



NSR Satellite & Space Market Survey:
**War in Ukraine &
Russian Economic
Sanctions Impacts**

March 2022

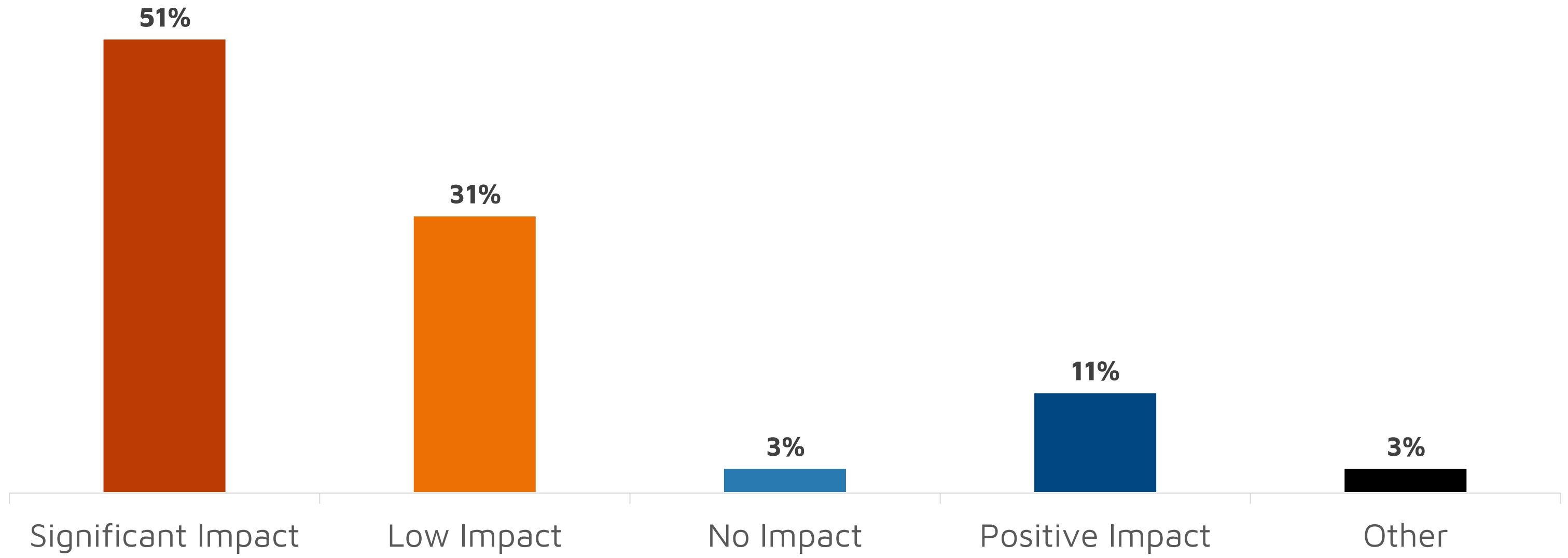
NSR's Mission



Providing industry leading **market research** and **consulting services** to satellite & space clients around the world.

Question 1

What impact has the war in Ukraine and Russian Economic Sanctions had on the Satellite & Space Market?



Source: NSR

Question 2

Has your company already been impacted by these events?

