



UK Government

# UK Space Strategy

September 2026

CP 1662



Government of the United Kingdom

**Ministry of Defence**

**Department for Business, Innovation, Science and Trade**

# **UK Space Strategy**

Presented to Parliament by the Secretary of State for Business, Innovation, Science and Trade and the  
Secretary of State for Defence by Command of His Majesty

**September 2026**

**CP 1662**



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# Foreword

**Space is entering a new era.** One that is marked by enormous potential to transform the way we live our lives, with dynamic commercial industry delivering services and products from space we could barely imagine a decade ago. But also one of growing volatility, where threats and hazards in space increasingly mirror the geopolitics on Earth.

Space technology has revolutionised our entire way of life – from medical breakthroughs and scientific discoveries that have reshaped our understanding of the universe, to connecting every part of the planet through communications, timing, and navigation. Space underpins the modern economy itself: our energy systems, our financial markets, our ability to protect the United Kingdom. Today, satellites underpin 18% of UK GDP. Space is not the future – it is the infrastructure of the present.

Space is increasingly a domain of competition. Adversaries are investing in capabilities to disrupt, degrade, and deny the space-based services on which we depend. Threats facing the UK on Earth are matched by increasing threats in space.

**That is why space is unequivocally a priority for the UK and for this government.** Faced with a new era of conflict, we are putting defence and national security at the heart of our approach to space. Faced with great opportunities in the burgeoning space economy, we are taking an assertive, interventionist approach to promoting our space industry – backed by our Modern Industrial Strategy and our wider reindustrialisation agenda to bring good growth to every postcode in the UK. In short, the UK must be competitive – commercially, economically, and in the space capabilities we build for our defence and national security.

**We have the foundations to succeed.** Our space sector is already one of the most innovative, productive, and commercially driven in the world. Our scientists and engineers are building instruments that peer to the edge of the universe and pioneering the technologies that will service satellites in orbit. Through this UK Space Strategy, backed by a serious, fully funded delivery plan unprecedented in its transparency, we are acting decisively to unleash that potential, deliver greater capability to protect and defend the United Kingdom, and scale up the commercial space businesses that will power our future prosperity.

**We will not do this alone.** The UK's strength in space has always been amplified by partnership – through NATO, through the European Space Agency, and through deep collaboration with allies old and new. We will deepen those partnerships, forge new ones, and work together to deter threats, shape the rules that govern space, and ensure this domain remains open, safe, and sustainable.

The new era of space is here. And this strategy ensures that the UK is ready for it.

*The Rt Hon Wes Streeting MP, Secretary of State for Defence*

*The Rt Hon Jonathan Reynolds MP, Secretary of State for Business, Innovation, Science and Trade*

# Part One: A new Chapter for UK Space

Government's first duty is to keep the United Kingdom safe, and secure. Delivering fair, strong, secure and sustainable growth is its highest economic priority. The UK space sector sits at the nexus of both, and that is why space is a strategic priority for this government, as identified in the Modern Industrial Strategy.

Space is a site of growing competition, and a domain that is central to defence.<sup>1</sup> Assured and resilient access to operate in, from, and through space sustains global security, prosperity, and our way of life. Every card payment, weather forecast, and journey using mapping and navigation relies on satellites. Global space and satellite services support 18% of total UK GDP, underpin our stock exchanges, monitor our environment and food systems, and help our emergency services respond to floods and disasters.<sup>2</sup> And, fundamental to all of this, space capability is essential to the UK's ability to understand, decide, and act across all defence domains, and underpins modern military operations.

But the geopolitical landscape has shifted sharply in recent years. Tensions have intensified, technological change has accelerated, and commercial markets have expanded rapidly. Space is now more contested, competitive and congested. In response, the UK needs a clearer strategic focus: one that brings together civil and defence priorities, strengthens resilience, protects our sovereign interests, and directs investment towards the markets and the assured and nationally separable capabilities that matter most.

This strategy sets out that approach, our vision for the UK in space, our plan to deliver over this spending review to 2030, and our longer term goals to 2035. It is backed by more than **£7.8 billion** in funding to 2029/30, and it provides a one government framework for securing the UK's interests and driving growth through space by putting defence, national security and economic growth at the centre of the UK's approach.

## UK Vision in Space

*Our vision is for the UK to be a competitive space power; assertive in protecting our interests and driving our growth.*

This means being a competitive space power that builds the capability needed to protect and defend the UK; integrates those capabilities through deep cooperation with partners and allies; commercialises the sector by focusing on companies generating significant profits through exports and sales to businesses and users; and specialises in those parts of the space economy where the UK has comparative advantage, while remaining responsive to a changing global context and shaping global norms on the peaceful use of space.

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<sup>1</sup> The Strategic Defence Review 2025 – Making Britain Safer: Secure at Home, Strong Abroad, June 2025, available at [GOV.UK](https://gov.uk)

<sup>2</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

**Every government intervention on space will serve this vision**, with defence, national security and economic growth rigorously prioritised.

This will make the UK a more attractive partner for international cooperation, a stronger destination for investment, and a more capable military power able to operate more boldly alongside allies in a contested domain and spectrum, in accordance with international law.

## The UK's Competitive Edge

The UK has a distinguished legacy in space, from early satellite communications to world-leading satellite manufacturing and space exploration and astronomy missions. Today, it is at the forefront of global innovation, with leading expertise in small satellite and payload development, integration, and manufacturing; leading research institutions; and the conditions to support cutting-edge technology and sustained growth.

The UK consistently punches above its weight. With around 1% of global public civil and defence space spending,<sup>3</sup> the UK captures around 5% of the global space market.<sup>4</sup> In 2022/23, the sector generated £7.2 billion in Gross Value Added to the economy, employing over 55,500 people across over 1,900 organisations in jobs paying above the median salary.<sup>5</sup>

The UK also plays a prominent diplomatic role, working through NATO, the European Space Agency, the United Nations and with allies to strengthen collective security and shape the rules and norms that govern space. The UK and Overseas Territories locations also play an important role in supporting space-enabled connectivity and infrastructure, including facilities on Ascension Island and planned UKSA stations in Bermuda.

These strengths are underpinned by a world-class science and technology base tightly linked to industry, anchoring regional clusters that accelerate innovation and commercialisation. A deep pool of skilled talent, an innovative and proportionate regulatory environment, and globally renowned financial systems – including the City of London, already a global centre for space insurance and one we intend to establish as a global hub for space finance – give the UK a distinctive competitive edge. To achieve our goals, we intend to fully utilise the excellent UK pipeline that runs from fundamental science and technology development through to data, facilities, skills, innovation and commercialisation.

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<sup>3</sup> Novaspace Government Space Programs Report - 25th Edition, 2025 (paywall)

<sup>4</sup> Expanding Frontiers: The down to earth guide to investing in space, May 2023, available at [GOV.UK](https://gov.uk)

<sup>5</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

## The Strategic Imperative

### **The geopolitical environment has shifted sharply.**

As set out in the Strategic Defence Review, the UK and its allies face multiple, direct threats to our security, prosperity and democratic values for the first time since the Cold War.

What was once a domain that enabled terrestrial military operations is now a domain where UK interests are threatened directly. States are investing in capabilities that can disrupt, degrade or deny space-based services, and more broadly project power through space.<sup>6</sup>

And as military, civilian and commercial services increasingly depend on shared space infrastructure, this raises the stakes in crisis and conflict and means that resilience must be built across the whole system: in orbit, on the ground, through supply chains and in the services on which the public and the economy depend.

### **Commercialisation and technology are changing the sector at pace.**

At the same time, commercialisation is accelerating at pace. Launch costs have fallen to less than one-twentieth of the shuttle era, whilst becoming more monopolistic.<sup>7</sup> Since the end of 2020, the number of active satellites in orbit has more than quadrupled,<sup>8</sup> with up to 100,000 satellites potentially in orbit by 2030 compared to around 14,000 today. New commercial markets are emerging in communications, in-orbit servicing, Earth Observation and advanced manufacturing. AI, quantum and autonomous systems are reshaping what is possible. These changes create opportunities for the UK and our workforce, but also demand faster decision-making, sharper prioritisation and a more interventionist approach.

### **The UK must turn innovation into scale.**

We recognise the space sector has challenges. Too many businesses are pre-revenue and struggling to scale: 53 companies accounted for 80% of space sector revenue in 2022, although this is notable progress from 8 companies in 2016.<sup>9</sup> High capital needs, concentrated markets and skills gaps mean many companies have not yet reached their potential. These forces - geopolitical, technological and industrial - are converging.

**In response, the UK is adopting a new approach: one that prioritises the most effective interventions in the most important subsectors, supported by a long-term spending plan and delivered by government acting as one – with joint civil and defence leadership, coordinated procurement, and a unified relationship with industry.**

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<sup>6</sup> Challenges to Security in Space 2022, Defence Intelligence Agency, 2022, available at [dia.mil](https://www.dia.mil)

<sup>7</sup> The Recent Large Reduction in Space Launch Cost, NASA Ames Research Centre, 2018, available at [ntrs.nasa.gov](https://ntrs.nasa.gov)

<sup>8</sup> 2021 data from the [Union of Concerned Scientists' Satellite Database](https://www.unionscientists.org/satellite-database) compared with 2026 CelesTrak data quoted on [How Many Satellites Are in Orbit? \(2026 Count\) | SatFleet Live](https://www.satfleetslive.com)

<sup>9</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

## The UK's Approach to Space

### Focussing our outcomes

Delivering our vision means that the UK will focus on two, top level outcomes from space under a one government delivery model. We will align national capabilities with long-term objectives, and coordinate our investment, policy and delivery levers across the space domain.

#### **Outcome One: Defence and National Security**

*Protecting UK and allied interests in, through and from space, in accordance with international law; safeguarding critical space infrastructure from threats; and assuring independent access to space data, resilient and responsive to global geopolitical changes.*

We will:

- Deliver enhanced defence capability to protect and defend the UK's interests and provide strategic effects to the Armed Forces through programmes such as SKYNET.
- Strengthen collective defence through NATO, sharing capabilities, supporting assured access to space, enhancing interoperability, and integrating space into strategic planning, while contributing to multinational cooperation through the Combined Space Operations and Multinational Force Operation OLYMPIC DEFENDER.
- Deepen and diversify partnerships, strengthening supply chains and access to space, improving collective responses to emerging threats, working through NATO and with the US as our closest defence and security ally, and forging new international partnerships.
- Build a more secure, resilient and risk-aware space sector; protect our critical national infrastructure; and implement targeted interventions to support cyber and protective security and the identification of critical assets.

