



Defence Space - through adversity to the stars?

Tuesday 10 September 2024



House of Commons
Defence Committee

Defence Space: through adversity to the stars?

Third Report of Session 2022–23

Report, together with formal minutes relating to the report

Ordered by the House of Commons to be printed 11 October 2022

Cdre Dave Moody CBE Head of Space Capability UK Space Command

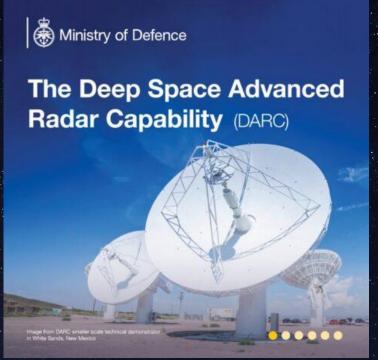
HC 182 Published on 19 October 2022 by authority of the House of Commons



Handrail

- Working together the opportunities and threats.
- Integrated Space Architectures,
 MOD working with wider
 Government, Industry.....Allies & Academia
- How do you network commercial space for use by the Government.





Commander UK Space Command's Focus

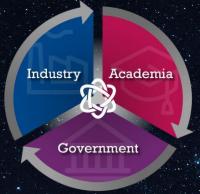
Commander UK Space Command Major General Paul Tedman identified five areas of focus in his 'The Battle Above' paper:

- 'Ensuring that the <u>public and policy makers are aware</u> of our dependence on space and threat to our way of life, and way of war'
- 'Normalise the space domain'
- 'Recognise that Space is an inherently Joint domain'
- 'International cooperation plays a pivotal role'
- 'Take more risk to reform procurement processes and cooperate with commercial providers to fuel innovation and develop a hybrid military and commercial architecture'

Opportunities and Threats: Working Together

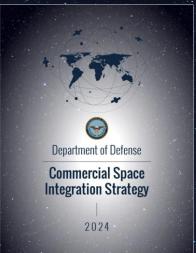
- How do we work together?
 - UK Space Industrial plan
 - US approach commercial integration strategy
 - US Reverse Industry days
 - NATO Space reverse industry day















SIZE & HEALTH OF THE **UK SPACE INDUSTRY 2022**



£17.5bn

Total space industry income



1,590

UK-based organisations with

space-related activities





48,800

in 2020/21

UK average









in 2020/21

Manufacturing Operations

Ancillary

5.1% Income growth (y-o-y)

