg) or contact [scs@adsgroup.org.uk](mailto:scs@adsgroup.org.uk).



# APPENDIX

## DEFINITIONS

**Greenhouse gases (GHG)** are gases that absorb radiation from the sun, causing global warming. This includes carbon dioxide, methane, nitrous oxide, chlorofluorocarbon-12, hydrofluorocarbon-23, sulphur hexafluoride and nitrogen trifluoride.

**Scope 1 (Direct emissions):** Activities owned or controlled by an organisation that release emissions into the atmosphere. Examples include emissions from combustion in owned or controlled boilers, furnaces, vehicles, and emissions from chemical production process equipment.

**Scope 2 (Indirect energy emissions):** Consumption of purchased electricity, heat, steam, and cooling. These occur at sources not under the organisation's control or ownership but are the consequence of their activities.

**Renewable energy** includes energy derived from sources like solar energy, on-shore and off-shore wind power, hydroelectric power, geothermal energy, tidal power and biofuels.

**Full Time Equivalents (FTE)** is an employment measure that takes into account the total hours worked by both full-time and part-time employees, standardised by a common measure of full-time hours.

**Senior leaders** are defined as Directors, Vice Presidents, or C-suite executives.

**STEM** roles and hours refer to Science, Technology, Engineering and Mathematics.

## METHODOLOGIES

Data in this report covers 2022, 2023, and 2024, and was requested from Charter signatories from Q3 2025 onwards, before being aggregated in Q1 2026. Both averages and absolute values are used, with individual data points reflecting this where applicable. Ratio values are calculated using weighted averages, weighted by defence-generated turnover for economic data and total defence FTEs for employment data. Companies with missing values were excluded from the weighting to avoid downward bias. The number of Charter signatories contributing data varies by figure.

Given the low sample size of Charter signatories and our commitment to anonymity, this report will not feature a summary of key performance indicators for individual companies.

**UK Total turnover:** the total of the values of sales of goods produced, purchased and resold without further processing, work done and industrial services rendered, and non-industrial services rendered for the survey year in question. This is before trade discounts, VAT and other taxes. It excludes repatriation of profits from overseas.

**UK Defence turnover:** the amount of UK total turnover derived from UK defence related activities for the survey year in question.

**Greenhouse Gas (GHG) Emissions:** Scope 1&2 GHG emissions is requested in thousands of tonnes (kt CO<sub>2</sub>e).

**Gender Pay Gap Reporting:** Consistent with UK Government reporting requirements. Assumes that pay for men equals 100%.

**Employment:** Full Time Equivalents (FTEs) approach is taken. FTEs are based on a 37-hour working week: (number of full-time employees x average full-time weekly hours) + (number of part-time employees x average part-time weekly hours). Defence FTEs per company will be calculated by multiplying the employment figure by the % turnover allocated to defence activities.

**Image credit:** From member companies, UK MOD © Crown copyright or Shutterstock images

# APPENDIX: CONTINUED

## SOURCES

Data points and key findings in this report are sourced from UK Defence ESG Charter signatories

### Resources for data points and case studies include:

Airbus | Non-CO2 emissions

ATI Programme funds first batch of projects to address non-CO2 aircraft emissions | Aerospace Technology Institute

BAE Systems – Our Social and Economic Impact in Barrow-in-Furness

Babcock wins Net Zero Resource Efficiency category at MOD Sanctuary Awards - Babcock International Group

Defence Industrial Strategy 2025: Making Defence an Engine for Growth - GOV.UK

Hybrid Air Vehicles - Airlander 10

Leonardo UK - From Helicopter to Drone, Uplift360 Partnership Turns Waste into Flight

Level Peaks - Carbon Reduction Plan

MBDA - UK Defence Minister visits MBDA for DRAGONFIRE laser weapon contract announcement

Our position on sustainability regulations and UK defence | FCA

QinetiQ Annual Report and Accounts 2025

RBSL holds groundbreaking event for new Challenger 3 turret test rig

RED Scientific

RINA - Sustainability at RINA

Saab - Saab Innovation Network | UK

Safran - Renewable energy: how is Safran taking action?

SBR | Precision Elastomeric Sealing Solutions

Sustainability - ADS Group

Thales Group | STEM Outreach and Volunteering in the UK

The Strategic Defence Review 2025 - Making Britain Safer: secure at home, strong abroad - GOV.UK

Whitetree - Social Value: VCSE Service Donations

<sup>1</sup> This was calculated as a turnover-weighted mean (Defence Generated Turnover).

Companies with missing values were excluded to prevent downward bias (Complete Case Analysis).

# SIGNATORY LIST

**AIRBUS**

 **Babcock**

**BAE SYSTEMS**

**HYBRID Air Vehicles**

 **LEONARDO**

**LEVEL PEAKS** | 

**MBDA**  
MISSILE SYSTEMS

**QINETIQ**

 **RED SCIENTIFIC**

 **RHEINMETALL**

**RI&A**

 **SAAB**

 **SAFRAN**

**SBR**  
Southbourne Rubber

**THALES**

 **WHITETREE**  
TRUST | INTEGRITY | INNOVATION | EXCELLENCE

## REPORTING FROM 2026 ONWARDS

 **RELIANCE PRECISION**

 **mind FOUNDRY**




## ABOUT ADS


ADS is the trade association for the UK's aerospace, defence, security, and space industries, representing more than 1,800 members. We work with those industries to secure the UK's advantage, enhance our international positioning as a go-to destination for innovation, and deliver on our sustainable leadership goals.

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