

BUSINESS INNOVATION SYMPOSIUM (E6)  
Public/Private Human Access to Space - Supporting Studies (2)

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THE STRUCTURE OF THE EUROPEAN SPACE INDUSTRY – CURRENT AND HISTORICAL  
ANALYSIS OF INDUSTRY CLUSTERS IN THE BENELUX

**Abstract**

A comprehensive understanding of a particular industry is imperative as a basis for policy decisions to foster this industry or a segment of it. In this sense, the Space Generation Advisory Council's Commercial Space Project Group strives to support the International Academy of Astronautics' study group on "Public/Private Human Access to Space" by providing a description and analysis of the European space industry. As a precursor to this paper, the main industry clusters in the European space industry have been identified along with their basic characteristics. This paper builds on that analysis by describing the space industry clusters in Belgium, the Netherlands and Luxembourg (Benelux) in more detail and examining their individual constitution in tandem with other external influences, e.g. academic research institutions and military and government bodies. Special emphasis is placed on reviewing the historical development of each cluster in the context of its current state (culturally, structurally, politically and economically). As this work is conducted in collaboration with other researchers who are focused on other European countries, the end goal of this research is to obtain a comprehensive picture of industry clusters all over Europe. This will help build an overall understanding of the European space industry and the roles individual nations play in it. Moving forward, a good understanding of how the European Space Industry has formed will give new insight into possible growth opportunities, e.g. strengths and advantages. This particular work will use Porter's analysis method described in his book "Competitive Advantage of Nations" to present a more detailed description of the active players within the Benelux space sector. Porter's model represents the influencing factors on industry in a diamond to illustrate the relationship between them and the resulting influence on industry competitiveness. Additionally, this paper will take into account socio-political factors set up by governments and policy makers, examining their role in the industry's past and continued development.