



UK SPACE OUTLOOK 2023

A guide to the
UK space sector



In partnership with



UK SPACE SECTOR

The UK space sector is a world leader in a rapidly expanding global space economy with opportunity to be at the forefront of unlocking new capabilities and skills.



£ **5.9** BN
EXPORTS



£ **7** BN
VALUE ADDED

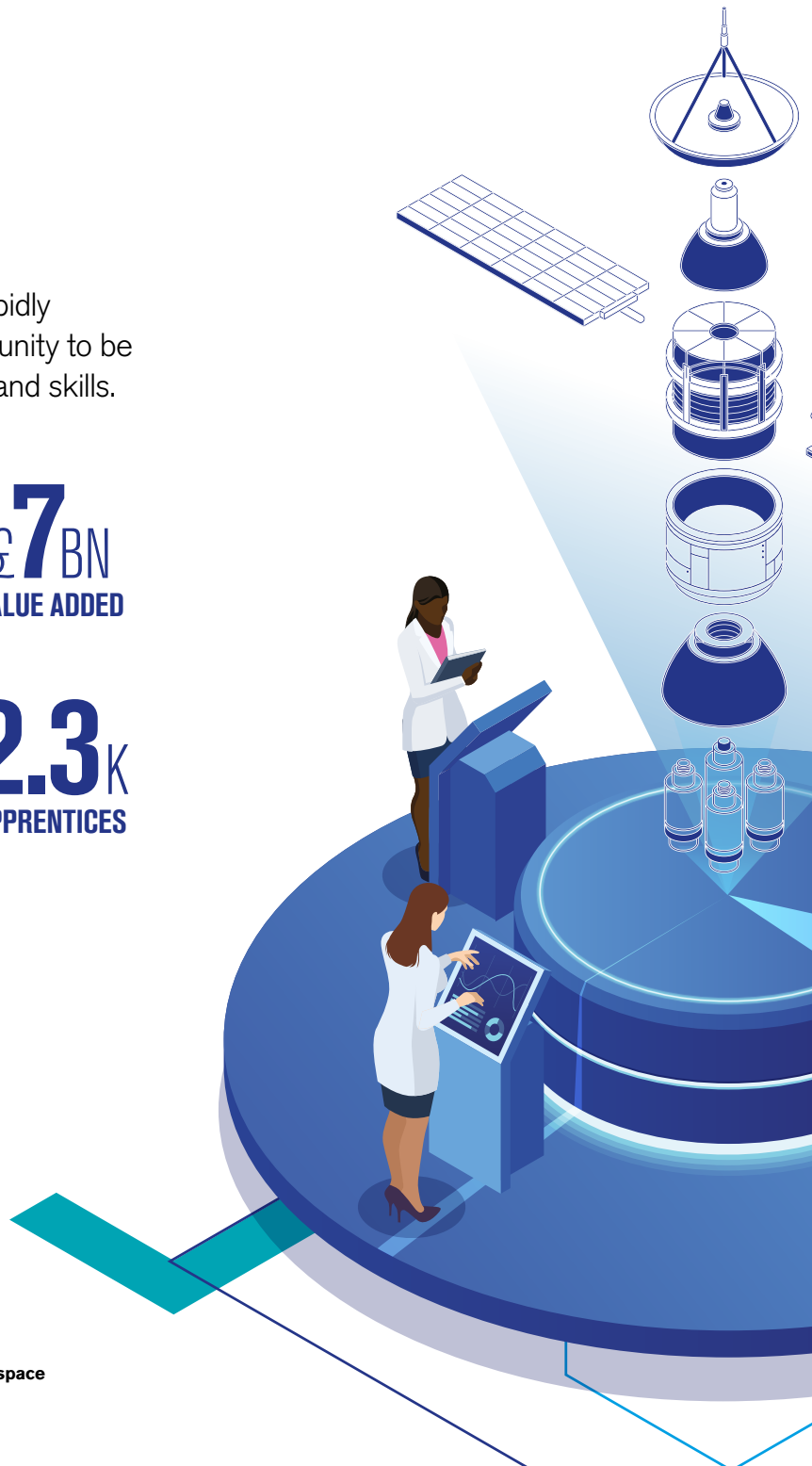


48.8 K
DIRECT
EMPLOYEES



2.3 K
APPRENTICES

£ **17.5** BN
TURNOVER



BUSINESS OPPORTUNITIES

SPACE CAPABILITY SYNERGIES

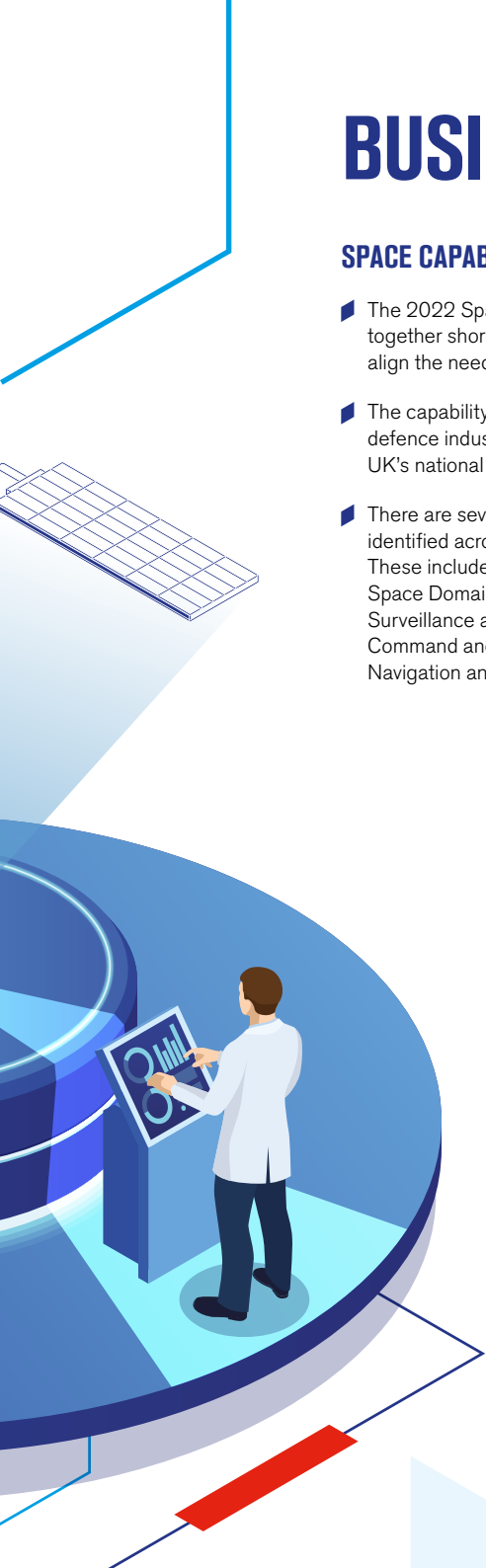
- The 2022 Space Capability Management Plan brings together short-term and longer-term programmes that align the needs of stakeholders and deliver for industry.
- The capability synergies across the space domain and defence industry will play a critical role in meeting the UK's national security needs.
- There are seven critical capabilities that have been identified across the space and defence domains. These include Satellite Communications (SATCOM), Space Domain Awareness (SDA), Intelligence, Surveillance and Reconnaissance (ISR), Space Command and Control (C2), Space Control, Position, Navigation and Timing (PNT) and Launch.