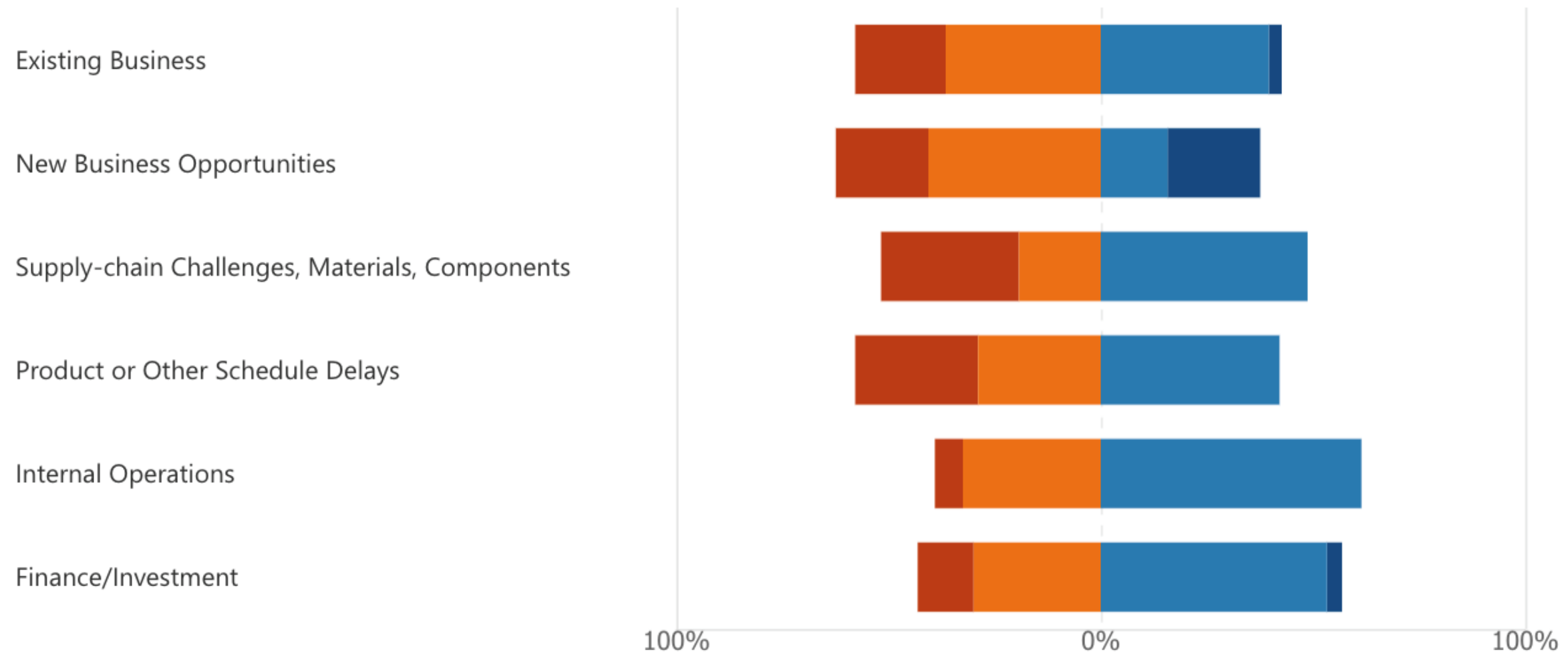


Source: NSR

Question 3

Which areas of your business have been impacted?

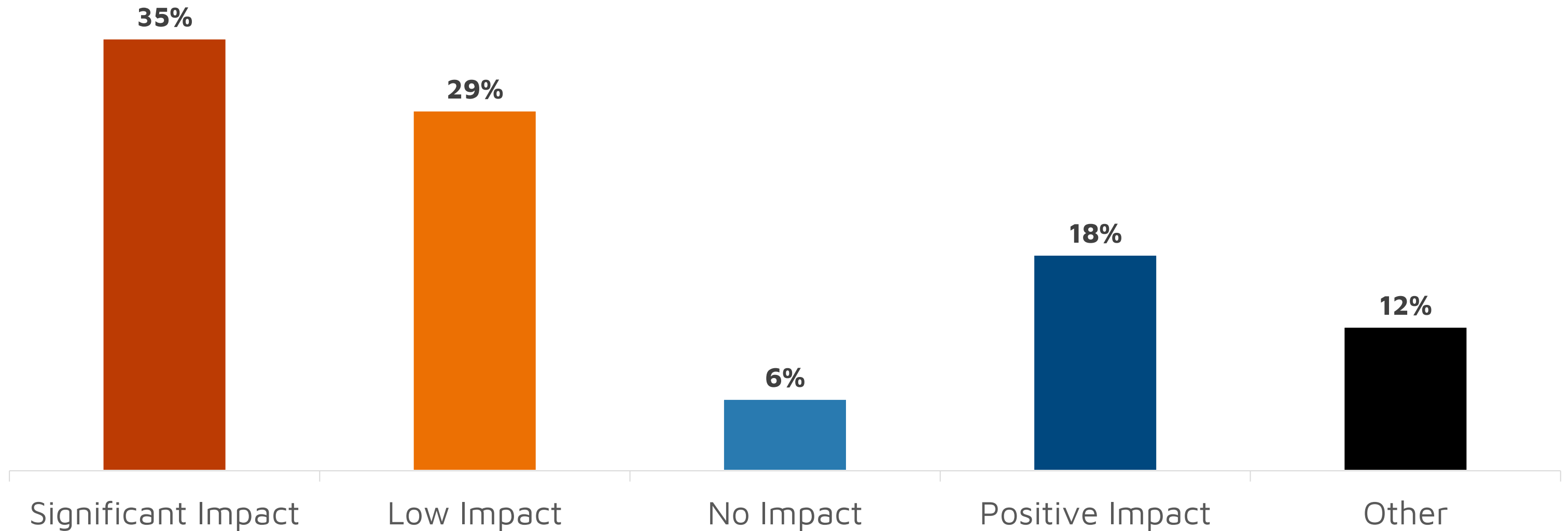
■ Significant impact ■ Low impact ■ No impact ■ Positive impact



