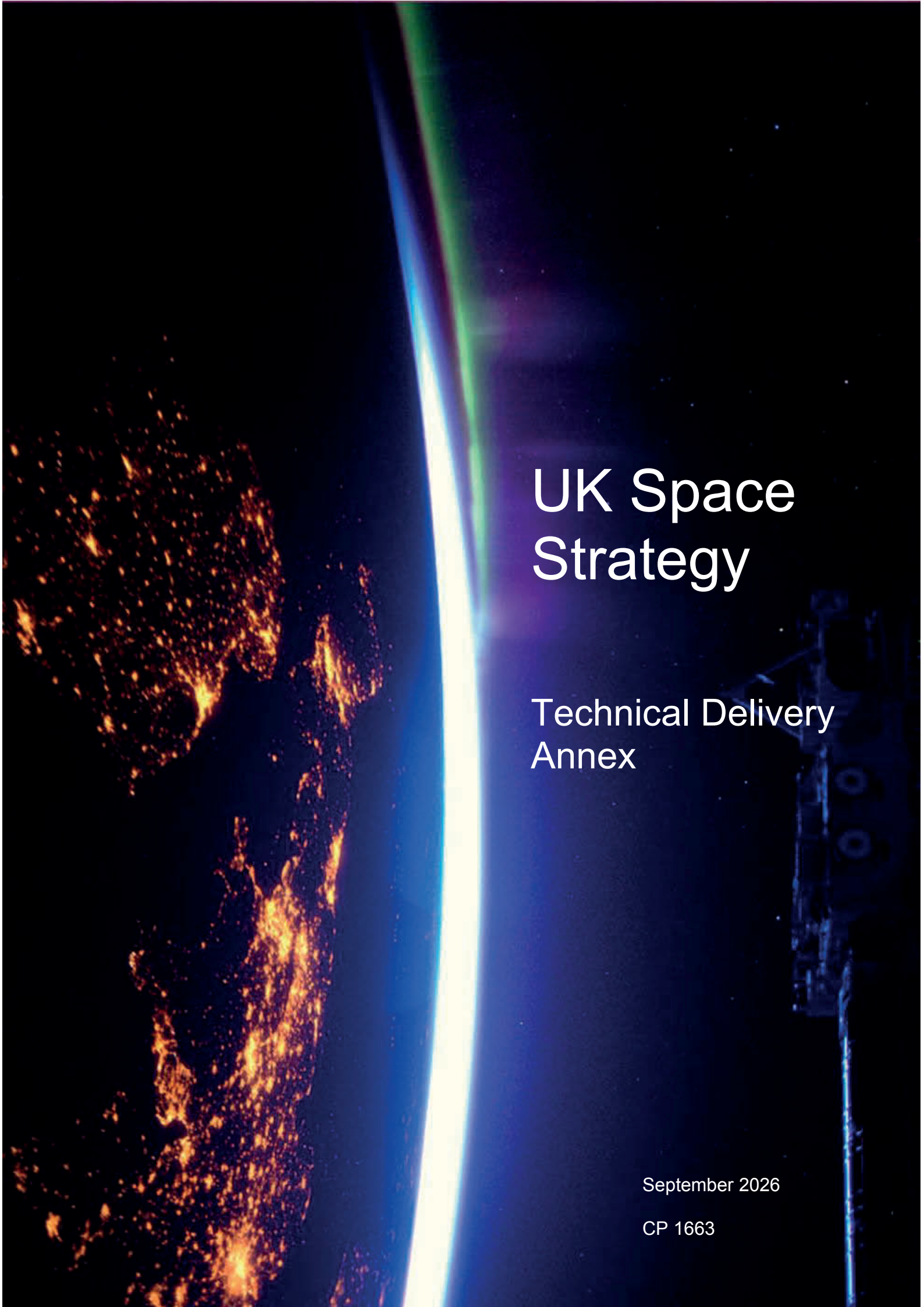




UK Space Strategy

Technical Delivery Annex

September 2026

CP 1663



Government of the United Kingdom

Ministry of Defence

Department for Business, Innovation, Science and Trade

UK Space Strategy - Technical Delivery Annex

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

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Introduction

The UK Space Strategy sets out the Government's policy and approach to space, placing defence, national security and economic growth at its core, with a one-government commitment to delivery.

This technical delivery annex complements the main strategy, setting out the funded activities that government will deliver over the current Spending Review period (FY26/27 to FY29/30) under the One Government approach. For some funded activities, particularly those delivered through the Defence Investment Plan, the funding timescales extend beyond FY29/30.

This annex will set out for each subsector and foundational area:

- The principal civil and defence activities government intends to deliver;¹
- The current funding planned to be available to deliver those activities, and the relevant timeframe;
- The key government bodies that will oversee delivery; and
- An advisory forward look of current planned timelines.

Delivery of the activities outlined in this document will be actively managed to ensure they remain aligned with strategic priorities, technological change and international developments. Government will continue to refine and build on these plans over time, including through further announcements where appropriate, including setting out the timings and technology focus for upcoming calls to support delivery of the objectives of each subsector.

Whilst this document contains the core space specific activities government will undertake, the space sector will continue to benefit from economy-wide interventions, from the UK's investments in general skills and technology, to our Modern Industrial Strategy.

Together, these two documents provide a comprehensive plan to deliver the UK Space Strategy, offering businesses, researchers, investors and international partners unprecedented visibility of government activity, providing the clarity needed to plan with confidence.

