

# Enterprise Space Category

## Supply Chain Risk Industry Round Table

5 March 2026



Version:

V1.0 03/03/2026

OFFICIAL

# The Enterprise Space Category (ESC) Supply Chain Risk



Jonathan Mundy



Sabrina Moussa-Hynam



Katie Weeks



Sarah Bulmer



Matt Roberts





# Session Overview

Session Housekeeping

ESC Overview

Why is Supply Chain Risk Important?

ESC Procurement Perspectives

Discussion 1 – Vulnerabilities and Single Points of Failure

Discussion 2 – Strategic/Global Risks

Next Steps

# Session Housekeeping

OFFICIAL



Notes from this round table are being taken (for internal use only).



Please have your mobile phones on silent, if you need to take a call, please quietly leave the room.



We encourage you to participate in the session, if you have a question please raise your hand and when invited to speak, please state your name and your company name.



We have a full agenda—please keep contributions concise so everyone has a chance to participate.



OFFICIAL





# Supply Chain Risk ESC Overview

OFFICIAL



# THE ENTERPRISE SPACE CATEGORY (ESC)

- The Enterprise Space Category has established a cross-government Category team, with representatives from Defence Digital, DE&S, Dstl, DSIT, CCS, Air Command and Space Command under the governance of a single Space Category Strategy.

## Objectives for the Enterprise Space Category

- Continue to deliver **critical government capabilities** in space.
- Access **market innovation** in a timely and agile manner.
- Ensure **coherence and alignment** across MOD and wider Government in terms of procurement within Space.
- Encourage the **growth** and further development of the UK Space Industry, providing improved Operational Advantage (through UK **innovation**) and Freedom of Action.
- **Improve VFM** in the procurement of solutions in the Space Category.



# THE ENTERPRISE SPACE CATEGORY (ESC)

## Benefits:

- Delivering awareness and coherence in Space sourcing as **ONE** Government.
- Understand the **value that early engagement** with Commercial unlocks.
- Share **market insights and good practice**.
- Triage the **Space value chain** and **collaborate on Category** and Commercial Strategies.
- Identify benefits that contribute to **delivery of outcomes**, **value for money** and **social value**.

## Delivered through:

- Establishing cross-Government Space Category **Communities of Practice**.
- Develop Cross Government Space **Category Strategy** and collaborative **Workstreams**.
- Creation of a single **Space Pipeline**.
- Collaborate on **Technology Roadmaps** and **Market Engagement**.
- Sharing **Training and Development** offerings.
- Acting as one **collaborative team**.

# THE ENTERPRISE SPACE CATEGORY (ESC)

## Benefits:

- Delivering awareness and coherence in Space sourcing as **ONE** Government.
- Understand the **value that early engagement** with Commercial unlocks.
- Share **market insights and good practice**.
- Triage the **Space value chain** and **collaborate on Category** and Commercial Strategies.
- Identify benefits that contribute to **delivery of outcomes**, **value for money** and **social value**.

