

Written evidence Submitted by Inmarsat (SPA0055)

Inmarsat:

Inmarsat, a British company, is the world leader in global mobile satellite communications. The organisation has been relied upon for over 40 years and provides services to over 80 nations. The world-leading satellite networks touch every aspect of life, all over the planet, to keep communities, companies and countries connected with particular focus on the global maritime sector (including the Global Maritime Distress and Safety Service used by 200,000 merchant ships), the global aviation sector, and many governments around the world. The organisation has over £1.2Bn revenue annually (95% exports), 1,000 UK employees, £180m annual UK space industry supply chain spend, and critical services provided to MOD, and all other 5-Eyes militaries & NATO governments. The organisation holds the world's most advanced and resilient mobile connectivity infrastructure.

What are the prospects for the UK's global position as a space nation, individually and through international partnerships?

The creation of a co-ordinated cross government national space programme offers the opportunity to elevate the UK's role a meaningful space nation, which will strengthen key alliances and trade partnerships with important allies. The UK has a great deal of talent and industrial resources to draw upon, but it is most powerful when contributing as part of a partnership in particular as we do not commit significant resources that larger space powers (e.g. USA, China, Japan, Russia, France, Germany, Italy) commit to space. For example, France spends 3 times more than the UK. The introduction of an integrated national strategy that aligns well with UK ambitions and leverages industrial and allied capabilities is critical. The UK should protect its own space assets, grow its space domain awareness capability and build relationships in key areas by providing unique capabilities that augment allied strengths through increased burden sharing.

What are the strengths and weaknesses of the current UK space sector and research and innovation base?

There has been solid investment in R&D assets mainly from the private sector (e.g. Inmarsat acquisition of satellites from other companies – c.50% of these satellites are built in the UK the rest built in France) however they are not leveraged as much as they could have been due to investment focus, procurement ambitions and lack of national public sector programmes to support science goals, noting that 75% of our current national civil spend is channelled through the European Space Agency.

There is strength in end-to-end satellite services and applications, mm wave RF technology, some quantum assets and strength in satellite manufacturing, particularly telecom satellite payload and small satellites.

What should be the aims and focus of a new UK Space Strategy:

- 1) Strategic, targeted investment: is essential for the UK to make the best use of cross-department space-related budgets and avoid dilution of return on investment.
- 2) Empowering economies of scale: The UK needs to capitalise on the synergies between defence and civil programmes in order to enable their true potential.
- 3) Expanding the workforce: The UK must support the expansion of a diverse workforce (both outside and inside government) that is adaptive to evolving

sector needs by reducing the scarcity of suitably qualified and experienced personnel (SQEP) due to programmes of limited scale/scope.

- 4) Ensuring Accountability: Develop a lead authority for the successful implementation of a national space strategy with clear accountability for execution.
- 5) Developing confidence: Ensure a clearer roadmap and government commitment, which will help reduce current industry reticence to invest at a corporate level in support of national space initiatives.
- 6) International leadership: The UK should swiftly avoid lost opportunities and secure greater international market share, particularly as international competition in the fast growing space market moves forward (predicted to be a £400Bn market globally by 2030)

What needs to be done to ensure the UK has appropriate, resilient and future-proofed space and satellite infrastructure for applications?

Focus on our current core world-leading strengths of telecoms services, satellite payloads, climate science instruments, and small satellites - all of these markets and areas are predicted to grow either economically or scientifically.

Climate change, earth observation and weather systems will continue to be reliant on the role of space as a medium for connecting the world's sensors. The ability to carry out exquisite monitoring of climate relies on not just satellites but satellites supporting sensors that are all over the earth. It is important to work closely with organisations that have a high number of sensors so that information can be collected and fused to plan more vigorously. Utilising these assets effectively has the potential to become a differentiator between the UK and other space faring nations.

Efforts should be made to develop public support for state activity and spending in space through understanding of societal reliance on space for resilience.

It is also important to ensure systems are designed from the outset to operate in a contested space domain and can counter terrestrial threats.

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