

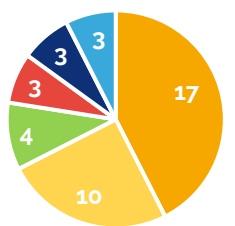
The impact of space on industry, economic growth and security in the UK's shifting political landscape

The United Kingdom is one of Europe's most capable space actors, most notable for its long-standing commitment to boosting commercial industry and leveraging its solutions. With over 1,500 space companies, the UK has also been Europe's leader in startup and scaleup investment since 2019, only second globally to the United States.¹ The UK's space ecosystem boasts a world-renowned R&D sector and is strongly embedded across ESA programmes, being the Agency's fourth largest contributor. Additionally, a UK national heads the Agency's Science Directorate. The UK is also once again a key contributor to the EU's Copernicus programme and Horizon Europe. However, it is the political will and ambition to become a science and tech superpower by 2030 that stands out in recent years, as this ambition holds promise for the UK to emerge as an even stronger actor in Europe's quest to attain full space power status.

Following the general election on the 4th of July 2024, the question arises of whether this ambition will be sustained and further amplified, and of the impact it will have on the UK's space sector. A robust UK presence in space holds defining power, as it can significantly enhance Europe's (including the EU's) overall capacity to act in space. Nevertheless, given the significant political shift in government and significant legislative authority of the UK Parliament, priorities regarding space over the coming months should be closely monitored and analysed.

1. Space and Technology in the 2024 General Election

The recent UK election was dominated by topics such as immigration, the National Health Service (NHS), and the cost-of-living crisis.² In such times, space might be an issue at the back of voters' minds.

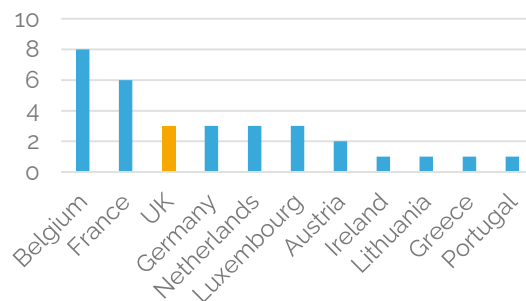


EU Cooperation mentions by party

While parties only sparsely touch upon space issues in their manifestos, it is notable that all mentions in the UK have a focus on the economic & industrial dimensions of space and are put under economic headlines, in line with the UK's long-term understanding of the importance of the space sector for the wider national economy. Interestingly, mentions explicitly hail the national space industry as a model of success and outline plans to further boost the space industry.

Overall, space is mentioned 3 times, split across 2 out of the 6 major parties (the Conservatives and the Scottish National Party (SNP)). This is in line with ESPI's analysis of party manifestos for the EU Elections earlier in 2024, with only Belgian and French parties mentioning space more often.³

However, space policy does not exist in a vacuum, and is strongly embedded within (i.a.) innovation, foreign, industrial and defence policies. Since the UK's departure from the European Union, cooperation between both actors emerged as a significant factor shaping space policy developments. Depending on their political ideology, parties emphasise different aspects of the



Space mentions in manifestos across Europe

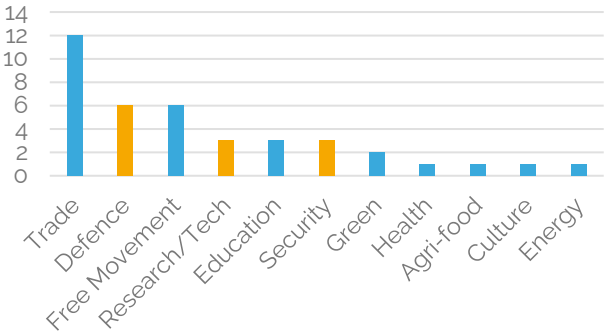
¹ ESPI Space Venture Database

² General election 2024: what are the most important issues for voters? ([link](#))

³ Data for other countries is taken from party manifestos for the European Parliament Election in June 2024. For a detailed analysis of the role of space in the EP election see ESPI publication "Will space sit in the European Parliament?" ([link](#))

(future) relationship with the EU and European cooperation more broadly.⁴ Both traditionally dominant forces, the Labour and Conservative parties, only mention the relationship with the EU in a limited manner. Not questioning Brexit explicitly, but instead doubling down on the notion of “making Brexit work” by proposing cooperation with Europe in specific policy areas. Both parties have made assertive statements on opportunities for future cooperation with the Bloc both in R&D as well as in Security & Defence.