#### **Outcome Two: Growth of the UK Economy**

*Fuelling a high-growth economy by bridging the gap between the UK's world-class S&T ecosystem and commercial industrialisation; and providing the targeted, end-to-end support necessary to help our most innovative companies scale and compete on the global stage.*

We will:

- Use government's procurement power to strengthen our domestic supply chain, support local jobs and build a long-term market for innovation, by refocusing our grant programmes for businesses to enable fewer, higher-value awards aligned with our priorities. We will also consider the use of contracts where appropriate, and consider acting as an anchor customer, where there are clear requirements for government capability, through the Enterprise Space Category (ESC).
- Help stimulate demand and use space technology through roadmaps, market insight and access pathways, improve access to finance and attract private investment and use our world-leading R&D ecosystem to drive success in every priority subsector.
- Explore tailored, strategic relationship management with suitable priority companies to understand key barriers to commercialisation and scale-up.

## Building on our sector-wide foundations

Across the whole space sector, we will ensure the foundations are right to support defence, national security, and economic growth.

**Industrialising the Space Ecosystem:** Supporting a skilled workforce, enabling companies to scale and stay and developing regional clusters.

- We will be more selective and interventionist: refocusing grants on fewer and higher-value awards with our R&D funding; consider acting as anchor customer where we have requirements; bolstering our talent base; and supporting businesses across our regions, from inception to global competitiveness.

**Building Partnerships and Multilateral Leadership:** Cooperating to boost UK security, exports, capabilities, and global cooperation.

- We will deepen cooperation with our closest allies; forge new relationships with high-potential partners; strengthen our role in NATO, ESA, the UN and multilateral institutions, and our work with the EU; and lead the development of the rules and norms that will govern the space domain for decades ahead.

**Pro-Growth UK Regulation:** Promoting growth through a responsive, fit-for-the-future regulatory framework that protects orbital and terrestrial environments, enables safe operations, and ensures the space sector progresses responsibly and sustainably.

- We will: make licensing faster, simpler and cheaper; reduce the regulatory burden for scaled activity; ensure the UK has the right access to spectrum; and lead internationally in shaping the frameworks that govern the future of space.

**Strengthening Security, Sustainability and Resilience:** Ensuring resilient and reliable access to space systems as congestion and competition grow across all sectors.

- We will strengthen our ability to protect and defend UK interests in, from and through space, in accordance with international law; build a more secure and risk-aware space sector as critical national infrastructure; and lead international efforts to keep the space environment safe, sustainable and accessible for generations to come.
- As part of this approach, we will establish Control of Space as a strategic requirement and an increasingly important component of national power, enabling the UK and its allies to maintain freedom of action in, from and through space in support of national security, military effectiveness, and economic prosperity.

This is how we will use every pound to build the capabilities, technologies and companies the UK needs to maximise our impact on the global stage.

## Advancing Subsectors of Space

We will concentrate our efforts and funding on the areas that matter most to our strategic interests and where the UK has the greatest potential.

The UK space economy has seven key subsectors, each with different capabilities, levels of maturity and uses for government, businesses and end-users. In some subsectors, the UK already has strong, established capabilities - a foundation of national strength built over decades of investment, innovation and operational experience. In others, the opportunities are more nascent - fast-moving, emerging markets where early and decisive action now can secure the UK a leading position for decades to come. That means government must act differently across them to deliver defence, national security and economic growth outcomes.

Of these seven subsectors, government will prioritise four for faster development: Satellite Communications, Space Domain Awareness, In-Orbit Servicing Assembly and Manufacturing and Access to Space. They have been selected for their growth potential, contribution to the wider economy, alignment with national security and defence priorities, and importance to building a more competitive and strategically focused sector.

The UK will continue to procure and use space wherever best supports growth, defence and national security. As such, investment will continue, in more targeted ways, in other areas.

### Space Domain Awareness (SDA)

SDA enables the UK to understand, monitor and respond to activity, hazards and threats in the space environment, supporting the safe, secure and sustainable use of space.

- We will build stronger, nationally separable SDA capabilities, anchored by the National Space Operations Centre, to meet civil and military needs, support our allies and protect UK interests in space and on Earth in compliance with international law.

### In-Orbit Servicing, Assembly and Manufacturing (ISAM)

ISAM covers the technologies and services that enable the assembly, servicing, repair and manufacturing of spacecraft and highly innovative products in orbit, improving resilience and long-term space capability.

- The UK will back the most commercially credible and strategically important ISAM capabilities, with a focus on building flight heritage and securing long-term competitive advantage in the emerging market.

### Satellite Communications (SatCom)

SatCom provides secure, resilient satellite-based communications that underpin national security, emergency response and critical economic activity across sectors such as aviation, maritime and digital connectivity.

- We will build a unified, integrated national SatCom architecture with coordinated, one government procurement, capitalising on our combined purchasing power and world-leading industrial strengths to deliver resilient SatCom connectivity.

### **Assured Access to Space**

Space launch and transport provide the means to place satellites and payloads into orbit and move them between orbits, supporting sovereign access to space and enabling downstream space services.

- We will combine expanded domestic launch capability, centred on SaxaVord Spaceport as Europe's leading site for polar and sun-synchronous missions, with trusted international partnerships to secure resilient, assured access to orbit.

### **Positioning, Navigation and Timing (PNT)**

PNT delivers precise positioning, navigation and timing services that are essential to the functioning of the UK economy, defence operations and critical national infrastructure.

- Over the next decade, the UK will develop sovereign, resilient PNT infrastructure to reduce our dependence on Global Navigation Satellite Systems (GNSS), layering space, terrestrial and quantum technologies to ensure the UK is never without this essential capability.

### **Earth Observation (EO)**

EO combines satellite-derived data with digital infrastructure to collect, process and exploit information that supports decision-making across security, climate, economic and public service applications.

- We will secure the capabilities, data access and infrastructure needed to use EO more effectively, strengthening intelligence surveillance and reconnaissance (ISR) for national security, improving public decision-making and growing the UK's competitive strengths in data and analytics.

### **Space Discovery**

Space discovery encompasses space science, exploration and discovery activities that expand knowledge of the Earth, solar system and universe while sustaining the UK's scientific excellence and long-term space capability.

- We will continue to back excellent discovery-led science while adopting greater focus in supporting our capability needs and our defence, national security, and economic growth ambitions.

## **Now Is the Time to Act**

The convergence of geopolitical competition, technological change and commercial opportunity demands a bolder, more focused and more coordinated national approach to space. The UK is primed to meet this moment.

Through this strategy, the UK is bringing to bear all its activity - policy, investment, regulation, procurement, diplomacy, partnerships, research and workforce - to the defence of UK interests and domestic economic growth across the space industry. Only through a whole-of-government effort can we deliver our vision for space.

# Part Two: Our Strategy to Build on Sector-wide Foundations

## Industrialising the Space Ecosystem

*The space ecosystem is the industrial, financial and skills infrastructure that enables UK space companies to start, scale and compete globally. The UK has built one of the world's most diverse and productive space sectors, but too many promising businesses struggle to commercialise. We will be more selective and interventionist: refocusing grants on fewer and higher-value awards, acting as anchor customer where we have requirements, and supporting businesses across our regions, from inception to global competitiveness.*

### Context

The UK space sector is one of the most diverse, commercialised, and business-oriented space sectors globally. In 2022/23, it comprised over 1,900 companies; was among the highest productivity sectors in the UK economy; employed over 55,000 workers, of whom 69% hold a primary degree or higher; and has been growing faster than the UK economy since 2009/10.<sup>10</sup> Over the past decade to 2022, the UK was the second most attractive destination for foreign capital investments after the United States (US).<sup>11</sup>

The UK space sector has undergone substantial expansion and diversification over the last two decades. Many UK-based high-growth potential companies have emerged. However, too many face challenges commercialising and securing a strong customer base. The UK's R&D funding landscape provides broad support across early-stage innovation. Increasing the scale of later-stage investment could bolster commercialisation and enable more ventures to progress. At the same time, access to the right skills can enable growth while boosting investor confidence and delivering high skilled UK jobs. As satellite technologies converge on multi-capable platforms and systems, the UK is well placed to take advantage of new opportunities through our dynamic technology ecosystem.

### The UK's Interventionist Approach

Government will act more strategically to unlock the UK space sector's full potential to support our defence, national security and economic growth. Our approach to growing, commercialising, and scaling the sector, will take a selective, interventionist approach that supports the commercialisation and growth of the highest-potential businesses and those critical to our national capabilities.

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<sup>10</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

<sup>11</sup> Expanding Frontiers: The down to earth guide to investing in space, May 2023, available at [GOV.UK](https://gov.uk)

As part of this approach, and subject to all appropriate legal due diligence, government will:

- Refocus grant programmes towards making fewer, higher-value awards overall to better support companies through commercialisation and scale-up, whilst maintaining the capability to support promising ideas with smaller grants where appropriate.
- Require clear evidence of prior R&D impact before issuing repeat or follow-on funding for businesses, ensuring public investment drives tangible progress towards commercialisation and profitability rather than research without market outcomes.
- Consider the use of contracts where appropriate, and act as an anchor customer where there are clear government requirements for government capability, through the Enterprise Space Category (ESC).
- Align civil funding with the future operating expectations for our defence and national security, focussing on developing the sector to be ready to meet those future needs.
- Explore tailored, strategic relationship management with suitable priority companies to understand key barriers to commercialisation and scale-up.
- Continue to drive exports through overseas trade missions, using the UK government's relationships and established buyer-led model to connect businesses with customers around the world. UK Export Finance will provide innovative loans, guarantees and insurance to support space companies to compete globally.

Government support will be targeted to support companies from start-up to commercialisation to scale-up with funding for technology development, skills, clusters, and procurement reform through the ESC. A particular focus will be placed on the priority sub-sectors identified in this publication with a more systematic approach to shaping how the UK sector grows.

We anticipate that the sector is likely to undergo a period of market-driven consolidation. Such consolidation can strengthen the competitiveness and long-term sustainability of the industrial base. Therefore, government will work actively to shape and manage any significant shocks or changes in critical capabilities, rather than allow the UK passively to be shaped by them.

## **Clusters**

The UK has a strong, nationally connected network of space clusters that bring together local space industries, academia, and government across every UK nation and region. Space clusters help create good growth in every postcode. They foster partnerships and harness regional strengths to drive collaborative innovation, and support companies of every size, including SMEs, to commercialise, scale, attract investment and create high-value jobs.

We will target investment in key infrastructure and programmes that will build on the valuable role clusters play in translating research and innovation into scalable commercial activity, supporting startups, spin outs and scale ups, and anchoring and strengthening supply chains in the UK. This targeted, place-based approach is building an interconnected ecosystem that provides the UK with a clear competitive advantage on the global stage, ensuring that the benefits of space activity are felt across every nation and region while supporting long-term economic growth and national prosperity.