Source: NSR

Question 4

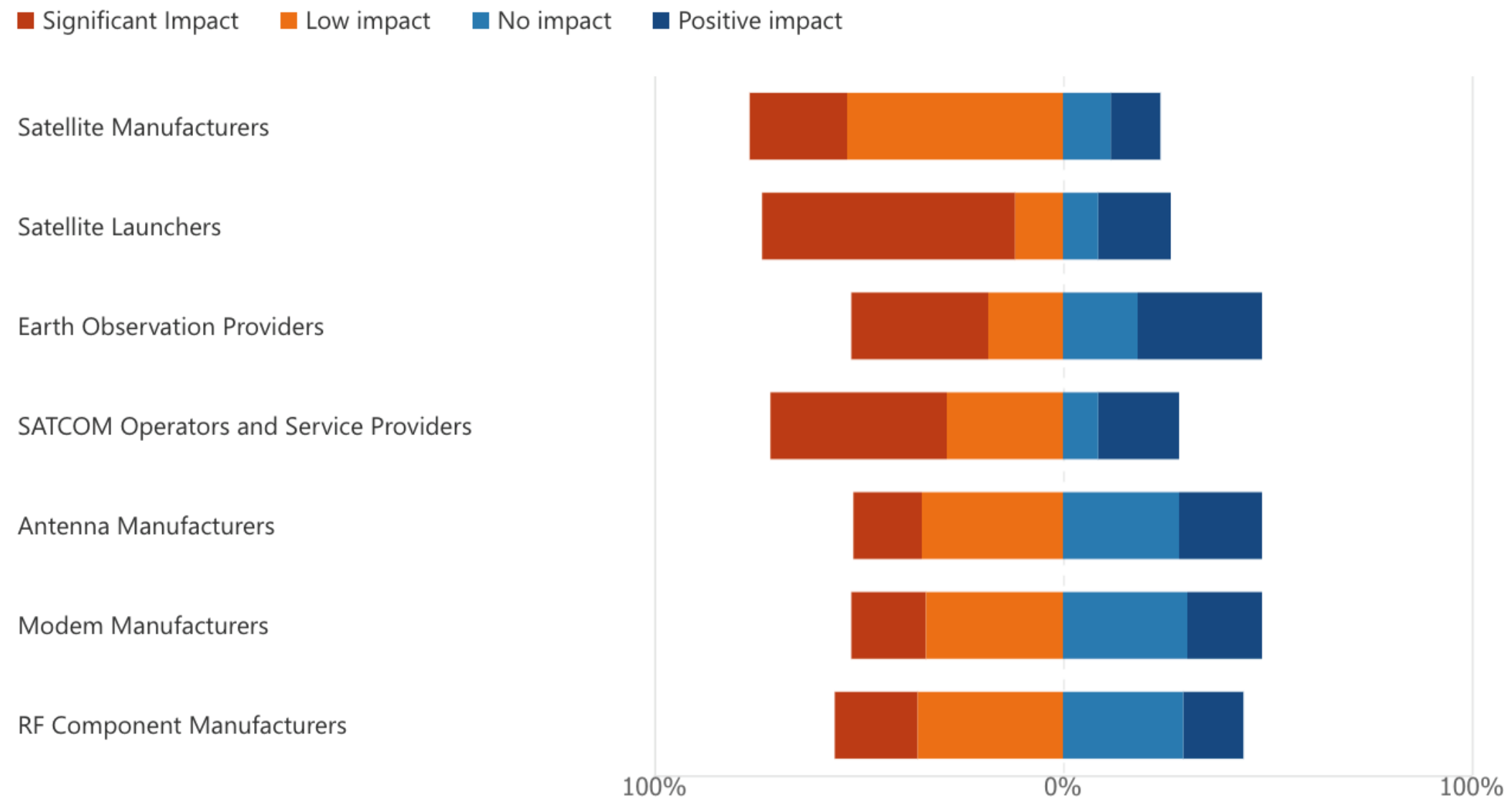
Will the War in Ukraine and/or Russian Economic Sanctions continue to impact your company over the next 12 months?



