



第5回宇宙法シンポジウム
「宇宙探査と産業連携」
平成26年9月3日

我が国の宇宙機器産業の現況

Current Overview of Japan's Space Industry

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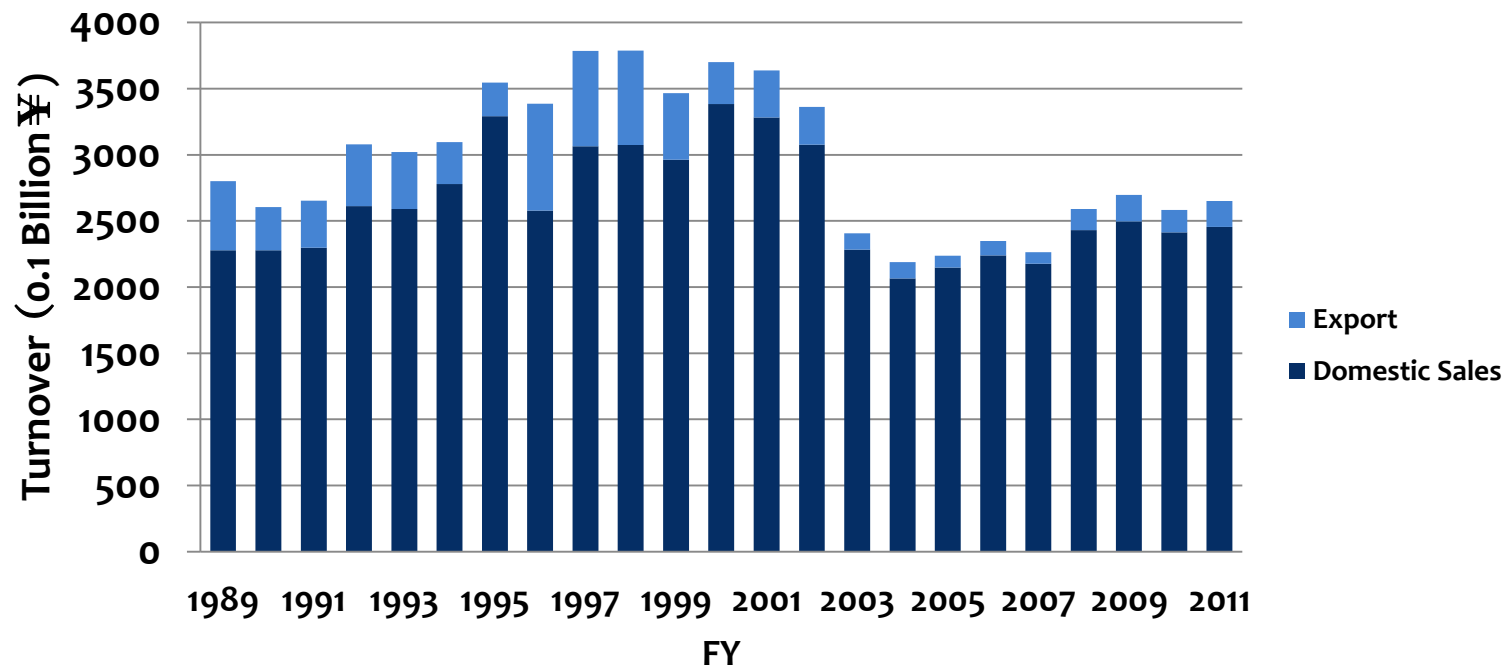
The Society of Japanese Aerospace Companies
Senior Vice President
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宇宙機器産業の売上額の減少 : Product Sales



- 宇宙機器産業の売上額は2000年以降に大きく減少
- The total product sales of Japan's space industry has been greatly reduced from the beginning in FY2000's .