## **Investment, Procurement and Access to Finance**

Supporting our interventionist approach, and with all legal due diligence required, government will use a targeted range of finance mechanisms to help bridge the commercialisation 'valley of death' such as through the use of grants, contracts, advanced market commitments, procurement, loans and equity stakes tailored to the particular circumstances. This will mean targeted use of early stage and seed finance mechanisms such as Contracts for Innovation and business readiness programmes like the UK Space Agency Accelerator and ESA Business Incubation Centre delivered through UKRI. Later-stage financing is provided by public financial institutions, including Innovate UK, UK Export Finance, British Business Bank and National Wealth Fund in line with its defence mandate.

### **Enterprise Space Category**

Government is introducing a new approach to procurement for space titled the Enterprise Space Category (ESC). This approach, built on experience in other parts of defence, is being adapted to space and expanded to include the whole of government. It will develop and clearly articulate routes to market, including frameworks managed by the Government Commercial Agency and defence demand signalling via the National Armaments Director Group, and will ensure more standardised engagement with government, simplifying how space services and technology providers can bid for and understand government contracts.

Publication of a cross-government demand pipeline for space, and of upcoming opportunities, will provide clear market access and more predictable demand for the sector.

### **Integration of Emerging Technologies**

Emerging technologies are already reshaping the sector. AI will transform how space systems are designed, operated and exploited, enabling faster innovation, more effective use of data and increasingly autonomous capabilities. These changes will be especially significant for defence and national security in the space domain, where speed, resilience and decision advantage are increasingly important. Government will utilise emerging technologies to support delivery of this Strategy's objectives while ensuring their use remains safe, secure and responsible.

### **Education and Future Workforce**

The UK space sector depends on our highly skilled and productive base of around 55,500 people with productivity more than double the national average.

To support long term, sustainable growth, government will continue to strengthen this talent pipeline, build future ready skills, and increase opportunities to enter the sector acting through a dedicated Space Education and Future Workforce programme. We will collaborate with industry, academia and through the Space Partnership, including through the reformed Space Skills Advisory Panel, and publish evidence on skills gaps across the sector through an annual Space Skills Survey and Space Skills Dashboard.

We will also ensure space benefits from the fantastic talent pipeline the UK already has – from space specific skills to connected degrees in engineering, quantum, and AI delivered by our world-leading university sector. UKRI will invest over £2.1 billion in doctoral training between April 2026 and March 2030 across its seven disciplinary research councils, supporting over 27,000 doctoral students. This supports both space specific skills and the wider degrees across all fields of study that make the UK one of the best places to do business in the world. We have been enhancing our support to ensure the UK is attractive to both domestic and international talent for doctoral studies. By October 2026, we will have increased the minimum stipend that must be provided by 40% compared to the 2021-22 academic year.

## Ecosystem Objectives

**By 2030, the UK will have:**

- **Thriving space cluster networks** driving local economic growth across the UK in partnership with all levels of government, fostering knowledge exchange, creating commercial opportunities and introducing businesses to new partnerships, and market and supply chains opportunities.
- **A more consolidated sector** operating at greater scale, more commercialised and better able to deliver UK capability needs with accelerated pathways to transition from concept to industrialised capability with domestic and international commercial opportunities across the civil and defence arenas.
- **A strengthened and diverse UK space workforce** that can deliver our national ambitions, enabled by a robust evidence base of requirements, action addressing workforce challenges, and a strong future talent pipeline.

## Key Funding Commitments

The UK will commit £706 million in funding between 26/27 to 29/30 in delivering our specific objectives for the Space Ecosystem. This will include delivery of:

- **UK MOD Capability Funding in Novel Technologies** - MOD plans to spend at least 10% of its annual Equipment Programme budget on novel technologies. This includes £420 million to accelerate the delivery of innovative space capabilities.
- **National Space Innovation Programme** - £65 million funding to de-risk high reward projects with a clear target market. The approach to the NSIP will be integrated with our new interventionist approach to supporting the ecosystem.
- **Space Clusters and Infrastructure Fund** - £37 million to invest in a coordinated portfolio of strategic R&D and test infrastructure that amplifies the strengths and capabilities of regions across the UK.
- **Education and Future Workforce Programme** - £14 million to build a resilient and future-ready space workforce through targeted pipeline-wide skills interventions including teacher upskilling, new internships, and training funds.

The full list of funded activities for the Space Ecosystem is detailed in the technical annex to this strategy.

## Building Partnerships, Multilateral Leadership, Shaping Rules

*International partnerships amplify our power in space - achieving through collaboration what no single nation can deliver alone. From collective defence through NATO to shaping global norms at the UN, the UK's alliances underpin our security, our trade and our influence. We will deepen cooperation with our closest allies, forge new international partnerships, strengthen our role in ESA and multilateral institutions, and lead the development of the rules and norms that will govern the space domain for decades ahead.*

### **Context**

International partnerships are essential to the UK's ability to protect its interests and deliver across security, economic and scientific objectives. The space domain is inherently global, with growing congestion, competition and technological change creating risks that no single country can manage alone.

Working internationally allows the UK to share capabilities and align approaches with allies to achieve outcomes that would not be possible independently. Strong international partnerships are fundamental to safeguarding UK security, sustaining economic growth, and ensuring long-term access to space. The UK has a leading global role in the shaping of common rules and norms, helping to ensure the space domain remains peaceful and usable for all nations.

The UK's approach through this space strategy is to rigorously prioritise defence and national security, and economic growth; to build a more competitive space sector; and to build new capabilities in target areas. This approach will make the UK a better partner, a stronger ally, and a leading voice in shaping the global rules and norms of behaviour in space.

### **Approach**

#### **Global Governance**

Working with international partners to shape global rules on space is a core UK interest as the rate of change in the space domain risks outpacing existing governance frameworks.

Multilaterally agreed laws, standards and norms help provide a common framework for all states to conduct their space activities. Strengthening this will provide clarity and confidence promoting commercial economic growth, and reducing risks of miscalculation, unintended escalation, and conflict.

Our leading role will help ensure that the evolving international system reflects our values and interests while ensuring space is accessible to all.

The UK will:

- Act to prevent an arms race in outer space (PAROS) and reduce the risk of conflict by engaging in UN efforts.

- Shape international standards, guidelines and best practice through the United Nations Committee on the Peaceful Uses of Outer Space (COPUOS), the Inter-Agency Space Debris Coordination Committee (chaired by the UK in 2025/26), and the Committee on Earth Observation Satellites.
- Drive global governance of scientific, commercial and technological activities in space to reinforce long-term security, resilience and sustainability in space.
- Continue to enhance our diplomatic and technical approach to manage our Spectrum interests through established international forums including the European Conference of Postal and Telecommunications Administrations (CEPT) and the International Telecommunication Union (ITU).

## **Collective Defence and Security**

Alliances and partnerships are the bedrock of UK national security and are even more important to the UK in the context of growing risk and uncertainty. As set out in the Strategic Defence Review, the UK's Global Defence Relationships are essential to the Integrated Force and our ability to deter, fight, and win: delivering combined strength through interoperability; pooling financial and technological resources to innovate; building industrial and supply chain resilience; and mitigating geographical disadvantages.<sup>12</sup>

At the forefront of the UK's many valuable alliances is NATO. In 2021 NATO recognised that attacks to, from, or within space could lead to the invocation of collective defence provisions under Article 5 of the North Atlantic Treaty, demonstrating the importance of space to our collective security. The UK works closely with the United States, our closest defence and security ally and the leading and most capable spacefaring nation, and will continue to do so through bilateral and multilateral cooperation across the space domain.

Through joint activity such as Multinational Force Operation OLYMPIC DEFENDER with the US, Canada, France, Germany, Australia and New Zealand, the UK is globally integrating its military space power to deter aggression and ensure we can operate seamlessly with allies. And through the Combined Space Operations (CSpO) Initiative, the UK is working closely with Australia, Canada, France, Germany, Italy, Japan, New Zealand, Norway, and the US to jointly address the rapidly evolving security dynamics of the space domain.

The UK will:

- Strengthen collective defence through NATO by sharing capabilities, supporting assured access to space, enhancing interoperability, and integrating space into strategic planning.
- Build on our participation in Combined Space Operations to deepen multilateral defence space cooperation with key allies.

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<sup>12</sup> The Strategic Defence Review 2025 – Making Britain Safer: Secure at Home, Strong Abroad, June 2025, available at [GOV.UK](https://gov.uk)

- Strengthen collaboration through Operation OLYMPIC DEFENDER to integrate military space capabilities and maintain operational advantage.
- Work with allies to safeguard long-term space operations, support innovation, and reinforce international security frameworks.

### **Deepening our partnerships, building new relationships**

The UK has deep and enduring partnerships on space with many nations. We will deepen the extent of our collaboration, whilst forging relationships with international partners. By expanding strategic alliances and initiating new partnerships, we can combine our respective strengths, pool financial and technological resources, increase resilience and economic benefits for our people, and mitigate risks.

We are broadening our bilateral partnerships already. Our collaboration with Germany under the Kensington Treaty is growing, with shared activity to establish responsive space launch capability. We will build on our collaboration with Norway under the Lunna House Agreement. We will continue to collaborate with France, building on agreements such as those made at the 37<sup>th</sup> UK-France Summit.<sup>13</sup> A UK-US Treaty is being developed on space launch and re-entry licensing to bring further growth opportunities for the UK. And in 2024 the UK signed a memorandum of understanding with Canada to further cooperation on space.<sup>14</sup>

In the future, the UK will actively seek to elevate our relationships and establish new partnerships and collaborations, being open to direct partnerships with countries across the world. The UK is already building new partnerships; in 2025 the UK and Japan expressed their mutual interest in advancing cooperation in the space domains,<sup>15</sup> and the UK and India set out space as an area for collaboration in the India-UK Vision 2035.<sup>16</sup> We will also use bilateral agreements to facilitate cohesion and trade across jurisdictions, such as the Memorandums of Understanding the UK Government has successfully concluded with New Zealand governing multijurisdictional rendezvous and proximity operations missions,<sup>17</sup> and with Luxembourg facilitating satellite transfers. We will also continue to work with Overseas Territory Governments to understand requirements, ensuring future engagement is shaped by mutual benefit and needs analysis.

### **Supporting a Stronger Europe in Space**

The UK strongly believes that Europe is stronger in space when we act together, leveraging the combined strength of our collective industries, and we are proud of the role the UK plays through the European Space Agency, EUMETSAT, and other European space endeavours.

As such, the UK welcomes the increasing focus that European states are placing on space and the ongoing collaboration the UK has with the European Union, including through the UK-EU Security and Defence Partnership and participation in joint programmes such as Copernicus

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<sup>13</sup> [UK-France Leaders Declaration - GOV.UK](#), 2025

<sup>14</sup> [UK and Canada enhance cooperation in space - GOV.UK](#), April 2024

<sup>15</sup> [UK-Japan Defence Ministerial Meeting 2025: Joint Statement - GOV.UK](#), August 2025

<sup>16</sup> [India-UK Vision 2035 - GOV.UK](#), July 2025

<sup>17</sup> [UK and New Zealand agree blueprint for satellite removal and servicing missions - GOV.UK](#), October 2024

and Horizon Europe in this Multi-Annual Financial Framework period. We believe that collaboration on open and fair terms between the EU, European States and the UK should remain the cornerstone of Europe's approach to space, enabling Europe to draw on its full range of capabilities in pursuit of our shared security, prosperity and technological leadership.

