

# Trends and Keystones of Space Industry

**Spyros Pagkratis**

**Vilnius, 7 October 2010**

## Mission Statement

The mission of the European Space Policy Institute (ESPI) is to **provide decision-makers with an independent view and analysis** on mid- to long-term issues relevant to the use of space.

Through its activities, ESPI **contributes to facilitate the decision-making process**, increases awareness of space technologies and applications with the user communities, opinion leaders and the public at large, and supports students and researchers in their space-related work.

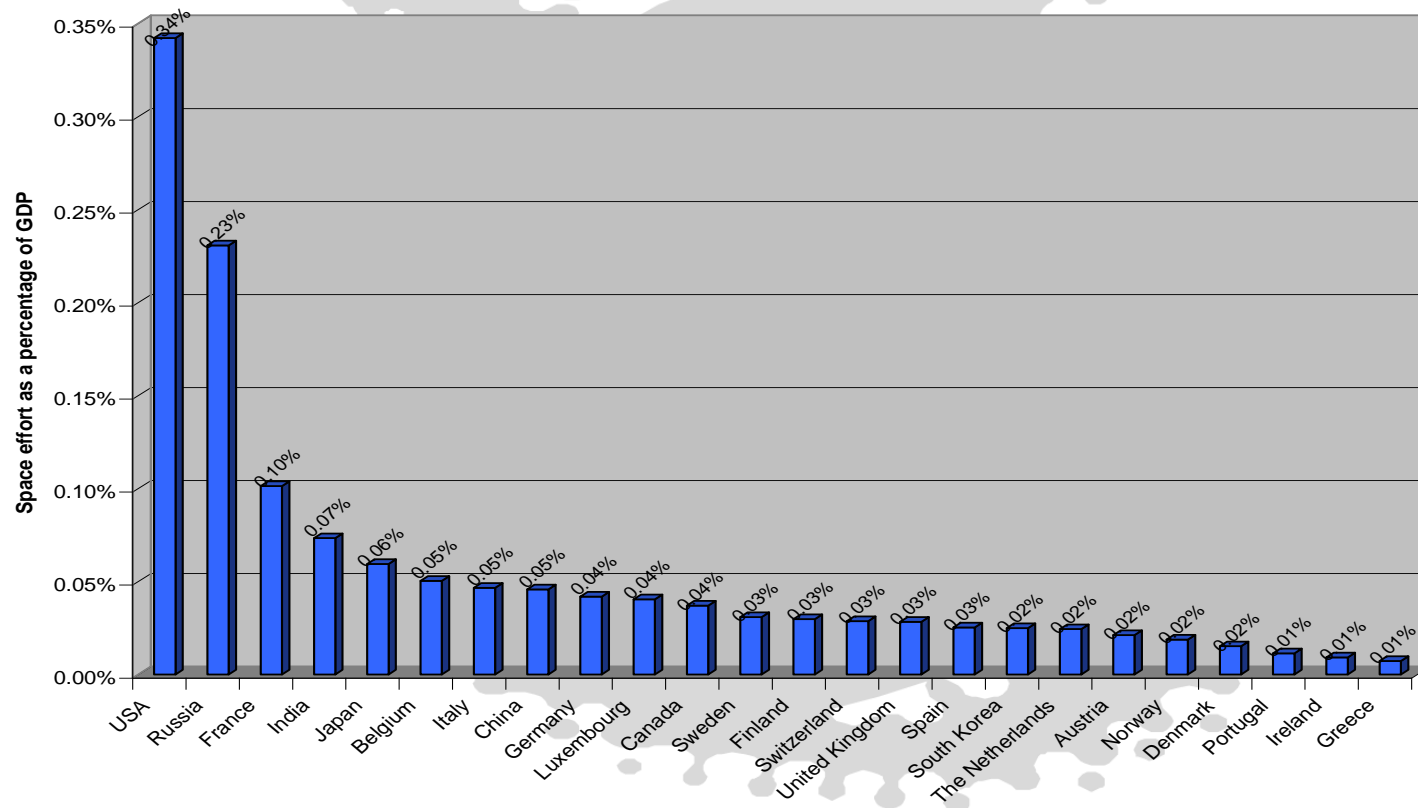
To fulfil these objectives, the Institute supports a network of experts and centres of excellence working with ESPI in-house analysts.



