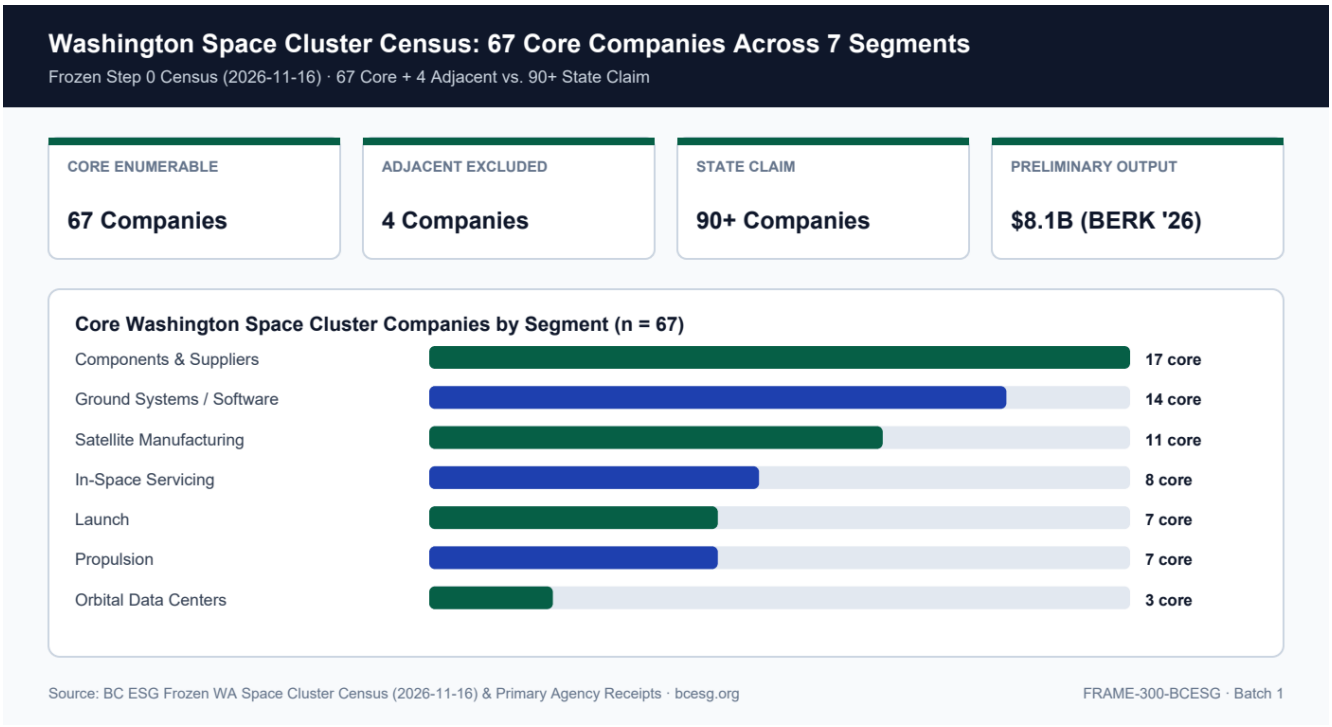
Washington's Space Cluster: A Sourced Census (67 Core Companies vs. 90+ Claimed)

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Verification & Scope Baseline: 67 companies publicly enumerable as of 2026-11-16, against the governor's office figure of 90+. An additional 4 space-adjacent plants (fusion and general aerospace without public space-program attribution) are tracked separately and excluded from the core count.