CIVIL CAPABILITY GOALS

- The Department for Science, Innovation & Technology (DSIT) is leading cross-government work to translate the National Space Strategy (NSS) into civil capability goals.
- The Space Partnership is supporting and is now bringing together experts from industry, academia and government to develop roadmaps across areas including Earth Applications, Space Domain Awareness, and In-Orbit Services and Manufacturing.
- These roadmaps will seek to identify the major developments required in skills, technology, and infrastructure, as well as the potential commercial opportunities and anticipated delivery organisations.

FUTURE LAUNCH CAPABILITY

- UK launch is a core priority for industry, and whilst the Virgin Orbit (VO) launch from Cornwall was unsuccessful, it demonstrated the UK's capability and infrastructure to host future launches and will provide sovereign capability for sending technology into space.
- Spaceport Sutherland and SaxaVord spaceport on Unst are both under construction, laying the groundwork for end-to-end UK services building, launching, and operating small satellites and stimulating new opportunities in UK-built launch vehicles and the wider supply chain.
- For UK launch to flourish further, government, industry and regulators must work constructively to implement a modern regulatory framework and create a favourable launch operating environment.



POLICY LANDSCAPE

NATIONAL SPACE STRATEGY

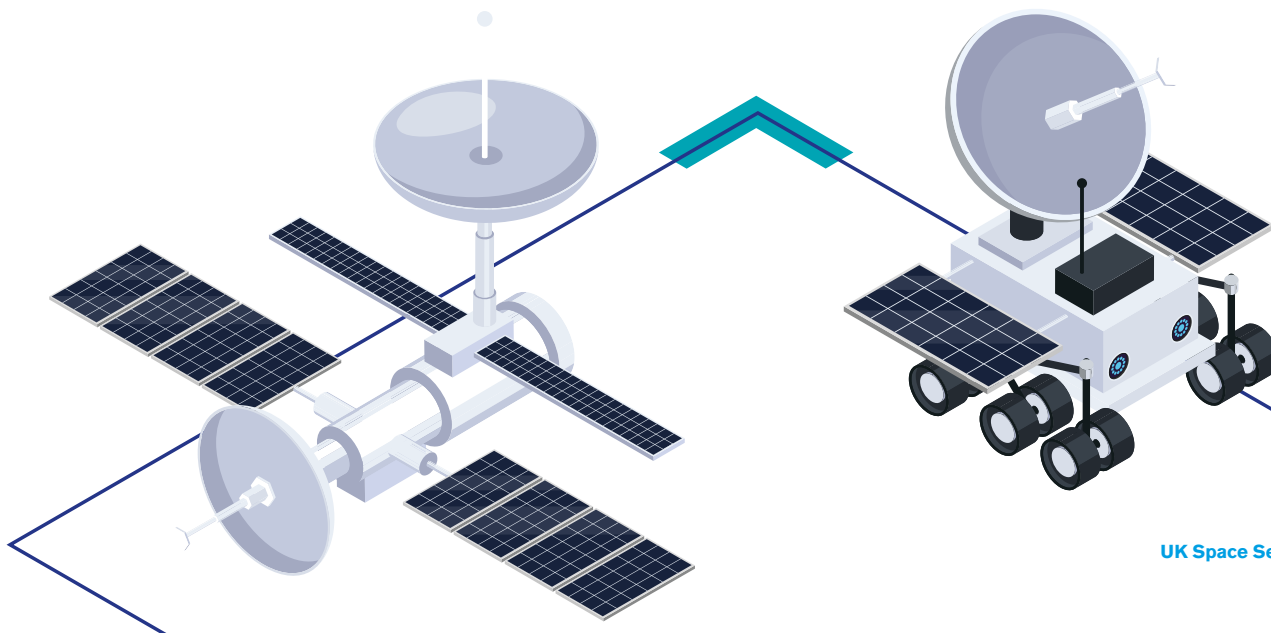
- Space continues to present significant opportunities for UK industry and society. The ten-point plan within the National Space Strategy (NSS) showcased key interventions that the UK Government will make.
- Industry welcomes the Government's plans to publish an NSS update in 2023. The newly formed DSIT, now responsible for civil space, will give a renewed focus on how the sector can leverage its cutting-edge capabilities and participate in international R&D programmes.
- Government's ongoing considerations and future space capability requirements must include the need for effective procurement that delivers resilient technologies and services that enables industry to capture more of the growing global market.