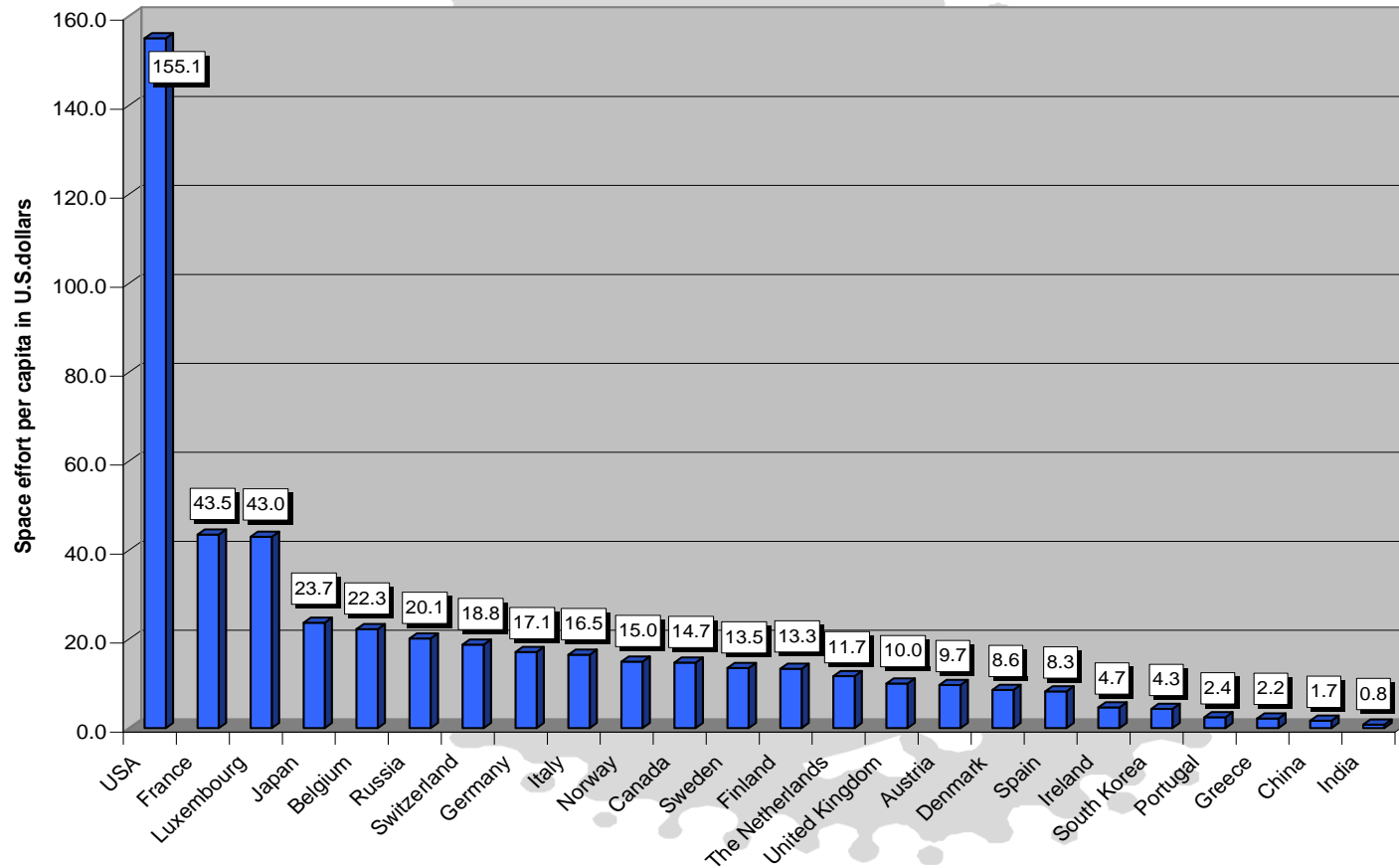
## Global government space budgets overview

