

UKRANIAN CRISIS: IMPACT ON EUROPEAN SPACE ENTITIES

Preliminary survey results and report
MAY 2022

THE REPRESENTATIVE ORGANISATION OF
EUROPEAN SPACE SMEs

SME4SPACE

10
YEARS

2011-2021

Method: Survey distribution

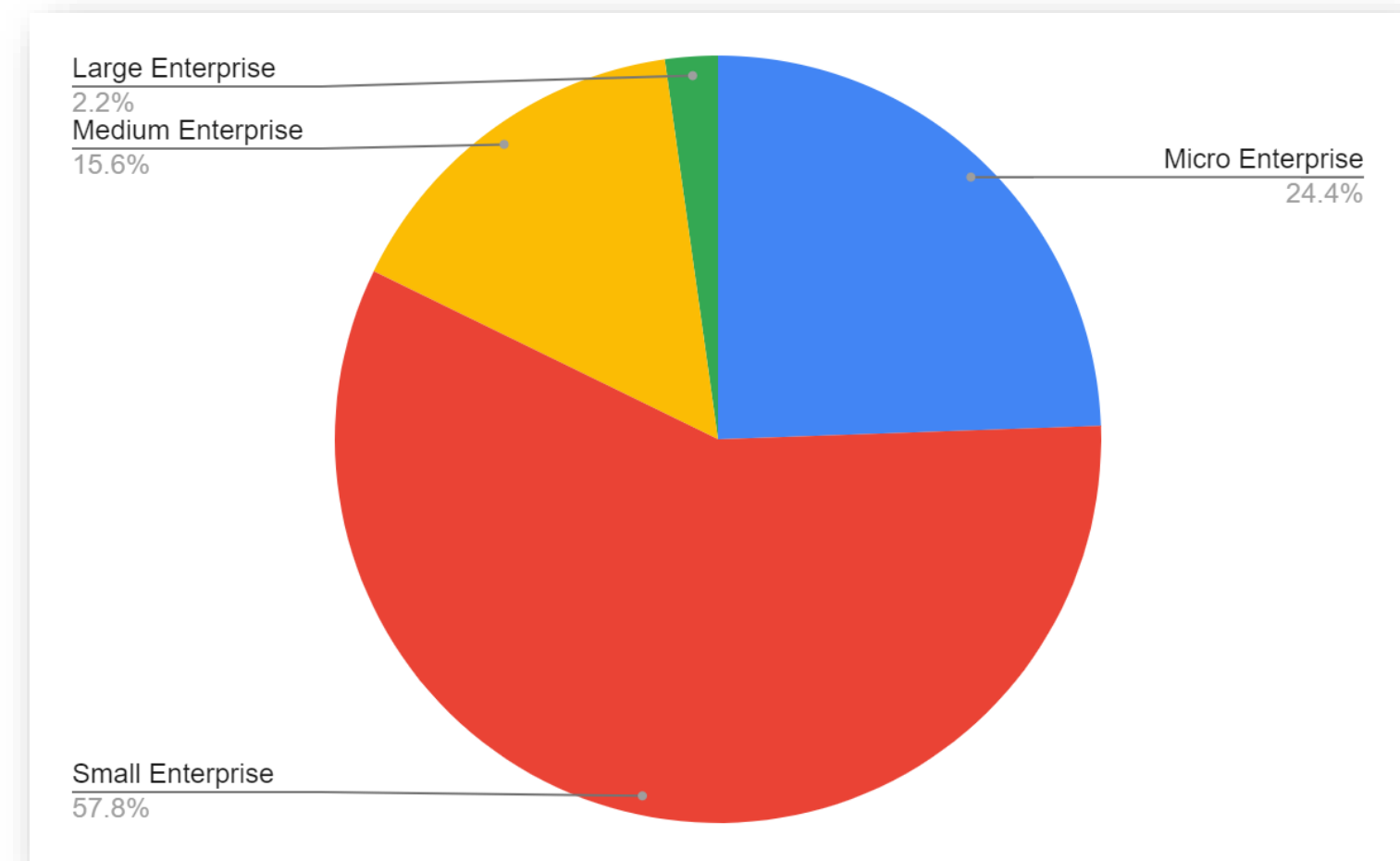
- The SME4SPACE survey “CONSEQUENCES OF THE GEOPOLITICAL SITUATION FOR THE EUROPEAN SPACE SMEs” was released on 6th of April 2022.
- It was circulated via email campaigns, website, social media (LinkedIn and Twitter) among the following networks:
 - SME4SPACE Working Members and SMEs
 - Broader Mailing list of SME4SPACE
 - ESA SME Office communication channels