DEFENCE SPACE STRATEGY

- The Defence Space Strategy (DSS) sets out a vision for how the UK space domain will enable advanced future defence capability.
- Underpinned by a strong space research and development programme, the dual-use nature of space technology means that support to the defence programme also supports the commercial and civilian sectors.
- The Integrated Review Refresh 2023 supports the DSS, committing to make the UK an impactful actor in space, strengthen our capabilities, support the growth of a sovereign UK space industry, and develop new governance for sustainable space activities.

SUSTAINABILITY AND CLIMATE CHANGE

- The Space Sustainability Standard and the Earth and Space Sustainability Initiative are key, alongside continuing collaboration with international partners and allies including ESA and the UN.
- The UK Space Agency will sponsor the fifth Summit for Space Sustainability in June 2023, designed to highlight opportunities and challenges for developing space sustainability solutions.
- Over half of forty essential climate variables can only be measured from space, highlighting the space sector's vital role in combatting climate change, responding to natural disasters, and ensuring sustainability and resilience.



AN ACTIVE SPACE SECTOR

SPACE PARTNERSHIP

- ◆ The Space Partnership brings together industry, academia, and government stakeholders to realise the shared ambitions set out in the NSS and grow the UK space sector.
- ◆ The Space Partnership will draw on expert knowledge and insight from across the sector and work to support activities, including the evolution and delivery of UK space policy.
- ◆ The Space Partnership is working with numerous bodies to develop a Space Workforce Action Plan, responding to the NSS's emphasis on the importance of a skilled workforce for sector growth and business success.

UK SPACE AGENCY

- ◆ The UK Space Agency (UKSA) continues to play a major role in delivering the NSS by championing the UK's space sector, catalysing investment in projects that generate contracts for UK businesses, and delivering missions and capabilities.
- ◆ The UKSA has launched a £20 million fund to support international partnerships that will harness the UK's national strengths, support new space capabilities, and catalyse investment.
- ◆ Up to £2 million is initially available from the International Bilateral Fund (IBF) to help strengthen the space sector's partnerships with other space nations, with further funding to be made available over the next two years.

SPACE CLUSTERS

- ◆ Following an initial £600k funding for 10 space clusters across the UK in 2022, the UKSA is funding a further 18 projects with an additional £6.5 million to boost the space sector.
- ◆ The UK Space Agency's £50m Space Clusters Infrastructure Fund (SCIF) is designed to stimulate private investment in UK space infrastructure in order to help increase the attractiveness of the UK as a destination for R&D investment.
- ◆ SCIF, launched in June 2023, has been designed to work with industry to make place-based infrastructure investments, creating new opportunities and jobs within the space sector.