Employees are

R&D expenditure in 2020/21

Exports

£5.9bn

Income from exports



INVESTMENT MONITOR

2022

£635m

34 Total funds invested Investment dea 2012-2022

£11.7bn 293

Total funds invested Investment deal

Employment by region

28%

London

21% South East

18% Scotland

33%





£7.0bn

Direct contribution of the UK space industry to UK GDP



by satellite services









3 in 5

expect income growth over the next three years

At least £370bn of UK GDP* is supported









SIZE & HEALTH OF THE **UK SPACE INDUSTRY 2023**



£18.9bn

Total space industry income in 2021/22



1,765

UK-based organisations with space-related activities

□ Space Applications Space Manufacturing Space Operations ■ Ancillary Services

■ In-space Economy



Employees are



R&D Expenditure in 2021/22 ·

52,000

Direct employees in

2021/22



2.3x

Labour productivity

compared to UK average

Employees with

Exports

£5.8bn

Income from exports in 2021/22



Investment Monitor

Investments into UK-headquartered space companies 2013-2023

2013-2023

Total funds invested £19.3bn

£7.2bn

Direct contribution of

the UK space industry

London

Economics

361 Investment deals

£8.85bn Total funds invested Investment deals

Regional employment

33%

London 18%

South East

12% Scotland

36%

Rest of the UK



2 in 3

