

LA CONCURRENCE MONDIALE, RUSSE, AMÉRICAINNE, CHINOISE, JAPONAISE... / GLOBAL COMPETITION: RUSSIAN, AMERICAN, CHINESE, JAPANESE...

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Résumé / Abstract :

In space cooperation and competition are bedfellows. The initial overpowering space race for primacy has progressively left some room to cooperation because of ambitious space programmes beyond the reach of most countries. Yet, in the area of access to space, competition continues to trump cooperation endeavours as access to space remains the foundation of space activities.

Once the availability of transport capabilities befitted to the needs of domestic institutional users has been developed, countries tend to focus first on independence (for both launcher system components and launch sites), then increased reliability and cost reduction. Capturing a share of the commercial market may subsequently come into play, as institutional demand – almost 70% of total worldwide demand – remains captive to domestic sources in all space-faring nations but Europe.

With competition among launch service providers starting in the late seventies, access to space gradually evolved towards progressively also serving non-institutional missions. Initially disputed only between Europe and the USA, a number of players have demonstrated success in launching and entered the commercial launch services market ever since.

New developments or adaptations of existing systems and new approaches continue to drive the efforts in matching but also creating evolving needs of customers, safeguarding industrial capacities, replacing obsolete systems and increasing competitiveness.

This presentation looks at the strategies that the different space players worldwide have put in place to answer to the above challenges in the current stiffening competitive landscape.

Carrière en bref / Career in brief :

Joined the European Space Agency (ESA) in 2001 and occupied several corporate functions until she took up duties within the Directorate of Launchers. Manages the Launcher Policy Office in the Directorate of Launchers since 2006. At present, heads the office that assesses at ESA the evolution of the worldwide launch service offer and demand for launch services and performs studies of strategic and economic nature for the European launcher sector. She is deeply involved in the drafting, negotiation and approval process of launcher-related documentation and agreements submitted to ESA decision-making bodies and in defining launch service procurement policy principles. Works in close collaboration with project development and exploitation sector colleagues in exploring new policy approaches in the area of European access to space and in developing the framework for the future exploitation of ESA-developed launchers.