Method: Survey distribution

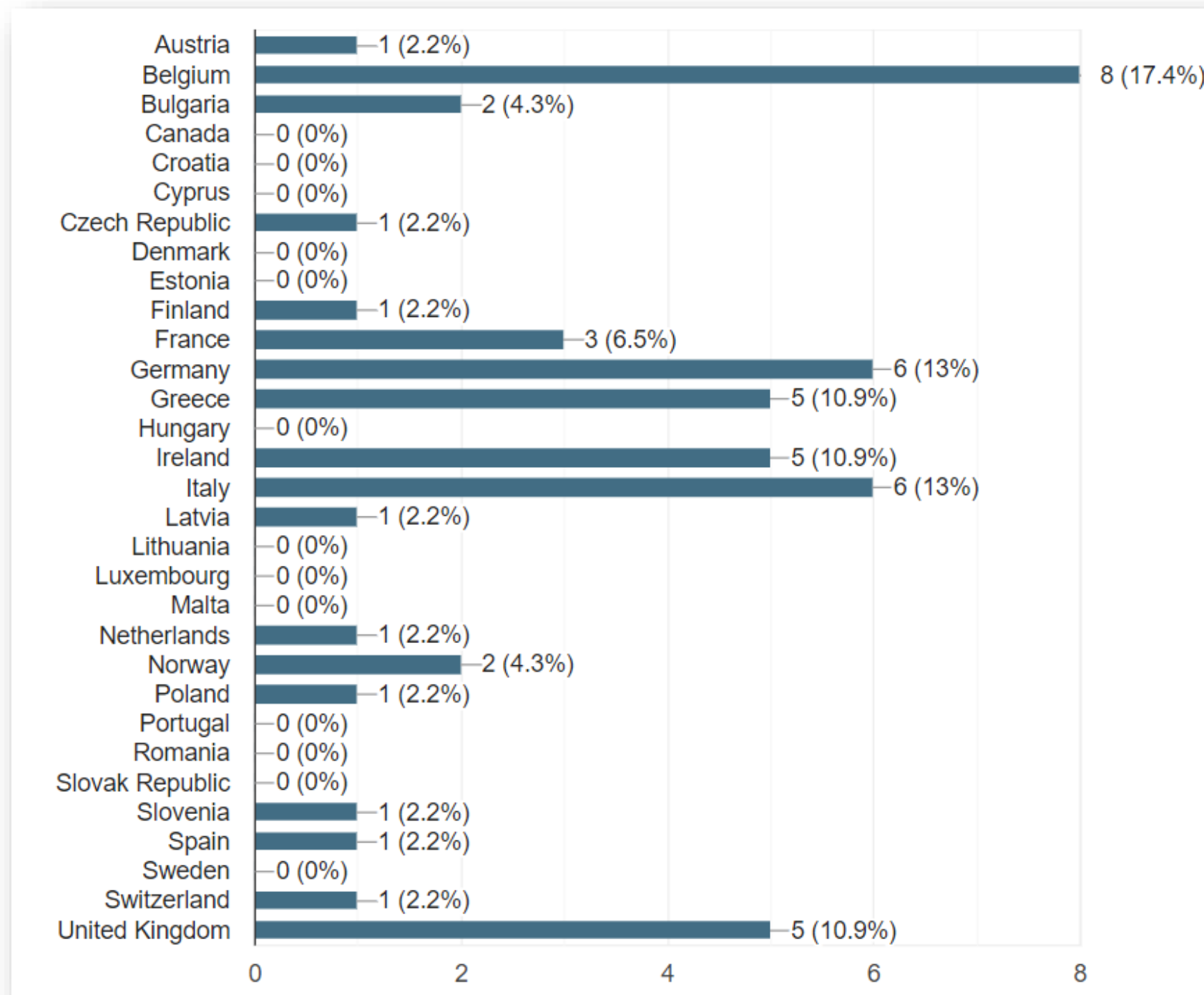
- The SME4SPACE survey “CONSEQUENCES OF THE GEOPOLITICAL SITUATION FOR THE EUROPEAN SPACE SMEs” remains active since its release
- The survey included 10 questions in a multiple choice or free text format
- Qualitative data were collected from 46 replies where the preliminary results are identified and highlighted in the present report

Size of space entity

- The chart below show the type of the space entity that participated in the survey.
- The majority of the replies were indicated by Small Companies with 56,5%.



