

# Cornwall and Isles of Scilly

*the natural place to grow  
great business...*



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**CORNWALL &  
ISLES OF SCILLY**  
LOCAL ENTERPRISE PARTNERSHIP

# THE UK'S SATELLITE

# LAUNCH SOLUTION



**GOONHILLY**  
EARTH STATION

A complete and competitive  
launch solution for industry



One of the UK's longest runways at 2,744m



# 'Eco-system'

1. **INFRASTRUCTURE:** *Cornwall Airport Newquay*
2. **World leading COMMUNICATIONS** capability: *Goonhilly Earth Station*
3. **INNOVATION and RESEARCH hub:** future flight and satellite technologies; underpinned by **SKILLS** inc. Advanced Flight Technology Institute
4. **A COLLABORATIVE approach** for new trade and investment as well as realising UK growth potential



# 1. Space Gateway: Cornwall Airport Newquay

- Safe, licensed environment
  - Existing airport facility
  - Strategic launch location
- Launch and integration capabilities
  - Space gateway, fuel handling, integration facility and suborbital aircraft hangar
- Business Environment
  - Connectivity
  - Mature business infrastructure – inc. hotels and conference
  - UK Enterprise Zones at Cornwall Airport Newquay and Goonhilly  
*(Tax breaks, planning freedom, inward investment ready)*
- Rocket and propulsion development
  - BLOODHOUND SSC rocket test facility
- Advance Flight Technology Institute: UAS and future aircraft





## 2. Communications Gateway: Goonhilly Earth Station

- Iconic Earth Station
- Command and control centre gateway
- Monitoring and tracking for multiple locations
- Deep space comms and satellite operation already live
- Payload capabilities
- Data Centre
- Home to GES Ltd and Avanti (*amongst others*)



### 3. Innovation and Skills

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*Cornwall: future flight and satellite technologies hub*

- **Advanced Flight Technology Institute** - Institute linked to physical environment providing safe route to validation and commerciality
- **Technology Exploitation Programme** for space and aerospace – investment already secured.
- **UK Satellite Applications Catapult:** South West Centre of Excellence (leading Universities, business, research and Met Office partnership)
- **South East Wales and South West England Science and Innovation Audit** (round 1): Advanced Engineering cluster
- **Skills:** Investment into school outreach through to apprenticeship and higher skills

# 4. Collaboration

*Part of a complete and competitive solution for industry*

- Aerospace Cluster: *South West* is global leader
- *iAero*: existing LEP/Industry partnership
- *Local Enterprise Partnerships*: 4 ‘space’ lead LEPs collaborating
- Strong track record of a collaborative approach to *inward investment*
- *Other Spaceports* : we are, and will, work to create a complete offer in ***UK and globally...***



# Size & Health of the UK Space Industry 2016



**£13.7bn**

Total Income in 2014/15



**6.5%**

Share of global space economy in 2014/15



**38,500**

Employees in 2014/15



**2.7x**

Labour productivity compared to UK average

**8%**

Space Manufacturing

**15%**

Space Operations



**74%**

Space Applications

**3%**

Ancillary Services



**6.5%**

Annual growth rate 2012/13 – 2014/15



**£415m**

R&D expenditure in 2014/15



**3 in 4**

Employees holding a university degree or higher qualification

**£5.0bn**

Exports in 2014/15

**49%**

Rest of Europe

**19%**

North America

**16%**

Asia-Pacific

**16%**

Other



## Regional employment

**26%**

London

**23%**

South East

**18%**

Scotland

**33%**

Other



## Wider UK GDP\* supported by satellite services



**£5.1bn**

Direct contribution of the UK space industry to UK GDP

More than **£250bn**



Telecommunications



Navigation



Earth Observation



Meteorology



**7 in 10**

Organisations expect income growth over the next three years



\*Note: Based on analysis of 687 UK-based space-related organisations. Source: London Economics 2016. Size & Health of the UK Space Industry. \*UK non-financial business economy only. Owing to complexities in measuring their Gross Value-Added (GVA) accurately, this figure excludes financial services and insurance, public administration and defence, public provision of education, health and all medical and dental practice activities (this correction is a feature of the ONS Annual Business Survey data some employees).







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