We intend to improve our relationship with the EU, and that means closer trading ties with the EU; it means **closer ties in relation to R&D, and closer ties in relation to defence and security**
 Sir Keir Starmer, Post-Election, July 2024⁶



Party policy areas for cooperation with the EU

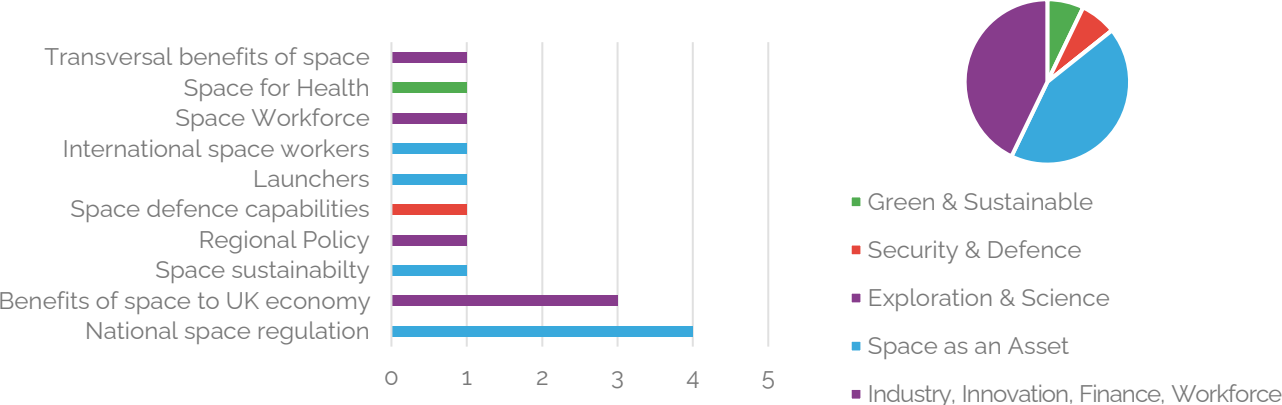
Apart from their general stance on relations with the EU, parties also address some more specific policy areas for cooperation with the Bloc in the future, notably Trade, Free Movement and Defence, with Research and Technology in fourth place. Moreover, with the appointment of Sir Patrick Vallance as the new Minister of State for Science, comes also a drive to reinforce relations with the global scientific community, a sentiment echoed in a recent G7 science meeting.⁵

Most notably, this is well in line with a pre-election statement by now Prime Minister, Sir Keir Starmer, on developing closer ties

with the Bloc on R&D and defence & security⁶, and a manifesto pledge of 10-year budgets for UK R&D institutions.⁷

2. Space in the UK Parliament (2019-2024)⁸

Although space and technological cooperation with Europe more broadly have not been among the most salient topics of the upcoming election, they were frequently a topic of debate in parliament, with 15 debates on space policy taking place in the 2019-2024 legislative period.