¹ This annex focuses solely on space-specific interventions. It is not intended to be exhaustive and does not capture all government programmes available to the space sector. All figures throughout this document are rounded to the nearest whole number of millions, or in the case of programmes below one million pounds, to the nearest one hundred thousand pounds. ESA figures represent UK funding flows; ESA contract flows may run to different time scales.

Industrialising the Space Ecosystem

Government will take a more proactive, targeted approach to shaping the sector to meet the UK's national security needs and growth goals.

Government will strengthen the conversion of space research into commercial value by improving access to Investment, Procurement and Finance to help de-risk technologies, remove barriers to adoption, and standardising procurement and export pathways to support UK firms to scale, compete globally, and deliver market-ready products and wider economic benefits.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
UK MOD Capability Funding in Novel Technologies <i>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</i>	£420 million	MOD
ESA Technology Programme <i>Develop technology for ESA and UK programmes to boost UK and European space industry competitiveness, encourage innovation and spin-in of non-space technology, and strengthen European independence in critical space technologies.</i>	£60 million	UKSA, ESA
National Space Innovation Programme (NSIP) <i>Support the UK space sector through grant calls, competitions and other mechanisms. NSIP primarily provides support through co-funded grants to de-risk high-reward projects with a clear target market.</i>	£65 million	UKSA
ESA ACCESS Element 1 – Scale Up: Provides start-ups with technical, financial and business support, and help businesses access global markets and investors. The ESA Phi-Lab UK <i>Provides funding and support to commercialise innovative technologies that promote sustainability in space and on Earth. Access support from world-leading technical and scientific expertise to business coaching and commercialisation.</i> European Space Agency Business Incubation Centre (ESA BIC UK) <i>Supports early-stage space businesses through a structured 18-month competitive programme that provides technical expertise, access to facilities, networks, office space, business support and funding to overcome innovation challenges and accelerate business growth.</i> ESA Investor Network <i>Community connecting space start-ups, potential investors and ESA programmes. The investor pool is diverse, spanning Angels, VC, PE, commercial banks and more.</i> Element 2 – Business Applications and Space Solutions (BASS): <i>Commercialisation programme to deliver innovative commercial space powered products, applications and services to all sectors in the UK.</i>	£50 million	UKSA, ESA, UKRI
Unlocking Space Unlocking Space for Business: drives private sector adoption of satellite data, technology and services. Unlocking Space for Government (Civil): aggregates government demand to increase public sector adoption of satellite solutions. Unlocking Space for Government (Defence): creates an integrated civilian and defence approach to space, unlocking new revenue opportunities and supporting dual use technology development. Unlocking Space for Investment: tackles access to finance barriers for UK space firms.	£41 million	UKSA
UK Government-backed Space Portfolio (Part of the UK Innovation and Science Seed Fund) <i>Investments through the evergreen UK Innovation and Science Seed Fund at pre-seed and seed stage.</i>	£22 million government investment	UKSA investment in UKI2S

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
Accelerating Business Growth <i>UK Space Agency Accelerator supporting space sector businesses through tailored support, mentoring, and funding access, including targeted programmes (LEO, GEO, Trajectory and Fusion Connect with Capital) and Space Ecosystem Navigators connecting firms to growth opportunities.</i>	£5 million	UKSA
Space Standards Support <i>Describes government's responsibilities for setting international standards in response to a range of international treaties and regulatory requirements. This activity helps to guide innovation, define missions' technology requirements, and ensure compliance.</i>	£3 million	UKSA
National Satellite Propulsion Test Facility at Westcott <i>The Westcott facility allows 'medium-sized' chemical propulsion engines (not launchers) to be tested in a bespoke vacuum facility.</i>	£1 million	UKSA

Wider finance-focussed programmes that the space sector can benefit from include the British Business Bank's Investor Pathways Capital Programme, UK Export Finance, and the work of the Office for Investment. The UK is also an associated member state of the EU's Horizon Europe programme, bringing opportunities for UK collaboration on space activity.

To bridge the gap between strong regional capability and global competitiveness, government will align **cluster** coordination, infrastructure investment, scale-up support and Foreign Direct Investment into a coherent national offer that de-risks private capital and enables UK space firms to grow, scale and anchor international activity across all regions in the UK.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
Space Clusters Infrastructure Fund (SCIF) <i>Funds a coordinated portfolio of space R&D and test infrastructure that amplifies the strengths and capabilities of regions across the UK.</i>	£37 million	UKSA
The Space Cluster Network programme <i>Invests in nations and regions of the UK, enabling them to take advantage of shared strengths to pursue new market opportunities and drive significant local economic growth.</i>	£6 million	UKSA

Through **Education and Future Workforce**, government will ensure that the sector has access to the skills and talent pipeline that will enable growth and resilience, with evidence-based interventions to secure an effective and diverse workforce.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
Education and Future Workforce Programme <i>Build a resilient and future-ready space workforce through targeted, pipeline-wide skills interventions, including teacher upskilling, new internships and training funds, overseen by the Space Skills Action Group through an annual Skills Dashboard.</i>	£14 million	UKSA, ESA

Wider skills-focussed government programmes that the space sector can benefit from include government's Engineering Skills Package and the Defence Industrial Strategy Skills Package.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
International Bilateral Collaboration <i>Funding support for the international chapter of the UK Space Strategy to build and maintain partnerships and collaborations with international partners on a bilateral basis.</i>	£30 million	UKSA

Pro-Growth UK Regulation

Regulation is a key driver of innovation, and a core part of government's pro-growth agenda. We will continue to work closely with the sector to prioritise the implementation of the Space Regulatory Review's recommendations and ensure that regulation keeps pace with innovation, supporting a responsible and competitive regulatory environment. The following table outlines core activities aligned to the objectives set out in the Pro-Growth UK Regulation chapter.