Source: NSR

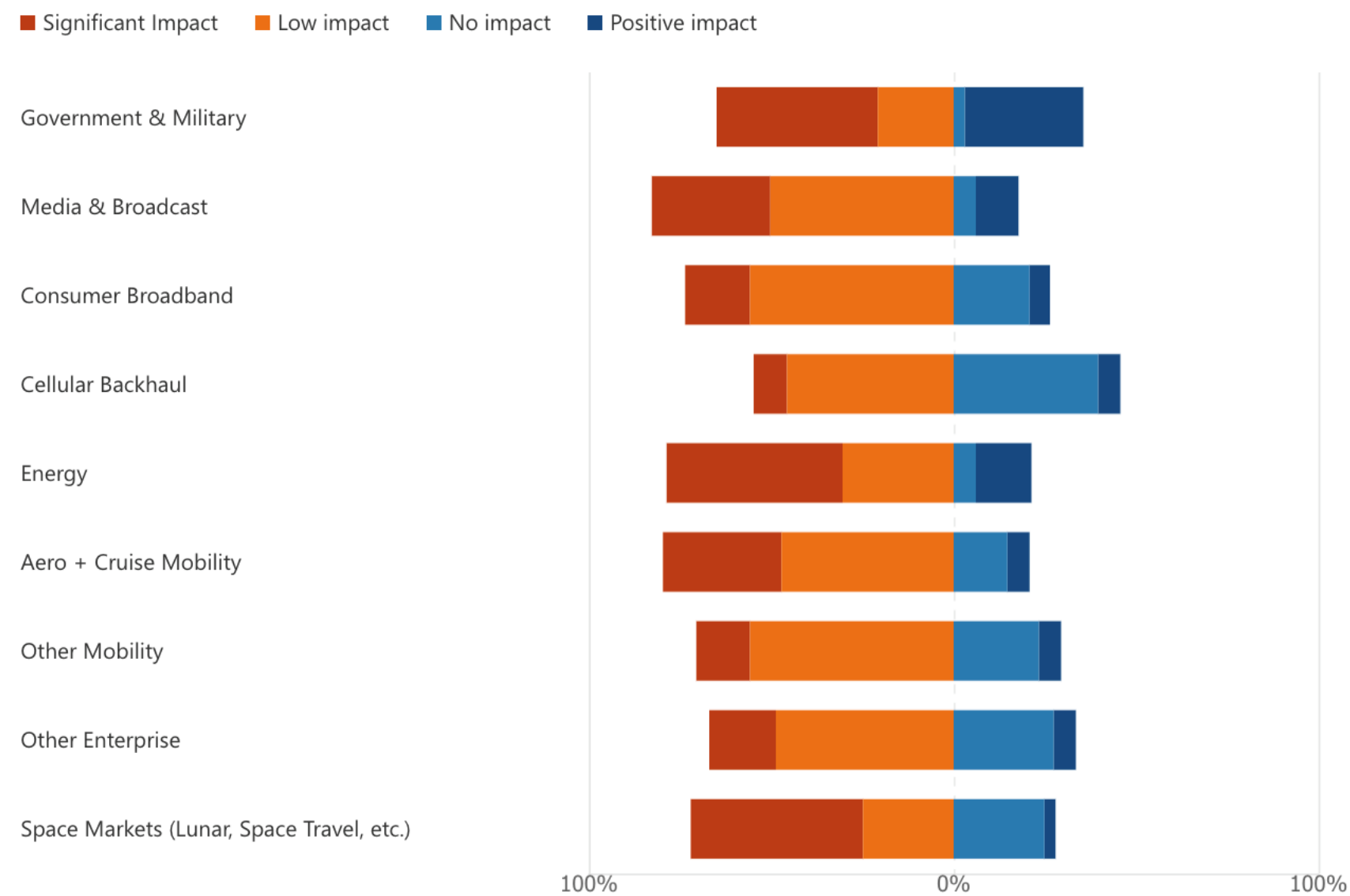
Question 5

Rate your views on the impact of War in Ukraine and Russian Economic Sanctions to the Satellite & Space Value-chain over the next 12 months.