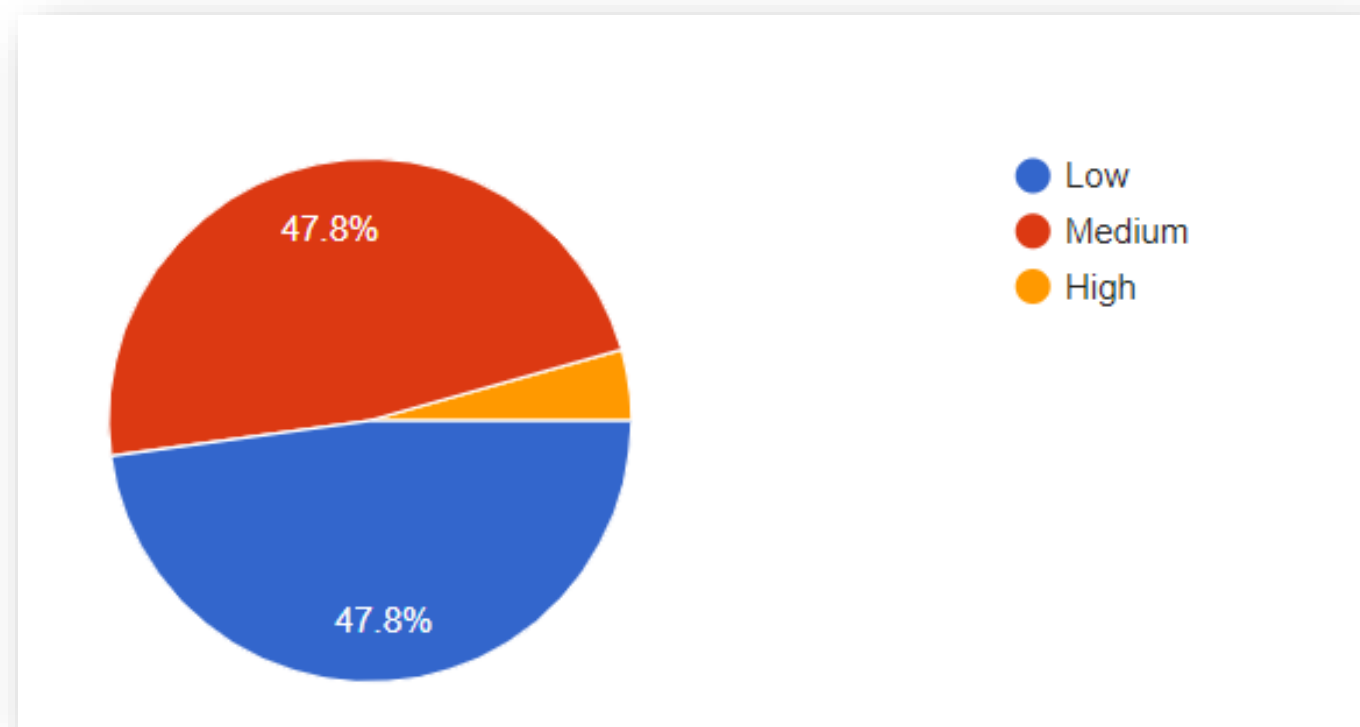
Country participation



- The table shows the country origin of the space entity in European and ESA Member States.

Size of impact due to Ukrainian crisis

- The chart below show the size of impact due to the geopolitical situation.
- The answer of Low and High impact were equally distributed with a 47,8% as seen in the chart below.



Main issues among space entities

- Listed below are the issues of the space entities have mostly been confronted with due to the Ukrainian war.
- Supply chain problem(s) – 54,3%
- Commodity price increase – 41,3%
- Project(s) delays or suspension – 32,6%
- Procurement issues such as availability of critical items, components or material – 28,3%
- Loss of turnover/Income/revenues – 26,1%
- Termination of ongoing/ future contract(s) – 19,6%
- Project(s) termination – 8,7%

Expected loss in terms of markets and related turnover for the current and coming year

- In this question the majority of the companies replied regarding 2022, the answers of which are found below:
- "Less than 20%": 45,6% of replies
- "None": 17,3% of replies
- "Between 21% - 50%": 8,69% of replies
- "N/A – Other": 8,69% of replies
- "Between 51% - 80%": 2,17 % of replies

Desired concrete measures to mitigate the impact of the Ukrainian crisis

- In this question the companies had to choose among various actions that could tackle the negative effects of the Ukrainian crisis. The dominant concrete measures are listed below:
 - Increase of budget for ongoing projects – 39,1%
 - Review of pricing for firm fixed prices – 37 %
 - Modify the priorities in the ongoing programmes (e.g. Critical Technologies for Non Dependence) – 34,8%
 - Assistance in looking for alternative suppliers – 26,1%
 - Bridging financing – 17,4 %
 - Accelerate ongoing developments (e.g. electric propulsion) – 15,2%
 - Assistance in looking for alternative flight opportunities – 13%