Objective	Progress to date	Future Plans
<i>Reduce regulatory admin and compliance costs to businesses and make processes quicker and simpler to ensure a responsive, agile regime that accelerates growth and innovation.</i> <i>Ensure the regulatory regime is swifter and simpler for repeated, scaled activity, such that high volume missions with known risks and proven viability are easier, faster, and cheaper to deliver in the UK.</i>	• The Civil Aviation Authority (CAA) has streamlined orbital licensing and environmental processes, strengthened cross-regulator coordination, and improved transparency through updated licence terms, guidance, and published performance metrics. • Ofcom has streamlined Non-Geostationary Satellite Orbit spectrum licensing and updated satellite filing procedures to clarify requirements, align with international changes, and reduce application timelines. • Government has introduced financial incentives and regulatory reforms, including updates to liability limits, enabling lower insurance costs; support to innovative new insurance models; streamlined approvals; and improved guidance, to reduce costs, increase certainty, and support growth and innovation across the space sector and the City of London.	The CAA have determined to: • Reform orbital licensing, including by implementing a "collect once, use many times" approach from 2026, reducing unnecessary repeat information requests and supporting more efficient licensing decisions. • Take forward options for multi-mission orbital licences by early 2027 to provide greater flexibility and reduce the administrative burden for UK operators. • Continue to review the Technical Question Set in 2026 to improve clarity, reduce information requests and support proportionate regulation. Ofcom will: • Establish a new framework for space launch authorisations by autumn 2026 to improve clarity on spectrum access for launch activities. Government will: • Develop further financial incentives by early 2027 to reward responsible operators and support innovation in areas such as debris mitigation and orbital safety. • Conduct a Post Implementation Review of the Space Industry Regulations 2021, the Spaceflight Activities (Investigations of Spaceflight Accidents) Regulations 2021, and the Space Industry (Appeals) Regulations 2021, to inform potential amendments by 2028, subject to parliamentary time. • Conduct a further Post-Implementation Review of the Space Industry Act 2018, with potential amendments by 2030 to ensure the framework remains competitive and fit for purpose. • Publish guidance to support interjurisdictional satellite transfers in autumn 2026.
<i>Provide a clear route to licensing new, high-potential technologies to remove barriers and accelerate the development of priority national capabilities.</i>	• Ofcom has expanded spectrum availability for space-based services, including a new authorisation framework for direct-to-device satellite services and expanded frequencies available for gateways in the UK. • Government has introduced regulatory and policy measures such as sandboxes, legislation and user-friendly guidance products to support advanced operations, clarify requirements for beyond-Earth orbit activities, and enable allied military launches from the UK without licensing barriers.	Government will: • Publish guidance in 2026 to support ISAM and lunar missions, incorporating RPO sandbox findings to enable UK innovation in Active Debris Removal and ISAM. • Invest £7 million from UKSA by 2029/2030 in further sandboxes and regulatory tools, focusing on high-growth areas and complex missions. • Provide £8.7 million per year over this SR in funding from DfT to CAA to deliver its duties as the spaceflight regulator for the UK. • Fund a re-entry sandbox in 2026 to de-risk the re-entry phase of space missions by clarifying regulatory processes and supporting emerging areas such as in-orbit manufacturing. • Continue engagement with the Medicines and Healthcare Products Regulatory Agency to produce a regulatory roadmap in the second half of 2026 clarifying regulatory pathways for in-space manufactured pharmaceuticals and informing future guidance.

Objective	Progress to date	Future Plans
		Subject to consultation and parliamentary time, introduce light-touch licensing regime for sounding rocket activities, exemptions for space station cargo missions and procurement-only licensing to simplify UK launch processes and reduce regulatory burdens for customers.
<i>Influence emerging international frameworks, guidelines and best practice to promote interoperability and smooth cross-border trade.</i>	The CAA has led the establishment and chairing of the International Space Regulators Forum to strengthen international collaboration and regulatory alignment. Government has influenced developing good practice and responsible usage of space internationally including at the UN and advanced bilateral agreements to reduce regulatory barriers, enable cross-border operations, and expand UK growth opportunities. Ofcom leads UK representation at international fora.	The CAA will: - Continue to lead active engagement with overseas regulators to enable cross-jurisdictional missions, including through its role in the International Space Regulators Forum. Ofcom will: - Continue to represent the UK on the use of spectrum at the ITU, including at World Radiocommunications Conferences and at the European Conference for Postal and Telecommunications Regulators (CEPT), working closely with government to ensure a consistent strategic approach. Government will: - Remain an active voice in shaping global space safety and sustainability through bodies such as the UN COPUOS, the Inter-Agency Space Debris Coordination Committee, and via the Artemis Accords. - Continue negotiations with the US Government for a treaty on space launch and re-entry licensing – a potential world first and growth opportunity for the UK space sector. The UK Government aims to conclude negotiations in 2026. - Engage internationally to enable multi-state rendezvous and proximity operations activities, informed by the RPO regulatory sandbox. - Continue engagement at COPUOS on draft principles for space resource use, with outcomes expected by 2027; and the workplan for the Long-Term Sustainability of Outer Space Activities. - Continue engagement with the European Union to minimise regulatory friction as the EU Space Act develops.
<i>Mitigate threats and hazards to space operations through proportionate regulation.</i>	Government has led international space sustainability efforts, including chairing the Inter-Agency Space Debris Coordination Committee (IADC), advancing global research and standards, and shaping UK policy and regulatory approaches to space debris and sustainability.	Government will: - Publish technical guidance in 2026 to improve clarity and certainty on space safety and sustainability, including on measures such as post-mission disposal, trackability and collision avoidance. - Develop Earth Observation and space data security policy, publishing guidance by Autumn 2026 to improve clarity, speed up processes, align with security requirements, and reduce regulatory friction. - Embed national security considerations into space licensing through a Policy Guidance Framework by 2028, ensuring consistent, clear treatment of security-sensitive activities while supporting innovation and commercial growth. - Explore licensing options for entities with no UK nexus through the Post Implementation Review of the Space Industry Regulations 2021, to ensure clear UK benefit and reduce regulatory risk. To be finalised by 2028.