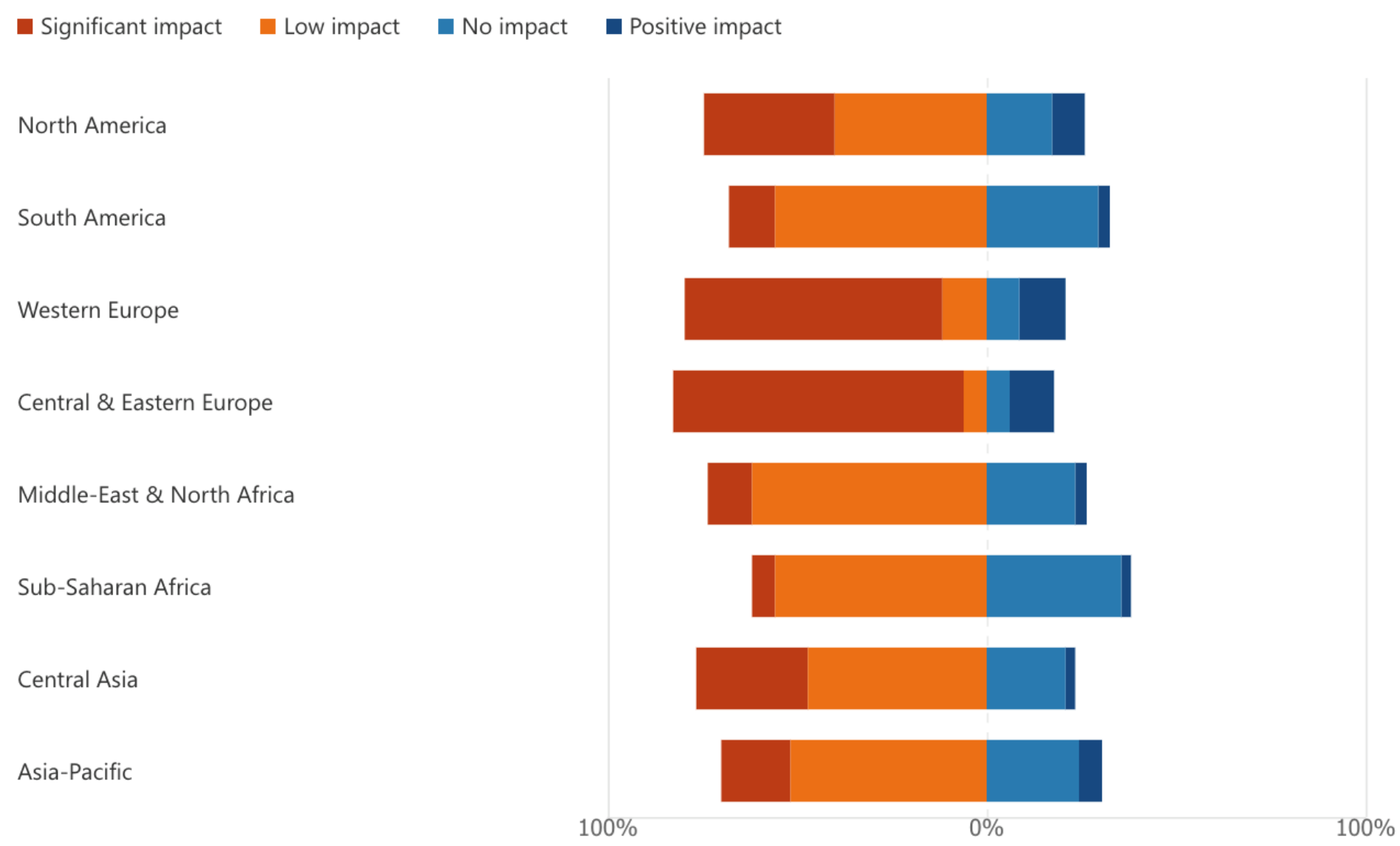
Source: NSR

Question 6
Rate your views on how War in Ukraine and Russian Economic Sanctions will impact each Satellite & Space End-user segment over the next 12 months.