- World's space budgets: \$67.8 billion (+9% from 2008)
- Of which 53.1% civil and 46.9% military expenditures
- US: overall the strongest space power (72% of civil and 90% of military expenditures worldwide)
- ESA: second (budget: \$4.8 billion)
- Russia: the largest annual space budget increase (\$2.8 billion)
- Japan: stable at \$3 billion
- France: largest European national space budget (including ESA contribution)

# Public Space Budgets as % of GDP



# Public Space Budgets per Capita

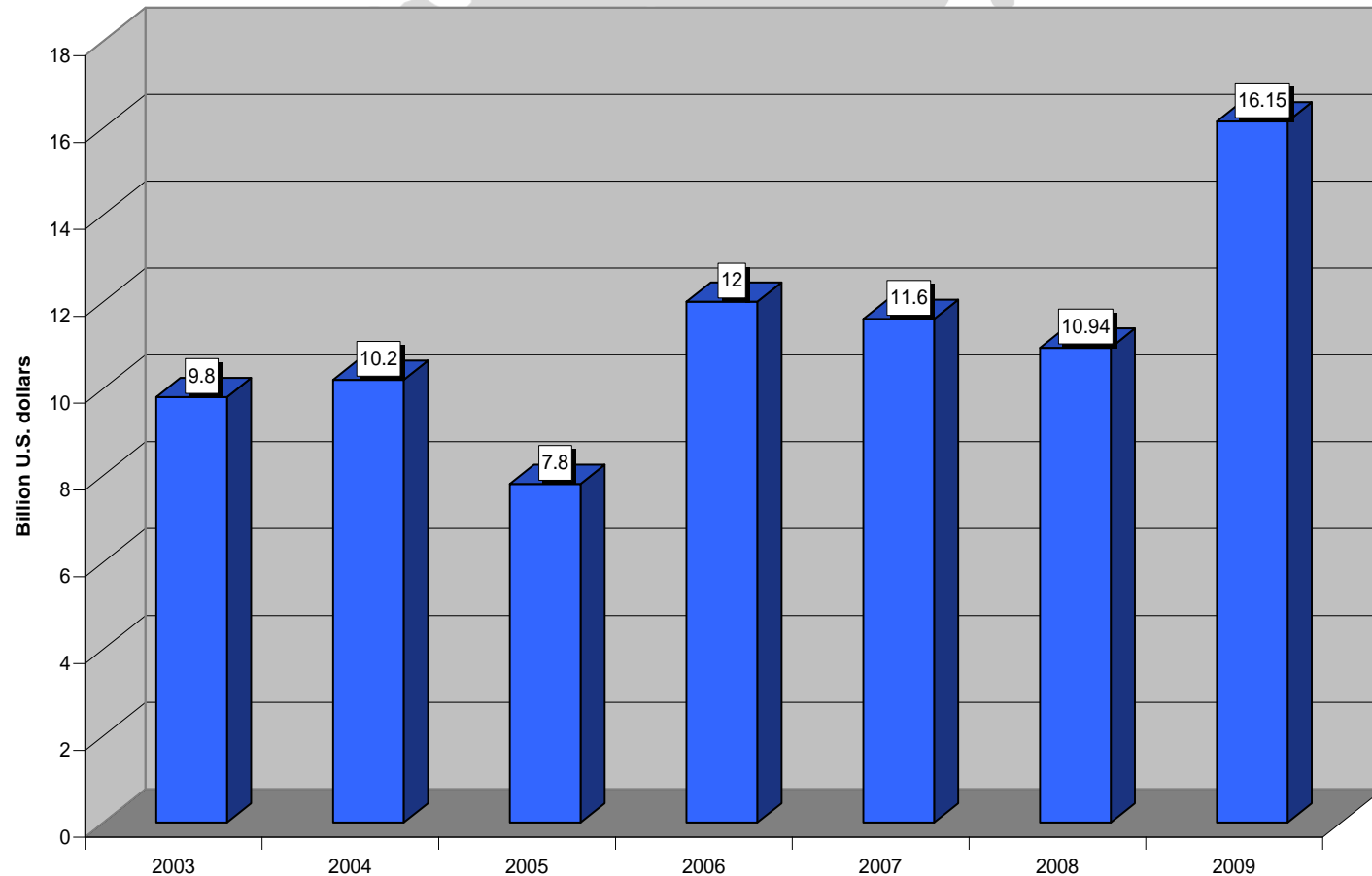


# Global commercial and industrial overview

## ➤ **Satellite Services**

- Robust financial results for all providers in spite of the financial crisis (+10% revenue and backlog increase)
- Increased investments in **Direct Broadcast Services** (television)
- Stable investments in **Fixed Satellite Services**, profited from government financial stimulus packages (broadband internet)
- **Remote Sensing** market in full development and entry of new actors
- Modest growth for **Mobile Satellite Services**, but prospects are improving