The UK will:

- In line with the UK-EU Security and Defence Partnership, establish regular exchanges on space security to discuss threats and respective frameworks with a view to strengthening cooperation in areas of shared interest including shaping global norms and strengthening Europe's contribution to NATO.
- Engage proactively with the EU and its Member States on the EU Space Act, the European Competitiveness Fund and related initiatives to avoid barriers for UK companies and ensure the inclusion of reliable and trusted partners such as the UK in efforts to support European space ambitions.
- Maximise current UK participation in Copernicus to deliver critical climate data, global leadership and export opportunities for UK Earth Observation services.
- Engage in Horizon Europe, focusing on projects that boost national capability, economic growth, and shared aims in sustainability and security.

The UK is a founding member of the European Space Agency, and it will remain a close multilateral platform for the UK. We recognise and value the technical and independent leadership of ESA in shaping the European conversation on space across all domains, bringing states across Europe together to share technical expertise and deliver together the political priorities of all its member states. The UK expects ESA to retain that independence and excellence so that it can continue to put its Member States first; to turn national investment into capability; to remain open and maximise opportunities for its Member States' industry and academia; to support national priorities; and to provide a route into international partnerships and markets.

With ESA, the UK will:

- Leverage ESA as a core multilateral platform to deliver UK space objectives, using its scale, expertise and international reach where it delivers a clear advantage, while pursuing national and bilateral mechanisms where they better support UK objectives.
- Use our influence as a Member State to keep ESA an independent, efficient, and credible technical agency.
- Maximise the strategic value of ESA's presence in the UK, particularly ECSAT at Harwell, to embed ESA capability in the UK and connect it to industry and academia.

## Pro-Growth UK Regulation

*Regulation sets the rules of the game, shaping how fast companies can innovate, investor confidence, and how safely the UK operates in space. The UK's outcome-based regime licenses everything from novel ISAM missions to launches from UK spaceports. But regulation must keep pace with a sector that is accelerating. We will make licensing faster, simpler and cheaper, reduce regulatory burden for repeat activity, ensure the UK has the right access to spectrum, and lead internationally in shaping the frameworks that govern the future of space.*

### Context

Regulation is a key driver of innovation and growth and a core part of the government's pro-growth agenda. In March 2025, the government published the Regulation Action Plan,<sup>18</sup> calling for a one government approach to reduce excessive risk aversion and better enable innovation. Through the Industrial Strategy, government committed to ensuring regulation keeps pace with innovation, including reducing the administrative cost of regulation for business by 25% and prioritising reform for the UK's frontier industries, including space.<sup>19</sup>

Together, these will mean a predictable, proportionate and internationally competitive regulatory environment that enables confident investment, faster decision-making and quicker routes to market, while upholding the high standards expected of a responsible spacefaring nation.

Existing work to prioritise and deliver regulatory reforms to support innovation, growth and sustainability were reinforced by commitments in the Advanced Manufacturing Sector Plan to support innovative regulatory tools, including sandboxes, backed by £7 million in funding. This builds on the successful delivery of a Rendezvous and Proximity Operations (RPO) regulatory sandbox, completed in March 2026 in collaboration across the government, the Civil Aviation Authority and an industry consortium to advance UK ambitions in ADR and ISAM.

### Approach

Regulation must continue to adapt in step with the evolving sector. To support this ambition, we will improve our licensing regime. We will reduce duplication, streamline requirements, and re-use information already provided, minimising both operator and regulator time and costs.

Alongside this, we will continue to set clear strategic direction for the regulatory framework, including through the Statement of Strategic Priorities for Telecommunications, to which Ofcom must have regard when carrying out its functions. This sets out priorities for investment, innovation and the effective management of radio spectrum, supporting wider objectives on growth, resilience and international engagement, including in areas such as satellite communications.

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<sup>18</sup> Regulation Action Plan, March 2025, available at [GOV.UK](https://www.gov.uk/government/publications/regulation-action-plan)

<sup>19</sup> The UK's Modern Industrial Strategy, June 2025, available at [GOV.UK](https://www.gov.uk/government/publications/the-uk-s-modern-industrial-strategy)

## Regulatory Objectives

By 2030 we will:

- **Reduce regulatory administration and compliance costs to businesses** and make processes quicker and simpler.
- **Ensure the regulatory regime is swifter and simpler for repeated, scaled activity**, such that high volume missions are easier, faster, and cheaper to deliver in the UK.
- **Provide a clear route to licensing new, high-potential technologies** to remove barriers and accelerate the development of priority national capabilities.
- **Influence emerging international frameworks, guidelines and best practice** to promote interoperability and smooth cross-border trade.
- **Mitigate threats and hazards to space operations** through proportionate regulation.

We have worked closely with the sector to prioritise regulatory reforms to enable growth, strengthen national space capabilities and enhance the UK's competitiveness. Early priorities include speeding up licensing processes by removing duplication and enabling repeatability, and reducing costs associated with licensing and insuring missions. The CAA will explore options for a more flexible approach to licensing repeat and multiple-mission activity, including through the multi-mission licensing sandbox, with the aim of reducing cost and administrative burden for UK operators.

We are developing clear, practical guidance, technical frameworks and case studies to provide more predictable licensing pathways for novel and emerging activities such as ISAM and lunar missions. This means we can respond quickly and proportionately as technologies evolve, while supporting the safe, rapid deployment of novel mission types with an anticipatory regime.

Regulatory sandboxes and testing tools bring together government, regulators and industry to identify and remove barriers. In late 2026, a sandbox will help de-risk the re-entry phase of space missions supporting emerging mission areas such as ISAM.

As part of this strategy, government has announced a targeted package of financial and insurance reforms to support growth, incentivise responsible behaviour and strengthen the UK's position as a global centre for space insurance, including:

- Adopting world-first variable liability limits approaches, enabling lower insurance costs.
- Waiving operator liability for novel space missions in ISAM and lunar.
- Adopting new world-first models for the provision of third-party liability insurance to support innovation in the City of London space insurance market, as part of our ambition to make the City of London a global hub for space finance.
- Abolishing decommissioning funds for operators of large constellations, freeing up millions of pounds for such operators to invest in operations.

The Regulatory Horizons Council will also consider how the 'As Low as Reasonably Practicable' principle is applied in space regulation and evaluate its effectiveness. Views are expected to be provided in October.

## Strengthening Security, Sustainability and Resilience

*Security, sustainability and resilience are the conditions that make everything else possible. As space becomes more congested, contested and commercially vital, the threats - from hostile action to debris and space weather - are growing in scale and sophistication. We will strengthen our ability to protect and defend UK interests in, from and through space in line with international law; build a more secure and risk-aware space sector as critical national infrastructure; and lead international efforts to keep the space environment safe, sustainable and accessible for generations to come.*

### Protect and Defend the UK through our Control of Space Requirement

The UK must possess the capability to gain and maintain freedom of action and manoeuvre in, from, and through space; to protect and defend UK and allied space interests; and to deny adversaries the same freedoms – collectively described as the UK’s **Control of Space Requirement**.

The UK will urgently develop an integrated, whole-of-government approach to delivering our Control of Space Requirement utilising all orbital domains and military, diplomatic, regulatory and legal levers to deter threats and protect UK and allied interests.

In this context, Control of Space is a system achieved through a combination of technologies and capabilities for the UK’s defence and national security concentrated in our Space Domain Awareness and In Orbit Servicing Assembly and Manufacturing subsectors. Within these two subsectors, and alongside the development of a thriving and commercialised civil environment, government will act assertively, leveraging our national capability, and together with allies and partners, to deliver our Control of Space Requirement.

Effective Control of Space operations, both defensive and offensive in nature, will require the seamless integration of Space Domain Awareness, Command and Control and layered response options, enabling the UK and its allies to **understand** activity within the space domain and its implications for national security, **decide** upon an appropriate course of action, and **act** in a timely manner to protect national interests and maintain freedom of action in, from and through space. Credible Control of Space, underpinned by robust threat awareness, will strengthen deterrence, **deter** hostile action, reduce opportunities for coercion and enhance the resilience of the space capabilities, services and infrastructure upon which the UK’s security, prosperity and military effectiveness depend

As part of delivering this Control of Space Requirement, the MOD and BIST will establish an integrated roadmap connecting civil and defence technology development in ISAM, SDA, and Space Control to be set out in forthcoming updates to defence space policy. This will include the continued development of specialist operational expertise and dedicated organisations able to deliver and integrate Space Control effects as part of wider joint and allied operations. The UK will continue to strengthen the structures, capabilities and partnerships necessary to secure access to, and advantage from, this critical domain.

To protect and defend the UK, deliver strategic effects for the UK Armed Forces, and deliver the UK's Space Control requirement, the Ministry of Defence is investing £880 million over 26/27 to 29/30 in Intelligence Surveillance and Reconnaissance and Space Control activities.

## **Protect and Defend the UK's Space Ecosystem**

Government aims to build a more secure, resilient and risk-aware UK space sector. The UK's interests in space face a wide range of risks and threats, including state and non-state threats, hybrid activity, cyber threats, supply-chain vulnerabilities, and climate-related impacts, that must be monitored, managed, and mitigated.

We will deliver effective monitoring and information-sharing on threats and hazards, while enhancing our ability to sustain assured access to critical services and defend UK space interests when challenged. Reducing the risk of economic harm from threats or hazards, such as the loss of GNSS,<sup>20</sup> remains a key focus for government.

Key to understanding the scale, nature and potential risk of natural hazards and the growing risk is our ability to understand the operating environment. Space Situational Awareness, Space Surveillance and Tracking and environmental monitoring of space weather are critical enabling capabilities to ensure we can understand, prepare for and operate effectively in this challenging domain. These priority capabilities and the government's intent to develop them further and faster, are set out in the Space Domain Awareness chapter.

Government will continue to work closely with domestic and international partners to improve collective understanding of risks and promote good practice, as well as implement targeted interventions to support cyber and protective security and the identification of critical assets.

Government will:

- Deliver guidance, engagement, training, exercises, and qualifications to ensure owners and operators of space systems have a clear, practical understanding of the threats and hazards they face.
- Embed proportionate security and resilience standards across the sector, including a recognised space-specific security accreditation scheme.
- Provide effective sector-wide monitoring and information sharing for all UK-licensed and registered space systems, enabling timely warning, impact analysis and trusted two-way reporting between industry and government.
- Deliver an operationally credible national response framework for space incidents, with industry prepared to respond to and recover from a range of space, cyber, physical and supply-chain incidents.