Space industry : manufacturing industry in satellites, rockets and related equipment

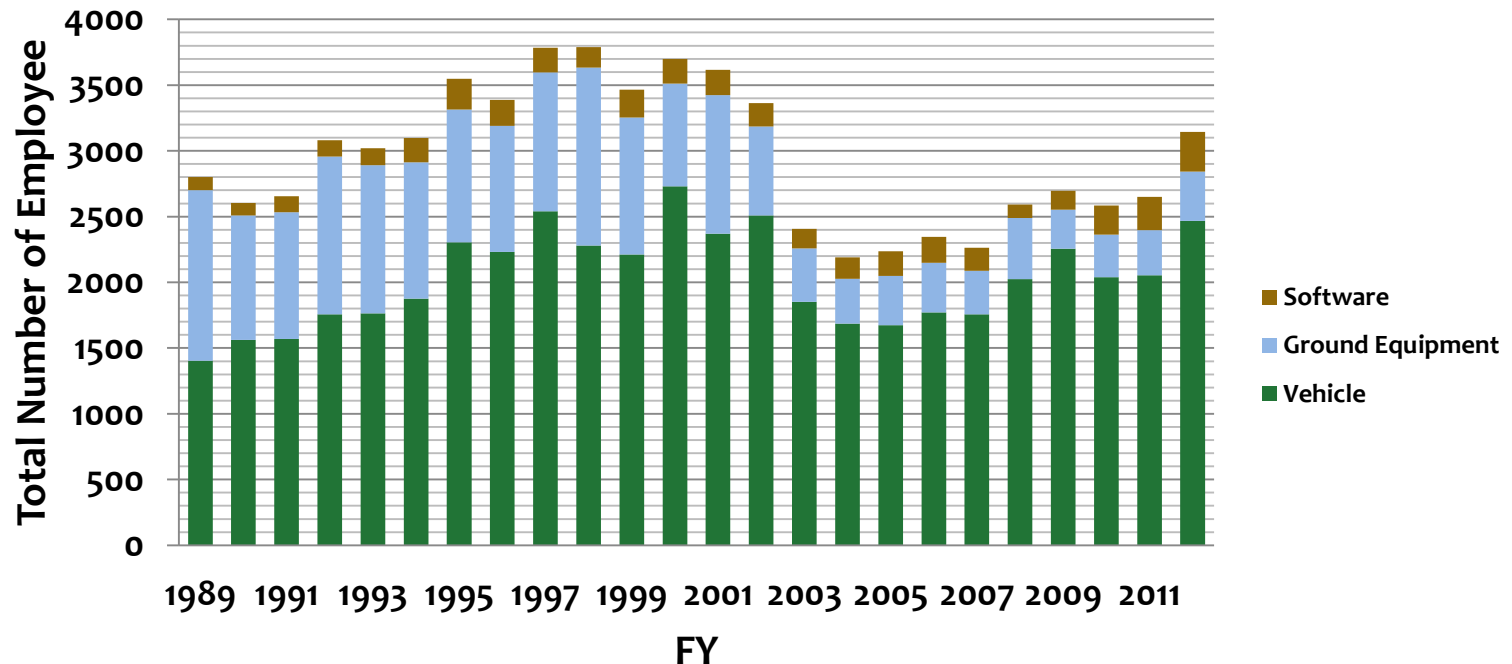


従業員数の減少 : Number of Employees



- 宇宙機器産業の従業員数は売上減に伴って大きく減少
- The total number of employees has been continuously decreased with the reduction of total product sales.

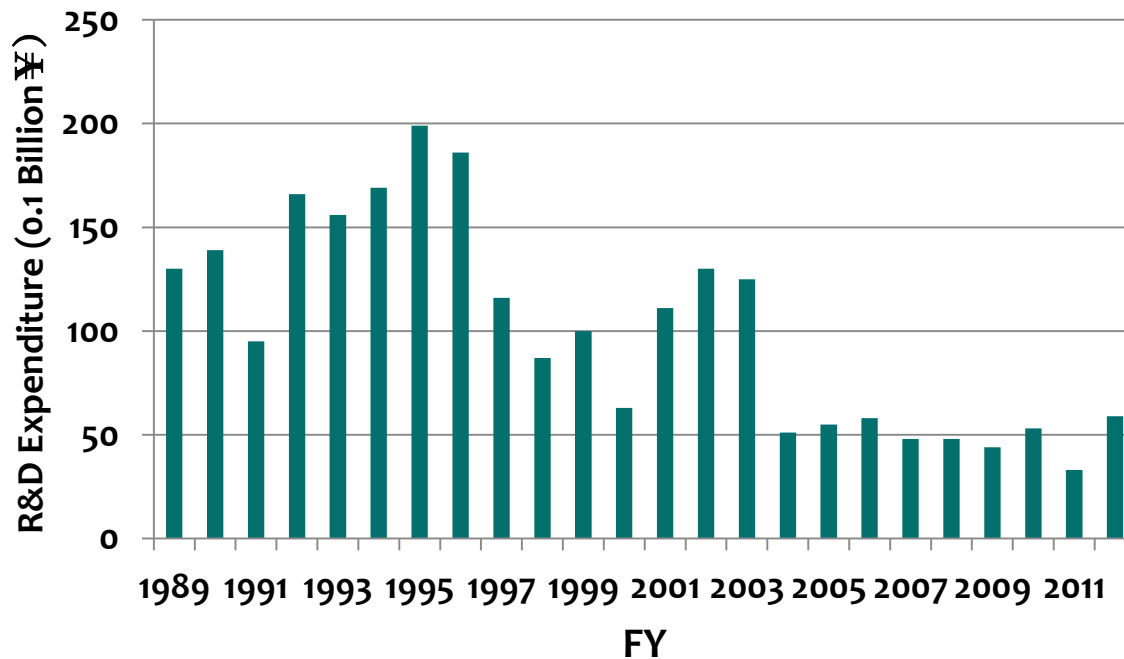
Based on a questionnaire result from 80 space related companies



