

June 26, 1997

Cable from the Brazilian Embassy in Washington to Foreign Ministry, 'Outer space. Expansion of the international market for spatial services. Brazilian insertion. Entrepreneurial interest. CLA. ECCO. Considerations.'

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Summary:

Brazilian diplomat Paulo Tarso Flecha de Lima recommends that the Brazilian government should proceed to make the Brazilian space market more attractive for foreign investments. Among Flecha de Lima's suggestions is the creation of a set of norms to regulate commercial activities at the Alcântara Launch Center.

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 ESPACO EXTERIOR. EXPANSAO DO MERCADO
 INTERNACIONAL DE SERVICOS ESPACIAIS.
 INSERCAO DO BRASIL. INTERESSE
 EMPRESARIAL. CLA. ECCO.
 CONSIDERACOES.

DESCLASSIFICADO
 DE ACORDO COM O DEC.
 5.301, DE 09/12/2004

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 RESUMO: A RAPIDA EVOLUCAO DO MERCADO INTERNACIONAL DE
 SERVICOS ESPACIAIS REQUER DEFINICOES SOBRE TEMAS COMO A
 COMERCIALIZACAO DE LANÇAMENTOS EM ALCANTARA E O PROJETO
 ECCO, PARA MANTER AS VANTAGENS DO BRASIL NUM MERCADO
 COMPETITIVO.

1058 51225

. A CONCRETIZACAO, NOS PROXIMOS ANOS, DE PROJETOS DE
 COMERCIALIZACAO DE SERVICOS ESPACIAIS PROPOSTOS POR GRANDES
 EMPRESAS NORTE-AMERICANAS E DE OUTROS PAISES, SOBRETUDO NA
 FORMA DE CONSORCIOS, CONFIRMA AS PERSPECTIVAS DE
 CRESCIMENTO DESSE MERCADO E AS POSSIBILIDADES DE O BRASIL
 APROVEITAR OS NICHOS EM QUE TEM CONDICOES DE
 COMPETITIVIDADE.

2. A EVOLUCAO RAPIDA DESSAS NOVAS INICIATIVAS, QUE NAO
 RARO ENVOLVEM EMPRESAS QUE JAH DEMONSTRARAM INTERESSE EM
 ESTABELECEM PARCERIAS NO BRASIL, REALCA A IMPORTANCIA DE
 DEFINICOES EM PELO MENOS DUAS AREAS RELEVANTES PARA A
 INSERCAO DO PAIS NO MERCADO INTERNACIONAL DE SERVICOS
 ESPACIAIS: A) A REGULAMENTACAO DO PROCESSO DE
 COMERCIALIZACAO DE SERVICOS A PARTIR DO CENTRO DE
 LANÇAMENTOS DE ALCANTARA., B) A DEFINICAO DA PARTICIPACAO
 BRASILEIRA NO PROJETO ECCO.

3. NO QUE RESPEITA AO CLA, HAH QUE SE RECORDAR QUE, NAO
 OBSTANTE SUA POSICAO GEOGRAFICAMENTE PRIVILEGIADA E A
 EXISTENCIA, NO LOCAL, DE INFRA-ESTRUTURA, IMPORTANTES
 INVESTIMENTOS AINDA TERA DE SER FEITOS E QUE OUTROS CENTROS
 SE ESTAO CANDIDATANDO PARA ABOCANHAR O MERCADO DE
 LANÇAMENTOS. NESSE CONTEXTO, O GOVERNO NORTE-AMERICANO
 RECENTEMENTE AUTORIZOU A OPERACAO DE ESPACOPORTO COMERCIAL
 NA FLORIDA E AS AUTORIDADES FRANCESAS ESTAO PROMOVENDO
 ESTUDOS DE VIABILIDADE COM VISTAS A COMERCIALIZAR SERVICOS
 DE LANÇAMENTO A PARTIR DAS INSTALACOES DO ARIANE 4 QUE

DE: BRASEMB WASHINGTON
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DESCLASSIFICADO

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FICARAO OCIOSAS APOS A ENTRADA EM SERVICO DO ARIANE 5. O RECENTE ACORDO DA LOCKHEED COM A ARGENTINA E OUTRO EXEMPLO ILUSTRATIVO.

4. A ESPERADA TRANSFERENCIA DA ADMINISTRACAO DO CLA PARA A INFRAERO E O ESTABELECIMENTO DAS REGRAS CORRESPONDENTES, SERAH ESSENCIAL, A MEU VER, PARA EVITAR PERDA DE NEGOCIOS NESTA AREA. A JANELA DE OPORTUNIDADE PARA OBTER AS MELHORES PROPOSTAS JAH ESTAH ABERTA, E PROPOSTAS DE ''BUSINESS PLANS'' DE LONGO PRAZO, COMO SE PRETENDE PARA KHOUROU, OU MESMO INICIATIVAS MAIS PONTUAIS, NAO ESTARAO DISPONIVEIS INDEFINIDAMENTE.