## **Promote the safety and sustainability of the space environment**

As traffic and congestion in the space environment grows, space systems are becoming more vulnerable to space debris, near-Earth objects, and severe space weather events. More than

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<sup>20</sup> The economic impact on the UK of a disruption to GNSS, 2023, available at [GOV.UK](https://www.gov.uk)

ever, our security and resilience in and through space rely on ensuring the safety and sustainability of the environment itself.

This strategy helps promote the safety and sustainability of the space environment:

- Through increased Space Domain Awareness, we will be able to track objects in the space domain more accurately, minimising the risk of debris-creating events and conjunctions.
- Through our investments in the VIGIL severe space weather monitoring mission, the UK is increasing our ability to monitor and protect the environment and CNI from solar activity.
- Through increased capability within ISAM and our National Active Debris Removal Mission, the UK is supporting the technologies to remove debris from the environment.
- Through our leadership in international Regulatory Diplomacy forums such as the UN COPUOS enabling the development of global norms, standards and practices that forward our national interests through protecting our ability to access and operate in space now and in the future.
- Through close engagement with the industry, academia and international markets to focus on the development of accessible, proportionate and affordable technologies that can mitigate the risks of conjunctions, debris generation, miscalculation or catastrophic failure.

As highlighted in the international chapter, the UK will continue to shape international norms and rules to minimise debris and maintain and promote space sustainability. Increased space sustainability allows us to maximise the use of space and its benefits to our economy, defence, and national security.

# Part Three: Our Strategy for Advancing Subsectors of Space

## Enhancing Space Domain Awareness

*Space Domain Awareness is how the UK understands what is happening in orbit - predicting (satellite intent), detecting, tracking and responding to threats, hazards and activity in space. It underpins the safety of every satellite the UK depends on, from defence communications to everyday navigation, forming the foundation of credible space power. We will build stronger, nationally separable SDA capabilities, anchored by the National Space Operations Centre, to meet civil and military needs, support our allies and protect UK interests in space and on Earth.*

### Context

SDA underpins civil and military space operations and helps protect critical space-based services on which the UK depends, including satellite communications, Earth Observation, and positioning, navigation, and timing services. It is an essential component of the Digital Targeting Web and is fundamental to the delivery of effective Space Control by enabling the detection, tracking, characterisation, and assessment of objects and activities in orbit.<sup>21</sup> This supports timely decision-making, freedom of manoeuvre, and effective operational response.

In addition, SDA protects people, infrastructure, and critical services on Earth by monitoring the risk of uncontrolled re-entry of space objects and supports the deterrence of hostile action. It also supports the sustainability of the space environment by enabling space traffic management in orbit, reducing the risk of collisions, and underpinning long-term access to the space environment for civil, commercial, and defence users.

### Approach

The UK's ambition is to develop a suite of resilient, nationally separable,<sup>22</sup> and enduring capabilities that complement those of its allies and are interoperable by design, while meeting UK sovereignty requirements. These capabilities will mature over time, strengthening national resilience, reducing reliance on partners, and supporting the growth of a competitive commercial sector.

We will continue to use the National Space Operations Centre (NSpOC) to help make space safer and more secure, supporting international security and defence while helping to grow a strong domestic space sector. Since its launch, NSpOC has monitored the uncontrolled re-entry of over 1,350 objects from space, issued 45,000 collision alerts to UK-licensed satellite operators, monitored 11 satellite break-up events, and played a major role in international

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<sup>21</sup> The Digital Targeting Web is a system-of-systems designed to connect sensors, decision-makers, and effectors across the land, sea, air, space, and cyber domains into a single, cohesive network.

<sup>22</sup> An approach to sovereign capability where the UK is able to contribute to international or commercial projects but retains the technical ability to operate those critical capabilities independently where necessary.

space hazard response. In 2025 alone, the NSpOC Military Operations team analysed and reported over 1,950 missile warning events, 305 global launch attempts, and created over 25,000 space products to support operations around the world.

The UK SDA Requirements updated in June 2026 provide clear direction on future government needs, giving industry and academia greater confidence to invest in solutions supporting detection, tracking, and characterisation. This presents a commercial opportunity for the UK SDA sector to develop high-quality tracking and situational awareness services for domestic use, with strong potential for export to global insurers, investors, and spacecraft operators.

Close collaboration with international partners will continue to benefit the UK. The UK will pursue targeted partnerships through NATO, Five Eyes, the CSPO, Multinational Force Operation Olympic Defender, the Joint Commercial Operations, and with other trusted allies. These partnerships will accelerate progress towards national objectives and contribute to wider global security and defence. The UK will also invest in ESA programmes that provide access to expertise and capabilities not currently available through national systems alone, such as the Vigil space weather mission. Through this approach the UK will further develop its leadership in SDA, becoming globally recognised for high-quality SDA data and insights for governmental, academic and commercial users.

While collective development is both necessary and effective, domestic investment and capability delivery remain critical. They deliver strategic autonomy, enable independent action, and sustain the UK's international influence as a leading space power.

In the Advanced Manufacturing Sector Plan, the government committed £80 million to the development of our priority subsectors of space.<sup>23</sup> Of that, £40 million is being committed to enhancing our SDA capability. Investment will focus on areas that deliver the greatest security, resilience, and economic benefit, securing UK civil and military interests in space and on Earth.

## SDA Objectives

**By 2030, the UK will have:**

- **Effective and resilient cross-government operational capability**, with the workforce, skills, tools, sensors, infrastructure, regulatory capacity and processes required to inform civil and defence response to risks, threats, and hazards.
- **Timely, high-accuracy, and high-fidelity object detection, tracking and characterisation** capabilities, aligned with the published targets of the cross-government SDA requirements,<sup>24</sup> via effective sensor networks and assured data access and procurement.
- **An SDA services industry** globally recognised for producing high-quality SDA data and insights for governmental, academic and commercial users.

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<sup>23</sup> Advanced Manufacturing Sector Plan, June 2025, available at [GOV.UK](https://gov.uk)

<sup>24</sup> Space Domain Awareness - Requirements, June 2026, available at [GOV.UK](https://gov.uk)

**By 2035, the UK will have:**

- **High-confidence, 24-hour forecasting lead times** for operational space weather predictions, underpinned by operational space environmental monitoring sensor networks and assured data access, enabling actionable decision-making for the protection of ground, air and, space-based infrastructure and to mitigate National Risk Register space weather risks.
- **A resilient SDA system that supports regulatory oversight**, capable of independently monitoring all observable UK activity in space.
- **Established nationally separable SDA systems** capable of informing sovereign military and civil operations to protect UK interests in space and on Earth, reducing dependence on others and strengthening the UK's contribution to allied space defence.

**Key Funding Commitments**

The UK will commit £274 million in civil funding between 26/27 to 29/30 in delivering our specific objectives for Space Domain Awareness. This will include delivery of:

- **The National Space Operations Centre** - £85 million to deliver resilient and continuously improving capabilities to monitor the space environment, warn of collision risks, and provide early warning of missile launches.
- **VIGIL Severe Space Weather Mission** - around £300 million<sup>25</sup> to date has been committed to this UK-led European Space Agency mission to place a monitoring satellite in orbit around the sun to monitor space weather and provide early warning of risks.

Further activity within the Defence Investment Plan will include:

- **Deep Space Advanced Radar Capability**: Investment to deliver a global network of ground radars to enhance Space Domain Awareness of objects in deep space and orbit operated jointly with the US and Australia.
- **BOREALIS** - a sovereign command and control data processing system with enhanced capability to analyse, interpret, and verify complex data, task sensors, and support government decision-making.

The full list of funded activities for Space Domain Awareness is detailed in the technical annex to this Strategy.

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<sup>25</sup> The UK's resilience to severe space weather, available at [www.nao.org.uk/reports/the-uks-resilience-to-severe-space-weather/](http://www.nao.org.uk/reports/the-uks-resilience-to-severe-space-weather/). This reflects the total commitments made at the ESA Council of Ministers 2019, 2022 and 2025 (2025 economic conditions).

## UK leadership in In-Orbit Servicing, Assembly and Manufacturing

*In-Orbit Servicing, Assembly and Manufacturing covers the technologies and services that maintain, move, repair and build spacecraft, and manufacture highly innovative products in orbit - enabling operations such as refuelling ageing satellites and removing dangerous debris. It offers a new high-growth market while strengthening resilience and future national security capabilities in space. The UK will back the most commercially credible and strategically important ISAM capabilities, with a focus on building flight heritage and securing long-term competitive advantage in the emerging market.*

### Context

ISAM is an emerging market segment with significant long-term potential, and the applications of ISAM technologies are diverse and continue to develop. In-Orbit Servicing (IOS) has the potential to reduce long-term operating costs for satellite operators, extend the lifespan of existing and future satellites, and strengthen the resilience of UK and allied space assets. The global market for in-orbit services is projected to be worth around £20 billion in cumulative revenue between 2024 to 2034.<sup>26</sup> Over time, In-Orbit Manufacturing (IOM) could also unlock new economic opportunities through the production of high-quality materials in orbit, such as semiconductors and pharmaceuticals, for use on Earth.

The development of ISAM capabilities can also deliver benefits beyond the space sector. Technologies underpinning ISAM, including robotics, autonomous systems, AI and machine learning, advanced materials and precision manufacturing have wide-ranging applications across the economy. These technologies can support innovation and productivity in sectors such as advanced manufacturing, healthcare and life sciences, helping to create skilled jobs and strengthen the UK's industrial base.

### Approach

The UK has a growing ecosystem of innovative companies, supported by strengths in robotics, autonomous systems, space systems engineering, and AI. These industrial capabilities are reinforced by world-class research institutions, a regulatory environment designed to facilitate innovation, and strong access to global capital markets.

In the Advanced Manufacturing Sector Plan, government set out a clear ambition to support the development and commercialisation of in-orbit technologies. Government support will prioritise building flight heritage for ISAM capabilities with the clearest pathways to commercialisation and the strongest contribution to national security and defence objectives.

We expect strong industry leadership to secure repeatable and scalable commercial missions, expand into global markets, and convert technological progress into sustainable revenue growth. Government will continue to work closely with industry and academia to ensure that

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<sup>26</sup> In-orbit satellite services: trends and forecasts 2024–2034, Analysis Mason Limited, April 2025, available at <https://www.analysymason.com/research/content/reports/inorbit-satellite-services-nsi141/>

policy, regulation, and targeted support remain aligned with market needs, while maintaining a clear focus on economic growth and national security outcomes.