企業独自の研究開発費の減少 : R&D Expenditure



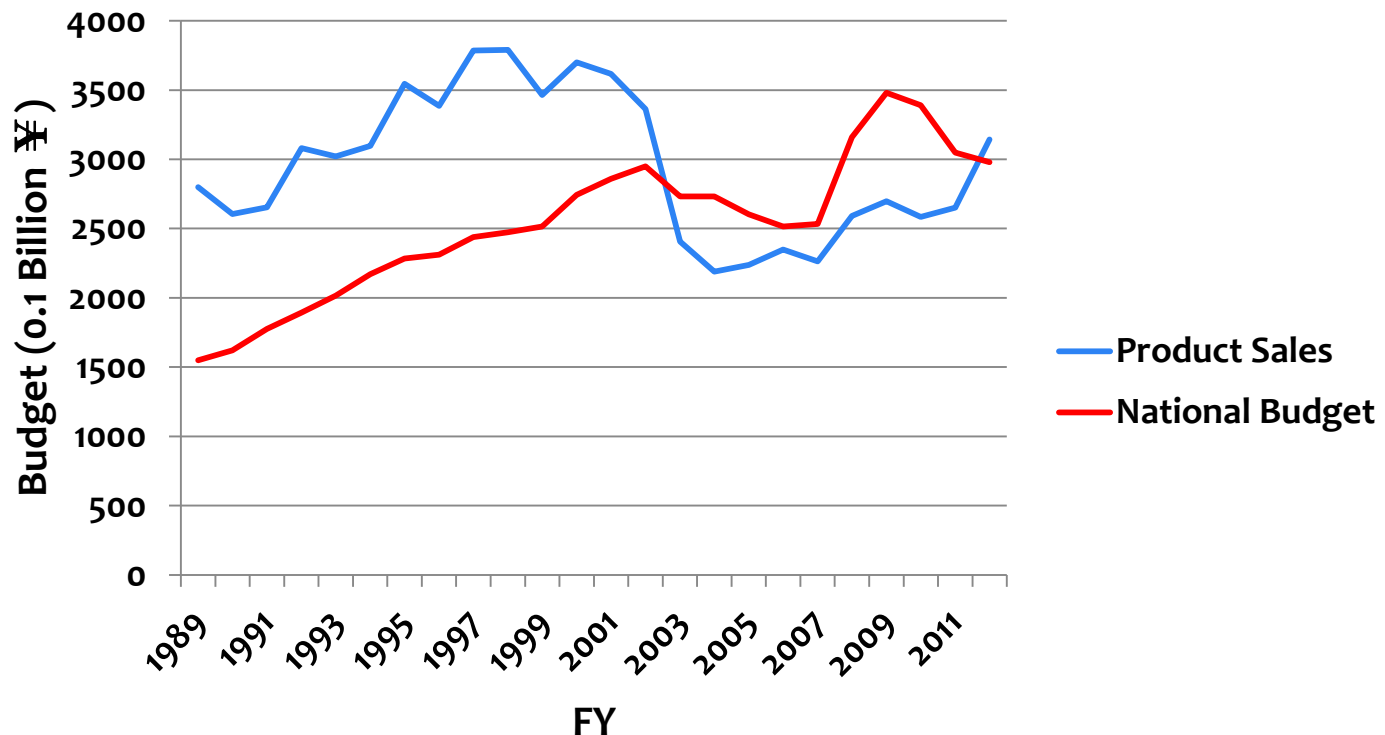
- 宇宙開発計画の縮小に伴って企業内の研究開発費も減少の一途
- The expenditure of R & D in space industry has been continuously decreased with the shrinkage of national space programs.



