

## 27th SYMPOSIUM ON SPACE POLICY, REGULATIONS AND ECONOMICS (E3)

The space economy: what are the socio-economic impacts? (3)

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PRELIMINARY INDICATIONS EMERGING FROM A SOCIO-ECONOMIC IMPACT ANALYSIS OF  
THE EUROPEAN LAUNCHER SECTOR

**Abstract**

In a context where the economic strains are challenging European policies as well as the very fabric of governmental contributions to public life, innovation and efficacy of public policy in research are called upon to support growth in Europe and to sustain employment and entrepreneurial capacities. Governments need evidence that the investments in space, while providing strategic tools to implement sovereign policies, create jobs and build the competitive European economy of the future. This is particularly true when the decisions at stake have a potential bearing on the future of the European space sector for at least the next 30 years, as it will be the case for the ESA Council at ministerial level meeting in December 2014. On this occasion, Ministers will be called to complement the decisions taken in November 2012, when ESA Member States secured investments for detailed definition studies of the new Ariane 6 launcher, continuation of specific adapted Ariane 5 ME (Mid-life Evolution) activities and common upper stage activities, with the ultimate goal of guaranteeing the strategic European access to space in the interest of governments as well as of the competitiveness of the European sector on the worldwide market. The Agency has thus decided to support these important decisions by assessing the value of future public investments in the European launcher area. This activity has been implemented through a study whose main results and applied methodologies are presented in this paper. The main objective of the study has been to evaluate ex-post the direct, indirect and induced socio-economic impacts of the Ariane 5 programme (mid-term evaluation) and of the Vega programme (early evaluation) globally, at European level, and within the economies and industries of each ESA Member State participating to the programmes. In comparison with the cost of the programmes, the assessment of the socio-economic impacts has allowed the evaluation of the utility of the programmes in a wider perspective, going beyond the purely economic terms. Secondary objectives of the study included updating the results of a previous study on the economy of French Guiana, where all ESA launch operations are conducted, resulting from the expenditure by ESA, CNES and Arianespace in connection with facilities and activities at the Centre Spatial Guyanais (CSG), Europe's Spaceport.