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Industrial Policies as Drivers of the Space Economy (3)

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IDENTIFICATION AND ANALYSIS OF NATIONAL AND REGIONAL INDUSTRY CLUSTERS OF
THE EUROPEAN SPACE INDUSTRY

Abstract

Industry models play a central role in understanding industries and processes on a macroeconomic scale and are indispensable as a support for politico-economic as well as corporate strategic decisions. A model particularly suited for the analysis of competitiveness and the development of regional and national industrial strengths and advantages is the one described in the book “Competitive Advantage of Nations” by Michael E. Porter, depicted in a “diamond” of interconnected factors. The space industry clearly reflects several of the elements described by Porter, among them: a tendency towards geographically concentrated industry clusters, caused by a strong dependence on high-quality suppliers, strong dependence on a skilled labor force and the necessity of exchange with research institutions. Large portions of the space industry are highly influenced by governments, be it through (inter-)governmental institutions acting as customers, through national research strategies or through governmental influence on factor conditions. Especially in Europe, this influence is scattered out to a number of institutions, including national and regional governments, the European Commission and the European Space Agency. Since their policies are a main influence and potential driver for the space industry and economic growth in this sector, it is especially important to take politico-economic and strategic decisions on the right basis. The first step in Porter’s analysis of the national/regional diamond is the identification and description of national/regional clusters of different industry subgroups. While other researchers focus on cluster identification in the United States of America, this paper will conduct an identification of clusters for the European space industry. Beyond the identification, it will analyze details concerning the nature of the clusters and especially the role of political strategies and environments in shaping them.