## ISAM Objectives

**By 2030, the UK will have:**

- **Demonstrated Rendezvous, Proximity Operations and Docking (RPOD) technology and capabilities** to conduct ISAM missions and contribute to Space Control missions, supported by leading testing infrastructure.
- **A robust and adaptable ISAM industrial base with flight heritage**, supported by academic expertise and R&D, able to meet evolving demands and enter new markets.
- **Integrated programme of civil and defence activity to meet government requirements**, with increased adoption of ISAM capabilities for asset life extension, defence, and responsible space stewardship.

**By 2035, the UK will have:**

- **A leading ISAM industry**, delivering repeatable safe in-orbit services to domestic and international markets.
- **A mature in-orbit manufacturing capability**, supported by a strong ecosystem and testing environment.
- **A significantly expanded set of military capabilities in space**, contributing towards nationally separable Space Control and supporting allied defence needs.

## Key Funding Commitments

The UK will commit £117 million in civil funding between 26/27 to 29/30 in delivering our specific objectives for ISAM. This will include delivery of:

- **National Active Debris Removal Mission** - up to £77 million to demonstrate the UK's capability to rendezvous with, and remove from orbit, UK-registered orbital debris, helping to reduce collision risks and keep space usable.
- **ISAM Demonstrator and Capability Development** - £40 million for ISAM technology demonstration building UK flight heritage.

Further activity within the Defence Investment Plan will include:

- **Space Control**: Developing capabilities to enhance our awareness of space activities and protect our critical national assets in orbit.

The full list of funded activities for ISAM is detailed in the technical annex to this Strategy.

## Building Ubiquitous Satellite Communications

*Satellite Communications (SatCom) is the connectivity backbone that keeps defence, government, businesses and the public connected, from sovereign military communications to mobile phones in the most remote communities. We will build a ubiquitous, integrated SatCom architecture for government, with coordinated, one government procurement, capitalising on our combined purchasing power and world-leading industrial strengths to deliver resilient SatCom connectivity.*

### Context

SatCom is critical for national security and resilience. It enables real time global connectivity which underpins the daily operations of UK Armed Forces, the UK's diplomatic networks, and our emergency services.

The subsector is also a major growth opportunity, already accounting for over 36% of space industry income (£3.53 billion) in financial year 2022/23,<sup>27</sup> with global SatCom services supporting an estimated £169 billion contribution across the UK economy (7% of UK GDP).<sup>28</sup> Forecasts indicate potential annual growth of up to 14% out to 2033 for the LEO satellite market,<sup>29</sup> driven by rapid changes including advances in low Earth orbit technologies, new 5G and 6G capabilities reaching maturity, and greater standardisation enabling the convergence of non-terrestrial and terrestrial networks.

SatCom services are increasingly integrated into routine activities at an enterprise-level scale. New market opportunities are emerging in areas such as aviation, maritime, autonomous systems, the “Internet of Things” that connects a wide range of infrastructure and services in new ways, and direct-to-device services that allow people to benefit from satellite connectivity through their mobile phones.

### Approach

The UK will capitalise on the combined purchasing power of the whole UK Government through the ESC and ensure increased national resilience of government SatCom systems. To do this we will establish a unified, integrated approach with a single SatCom architecture and coordinated procurement for one government requirements led by the MOD.

The UK sector will host multiple operators that ensure access to a range of connectivity solutions when they are needed. The foundation for this will be an ecosystem that prioritises interoperability through open standards, fosters innovation through competition, and enables aggregation of capabilities into a cohesive and comprehensive offering. The government will create clearer opportunities for industry by setting out its expectations and requirements and adopting a streamlined approach to procuring services. The UK will continue to maximise the benefit of its shareholding in Eutelsat as an investment in SatCom capability, where possible. Cooperation with allies and international partners remains central to our approach, enabling

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<sup>27</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

<sup>28</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](https://gov.uk)

<sup>29</sup> LEO Satellite Market (2025-2033), June 2025, available at <https://www.grandviewresearch.com/industry-analysis/leo-satellite-market-report>

access to allied networks, strengthening interoperability, accelerating capability development and embedding UK technologies in emerging global architectures.

Government investment in SKYNET will ensure it continues to underpin the UK's sovereign sensitive defence communications and deliver services to NATO allies. The UK will maintain a hybrid strategy that blends SKYNET, allied collaboration, and commercial services to ensure robust and flexible communications across civil and defence domains, including areas that support national resilience, such as crisis response and emergency services.

To capitalise on the market opportunity and ensure that our defence capabilities have access to the cutting-edge SatCom technologies, the government is investing via ESA and national R&D funding programmes across civil and defence to establish industry capability in next-generation SatCom technologies, including new direct-to-device mobile networks, user terminals that can roam across services, quantum and optical technologies that give the UK industry access to mission-scale SatCom testbeds. The UK hosts ESA's European Centre for Satellite Applications and Telecommunications which, equipped with facilities such as the 5G/6G hub, is showing the way in the development of next-generation connectivity. Alongside this, the government recently announced the creation of a UK-funded AI Lab for SatCom, to onboard AI at scale and drive growth. These facilities enable UK industry to gain early expertise in emerging architectures and a strong competitive position.

The UK will also continue to strengthen our diplomatic and technical approach to managing our spectrum access through established international forums including CEPT and the ITU. This will include targeted investment in capability and technical support, and clearer coordination across government, working closely with Ofcom, to support UK interests.

## SatCom Objectives

### By 2030, the UK will have:

- **A resilient, integrated national SatCom architecture set out**, with clear interoperability standards, unified commercial procurement structures, updated spectrum access rules, and central coordination by MOD, that will enable future systems to work together to support government activities.

### By 2035, the UK will have:

- **Cutting-edge SatCom services for government** that form a "network of networks", blending sovereign, partner and commercial capabilities to provide 24/7 communications for security, defence, crisis and emergency service operations.
- **Commercial satellite connectivity integrated with terrestrial 5G and 6G services** across the UK and Overseas Territories, improving access to the internet and enabling new uses of SatCom in homes, businesses, and national infrastructure.
- **Market-leading industry capabilities** that strengthen the UK's position in the global SatCom value chain and support national security objectives, enabled by UK-based R&D, infrastructure, and manufacturing to supply commercially successful multiorbital equipment and services at scale.

## Key Funding Commitments

The UK will commit £2.8 billion in funding between 26/27 to 29/30 in delivering our specific objectives for SatCom. This will include delivery of:

- **Defence Satellite Communications** - £2.3 billion to deliver military satellite communication services to the UK Armed Forces.
- **Industrial Development through R&D funding** - £429 million in total comprising the ESA Advanced Research in Telecommunications Systems (ARTES) programme to develop SatCom technologies, supported by the UKSA Connectivity in LEO programme to part-fund the commercialisation of innovative SatCom capabilities, and the ESA Moonlight programme to deliver Europe's first dedicated lunar telecommunications and navigation constellation.
- **SatCom for public services** - at least £75 million including procurement of LEO SatCom services for UK and Overseas Territory users, increased resilience of the Emergency Services Network, and deployment of LEO technologies for Wi-Fi connectivity on UK mainline trains.

The full list of funded activities for SatCom is detailed in the technical annex to this Strategy.

## Securing Assured Access to Space

*Assured access to Space is the ability to place satellites into orbit reliably, securely and when needed. Every other space subsector is dependent on it. As global demand outstrips supply and geopolitical risks grow, assured access is a national security requirement. We will combine expanded domestic launch capability, centred on SaxaVord Spaceport as Europe's leading site for polar and sun-synchronous missions, with trusted partnerships to secure resilient, assured access to orbit.*

### Context

The UK currently launches through a small number of overseas providers. However, as global demand has dramatically increased, the market is supply constrained increasing the risk that the UK might be unable to secure timely access to space in the future.

This market concentration creates strategic risk and lacks resilience. In a period of heightened international uncertainty and growing reliance on space-based systems, assured access to space is a national security requirement. The Strategic Defence Review emphasised the need to improve the resilience of UK military space systems, creating redundancy in the UK's options for accessing space.

### Approach

The government's policy is to ensure the UK has the capabilities necessary to launch and insert commercial or UK Government satellites into space reliably, on predictable terms, and with confidence in availability, security and resilience.

We will achieve this by combining a reliable UK-based capability for polar and sun-synchronous missions with partnerships that provide access to other orbits and lift classes.

The UK has already taken steps to strengthen its delivery of assured access. The UK's high-latitude location enables efficient access to polar and sun-synchronous orbits, and extensive coastline and island geography allows safe launch trajectories out over the sea. The UK has also established a stable and internationally credible regulatory framework to enable commercial launch activity. Alongside this, we have taken targeted steps to mature a domestic launch capability, including developing SaxaVord Spaceport as the first licensed vertical launch site and supporting launch operators to progress orbital and sub-orbital capabilities.

These industrial, geographic and regulatory strengths position the UK to play a strong role within the European and allied launch systems. The UK will focus on supporting the development of robust space launch infrastructure and an industrial base, delivered through trusted commercial operators and international partnerships for the provision of a reliable launch capability.

The UK is developing its launch infrastructure, with SaxaVord Spaceport providing the licensed facilities to support multiple operators, with approval for up to 30 launches per year.<sup>30</sup> The

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<sup>30</sup> [SaxaVord granted spaceport licence by UK Civil Aviation Authority | UK Civil Aviation Authority](#)

Government plans, subject to due diligence, to invest £30 million in SaxaVord Spaceport to accelerate the operational readiness of the spaceport infrastructure required for regular orbital launch activity from the UK.

Assured access will also be secured through international partnerships and commercial collaboration, including participation in European Space Agency programmes and bilateral cooperation with allies. These arrangements will diversify access, including to equatorial orbits and other lift classes, and increase confidence in the timely availability of launch for UK missions. In support of our collective ambitions, the UK is collaborating with Germany and other allies to establish responsive space launch opportunities through SaxaVord Spaceport.

## Assured Access to Space Objectives

By 2030, the UK will have:

- **Frequent orbital launch activity from the UK**, with SaxaVord Spaceport supporting commercial, government and institutional launches.
- **Become established as Europe's leading launch location for polar and sun-synchronous missions**, underpinned by reliable infrastructure, predictable delivery arrangements and trusted international partnerships.
- **Secure assured access arrangements** with a broader set of commercial providers and allied partners, enabling the UK to secure launch of small-satellite payloads within defined readiness timelines whenever required.

By 2035, the UK will have:

- **A reliable and diversified approach to assured access**, combining UK-based launch capability with partnerships with allies to reduce reliance on any single provider and enable access to all required orbits.
- **A resilient UK launch ecosystem**, centred on regular launch operations from the UK and maximising national security and economic benefit through UK industrial participation.

## Key Funding Commitments

The UK will commit £227 million in funding between 26/27 to 29/30 in delivering our specific objectives for Assured Access to Space. This will include delivery of:

- **ESA Space Transportation Programme** - £148 million for the European Launcher Challenge and other ESA Launch programmes to build launch heritage and cadence in the UK.
- **Spaceport development** - £30 million to accelerate operational readiness of SaxaVord Spaceport as the UK's primary launch location for polar and sun-synchronous missions.