Segment	Core Count	Classification	Anchor Examples in Batch 1
Components & Suppliers	17	Core	Aerojet/Honeywell supply ecosystem (see Batch 2)
Ground Systems / Software	14	Core	Azure Space, AWS, RBC Signals (Batch 2)
Satellite Manufacturing	11	Core	SpaceX, Amazon Leo, BlackSky, Portal, K2 Space
In-Space Servicing	8	Core	Starfish Space, Gravitics
Launch	7	Core	Blue Origin, Stoke Space
Propulsion	7	Core	Aerojet Rocketdyne (Redmond)
Orbital Data Centers	3	Core	Starcloud, Cowboy Space
Adjacent (Fusion / General Aero)	4	Adjacent (excluded)	Tessera & Orion (Auburn), Exotic Metals (Kent), Avalanche

How the Frozen Census Was Built

BC ESG compiled this baseline from four primary enumeration streams: the Alliance Velocity Space City directory (53 named listings), the Workforce Development Futures Alliance (WDFA) aerospace and space roster (54 named organizations), Washington State Department of Commerce / Choose Washington sector materials, and primary facility verification across corporate filings, supplier logistics guides, and municipal records (`CLM-01`, `CLM-03`, `CLM-05`, `CLM-06`).

Every candidate organization passed two inclusion gates to enter the **core** count: (1) a verified physical facility or operating office inside Washington State, and (2) primary business operations or a dedicated business unit producing space systems, launch/propulsion hardware, orbital infrastructure, or space-qualified components and ground software. Corporate renames and acquisitions—including `Tethers Unlimited` into ARKA (Bothell) and `Aetherflux` into `Cowboy Space` (Kent)—were collapsed to single rows, while non-operating nonprofits (`Space Northwest`), venture funds (`Hemisphere Ventures`), and recruiting firms (`AdAstra Talent Advisors`) were excluded (`CLM-01`).

Core vs. Adjacent Definitions and the 67-Company Baseline

Applying those gates yields **67 core space companies publicly enumerable as of 2026-11-16, against the governor's office figure of 90+** cited by Greater Seattle Partners and state economic development profiles (`CLM-02`). Four additional Washington operators—`Avalanche Energy` (Seattle fusion R&D), `Tessera` and `Orion Industries` (Auburn precision aerospace plants), and `Exotic Metals Forming` (Kent Valley hard-metal fabricator)—are preserved in the census as **adjacent** because public records do not establish a dedicated space-specific unit (`CLM-27`).

Economic impact context from Space Northwest and BERK Consulting's **2026 preliminary** study estimates **$8.1 billion** in direct annual economic output, **12,300 direct jobs**, and **34,200 total jobs** statewide (`CLM-04`). Because those figures are preliminary and aggregate, BC ESG labels them preliminary and does not treat them as an enumerated company roster. For why public directories stop at 67 while state officials cite 90+, see our dedicated 90-vs-67 gap analysis.

The Nine-Section FRAME-300-BCESG Roadmap

Prior to this batch, `bcesg.org` held `173` published posts and `0` space-cluster articles, with only two Washington-specific building-energy guides (`Post #1171` on WA CBPS and `Post #1275` on Seattle BEPS). Across the 300-topic `FRAME-300-BCESG` program, **279 topics (93.0%)** are net-new, **19** adapt existing disclosure playbooks (California SB 253/261, EU CSRD, Scope 3 supplier data), and **2** are already covered (`CLM-01`, `CLM-28`).

Batch 1 establishes the census foundation: this hub, the 90-vs-67 gap analysis, **8 city profiles** (Kent, Auburn, Renton, Tukwila, Redmond, Bothell, Marysville, Moses Lake), and **12 anchor company profiles** (Blue Origin, Stoke Space, SpaceX Redmond, Amazon Leo, Cowboy Space, Portal Space Systems, K2 Space, BlackSky, Gravitics, Starfish Space, Aerojet Rocketdyne Redmond, and Starcloud).

Verified Primary Sources & Internal Bridges

- Alliance Velocity Space City Directory: https://www.alliancevelocity.com/space-city
- WDFA Washington Aerospace & Space Roster: https://wdfa.us/
- Choose Washington Commercial Space Sector: https://choosewashingtonstate.com/why-washington/our-key-sectors/commercial-space/
- Greater Seattle Partners: https://greater-seattle.com/
- Space Northwest: https://spacenorthwest.org/
- BERK Consulting: https://www.berkconsulting.com/