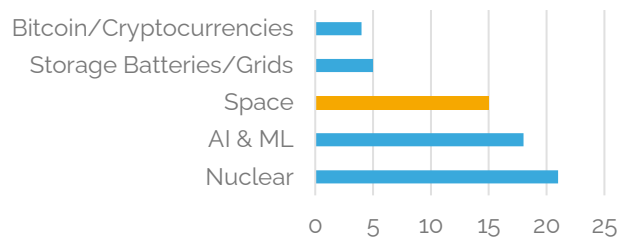
Space debate topics 2019-2024 generally (left) and by ESPI2040 theme (right)

The dominant topics within those debates have been national space regulations, specifically the Space Industry (Indemnities) Bill as well as the benefit of space for the broader UK economy in terms

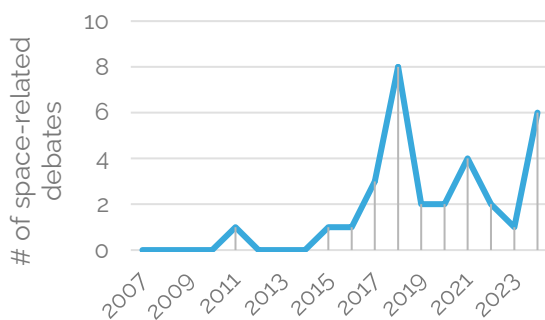
⁴ On one hand, the Liberal Democrats, the Greens, and the Scottish National Party (SNP) openly advocate to undo Brexit and list potential areas that could benefit from returning to the European Union. On the other hand, Reform UK calls for the abolishment of all remaining EU laws which still influence UK policymaking.
⁵ UK wants to be a “reliable” partner on science, says Patrick Vallance ([link](#))
⁶ Dsit confirms it is “working on” improving R&D links with EU ([link](#))
⁷ Labour Election Manifesto 2024 ([link](#))
⁸ All data on UK parliamentary debates has been accessed through the Hansard archive ([link](#))

of GDP and jobs.⁹ Debates with the main topics of Security & Defence and Green & Sustainable Societies remain limited, while Exploration & Science was not present in parliamentary debates.

In terms of space debates in contrast to other key technological domains, space is amongst the top contenders – with only AI & Machine Learning (ML) and Nuclear slightly in front. This again highlights space as a **top technological priority for the UK**, only behind the recent AI boom and an ongoing push by many nations for cleaner energy alternatives. A high frequency of AI and Nuclear debates is unsurprising considering the adoption of the UK’s framework for AI regulation in February 2024 for the former, and frequent debates on the next steps for an ageing nuclear sector for the latter.¹⁰



MP Debates – Space vs Other Technological Domains



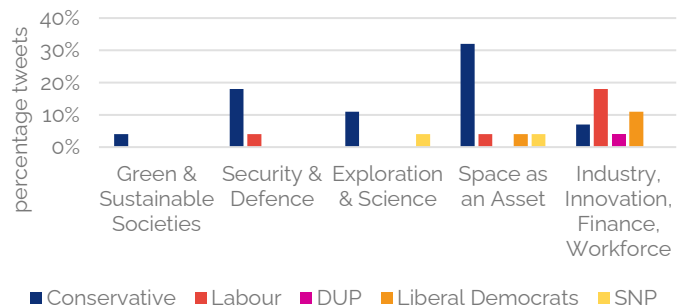
Space debates in parliament (2007 to May 2024)

In a broader context, since 2007 there have been 32 debates about space in the UK parliament out of over 80,000, with an overall upward trend identified.¹¹ Debates reached a peak in 2018, with 8 debates out of just over 5,500, increasing from the previous year by over 2.5 times, mostly attributed to the debate on the Space Industry Bill, which brought about the Space Industry Act of 2018. Space debates declined sharply following the introduction of this act to level 2016 figures in 2023, also likely due to the Covid-19 pandemic, before increasing again six-fold in the 2024 parliamentary period with the discussion of the Space Industry (Indemnities) Bill. Discussion

of the UK’s Space Industry was a topic of over 65% of debates, demonstrating the ongoing importance placed on economic benefits enabled by the sector.

3. Space in Election Media

Analysing statements of the new Labour government could also help to identify shifting or steady space priorities, in concurrence with the shift in leadership. Space played a minor role in threads on X,¹² with less than 50 tweets identified about the topic from over 120,000 analysed. This outcome is unsurprising considering the wide range of pressing issues facing voters in the UK.



