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?

- **Significant Impact**: 51%
- **Low Impact**: 31%
- **No Impact**: 3%
- **Positive Impact**: 11%
- **Other**: 3%

Source: NSR
Question 2

Has your company already been impacted by these events?

- Yes: 51%
- No: 40%
- Other: 9%

Source: NSR
Question 3

Which areas of your business have been impacted?

- Significant impact
- Low impact
- No impact
- Positive impact

Existing Business

New Business Opportunities

Supply-chain Challenges, Materials, Components

Product or Other Schedule Delays

Internal Operations

Finance/Investment

Source: NSR
Question 4

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

- **Significant Impact**: 35%
- **Low Impact**: 29%
- **No Impact**: 6%
- **Positive Impact**: 18%
- **Other**: 12%

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.
Question 8

My Company is:

- Satellite Manufacturer: 8%
- Launch Provider: 4%
- Satellite Operator: 23%
- Earth Observation Provider: 4%
- SATCOM Service Provider: 17%
- Antenna Manufacturer: 6%
- Modem Manufacturer: 6%
- End-user: 8%
- Investor: 8%
- Other: 15%

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
- crisis around the war
- Cold war
- impact on sales
- seriously impacted

SatCom revenues
- war priorities
- scale war
- satellite operators
- nonsensical schemes

Soyuz launches

operators - war
- war evolution
- positive impact

Satellite & Space

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

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

Source: NSR