Strengthening Security, Sustainability and Resilience

Government is determined to strengthen its ability to protect and defend the UK's interests in, from, and through space. To deliver against our national security interests, government aims to **protect and defend the UK's space ecosystem** by building a more secure, resilient and risk-aware sector through strengthened sector-specific policy and standards aligned with wider government security and resilience frameworks.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
Intelligence, surveillance and reconnaissance and Space Control, including: Space Control: Developing capabilities to enhance our awareness of space activities and protect our critical national assets in orbit. Space-based ISR: Developing operational sovereign intelligence, surveillance, and reconnaissance capabilities for defence. Deep Space Advanced Radar Capability: Investment to deliver a global network of ground radars to enhance awareness of objects in deep space and orbit. Operated jointly with the USA and Australia.	£880 million	MOD
Security, Sustainability and Resilience activities including: Concept development of the Hack-a-Sat in-orbit cyber security demonstrator Deploy the Hack-a-Sat cyber security testing and evaluation satellite, enabling industry-led attack-and-defend exercises to identify vulnerabilities and assess satellite cyber security countermeasures. Strengthen awareness of space services' criticality and risk impacts Embed understanding of space service criticality across UK Government, promote sector-wide risk awareness and security culture, and conduct impact analysis of capability loss. Strengthen cyber resilience in the UK space sector Targeted support to the sector through security advice and guidance, cyber security accreditation funding, and cyber security consultancy services. National security assessments Develop and implement a space-specific security accreditation scheme and undertake national security assessments across licensing, investment (including M&A), and government funding decisions. Deliver space sector crisis management and test sector preparedness Develop and regularly exercise response plans for a range of applicable incidents that could impact the sector and its supply chain. Conduct regular exercises with industry and other government stakeholders.	£14 million (envelope across all activities)	UKSA
Secure spectrum used by UK science missions Fees paid to Ofcom to license spectrum used by UK space science missions.	£17 million	UKSA

Enhancing Space Domain Awareness

To deliver on UK Government priorities for space, funding will support resilient, cross-government SDA capabilities, improving access to sensors and data to better detect, track and understand activity in space. The below table sets out the funding programmes for SDA:

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
ESA Space Safety domain Vigil <i>Lead delivery of the ESA Vigil space weather mission to provide advance warning of hazardous solar activity and improve national preparedness and resilience.</i> RAMSES <i>Contribute to the ESA RAMSES planetary defence mission to detect and assess asteroid threats. This covers ADRIOS, which is also listed in the ISAM chapter.</i> COSMIC <i>Contribute to the ESA COSMIC programme, designed to mature space weather monitoring, debris mitigation technologies, and planetary defence capabilities.</i>	£140 million	UKSA
National Space Operations Centre <i>Deliver resilient and continuously improving operational capabilities within NSpOC to safeguard UK interests in space and on Earth.</i> UK Global Optical and Radar Sensor Network <i>Develop the UK Global Optical and Radar Sensor Network to enhance sovereign sensor coverage and improve tracking and characterisation of objects in orbit.</i> Monitor Space Hazards <i>Further develop the Monitor Space Hazards function and alerting processes to include live tracking of re-entry, conjunction, fragmentation, and UK satellite activity.</i> Next Generation Tools <i>Fund UK-registered organisations to develop tools to improve data processing within BOREALIS, enhancing analysis capability and supporting UK SDA sector growth.</i>	£85 million civil funding MOD funding for NSpOC included in the funding set out under security, sustainability and resilience.	UKSA MOD
Met Office Space Weather Partnership Programme <i>Deliver the Met Office Space Weather Partnerships Programme to maximise the use of SWIMMR outputs and develop targeted, user focused capability.</i>	£11 million	Met Office
Chilbolton Advanced Satellite Tracking Radar <i>Deliver upgrades to the Chilbolton Advanced Satellite Tracking Radar to improve sensitivity and performance, strengthening data quality for government and industry users.</i>	£7 million	UKRI, NSpOC
Met Office Space Weather Operations Centre (MOSWOC) <i>Deliver a continuously improving MOSWOC to enable earlier and more reliable space weather operational forecasting to mitigate the risks posed by severe space weather.</i>	£23 million	Met Office
Space Weather Instrumentation, Measurement, Modelling, and Risk (SWIMMR) <i>Full post-programme operationalisation of SWIMMR models including the Advanced Ensemble Networked Assimilation System (AENeAS) to enhance space weather modelling capability.</i>	£8 million	Met Office, MOD
Deep-Space Advanced Radar Concept (DARC) <i>Deliver DARC in partnership with the US and Australia, providing a ground-based radar capability to identify, track, and characterise objects in GEO and other orbital regimes.</i>	Funding set out in the Security, Sustainability and Resilience chapter.	MOD
British Geological Survey Space Geodesy Facility (SGF) <i>Provides reference orbits and photometric observations to NSpOC through the SGF Satellite Laser Ranging (SLR) facility.</i>	£800,000	UKRI
BOREALIS <i>Enhance BOREALIS to analyse, interpret, and verify complex data, strengthen Command Control capability, sensor tasking, and decision support.</i>	Funding set out in the Security, Sustainability and Resilience chapter.	MOD

