

Foreword

The Space Economy at a Glance (2011) provides a statistical overview of the global space sector and its contributions to economic activity. This publication is an updated, more comprehensive version of The Space Economy at a Glance (2007), the first-ever OECD statistical overview of the emerging space economy. The new edition provides not only recent indicators and statistics based on both official and private data, but also a strategic outlook that identifies key issues for the future. The figures cover many countries, and, for first the time, include various official statistics concerning the Indian and Chinese space programmes.

The publication is the result of several years of co-operative efforts with the space community. In 2002, the OECD's strategic foresight unit (the International Futures Programme, IFP) launched a project to explore how space technologies could contribute to finding solutions to some of the major challenges facing society. Two publications resulted from that in-depth project. Space 2030: The Future of Space Applications (OECD, 2004) explored promising space applications for the 21st century. Space 2030: Tackling Society's Challenges (OECD, 2005) assessed the strengths and weaknesses of the regulatory frameworks that govern space, and formulated a policy framework that OECD governments might use to ensure fullest possible realisation of the potential offered by space. In particular, it identified space infrastructure as a key issue for the future development of the space economy.

The space sector plays an increasingly pivotal role in the efficient functioning of modern societies and their economic development. The use of satellite technology in navigation, communications, meteorology, and earth observation is giving rise to a growing stream of applications in such areas as air traffic control, transport, natural resource management, agriculture, environmental and climate change monitoring, entertainment and so on, which in turn are creating new downstream uses and new markets. Space is increasingly seen as an important potential source of economic growth, social wellbeing and sustainable development.

Upon completion of the two-year OECD space project, there was strong encouragement from a number of institutions, especially space-related agencies, for the OECD IFP to continue exploring the economic dimensions of space infrastructure. The year 2006 saw the launch of the OECD Forum on Space Economics (the "Space Forum"), an innovative platform for international dialogue on the social and economic aspects of space activities. This Forum is supported by contributions and/or expertise from a number of governments and space agencies: ASI (Agenzia Spaziale Italiana, the Italian Space Agency), the UK Space Agency, CNES (Centre National d'Études Spatiales, the French Space Agency), CSA (Canadian Space Agency), ESA (European Space Agency), NASA (National Aeronautics and Space Administration), Norwegian Space Centre (Norsk Romsenter) and USGS (United States Geological Survey). One of the Forum's first outputs was The Space Economy at a Glance in 2007. Other outputs have included case studies examining the socio-economic contributions of space applications. The first publication of these studies, Space Technologies and Climate Change (2008), looked at the role of these technologies in tackling some of the major problems posed by climate change, focusing on examples from water management, marine resources and maritime transport. A second, upcoming case study publication, Space Technologies and Global Food

Supplies (2011), will look at how space applications could assess food stocks via remote sensing, or could render the food transport industry more cost-efficient and environment-friendly through navigation aids.

This publication was prepared by Claire Jolly, Policy Analyst in the OECD International Futures Programme (IFP), under the direction and guidance of Barrie Stevens, Head of IFP and Pierre Alain Schieb, Head of Futures Projects. Anita Gibson provided editorial and administrative assistance. Logan Gibson and Hyungsoo Woo conducted research and analysis. The team benefited from contributions from colleagues inside the Organisation, particularly H el ene Dernis from the Directorate for Science, Technology and Industry (STI) for patents.

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