## Delivered through:

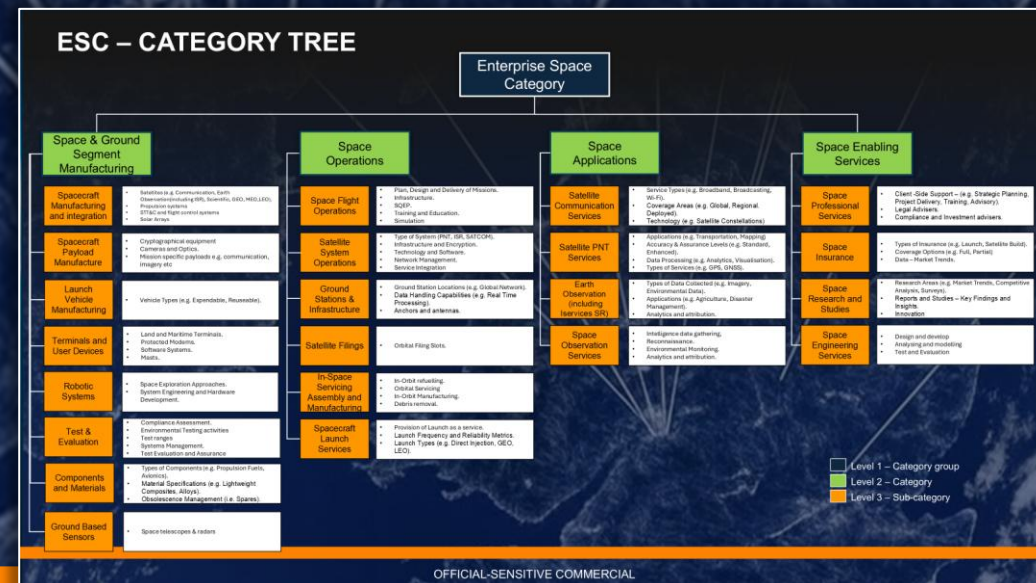
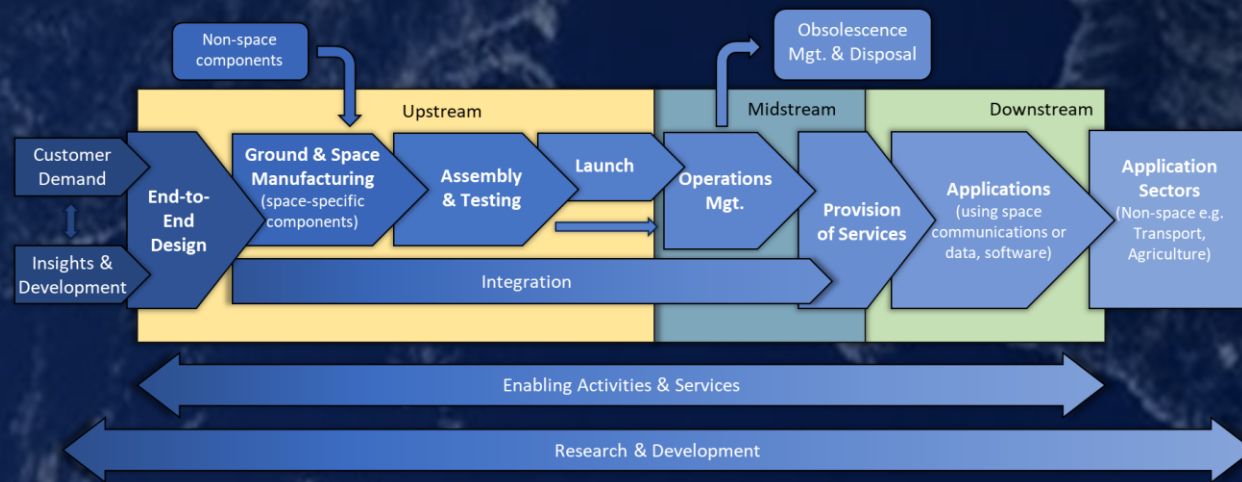
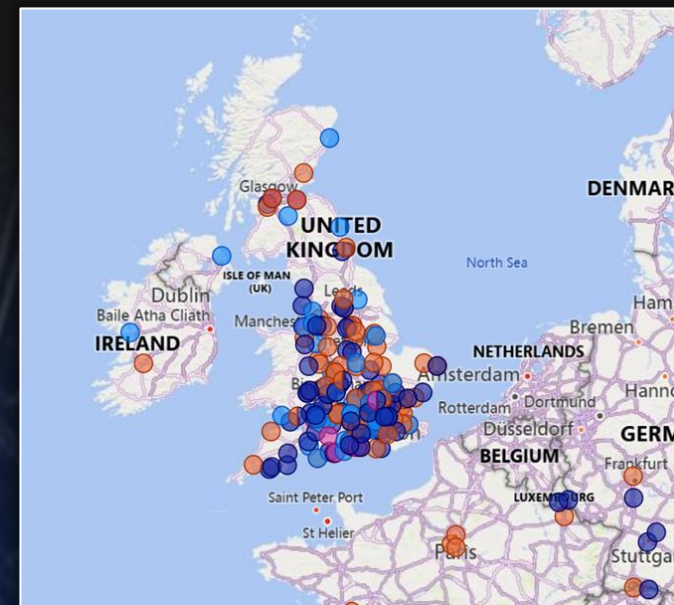
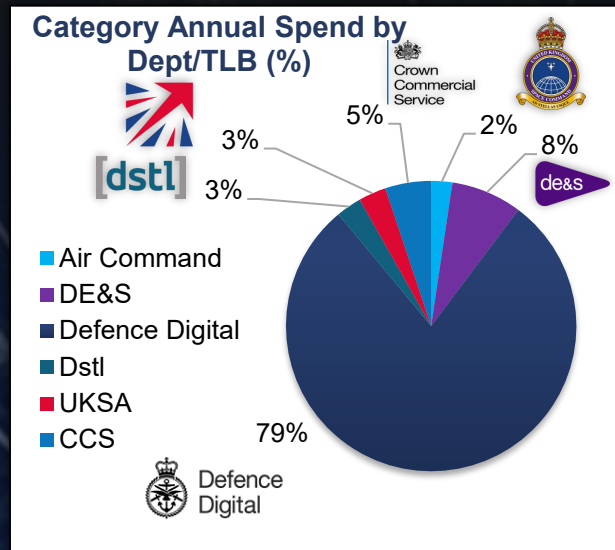
- Establishing cross-Government Space Category **Communities of Practice**.
- Develop Cross Government Space **Category Strategy** and collaborative **Workstreams**.
- Creation of a single **Space Pipeline**.
- Collaborate on **Technology Roadmaps** and **Market Engagement**.
- Sharing **Training and Development** offerings.
- Acting as one **collaborative team**.