Competing in In-Orbit Servicing, Assembly and Manufacturing

To deliver government ambitions for ISAM and Space Control, government will prioritise activities which mature and commercialise key technologies. While not exhaustive, the below table sets out the range of activities in development, or that are expected to be delivered over this Spending Review period.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
National ADR Mission <i>Deliver a National Active Debris Removal Mission that proves ISAM technologies and builds UK heritage in in-orbit servicing.</i>	Up to £77m	UKSA
ISAM Demonstrations <i>Develop and deliver capability demonstrations of ISAM technologies to build flight heritage, de-risk operations, and positioning UK industry for commercial deployment.</i> ISAM Capability Development Enabling activities, including policy development, international partnerships, infrastructure and understanding emerging technologies.	£40m funding envelope	UKSA
ESA Programmes and Activities <i>Participate in the delivery of ESA ISAM missions that support the ISAM sector, including CAT; ClearSpace-1; ELSA-M; RISE.</i>	<i>Funding provided through the relevant ESA programme, e.g. ARTES. ARTES funding described in the SatCom chapter.</i>	UKSA
Develop and Deliver Space Control <i>Developing capabilities to enhance our awareness of space activities and protect our critical national assets in orbit.</i>	<i>Funding provided in the package included in the Security, Sustainability and Resilience chapter.</i>	MOD

Building Ubiquitous Satellite Communications

The below table sets out funded activities to deliver government's priorities for resilient, cross-government SatCom that blend sovereign, partner and commercial capabilities to provide 24/7 communications for security, defence, crisis and emergency service operations.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
Defence Satellite Communications <i>Includes a further £50m investment to extend the life of the in-service SKYNET 5 military communications satellites. To be replaced by new satellite communications capabilities including SKYNET 6A, which is due to launch in 2027.</i>	£2.3 billion	MOD
ESA ARTES <i>Support industry through ESA ARTES to develop strategic SatCom technologies, including advanced connectivity, security and emerging capabilities.</i>	£276 million	UKSA
ESA Moonlight <i>Co-fund ESA's Moonlight mission to deliver Europe's first lunar communications and navigation constellation, supporting UK industrial capability and future commercial opportunities.</i>	£73 million	UKSA
Connectivity in Low Earth Orbit – C-LEO <i>Provide grant and ESA ARTES funding to support the commercialisation of innovative UK SatCom technologies, capabilities and supply chains.</i>	£80 million	UKSA
Wi-Fi connectivity for rail passengers on mainline trains <i>Use LEO to provide reliable high-speed Wi-Fi connectivity for passengers travelling on mainline trains.</i>	£57 million	DfT Operator Limited
Procurement of LEO satcom services for government customers <i>Government will procure wrap-around LEO SatCom connectivity service provision and equipment for government customers, including overseas territories and network locations.</i>	£7.8 million	FCDO, BIST and Government Commercial Agency
Resilient telecoms <i>Working across government, we will use space capabilities to provide resilient communications for government in the event of disruption to terrestrial networks, including across cyber risks.</i>	£6 million	CO
ECHO2 <i>Deliver LEO SatCom capability through the ECHO2 global communications network, enhancing resilience, data transfer and connectivity for the UK's overseas and diplomatic network.</i>	£6 million	FCDO

UK space businesses can also benefit from wider activity such as the telecoms R&D hubs run by DCMS to support early-stage research in advanced connectivity technologies; international partnerships including ESA's UK-based European Centre for Space Applications and Telecommunications (ECSAT); and DCMS' Advanced Connectivity Technologies R&D Programme, which will provide R&D funding to develop and commercialise advanced connectivity technologies including non-terrestrial networks.