Source: NSR

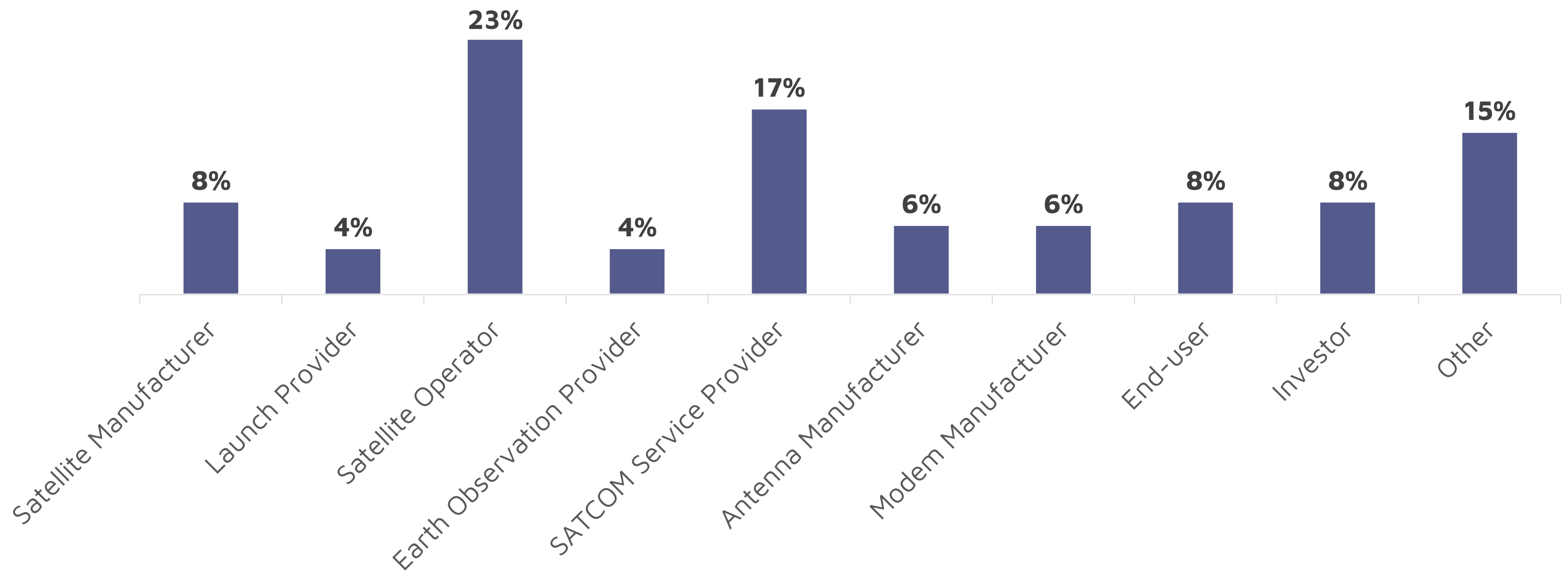
Question 7
Rate the regional impacts to the Satellite & Space Markets from the War in Ukraine and Russian Economic Sanctions.



Source: NSR

Question 8

My Company is:



Source: NSR

Question 9

Do you have other thoughts or comments about War in Ukraine and Russian Economic Sanctions potential impact on the Satellite & Space Markets?

46% of Responses included "Impact"

Demand for Satcom **SatCom revenues** **Soyuz launches**
crisis around the war **Cold war** **war priorities** **scale war**
impact on sales **seriously impacted** **impact** **war** **satellite operators** **nonsensical schemes**
grow significantly **operators - war** **war evolution** **positive impact**
hardware shortage **Satellite & Space** **Satcom for Ukraine**

Investment and innovation in cybersecurity, secure and sovereign Satcom is going to grow significantly.

"Companies launching from Russia will need to source alternative options. That can be good for launch providers in other parts of the world."



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