Tweet context by ESPI2040 Theme by party of posting MPs

However, when space was mentioned, it was done so mostly in the context of the capability and potential of industry (39%), especially related to skills & workforce and the potential of domestic companies. Furthermore, space as an asset was a reoccurring topic (43%), namely the importance of the SaxaVord Spaceport and the launch of the National Space Operations Centre. The Conservative Party tweeted the most about space (50%), with Labour following (25%), and the Liberal Democrats (14%) coming in third. It is

⁹ To structure political debates in the space domain, the five ESPI research domains put forward in ESPI2040 ([link](#)) are taken as theoretical foundations.

¹⁰ The UK’s framework for AI regulation ([link](#)); The UK’s ageing reactors bring nuclear question to a head ([link](#))

¹¹ 2007 was chosen due to limitations of available data in the Hansard archive.

¹² X posts of all MPs with accounts were collected in the run up to the UK election (27th March – 3rd July 2024) and searched for keywords/phrases pertaining to space. This was done using the Dods Political Intelligence Platform. ([link](#))

important to note, however, that approximately 70% of Conservative tweets were by Government officials tweeting about space in the context of their portfolio.

We will act **as a leader and partner across government** ... to boost Britain's economic performance and power up our public services to improve the lives and life chances of people through the **application of science and technology**.
[Peter Kyle, Post Election, July 2024¹⁴](#)

In other forms of media, the conversation surrounding space was fairly limited, notwithstanding the then Minister of State for Science, Innovation and Technology, Andrew Griffith,

promoting the recently released Space Regulatory Review 2024 and launching the National Space Operations Centre.¹³ However, post-election, there has been a strong focus on science and technology, with the Department for Science, Innovation and Technology (DSIT) set to expand, and its new Secretary of State for Science, Innovation and Technology Peter Kyle promoting the transformation of "public services and fueling economic growth" through these means.¹⁴ Based on this, it seems the new Labour government could heavily focus on the value of the space industry for the UK, doubling down on the previous government's plans to become a superpower by 2030, with a host of (social) media interactions focused on the industry's ability to boost highly skilled jobs and innovation. Concurrently, with the appointment of Sir Patrick Vallance, former Government Chief Science Advisor from 2018 to 2023, we might also see an even greater role for space science and basic R&D in the UK.

4. The way forward for space in the UK

Whilst space might not be one of the top issues parties use to address voters, it becomes increasingly important when building a robust economic and security policy. Taking the analysis above as a predictor, we can estimate that space might see slightly less prominence in the upcoming legislative term, but that priorities may shift even more strongly towards the industrial and scientific dimension of space under a Labour government.

The UK has long been a pioneer in many aspects of developing its space sector, particularly in close-to-market segments such as satellite communications. By leveraging these strengths, the UK not only enhances its own economic and security landscape but also plays a critical role in the wider European ecosystem. A strong industry matched with a political vision can boost innovation and competitiveness across Europe, ensuring that the continent remains a relevant actor in the global space race. Additionally, the UK's military capabilities in space operations bolster collective European security, highlighting the indispensable nature of UK contributions to collective defence and security initiatives.

What is clearly emerging, is a renewed promise to strengthen UK ties in key strategic industries – "The UK is back", assures Starmer, "we want to play our part on the main stage."¹⁵ Space is undoubtedly an essential building block in asserting the UK's role on said main stage, both within a European and an International context. To deliver on the promise, the budgetary commitments will have to increase alongside an overdue discussion on the UK's role within a complex system of European space governance, beyond individual programmatic commitments, and including military space cooperation.

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¹³ New roadmap for pro-growth regulation in UK space sector launched as Science Minister launches new National Space Operations Centre ([link](#))

¹⁴ UK digital functions rewired with pledge to 'overhaul the experience of interacting with the government' ([link](#))

¹⁵ The Tories are gone – and Britain is moving closer to Europe again ([link](#))