Securing Assured Access to Space

To deliver on UK Government priorities for space, funding will support sovereign and international launch capabilities to enable reliable and competitive access to space. The below table sets out funded activities supporting infrastructure, services and partnerships.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
ESA Space Transportation Programmes <i>Funding for European Launcher Challenge (ELC) and other ESA launch programmes to build launch heritage and cadence in the UK.</i>	£148 million	UKSA
UK Spaceport Infrastructure Funding <i>Funding to accelerate the operational readiness of SaxaVord Spaceport as the UK's primary launch location for polar and sun-synchronous missions.</i>	£30 million	UKSA
ESA Mandatory Guiana Space Centre (CSG) <i>Funding through the European Space Agency mandatory programme to support access to space for ESA missions.</i>	£39 million up to calendar year 2028	UKSA
UKRI Space Programme <i>Investment to develop flight-ready innovative platforms to build on the UK's strong science-led satellite mission capability and help translate research and innovation into deployable systems and directly incentivise UK launch capability</i>	Up to £9 million	UKRI

Building Resilient Positioning, Navigation and Timing

To deliver on UK Government priorities for resilience, funding will support resilient positioning, navigation and timing (PNT) capabilities.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
ESA NAVISP NAVISP Element 1 <i>Fund early-stage R&D into resilient PNT technologies to support the development of innovative capabilities and services.</i> NAVISP Element 2 <i>Support the development and commercialisation of near-market PNT technologies to strengthen UK sector competitiveness.</i> NAVISP Element 3 <i>Support for projects directly aligned with UK government priorities and departmental needs. This includes, but is not limited to, the government-led projects listed below.</i> eLoran Timing Architecture <i>Develop a timing synchronisation and generation chain to support resilient eLoran architecture and ensure compatibility with space-based systems.</i> Regional Hybrid PNT System R&D <i>A competition to assess concepts for regional hybrid (combining space and ground-based PNT systems).</i> Two-way satellite time and frequency transfer system (TOUCAN) <i>Deliver TOUCAN to provide resilient UK timing and enable stable satellite-based time transfer between national timing infrastructure.</i>	ESA NAVISP total £52 million	UKSA
PNT Interference Monitoring and Warning Capability <i>Develop a PNT interference monitoring and warning capability to detect, locate and respond to jamming and spoofing threats across space and ground systems.</i>	£13 million	BIST
FutureNav – LEO-PNT <i>Support UK industry to develop and commercialise LEO-based PNT capabilities and services.</i> FutureNav - Quantum and AI <i>Fund quantum and AI-based PNT demonstrators in space to develop next-generation timing and navigation capabilities.</i> FutureNav – Genesis <i>Deliver the Genesis satellite geodesy mission to improve the International Terrestrial Reference Frame and support global navigation and Earth science.</i>	£5 million £900 thousand £600 thousand	UKSA
Space-based time transfer R&D <i>Deliver concept studies for the technology required to deliver global timing independent of, and not susceptible to the same vulnerabilities as, GPS and other Global Navigation Satellite Systems (GNSS).</i>	£3 million	BIST, MOD, FCDO

Using Earth Observation for Security and Growth

The table below sets out programmes to develop Earth Observation capabilities and help

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
ISTARI <i>Develops UK-owned space-based ISR capabilities in support of national security.</i>	Funding included in the Security, Sustainability & Resilience chapter.	MOD
MINERVA <i>Operationalise the MINERVA digital architecture within Programme ISTARI to enable interoperability with partners and allies.</i>	Funding included in the Security, Sustainability & Resilience chapter.	MOD
EUMETSAT meteorology <i>Support EUMETSAT meteorology programmes to deliver operational missions and data, meeting user needs and supporting UK sector opportunities.</i>	£235 million	Met Office, BIST
FutureEO (ESA EO programmes) <i>Support the delivery of ESA's EO main programme to develop EO missions and capabilities, meteorological missions, and turn EO data into societal and economic value. Includes the SCOUTs, Earth Explorers e.g. Earth care, Biomass, FLex. Forum and Mission of Opportunity NGGM.</i>	£205 million	UKSA
Copernicus <i>Participate in and influence Copernicus to enable economic, environmental and social value while also supporting UK entities to secure Sentinel and Copernicus Services contracts and grow the UK EO sector.</i>	From £135 million p/a to EU until 2027; £78 million supporting ESA programmes	UKSA
Research and innovation using space data <i>Activity to maximise the use of space data for environmental resilience, security and economic growth.</i>	£72 million	UKRI
EO Data Procurement <i>A major cross-government initiative to procure optical EO datasets for the whole UK public sector with associated services and analytical support.</i>	<i>Significant commercial procurement envelope to be managed through procurement processes.</i>	DCMS
Aeolus-2 (ESA) <i>Deliver Aeolus-2 to improve weather prediction through global wind data and support downstream resilience.</i>	£33 million through ESA	UKSA
National Earth Observation programme: National EO Missions and Technology programme <i>Develop and deliver a national EO Technology Innovation and Missions programme.</i> MicroCarb <i>UK collaboration in and exploitation of the delivery of the MicroCarb mission includes UK contribution to calibration and validation activities and participation in the Mission Advisory Group.</i> Earth Observation Data Hub (EODH) <i>Delivering a federated hub of civil EO data across providers.</i> Satellite Earth Observation Data Digital Twin national spend <i>Integrate EO Digital Twin data and tools with UK data environments to support decision making and maximise value.</i> Climate services call programme <i>Deliver the EO Climate Services programme to drive innovation in UK EO commercial sectors</i>	£28 million	UKSA
National Earth Observation capability	£23 million	UKRI