The list of funded activities for Assured Access to Space is detailed in the technical annex to this Strategy.

## Building Resilient Positioning, Navigation and Timing

*Positioning, Navigation and Timing delivers the precise positioning and timing signals that underpin critical national infrastructure, defence operations and everyday economic life - from stock exchanges and telecoms to aviation and emergency services. Yet these systems are increasingly vulnerable to jamming, spoofing and space weather. Over the next decade, the UK will develop sovereign, resilient PNT infrastructure to reduce our dependence on Global Navigation Satellite Systems (GNSS), layering space, terrestrial and quantum technologies to ensure the UK is never without this essential capability.*

### Context

PNT is a critical enabler for Defence operations, providing interoperability of networks for communications and targeting, and as a navigational aid. Ongoing jamming (emission of a stronger signal to overpower weaker GNSS signals) and spoofing (broadcast of false GNSS signals to deceive timing and location) in modern theatre environments mean that assured access to GNSS for PNT services must be protected and enhanced. Government will utilise both space and terrestrial means for defence, to ensure a continued supply of PNT data.

GNSS systems are also a bedrock of the UK economy. Telecoms, the internet and stock exchanges rely on precise timing. Transport infrastructure of all kinds, from shipping and aviation to rail and road, all rely on precise positioning signals. Almost every aspect of modern-day life relies on these systems in some way. This dependence is deep; if GNSS failed there would be significant disruption to GNSS-dependent critical national infrastructure and the financial impact of a loss of GNSS for a single day is estimated to be £1.4 billion, rising to £7.64 billion over the course of a week.

GNSS and their signals are exposed to vulnerabilities such as the effects of space weather and interference. They are also susceptible to technical failure, including satellite malfunctions or system outages that can disrupt services. Even localised jamming can have an outsized impact: a jammer near an airport can impact air traffic over considerable distances. Meanwhile, the threats posed by accidental and deliberate interference and cyber-attack are steadily evolving, particularly in conflict zones around the world. As we become increasingly dependent on GNSS for a wider array of capabilities and functions, we must act to ensure the resilience of PNT systems which could lead to greater deterrence of hostile action.

### Approach

PNT resilience therefore requires diversification away from relying solely on GNSS, where feasible. The Government Policy Framework for Greater PNT Resilience<sup>31</sup> sets out our blueprint for how we will achieve resilient PNT. The UK will develop layered PNT systems that are independent from each other and not vulnerable to the same threats.

Space is one of several layers in the UK's PNT system-of-systems. Outside of the space domain, the UK Government is investing £248 million in a National Timing Centre (NTC) and £71 million in an Enhanced Long-Range Navigation (eLoran) network. These will be developed

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<sup>31</sup> Policy Framework for Greater PNT Resilience, 2023, available at [GOV.UK](https://www.gov.uk/government/policy-frameworks/greater-pnt-resilience)

alongside military systems to distribute time, and deployable eLoran transmitters that can be rapidly deployed to contested locations worldwide. We are also investing £205 million in R&D for quantum PNT and sensing to catalyse technology development.

These investments in terrestrial and quantum PNT systems will complement investments in space PNT technologies. The UK is developing a system that uses a satellite to perform a two-way satellite time and frequency transfer (through project TOUCAN) between the National Timing Centre and eLoran transmitters. We will develop, validate and assess technology concepts that could fulfil a requirement for GNSS independent global timing. We are developing a world-leading PNT interference monitoring and warning capability that will allow us to detect and act on interference to GNSS and eLoran signals. And we are investing £59 million through European Space Agency (ESA) PNT programmes to catalyse technology development and support UK businesses to commercialise promising PNT technologies.

In line with the Government Policy Framework for Greater PNT Resilience, the UK is continuing to assess options for the most effective approach to augment GNSS signals to deliver high trust, high precision data for safety-critical use cases.

This chapter sets out the "Space" elements of this system-of-systems - investments in space and space-enabled PNT technologies, and investments in PNT via the UK Space Agency and European Space Agency - and how they will support our vision for PNT resilience and PNT-enabled economic growth.

## **PNT Space Objectives**

As part of wider UK ambitions on PNT overall, space and space-enabled PNT technologies will contribute towards the following objectives.

### **By 2030, the UK will have:**

- **Secure, stable time transfer via space** linking the National Timing Centre to eLoran transmitters across the UK, reducing the UK's dependence on GNSS.
- **Delivered concept studies for GNSS-independent global time transfer and hybrid PNT fusing a terrestrial eLoran segment and a space segment**, to support decisions on viable UK PNT architectures.
- **A robust, interoperable, and resilient eLoran timing architecture** that ensures high-integrity timing generation and synchronisation with national reference timescales.
- **A new national capability to identify and monitor PNT interference**, to enable the most effective response to threats.
- **State of the art facilities and modelling and simulation capabilities to predict, test, and validate the performance of PNT systems** under normal and degraded conditions.
- **An updated and effective regulatory framework** addressing the risks posed by PNT interference and misuse of technologies such as jammers.

- **Contributed to an improved International Terrestrial Reference Frame** via the Genesis satellite geodesy mission, together with international partners.

**By 2035, the UK will have:**

- **A strong pipeline of innovative PNT technologies** spanning low to mid Technology Readiness Levels, supporting the next generation of resilient PNT tech development.
- **A competitive and growing PNT sector** bringing near-market technologies, including LEO PNT, quantum PNT, and AI-enabled PNT technologies, into commercial deployment.

### **Key Space Funding Commitments**

The UK will commit £76 million in civil funding between 26/27 to 29/30 in delivering our specific objectives for PNT. This will include delivery of:

- **ESA NAVISP** - £52 million funding to the European Space Agency NAVISP programme to increase the competitiveness of the UK PNT sector and fund the development of resilient PNT solutions.
- **PNT Interference Warning Capability** - £13 million to develop a UK-wide system to monitor, locate, and react to threats to PNT signals such as jamming and spoofing originating in space and on the ground, with a fully operational world-class facility by 2029/30.

The full list of funded activities for PNT is detailed in the technical annex to this Strategy.

## Using Earth Observation for Security and Growth

*Earth Observation turns data from space into intelligence about the Earth, its environment and human activity, including satellite-based intelligence, surveillance and reconnaissance (ISR). It supports defence and national security, improves public decision-making, and creates major commercial opportunities in environmental data and analytics. We will secure the capabilities, data access and infrastructure needed to use EO more effectively, strengthening ISR for national security, improving public decision-making and growing the UK's competitive strengths in data and analytics.*

### Context

Space-derived Earth Observation data is essential for the UK's defence and national security, with satellite-based intelligence, surveillance and reconnaissance (ISR) changing how wars are fought as quickly as civil data is changing the economy. ISR capabilities support the UK's 'Understand' and 'Strike' requirements outlined in the Strategic Defence Review, as these systems support rapid, accurate, and effective targeting.<sup>32</sup>

EO is important for economic growth, with EO satellite services supporting industries that contribute more than £164 billion to UK GDP (7%), with even larger value once meteorological services are included.<sup>33</sup> Data technologies, products and services create commercial opportunities while also enabling better public decision making.

The data we derive from EO is integral for monitoring and mitigating some of the UK's most serious risks.<sup>34</sup> This includes food security, natural and environmental hazards, disaster response and ecosystem collapse, both in the UK, its Overseas Territories, and globally.<sup>35</sup> UK leadership on climate datasets (such as Met Office sovereign climate data sets and ESA's Climate Change Initiative's Open Data Portal) provides an essential contribution to accurately monitoring the health of our planet. Space-based EO, when combined with ground-based and in situ sensors, is crucial for combatting climate and biodiversity crises.

### Approach

The UK will continue to procure space-based Earth Observation capabilities where necessary for our national security and defence, such as through the MOD ISTARI programme, and where government services can be directly supported by Earth Observation data, such as Met Office weather and climate services and Defra's Rural Payments Agency. We will explore how to further use EO data to support delivery of government services. Space applications and geospatial services will increasingly underpin innovations in areas such as green finance, nature markets, sustainable investment, green infrastructure, and agri-tech, where the UK has the potential to become a world leader.

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<sup>32</sup> Strategic Defence Review, July 2025, available at [GOV.UK](#)

<sup>33</sup> Size and Health of the UK Space Industry 2024, July 2025, available at [GOV.UK](#)

<sup>34</sup> National Risk Register 2025, January 2025, available at [GOV.UK](#)

<sup>35</sup> Nature security assessment on global biodiversity loss, ecosystem collapse and national security, January 2026, available at [GOV.UK](#)

The UK will develop a seamless, trusted and cost-effective EO data architecture that enables users to integrate, analyse and apply satellite data at scale. Strengthening space data architecture will increase EO data uptake, grow demand, crowd in private investment and enable UK firms to export sovereign, compliance-ready products, maximising the value of UK satellite investment, unlocking new services, supporting defence needs and positioning the UK as a global leader in space-enabled solutions. To that end, the UK is investing £8 million over 4 years for the continued development of the EO DataHub, a national data platform that provides a single point of access to quality assured public and commercial EO data. UKRI provides national capability, research excellence and digital infrastructure that enable the UK to turn EO data into public value. Government's wider investments in the Industrial Strategy are strengthening the UK's ability to deploy geospatial AI and other advanced analytical techniques to convert these data assets into meaningful geospatial intelligence and value.

Achieving these goals relies on international collaboration, particularly with ESA, NATO and other allies, the European Commission and European Organisation for the Exploration of Meteorological Satellites (EUMETSAT), enabling UK access to global sensor constellations, calibration networks and environmental datasets, beyond what could be developed alone. Targeted partnerships with trusted international organisations and national counterparts will support interoperable standards, shared calibration and validation, and combined analytical insight, improving data quality, coverage and timeliness.

## Objectives

### By 2030, the UK will have:

- **Consolidated public sector access to high-quality EO data** by identifying priority national security, defence and public service requirements, and procuring the necessary data and capabilities.
- **Supported the exploitation of EO data into new and emerging commercial markets** by increasing the usability, uptake and economic impact of EO data and data products for UK users by improving access to trusted data, processing and analytics services, through progressing the UK space data architecture, developing common standards, and enabling innovation-friendly licensing.
- **Strengthened UK resilience and maintained leadership in climate science** by supporting capabilities to maximise the benefits of international EO collaboration, and delivering improvements in environmental monitoring, weather forecasting and response to extreme events.

### By 2035, the UK will have:

- **A secure, assured, UK-owned and operated, nationally separable ISR capability**, prioritising technology, missions and infrastructure along with strong international relationships that enhance national security and economic growth by improving the UK's ability to monitor security risks.
- **A mature EO data ecosystem** with space data architecture that supports trusted data access, analytics services, common standards and innovation-friendly

licensing to unlock greater value from EO data across public, commercial and research applications, accelerating innovation and enabling AI-driven solutions.