Organisations expect income growth over the next three years



Organisations

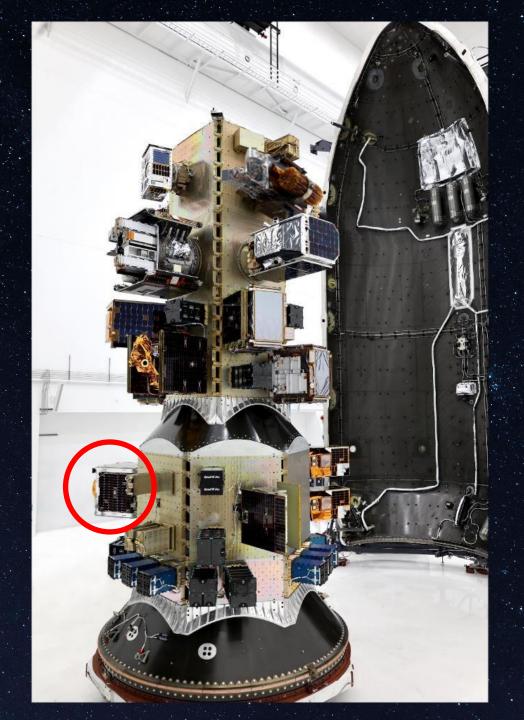


Opportunities and Threats Tyche



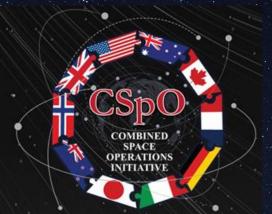




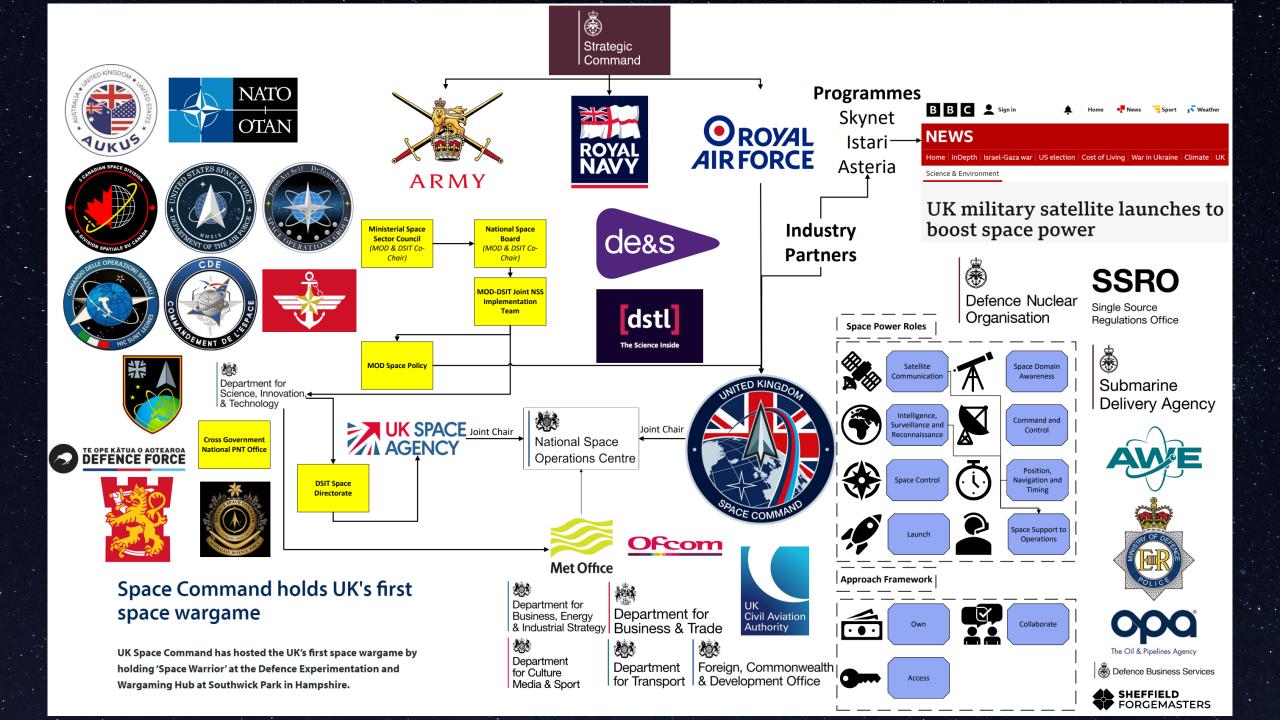


Integrated Space Architectures







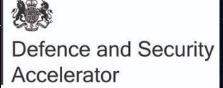


Networking the commercial sector













NATIONAL SECURITY

Investment Fund

STRATEGIC

Delivered by British Business Bank











































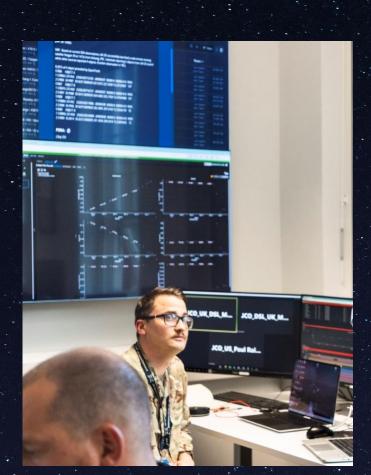




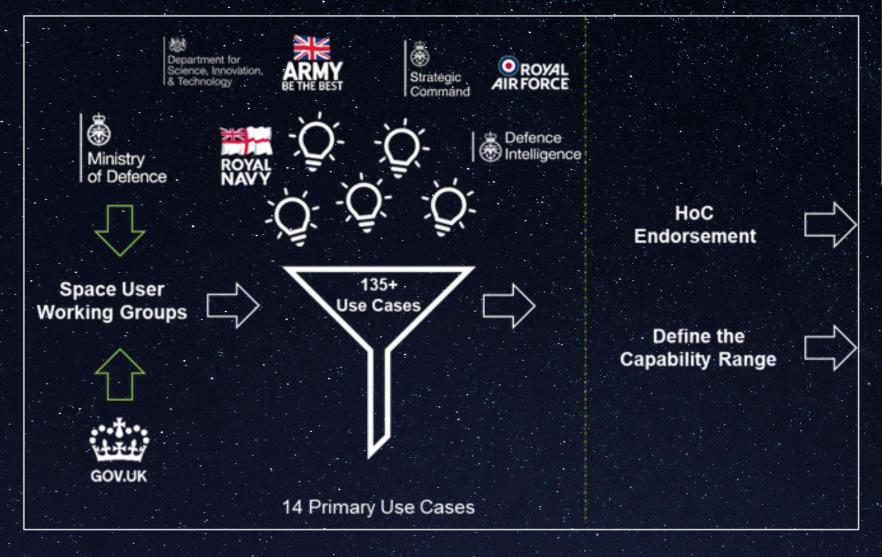


LONDON SPACE NETWORK

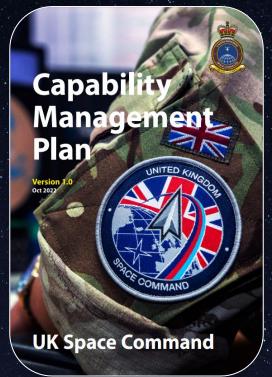
Space Command Progress



Defence Next Steps







Summary

UK Space Command is focussing on:

- Raising public and policy makers awareness
- Normalising the space domain
- Recognising Space as an inherently Joint domain....that can alter an adversaries' behaviour
- Developing International cooperation
- Taking more risk with procurement processes, cooperating with commercial providers to fuel innovation and developing a hybrid military/commercial architecture

First Steps:

- Capture of 130+ frontline user requirements/use cases
- Directed Space Engagement with CSpO, NATO and Bi-laterally with numerous other countries
- Recruitment of Space Architects
- Inward Industrial Secondees