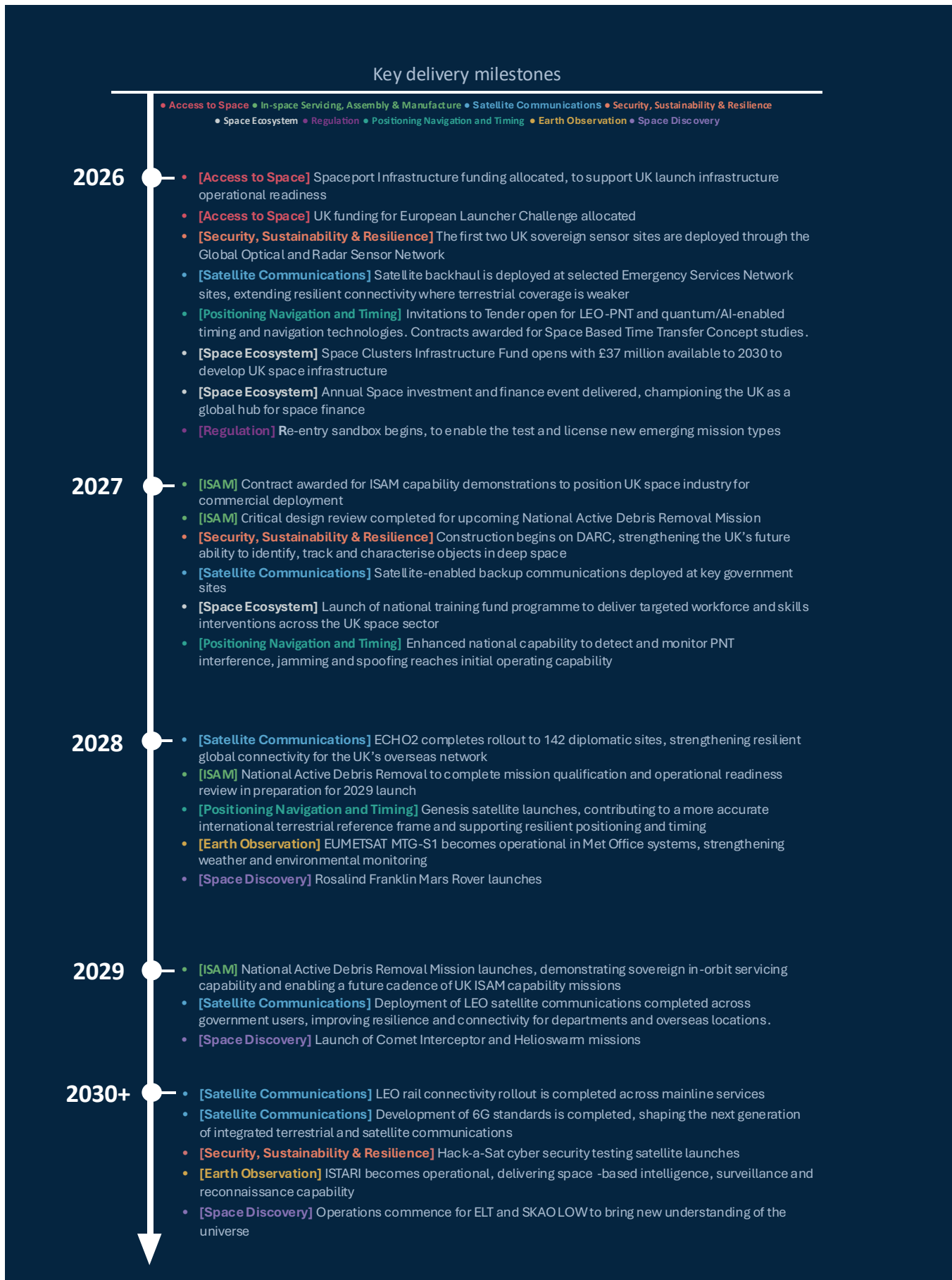
Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
<i>Support for the National Centre for Earth Observation and for leading EO measurement infrastructures and facilities to support the UK's research and innovation ecosystem.</i>		
Data and compute infrastructure for research and innovation with EO data <i>Invest in national data and compute infrastructure to support EO research, analysis and innovation.</i>	£14 million	UKRI
InCubed (ESA) <i>Support UK companies to commercialise advanced EO technologies and services.</i>	£11 million	UKSA
UKRI Space Programme <i>Maximise UK strengths in world-class research and innovation in Earth Observation to deliver defence, resilience, and climate applications whilst strengthening the UK's ability to make EO data more usable and accessible across government and industry.</i>	Up to £9 million	UKRI
ESA Digital Twin Earth (DTE) Programme <i>Support the development of ESA's Digital Twin Earth programme to enable improved monitoring, forecasting and decision-making.</i>	£5 million	UKSA
Membership of Disasters Charter <i>Support UK participation in the Disasters Charter to enable priority access to EO data for global disaster response and strengthen international collaboration.</i>	£2 million	UKSA
Participation in GEO, CEOS, and Space4Climate <i>Continue UK participation in international EO initiatives, including GEO and CEOS, and maintain strong cross-sector collaboration through Space4Climate.</i>	£1 million	UKSA / DCMS
Copernicus Data Processing <i>Process Copernicus Sentinel data into analysis-ready formats to support consistent and cost-efficient use of environmental data sets.</i>	£1 million	Defra
European Resilience in Space – Earth Observation (ERS-EO) <i>Participate in ESA's ERS-EO programme to develop secure and coordinated European EO capabilities.</i>	£100,000	UKSA, MOD

Focussing Effort in Space Discovery

To deliver on government's continued commitment to furthering the UK's expertise in space discovery, funding will support the research base, national laboratories, universities, data infrastructure, facilities, talent pipelines and international partnerships that enable the UK to support government priorities and lead in current and future space capability areas. The following table outlines the funding programmes.