- **A resilient, assured public sector EO data supply** that meets priority national security, defence and public service needs, with rationalised access to timely high-quality EO data and capabilities across government, improving the UK's ability to monitor and predict environmental hazards and strengthening resilience to climate change.
- **A strong UK EO technology pipeline** that strengthens sovereign and allied capability through continued targeted investment into areas of UK industrial, academic and operational advantage.

## Key Funding Commitments

The UK will commit £990 million in civil funding between 26/27 to 29/30 in delivering our specific objectives for EO and related meteorological services. This will include delivery of:

- **Targeted development through ESA Programmes** - £332 million total commitment through European Space Agency programmes to develop the EO subsector, including EO technology development, science and meteorology, and EO data applications, through programmes such as FutureEO, ESA Copernicus funding, Aeolus-2, and the European Resilience in Space programme.
- **Membership of the EU Copernicus programme** - from £135 million per year until 2027 to participate in Copernicus, securing better UK access to Copernicus data from the Sentinels and Contributing Missions as well as access to multimillion pound contracts for the Sentinels and associated data services. Whilst no decision has been made on the UK's future relationship with Copernicus after 2027, we continue to collaborate closely with our European Partners.
- **Collective procurement of Earth Observation data** - a major cross-government initiative to procure optical EO datasets for the whole UK public sector with associated services and analytical support, improving procurement efficiency, and stimulating public sector demand that will widen uptake and use of EO data and technology.

Further activity within the Defence Investment Plan will include:

- **MOD ISTARI programme** - to deliver Defence capabilities in Space-based Intelligence, Surveillance, and Reconnaissance activities.

The full list of funded activities for EO is detailed in the technical annex to this Strategy.

## Focussing Effort in Space Discovery

*Space Discovery is the research, science and innovation base that creates future space capability, generating knowledge, technologies, talent and partnerships that will sustain the UK's world-leading scientific reputation; and powers the pipeline from curiosity to commercialisation. We will continue to back excellent discovery-led science while adopting greater focus in supporting our capability needs and our defence, national security, and economic growth ambitions.*

### Context

Curiosity-driven research generates the knowledge, talent and technologies that underpin the UK's long-term security and prosperity, from long-term datasets and scientific evidence to the innovation pipeline that feeds future capability and growth.

### Approach

To support the national priorities of defence, national security and growth, government is refreshing its approach to Space Discovery so that foundational science, innovation and exploration are more targeted so they can better support the development of future capability, economic opportunity, international influence, partnerships and national security. The priority subsectors inform strategic opportunities, while maintaining the breadth of research needed to generate future capability. We will back excellence in discovery-led science, working with national and international partners to drive global leadership, fuel academic-industry collaboration and enhance our talented workforce to put the UK at the forefront of space invention.

We will champion the UK's fundamental and world-leading curiosity-driven science wherever in space it occurs. Research will be funded in line with the Haldane Principle, ensuring that curiosity-driven research is led by the best available evidence and scientific expertise. We will prioritise investments that combine scientific excellence, long-term strategic value, value for money, and the potential to enable future UK capability.

Space Discovery activity will remain primarily supported by the UK Space Agency and UK Research and Innovation (UKRI), providing funding throughout the UK research ecosystem, enabling researchers to deliver space and ground-based instrumentation, facilities and data processing, skilled staff and scientific leadership, and advanced research and development across all critical technologies. We will establish a new strategic partnership between UKSA and UKRI to ensure strategic, coherent, and effective use of our resources to deliver world-leading research and innovation and support the space strategy more widely.

### Discovery-led Science, Research and Innovation

To ensure continued and future UK expertise in space discovery, we will support the research base, national laboratories, universities, data infrastructure, facilities, talent pipelines and international partnerships that enable the UK to lead in current and future space capability

areas. Priorities will be informed by evidence, community expertise, UKRI and UKSA programmes, and the outcomes of the Frontiers process.

## Space Exploration

To rigorously prioritise defence, national security and economic growth, we must take a new approach to our exploration ambitions.

Government will not prioritise funding towards large-scale exploration missions for their own sake. Instead, we will consider programmes against our broader national priorities, affordability, and impact. The UK's ambitions for large exploration missions will initially focus on delivering our existing commitments, such as the UK's leadership in the UK-built Rosalind Franklin Mars Rover.<sup>36</sup> We will also proceed with the current phases of work we have funded to FY29/30 and through ESA Council of Ministers 2025. Future funding commitments will be considered carefully, on a case-by-case basis, and will focus on areas where the UK has real and unique strengths to contribute to global partnerships such as the ARTEMIS missions.

ESA's Class of 2022 career Astronauts, including UK astronaut Dr Rosemary Coogan, are now all flight qualified, and it is ESA's stated intent that all will fly to the International Space Station by 2030.<sup>37</sup> We will also explore other emerging opportunities where they may arise, such as commercially sponsored flights, provided this is at low cost to the taxpayer.

## Discovery Objectives

**By 2035, we will:**

- **Continue to be recognised as a globally productive and influential contributor to Space Discovery**, ensuring the UK has a leading role in developing scientific instruments, research, data processing tools, facilities, calibration and validation capability, and data assets related to space.
- **Harness and build strong industrial and academic capability in Space Discovery through targeted funding of UK industry, national laboratories and university research organisations**, enabling them to compete for key roles on significant programmes or missions (e.g. providing spacecraft, ground-based facilities and major sub-systems).
- **Have a track record of identifying, commercialising, and maximising the technological benefits developed through Discovery activities for the achievement of wider government priorities**, driving the development of key space discovery technologies, data capability, and research infrastructure.

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<sup>36</sup> Growth and security at the forefront in UK funding boost for European Space Agency, available at [GOV.UK](https://www.gov.uk/government/news/growth-and-security-at-the-forefront-in-uk-funding-boost-for-european-space-agency)

<sup>37</sup> European Space Agency Press Release, May 2024, available at [esa.int](https://www.esa.int/press-releases)

## Key Funding Commitments

The UK will commit £1.295 billion in civil funding between 26/27 to 29/30 in delivering our specific objectives for Space Discovery. This will include delivery of:

- **National Discovery Programmes** - £172 million via key UKSA programmes to fund UK contributions to ESA science missions such as Ariel, LISA, Rosalind Franklin, PLATO, SMILE, Comet Interceptor, Solar Orbiter, EUCLID, GAIA, New Athena, BepiColombo, JUICE, and the James Webb Space Telescope. Through this funding we support fundamental science that helps us better understand the universe.
- **UKRI Fundamental Science** - £421 million to support discovery and astronomy through research programmes, talent, R&D, construction and operation of instruments and facilities, facility access for the research community, digital infrastructure and management of UK membership in international research infrastructures.

The full list of funded activities for Space Discovery is detailed in the technical annex to this Strategy.

## Part Four: One Government Approach to Space

Delivering this strategy will require government to act as one, leveraging each department's individual levers and spending power to realise a single vision for the UK space sector.

### **Governance – Cohering Government Policy Making**

Realising the UK's global space ambitions requires a coordinated, unified approach across the whole of government, to maximise our national strengths.

To achieve this, strategic oversight has been elevated to the highest tiers of government. Key decision-making is integrated into the Cabinet-level National Security Council (NSC) alongside other Cabinet Committees where necessary. This ensures space remains central to the UK's broader geopolitical and technological priorities. All departments participate in a dedicated cross-government governance framework coordinated by the Department for Business, Innovation, Science and Trade (BIST) and the Ministry of Defence, to turn ministers' direction into delivery. HMG will act with unity and purpose to drive the UK's space economy and national security forward.

We will strengthen our strategic partnership with UKRI to support greater alignment of space policy and delivery across the UK R&D landscape, by establishing clearer mechanisms for coordination and collaboration.

To ensure our strategy is having the impact we need, we will ensure appropriate monitoring and evaluation is in place for government interventions, and the technical delivery annex sets out this approach in more detail.

### **Delivering in Practice – Acting at Scale**

This one government approach goes beyond governance structures; it is also about how government delivers in practice.

Where the UK needs space enabled services, they can be procured more effectively as one government with a single, unified set of requirements, than by many smaller bespoke procurements by individual departments. This allows us to harness greater scale, deliver public services more efficiently, and surface latent demand within government that might otherwise go unrecognised.

The first step in this approach is to build our unified, integrated approach for SatCom for government. This will leverage the technical expertise in the Ministry of Defence and the combined purchasing power of the whole UK Government through the ESC to coordinate requirements and procure solutions.

As this approach matures, and the ESC management of procurement develops, we will explore options to adopt similar models elsewhere in our space activity. And we will explore how we

work together with the Devolved Administrations and the Overseas Territories to ensure we benefit from the whole strengths of our diverse geography.

## **Delivering Together – Working in Partnership with the Space Sector**

Delivering our vision for the UK cannot be achieved by government acting alone. We will rely on the combined expertise, inventiveness, experience, and excellence of the UK space sector itself to make this strategy a reality.

As such, we will work in partnership with the sector in everything that we do.

As we committed to in the Advanced Manufacturing Sector Plan, a new sector-led and ministerially chaired Space Industry Advisory Group (SIAG) was established in May 2026 to ensure sector insight continues to inform government's approach and highlight the challenges and opportunities facing the sector. The SIAG will:

- Provide **strategic input** to policy making, giving senior industry and academic leaders direct access to ministers and officials, ensuring government decisions are informed by commercial reality and sector expertise.
- Provide **market intelligence**, giving government candid insights into the UK's international competitiveness, emerging opportunities, and the barriers that prevent space businesses from scaling.
- Provide **shared direction**, allowing trusted and early sharing of ministerial priorities and forthcoming policy considerations, so that government and the space sector can move in step and act as one.

We will also ensure that industry has clear expectations of government procurements in the space sector, taking a coherent and consistent approach to Social Value to ensure businesses can maximise their investments in Social Value programmes. This will include an increasing emphasis on delivering value to the UK space sector specifically, focusing on supporting skills growth and developing resilient and innovative supply chains.

We also intend to continue exploiting mechanisms to ensure unfettered access to the skills, facilities and capabilities necessary to deliver resilient and secure supply chains in critical areas, such as the Technological Capital framework used in the SKYNET programme. Through these mechanisms, we may choose to specify certain activities that must be undertaken in the UK to enhance our freedom of action and build the resilience of the UK space industry, whilst recognising that the space supply chain is inherently a global one.

We are asking the sector to do things differently too: to align activity with national priorities, to accelerate commercialisation, to engage with government as one customer rather than many, and to bring forward solutions to our hardest capability gaps. Acting together, we can deliver the vision of a competitive space power – assertive in protecting our interests and driving our growth.

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