# World Satellite Manufacturing Revenues



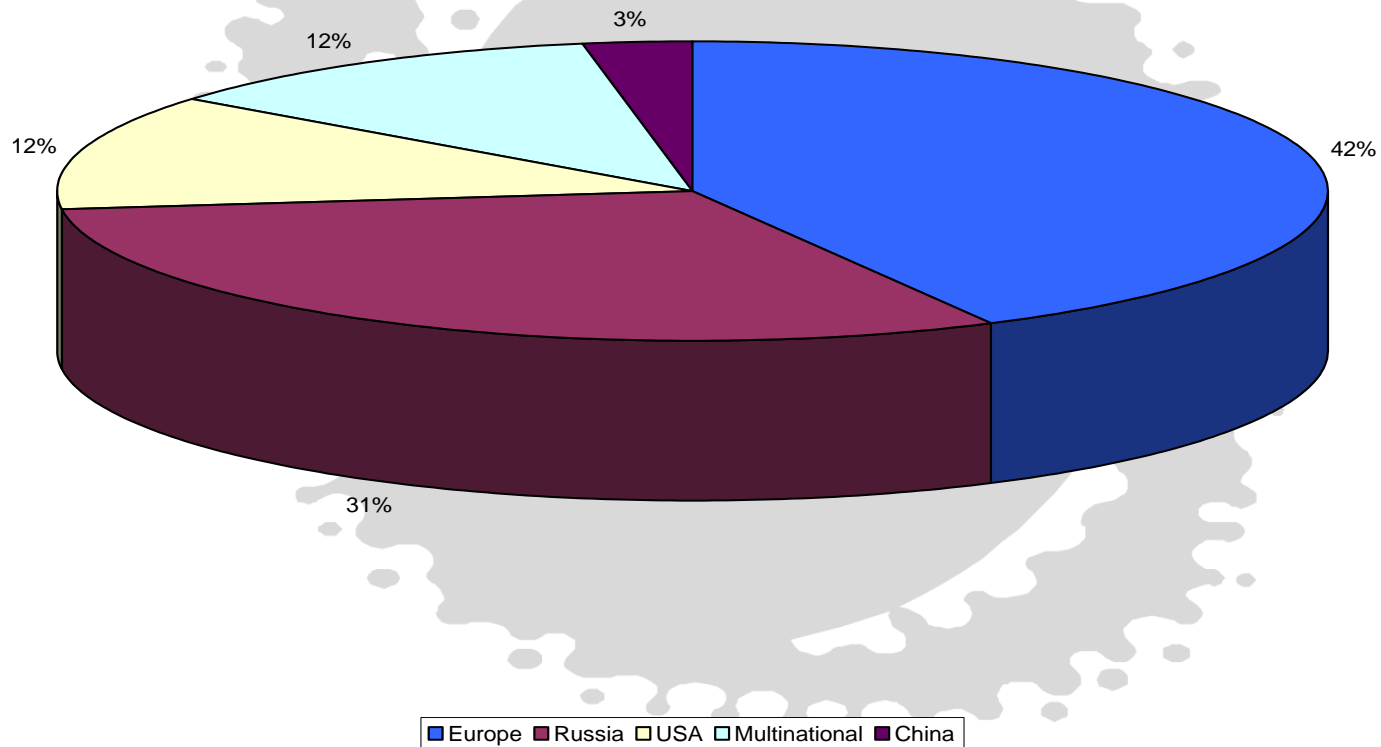
# Global commercial and industrial overview