Activity	Funding (26/27 – 29/30 unless otherwise specified)	Delivery Leads
ESA Mandatory Science programme <i>UK GNP-based contribution to ESA-led fundamental scientific research, including heliophysics and astronomy missions.</i>	£413 million	UKSA
ESA Human and Robotic Exploration <i>Support for exploration activity including the Rosalind Franklin Mars Rover, ENDURE nuclear research, and the ARGONAUT lunar lander.</i>	£269 million	UKSA
UKRI funding for astronomy, space science and international research infrastructure programmes <i>Through UKRI and STFC, we will continue to support space discovery and astronomy through research programmes, talent, R&D, the construction and operation of instruments and facilities, facility access for the research community, digital infrastructure and the management of UK membership in international research infrastructures.</i>	£421 million	UKRI
National Space Science Programme <i>UK contributions to ESA science missions such as Ariel, LISA, PLATO, SMILE, Comet interceptor, Solar Orbiter, Euclid, Gaia, New Athena, Bepi Colombo, JUICE, JWST-MIRI, Envision.</i>	£110 million	UKSA
Science & Exploration Bilaterals Programme (SEBP) <i>UK contributions to science missions with other space agencies around the world such as LiteBIRD, LEAP, Helioswarm, PRIMA, Lunar Spectroscopy, Habitable Worlds Observatory, and Chandrayaan-2.</i>	£41 million	UKSA
National Exploration Programme <i>UK contributions to ESA/NASA Exploration missions such as Rosalind Franklin Mars Rover.</i>	£21 million	UKSA
UK Astronomy Technology Centre <i>To support and lead the development of scientific instruments for ground and space-based astronomical observatories in collaboration with leading astronomical institutes across the world.</i>	Up to £14 million	UKRI
RAL Space national laboratory capability <i>To maintain and develop national capability in space instrumentation, calibration and validation, environmental tests, mission support, data systems, scientific exploitation and technology translation. RAL also supports future mission opportunities and national capability needs across most space subsectors and beyond.</i>	£5 million	UKRI
One-Government Space Discovery Approach <i>We will continue the Frontiers programme to ensure UK space discovery activity is guided by cutting-edge expertise and develop an effective co-delivery approach between the UK's National Space Laboratories and UKSA, and by extension wider government.</i>	£1 million	UKSA, UKRI

Forward Look Timeline



Monitoring and Evaluation

To maximise the benefits of UK space strategy and delivery, support evidence-based decision making, and strengthen learning and accountability, we have established monitoring and evaluation (M&E) plans at the programme and cross-government levels. These plans are aligned with the 2024 UKSA Evaluation Strategy² and embedded within governance structures.

This section sets out the high-level key performance indicators (KPIs) for UK space strategy and delivery. These indicators will help to assess whether the sector is evolving towards stronger and more commercialised growth over time. In practice, individual KPIs will be interpreted alongside related metrics to provide a more complete picture of progress. Progress against each KPI will be published annually to maintain transparency and accountability.

Project-level evaluation³ will enable the full assessment of government interventions by appraising programme outcomes and how these occurred, including where outcomes are difficult to measure, emerge over longer time horizons, or cannot be clearly attributed to a single intervention. This includes consideration of wider economic, environmental and social impacts. Evaluation will follow government best practice as set out in the Magenta⁴ and Green⁵ books. Benefits management will be applied at the project level to define, measure, and realise the desired changes or benefits of an intervention while minimising negative impacts. Work will continue to refine and expand the below set of KPIs to strengthen our evaluation.

Key Performance Indicator	Key Data Source	Rationale
Increase in total space sector income	Size and Health of the UK Space Industry (Annual)	Indicator of overall sector growth and economic performance.
Increase in number of large space businesses (based on income or employment)	Size and Health of the UK Space Industry (Annual)	Indicator of scale-up and sector maturity
Increase in percentage of income generated from abroad	Size and Health of the UK Space Industry (Annual)	Indicator of international competitiveness and export performance.
Increase in number and value of ESA contracts allocated to UK organisations	European Space Agency Data (Quarterly)	Indicator of international competitiveness and capability.
Increase in R&D Investment as percentage of income (R&D intensity)	Size and Health of the UK Space Industry (Annual)	Indicator of investment in innovation and future capability.
Maintain or increase Field-weighted Citation Impact	SciVal (Monthly)	Indicator of scientific excellence and international research impact. As the UK is already a leader in this field, retaining excellence or increasing it is considered.
Maintain or increase proportion of UK GDP supported by satellites	Size and Health of the UK Space Industry (Annual)	Indicator of the sector's contribution to the wider UK economy.
Maintain or increase space employment ⁶	Size and Health of the UK Space Industry (Annual)	Indicator of the sector's economic footprint and workforce base.

² UKSA Evaluation Strategy, 2024, available at [GOV.UK](https://gov.uk)

³ Evaluation is a systematic assessment of the design, implementation and outcomes of an intervention (Magenta Book (2026), p. 8)

⁴ <https://www.gov.uk/government/publications/the-magenta-book>

⁵ <https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government>

⁶ This KPI is influenced by a variety of factors including automation and process innovation, as such as the sector matures this measure may evolve in multiple directions whilst remaining a positive indicator of sector health.

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