# THE ENTERPRISE SPACE CATEGORY (ESC)

Space Standardised Terms and Conditions (T&Cs) Playbook  
Enterprise Space Category

OFFICIAL





# Supply Chain Risk

## Why is it important?

OFFICIAL



# SUPPLY CHAIN RISK

- **Purpose of session:**

- To gather **Industry insights** and help inform how Government can better **understand, manage and mitigate** supply chain risk in the Space Industry.

## Why is Supply Chain Risk Important?

- Government buyers sit at the top of **complex supply chains** yet often have very **poor visibility** (structure, risks, vulnerabilities).
- Historically, we have largely relied on our **Tier 1/Primes** to manage the supply chain on our behalf, despite us ultimately **owning the delivery risk**.
  - This has often led to **reactively responding** to supply chain issues after they arise.
- There is an increasing focus across Defence, Government and wider industry on **resilience** as a key metric of supply chain performance (rather than simply efficiency, or cost).
- Drive towards supply chains that have **fewer vulnerabilities** – just in case vs. just in time



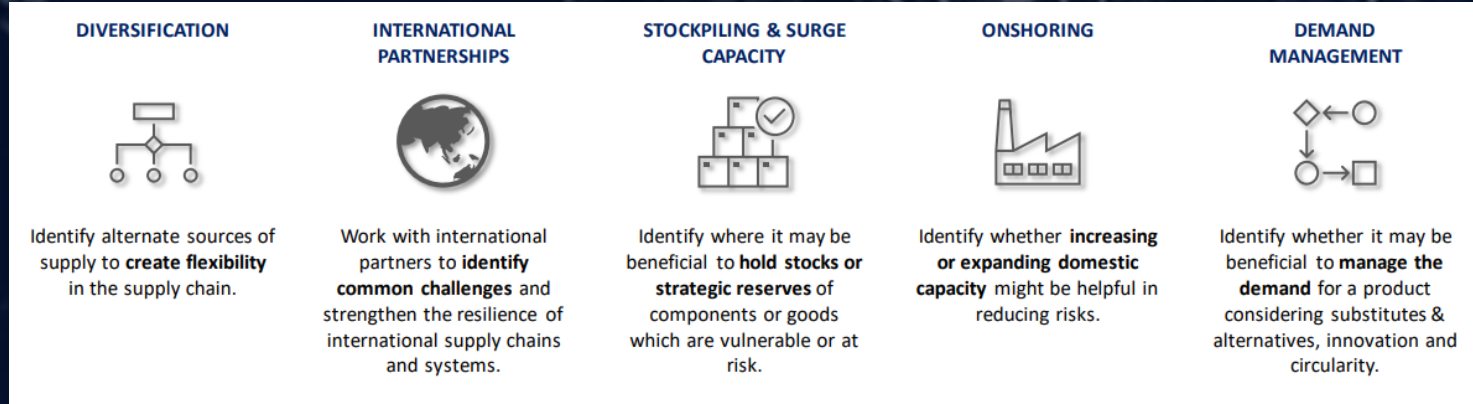
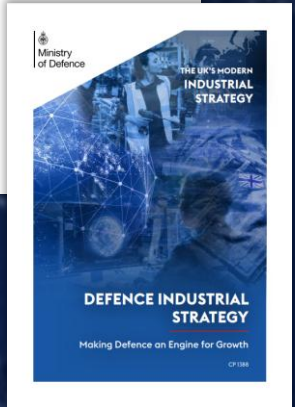
# SUPPLY CHAIN RISK

- **Strategy and Policy**

- The Integrated Review (2021) – Stated desire to strengthen the **resilience** of our critical supply chains.
- Space Industrial Plan (2024) – One of the Missions to 2030 is to **increase supply chain resilience**.
- Defence Industrial Strategy (2025) – “The conflict in Ukraine has provided a stark reminder of the importance of **resilient supply chains** and **security of supply**. We need to better understand our supply chain **vulnerabilities**, where we need to bolster business in the UK, and strengthen our approach to managing critical supply chains to **guarantee continued access**.”

- The DIS also highlights how difficult it is to gather meaningful and timely supply chain data.

- The DBT Supply Chains Resilience Framework (2022) recommends five options to **strengthen long-term resilience**:





# Supply Chain Risk

## ESC Procurement Perspectives

OFFICIAL



# ESC Procurement Perspectives

- **SKYNET 6 Wideband Satellite Systems (WSS):**
  - WSS uses two frameworks to improve supply chain **security, transparency and resilience**:
    - Assured Capability
      - Significant supply chain **visibility** (based on system component breakdown)
      - Targeted **security measures** in the supply chain
    - Technological Capital
      - Effectively mandates “**on-shoring**” key elements of the satellite manufacture supply chain.



## Perception of risk growing?

- Engagements with companies across our procurements have highlighted a view of **increasing supply chain risk** in the space industry, relating to issues such as:
  - Uncertainty over **export controls** and **trade** policies
  - **Critical material** risks
  - **Bottleneck** suppliers



# Supply Chain Risk Discussion Sessions

OFFICIAL



# What Supply Chain Vulnerabilities and single points of failure are present in the Space Industry?

For example:

- Where is the most critical single-point dependency.
- Which element of the supply chain carries the highest risk?
- Where does Govt. procurement create risk?

## Supply Chain Risk: Discussion 1

# What are the Strategic / Global disruption and geopolitical risks impacting your Supply Chain?

For example:

- Which part of the supply chain is most exposed to global disruption?
- What risks do you think the MOD underestimates?
- Impact of global trade controls on supply availability and cost?

## Supply Chain Risk: Discussion 2

# NEXT STEPS

- For Space specifically we will continue to engage with industry quarterly via **focussed Enterprise Space Category Round Tables**.
- **Thank you for joining us today** and for sharing your initial thoughts. **We would welcome any feedback** on the session and please share any ideas that we didn't have time to discuss by email: [ukstratcomdd-cm-space-esc@mod.gov.uk](mailto:ukstratcomdd-cm-space-esc@mod.gov.uk)



Thank you for attending  
and participating