## ➤ Commercial Launch Services

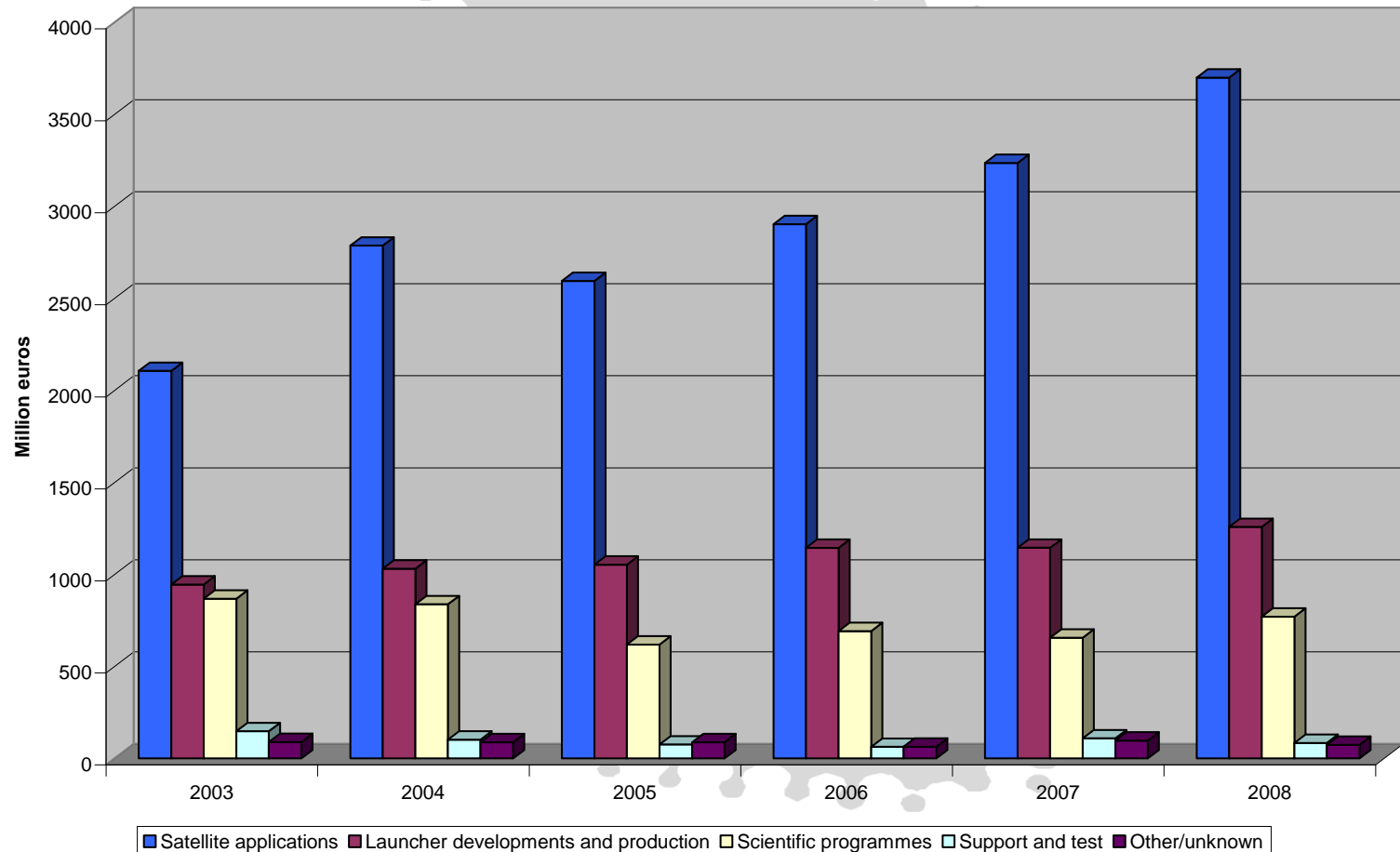
- Estimated total market revenue: \$2.5 billion (+25% from 2008)
- European companies account for 42% of total (Russia: 31%, US:12%)
- Market dominated by European companies, which profited from Sea Launch bankruptcy
- Commercial launch rate barely sufficient to cover demand
- Proved technology, driving down insurance costs
- Chinese companies far from consolidating their position



## Estimated Commercial Launch Revenues by Country/Entity



# Estimated Share of the European Space Industry Consolidated Turnover by Sector



# Estimated Share of the European Space Industry Consolidated Turnover per Institutional Customer

