Talent & Supplier Density: The >68% Active-Satellite Ecosystem (Preliminary) Pulling Firms to Puget Sound

Pillar: Structural Factors | **Basis:** 67-Company Census + Preliminary BERK 2026 | **Primary Source:** BC ESG Census / Space NW BERK (Prelim) | **As Of:** As of Nov 16, 2026

Washington's primary structural advantage in the state fight is engineering and supplier density—67 publicly enumerable core space companies (17 components/suppliers, 14 ground/software, 11 satellite builders, 7 launch, 7 propulsion, 8 servicing, 3 orbital compute) anchored by a preliminary >68% share of active satellites in orbit.

Documented Policy & Site-Selection Record

• Constellation Anchor Gravity: SpaceX's Starlink campus in Redmond (#1418) and Amazon Leo in Redmond/Kirkland (#1421) create a deep pool of RF, FPGA, flight-software, and high-rate manufacturing engineers.

• Preliminary BERK 2026 Scale: Space Northwest and BERK Consulting (Sept 2026, preliminary) estimate >68% of all active satellites in Earth orbit were built in Washington, supporting 34,200 total jobs (~12,300 direct).

• Supplier & Tooling Ecosystem: 17 core component/material suppliers (Janicki, Electroimpact, Karman/Systima, Crane, Honeywell, Space Valves, Kymeta) plus 4 adjacent precision aerospace suppliers anchor local sourcing.

• Why Inbound Firms Pay the Premium: K2 Space, Agile Space, and Shield AI opened or scaled Puget Sound hubs specifically to hire experienced engineers without relocating families.

Washington Core Space Cluster Density (Step 0 Census)

Segment	Enumerated Core Firms	Representative Anchors
Components & Suppliers	17 (+4 adjacent)	Electroimpact, Janicki, Karman, Crane, Space Valves
Ground Systems / Software	14	AWS Aerospace, Azure Space, RBC Signals, Integrate
Satellite Manufacturing	11	SpaceX Redmond, Amazon Leo, Portal, BlackSky, K2 Space
Launch & Propulsion	7 + 7 (14)	Blue Origin, Stoke Space, Aerojet Rocketdyne, Agile Space
In-Space Servicing & Compute	8 + 3 (11)	Starfish Space, Gravitics, Starcloud, Cowboy Space

Founder, Staffer & Site-Selector Takeaways

• Founder Takeaway: Talent density lowers time-to-hire for senior propulsion, RF, and flight-software engineers—often outweighing multi-year tax credits for early-stage R&D.

• Staffer Takeaway: Preserving this density requires keeping early-stage founders from relocating Series A/B manufacturing lines out of state.

Cross-Cluster Links & Primary Sources

• **WA Space Cluster Hub (#1382):** https://bcesg.org/washington-space-cluster-census/

• **The 90-vs-67 Gap Analysis (#1385):** https://bcesg.org/washington-space-cluster-90-vs-67-gap/

• **SpaceX (Redmond) WA Profile:** https://bcesg.org/spacex-redmond-washington-space-cluster-profile/

• **Amazon Leo WA Profile:** https://bcesg.org/amazon-leo-washington-space-cluster-profile/

• **Blue Origin WA Profile:** https://bcesg.org/blue-origin-washington-space-cluster-profile/

• **Space Northwest:** https://www.spacenorthwest.org/

• **BERK Consulting:** https://www.berkconsulting.com/

• **Puget Sound Regional Council (PSRC):** https://www.psrc.org/

Provenance Note: Combines BC ESG Step 0 Census (67 core companies) with Space Northwest / BERK 2026 PRELIMINARY satellite-share estimate.