

Brexit and Industry and Space Policy


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The European Space Policy Institute (ESPI)

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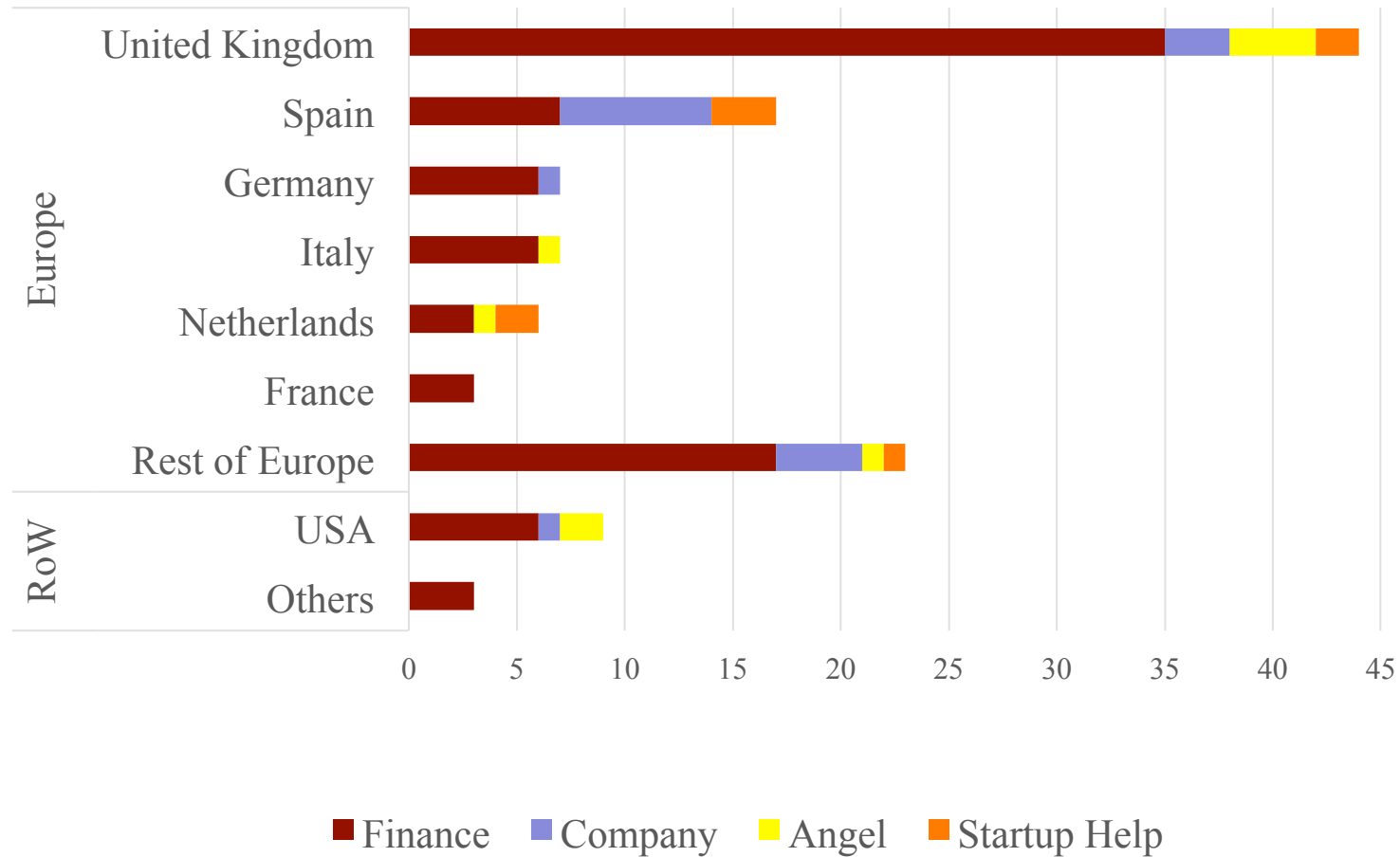



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UK and Space

- **UK is member of ESA, EUMETSAT, ...**
- **Traditionally focused on business and applications**
 - ✓ Limited participation in Ariane and in Human Space Flights
- **A member very sensitive to S&D-related issues**
- **Very liberal approach to Space**

Distribution of “Newspace” investors in Europe



Copernicus

- **UK continued membership in ESA, EUMETSAT, ECMWF, Mercator**
- **Free data policy ensures availability of most of the data to UK**
 - ✓ Some data restricted to contributing parties
 - ✓ Potential Issue for high-bandwidth access to data
- **UK based industrial participation at stake**
 - ✓ In future contracts issued through EU
 - ✓ In all processes using EU procurement rules

Space Security

- **UK might not be part any more of the SST/SSA EU programme**
 - ✓ Some arrangements to ensure continued access to data
- **Limited concerns**
 - ✓ Programme in the making
 - ✓ No major UK national assets
 - ✓ Major commercial operators secured
 - ✓ US-based services available

GOVSATCOMS

- **Sole area where UK ever implemented a strong national space policy**
 - ✓ Skynet series
- **UK industry involved in the open GEO Satcoms business**
- **Limited concerns regarding EU Govsatcoms programme**

Galileo

- **UK initially fiercely opposed to the programme**
 - ✓ Then insisted to position UK industry at the core of the PRS
- **Demonstrates the high relevance of the programme**
- **All civil signals including EGNOS will remain accessible to UK**
 - ✓ PRS?
- **UK-based Industrial participation in future developments at stake**

- **“Case for Space” in Brexit:**
 - ✓ Not commensurate to the actual size of the sector
- **No UK industrial Space champion**
 - ✓ UK gets 17% of the industrial activities in Galileo
 - ✓ UK space industry strongly export-oriented
- **ESA and R&T not to be affected**
 - ✓ Sufficient to keep the critical mass in UK?
 - ✓ Potential issues regarding supply chains and access to talent
- **S&D space related issues to be addressed in a consistent manner**
 - ✓ UK contributed to shape EU policy in this matter

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