

Foreword

The Handbook to Measuring the Space Economy is the result of collective efforts within the framework of the OECD International Futures Programme (IFP), aimed at better understanding the space sector and its wider economic dimensions.

The work is part of a systematic effort within the OECD to understand and assess the potential economic, social and environmental benefits of new economic sectors, based on technological innovations that contribute to productivity gains in the economy and society at large. Information and communication technologies (ICT), biotechnology-based applications, and space-based applications are parts of this group of actual or potential drivers.

As the space economy develops, policy-makers, investors, members of the public and private sector and academia increasingly call for access to comparable statistical data from major space faring nations and their space industry. As the Handbook suggests this requires more work and co-operation internationally. Although useful indicators and statistics already exist, a number of methodological obstacles still remain in order to more accurately quantify the space sector and render data comparable across countries.

Contributing to the emergence of economic data, the Forum on Space Economics – the OECD Space Forum – was launched to investigate the economic dimensions and implications of the space infrastructure for the larger economy. This innovative platform includes a number of governments and space agencies as founders: ASI (Agenzia Spaziale Italiana, the Italian Space Agency), CNES (Centre National d'Etudes Spatiales, the French Space Agency), CSA (Canadian Space Agency), ESA (European Space Agency), NASA (National Aeronautics and Space Administration), NOAA (National Oceanic and Atmospheric Administration), Norwegian Space Centre (Norsk Romsenter), the UK Space Agency and USGS (United States Geological Survey). Other actors in governmental agencies, the space industry, academia, industry associations, and consulting firms are regularly involved in the Forum activities. The Space Economy at A Glance (2007, 2011) is one of several outputs of the Forum. It paints a detailed picture of the space industry, its downstream services activities, and its wider economic and social impacts. In parallel, case studies are conducted in the Forum to explore the specific economic impacts of space applications in various sectors. Two publications summarise the findings so far Space Technologies and Climate Change (2008) and Space Technologies and Food Security (2012, forthcoming).

The Handbook to Measuring the Space Economy builds on the OECD Space Forum's analytical groundwork and provides a comprehensive approach to measuring the space economy. It takes stock of current issues surrounding measurements of the space economy's contours, identifies the main obstacles to be overcome, and presents several avenues for improvements in economic data. More work is needed to better map statistically the space sector and its downstream activities, and ongoing international co-operation is key to address a number of challenges identified in this publication.

The report was prepared by Claire Jolly, OECD Policy Analyst, under the direction and guidance of Barrie Stevens, Head of the International Futures Programme and Pierre-Alain Schieb, Head of Futures Projects. Anita Gibson provided administrative and editorial assistance. The team has benefited from many contributions since the beginning of the Forum, including suggestions from Colin Webb, Directorate for Science, Technology and Industry (DSTI) and the initial support of Paul Schreyer and Andreas Lindner of the Statistics Directorate. Thanks also go to Dirk Pilat and Sandrine Kergroach-Connan of DSTI whose 2002 paper commissioned by the IFP was the building block in the development of this work. Experts from other organisations also contributed useful inputs, including A. Malfara, Senior Classifications Specialist from Statistics Canada. Our thanks go to members of the OECD Space Forum, who contributed expertise, ideas and data. Our thanks go also to experts in the space community from industry associations, consulting firms and academia, particularly to Pierre Lionnet from Eurospace, Norihiro Sakamoto formerly from the Society of Japanese Aerospace Companies and Henry Hertzfeld from the Space Policy Institute.



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