5. NO QUE RESPEITA AO PROJETO ECCO, A PROPOSTA INICIAL DO INPE E DA AEB DE UMA CONSTELACAO DE SATELITES EM ORBITA BAIXA, INICIALMENTE APOIADA PELA TELEBRAS, MOTIVOU O INTERESSE DE IMPORTANTES EMPRESAS NORTE-AMERICANAS, AA FRENTE A BELL ATLANTIC (HOJE BELL ATLANTIC/NYNEX, QUE CONTROLA BOA PARTE DO MERCADO DA COSTA LESTE), REUNIDAS NO CONSORCIO CONSTELLATION COMMUNICATIONS INTERNATIONAL (CCI). CONTUDO, DEPOIS DE AVENTAR A POSSIBILIDADE DE ASSOCIACAO POR MAIS DE DOIS ANOS, A TELEBRAS AFASTOU ESSA POSSIBILIDADE. A LONGA ESPERA ASSIM IMPOSTA AA INICIATIVA, NO MINIMO, BENEFICIOU OS CONCORRENTES. TODAVIA, CONTATOS POSTERIORES DA CCI COM A INPE, A AEB, ALEM DE COM EMPRESAS NACIONAIS, ABRIRAM APONTAM PARA OUTRAS OPORTUNIDADES DE PARTICIPACAO BRASILEIRA NO ECCO, QUE CONTINUA A INTERESSAR AQUELAS AGENCIAS GOVERNAMENTAIS. PERSISTEM, NO ENTANTO, DUVIDAS EM DUAS AREAS PRINCIPAIS: A) QUAIS OS REQUISITOS DE PARTICIPACAO ACIONARIA BRASILEIRA NA EMPRESA ECCO BRASIL, CUJA CRIACAO ESTAH SUSPENSA NA DEPENDENCIA DESSA INFORMACAO., B) QUAL A FORMA DE ASSOCIACAO DO INPE/AEB AO PROJETO, EM FUNCAO DA LEGISLACAO DE LICITACOES.

6. AS DUVIDAS ACIMA SAO NATURAIS, SOBRETUDO EM UM MERCADO EM QUE O BRASIL DAH OS PRIMEIROS PASSOS SIGNIFICATIVOS. NAO PASSA DESPERCEBIDO, POREM, A PARCEIROS EM POTENCIAL, O RISCO QUE O PROLONGAMENTO DE INDEFINICOES REPRESENTA PARA A FRUICAO DAS OPORTUNIDADES DA ATUAL CONFIGURACAO DO MERCADO, CUJOS EFEITOS PODERAO AINDA DEIXAR-SE SENTIR AO LONGO DAS PROXIMAS DECADAS. A REGULAMENTACAO DE NOVAS AREAS EXIGE, EVIDENTEMENTE, CUIDADOSO ESTUDO, PARA ENCONTRAR O NECESSARIO RESPALDO NA ORDEM JURIDICO-INSTITUCIONAL. NO ENTANTO, DIANTE

DA DINAMICA QUE VEM GANHANDO O MERCADO ESPACIAL, CONVIRIA, A
MEU VER, AMPLIAR O ESCOPO DE IDENTIFICACAO DE OPORTUNIDADE

PAULO TARSO

DESCLASSIFICADO
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5.301, DE 09/12/2004

From: Embassy in Washington

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CONFIDENTIAL

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Outer space. Expansion of the international market for spatial services. Brazilian insertion. Entrepreneurial interest. CLA. ECCO. Considerations.

Summary: The quick evolution of the international market of spatial services requires definitions about questions like the commercialization of launchings at Alcântara and the Project ECCO, in order to keep the advantages of Brazil in a competitive market.

1058 51225 - The realization in the next few years of projects of commercialization of spatial services proposed by large companies from the United States and other countries mainly in the form of consortia, confirms the prospects for the growth of this market and the possibilities for Brazil to utilize the niches in which it has competitive conditions.

2. The quick evolution of these new initiatives, which often involve companies that already have shown an interest in establishing partnerships with Brazil, highlights the importance of definitions in at least two relevant areas for the insertion of the country in the international market of spatial services: a) the regulation of the process of commercialization of services from the Alcântara launching center and b) the definition of the Brazilian participation in the ECCO project.

3. In what regards CLA, it must be recalled that despite its geographically privileged location and the existence of infrastructure at the site, important investments still need to be made and other centers are gearing up to grab the launching market. In this context, the American government recently authorized the operation of a commercial spaceport in Florida and the French authorities are promoting feasibility studies with a view to commercialize launching services from the Ariane facilities that will be idle after the entry into service of Ariane 5. The recent agreement of Lockheed with Argentina is another illustrative example.

4. The expected transfer of the administration of CLA to Infraero and the establishment of the related norms will be essential, in my view, to prevent the loss of business in this area. The window of opportunity to obtain the best proposals is already open and proposals of long term "business plans" as those intended for Khourou, or even one-off initiatives will not be indefinitely available.

5. In what regards Project ECCO, the initial proposal from INPE and AEB of a constellation of satellites at low orbit, at first supported by Telebrás, raised the interest of important American firms, headed by Bell Atlantic (currently Bell Atlantic/Nynex, which controls a large part of the East Coast market) joined in the consortium Constellation Communications International (CCI). However, after having put forward the possibility of association for more than two years, Telebrás moved away from that possibility. The long wait thus imposed to the initiative at least benefitted the competitors. Nevertheless, subsequent contacts by CCI with INPE, AEB and national companies, point to other opportunities for Brazilian participation in ECCO, which continues to interest those governmental agencies. Doubts on two main areas, however, still remain: a) what are the requirements for Brazilian stock participation in the company ECCO Brazil, whose creation is held up and contingent on that information; b) what is the form of association of INPE/AEB in the project, in

the light of the legislation on bids.

6. Such doubts are natural, especially in a market in which Brazil is taking its first significant steps. But potential partners do not fail to notice the risk that a continuing lack of definitions represents for the enjoyment of the opportunities in the present configuration of the market, the effects of which may still be felt during the coming decades. Obviously, the regulation of new areas requires careful study in order to find the necessary support in the legal-institutional order. However, in the face of the growing drive of the spatial market, it would be convenient, in my view, to widen the scope of the identification of opportunities.

PAULO TARSO