SPACE SECTOR REGIONAL EMPLOYMENT

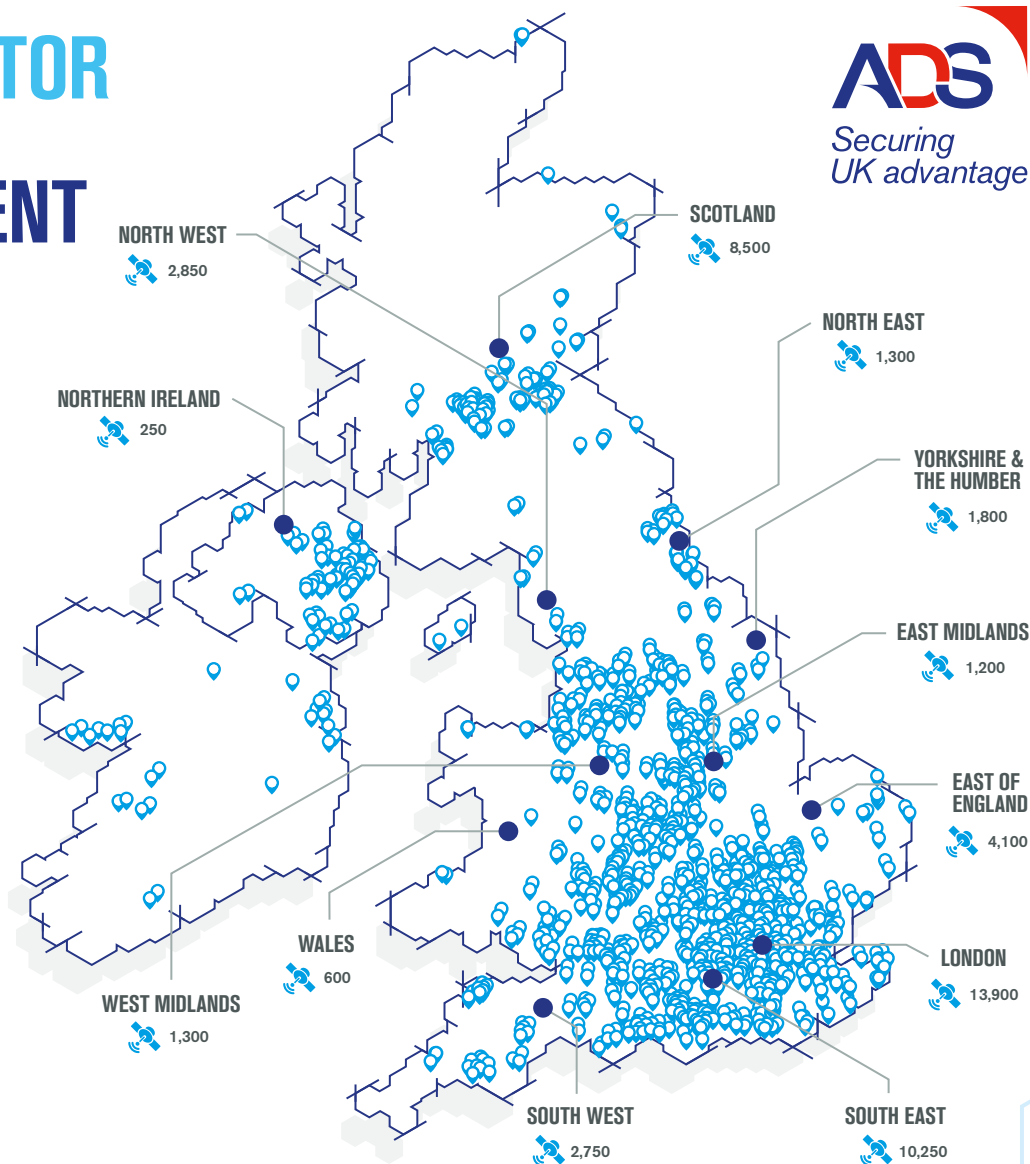
The space sector employs people in all regions and nations of the UK.

NUMBER OF
DIRECT JOBS
ACROSS
INDUSTRY IN:



SPACE

INDICATES THE LOCATION OF
AN ADS MEMBER WHICH IS
ACTIVE IN THE AEROSPACE,
DEFENCE, SECURITY OR
SPACE SECTOR



ADS
Securing
UK advantage

**ADS: Promoting
the space sector
jointly with
UKspace**

UKspace is the trade association of the UK space industry and has been its leading voice for over 30 years. It promotes the interests of industry with the UK government, parliament, and national and international stakeholders.

For more information, visit www.ukspace.org

ADS is the UK trade association advancing leadership in aerospace, defence, security and space, to enable prosperity and clean, secure growth for our nation.

For more information, visit ADS Group - Aerospace, Defence, Security & Space

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