国の宇宙関連予算と宇宙機器産業の売上額 : National Budget & Product Sales



- 宇宙機器産業の売上額は2003年以降は国の予算を下回る状況
- The amount of total product sales in space industry has becomes less than the national space budget after FY 2003.





- 宇宙基本計画では宇宙探査について以下のように記述されている

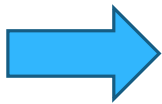
- 大規模なプロジェクトについては、学術のみの目的では実施が困難になりつつある面があり、国際協力や産業競争力強化など、多様な政策目的との連携など、プロジェクトの企画・立案や選択にあたり、学術コミュニティと政策担当者との十分な検討が必要である。
- 今後とも一定規模の資金を確保し世界最先端技術の成果を目指す

「宇宙基本計画」(平成25. 1)

- “ Basic Plan on Space Policy “ indicates the followings for space exploration.
- The large-scale projects related to space science and space exploration are difficult to carry out for purely academic purposes. On planning or selecting a project, academic community members and policy makers should examine the project together to link it to various policies, including international cooperation and the enhancement of international competitiveness.
- It is necessary to make full use of the scheme and ensure a constant amount of funds, in order to achieve cutting edge breakthrough.

“Basic Plan on Space Policy” (Jan.2013)

- 我が国の宇宙機器産業は**官需への依存度**を高めている
- 企業内の従業員数の減少と研究開発費の削減は**企業の独自活動を縮小**した
- 企業が**宇宙探査に独自の資源**を投入する余裕は少なくなった
- Recently, Japan's space industry heavily relies on **the government demand**.
- The reduction of employees and **R&D expenditure in the industry** caused **shrinkage** of its own activities.
- These circumstances implies that **it cannot afford for the industry** to spend its own resources for space exploration.

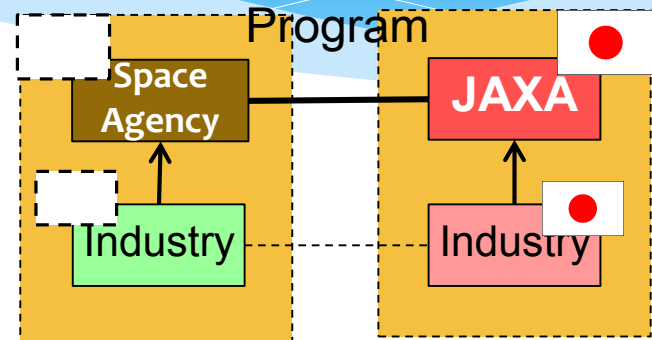


- 政府計画の**長期的な方向性**の明示が必要となっている
- **新技術の開発機会**を創出するプログラムが期待される
- **国際協力**によって各国の宇宙予算の効率的な運用が期待される
- Clarifying the **long-term program** in the government level is expected.
- Programs promoting development in **advanced technology** are expected.
- **International cooperation** is expected for efficient uses of national budget.

✓ TYPE I

International Cooperation

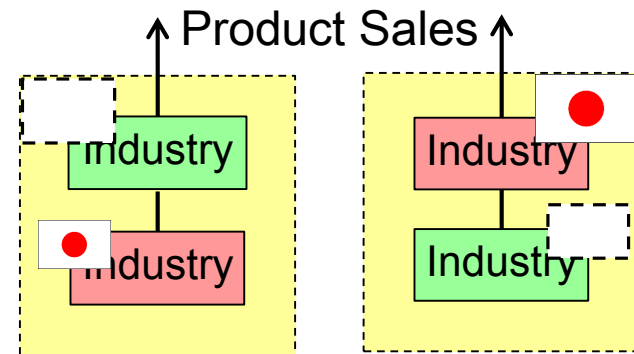
- Governments Agreement
- Industry Participation by Contracts



✓ TYPE II

Business Relationships

- Contracts between Companies
- Buyers and Suppliers Relations



TYPE III

Other Possibilities

- Mutual Partnership
- Joint Program between Companies

