

Space+Spatial Industry Growth Roadmap 2030



Government Industry Growth Objectives



By 2030:

additional
20,000 JOBS

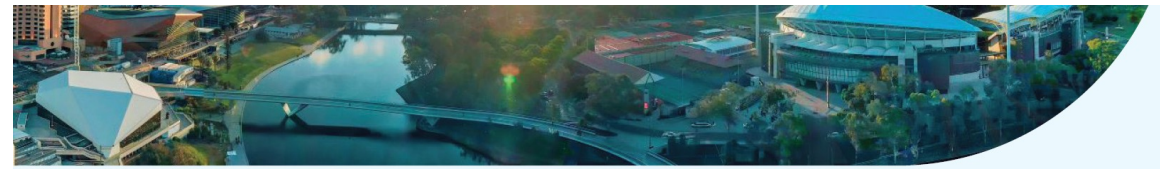
and

12 BILLION DOLLARS
added to Australia's GDP

Space+Spatial Industry Growth Roadmap 2030

Steering Committee

Dr Peter Woodgate	Chair
Mr David Ball.....	Deputy Co-Chair and Chair, SIAA (May to December 2020)
Dr Tim Parsons	Deputy Co-Chair and Chair, SIAA (from February 2021)
Mr Glenn Cockerton.....	Deputy Co-Chair and Director, SIBA-GITA
Mr Graeme Blick	Chief Geodesist, Land Information New Zealand (Invited Observer)
Ms Sandy Carruthers.....	Council Member ANZLIC
Dr Kimberley Clayfield	Director, Space Research Program, CSIRO
Dr Jackie Craig AM	Board member, SmartSat CRC (from November 2020)
Dr Rosalind Dubs	Board member, SmartSat CRC (from November 2020)
Mr Chris Hewett.....	AS GEOINT, Department of Defence (to December 2020)
Dr James Johnson.....	CEO, Geoscience Australia
Mr Andrew Kiley.....	Assistant Secretary, Department of Home Affairs (to February 2021)
Ms Stephanie Kolobaric.....	Department of Home Affairs
Prof Andy Koronios	CEO, SmartSat CRC
Ms Agnes Lane.....	Strategy Lead EO, Bureau of Meteorology (from July 2021)
Prof Megan Lewis.....	President, Earth Observation Australia (from February 2022)
Mr Anthony Murphett.....	Deputy Head, Australian Space Agency (to January 2022)
Ms Linda McCann.....	AS GEOINT, Department of Defence (from January 2021)
Ms Tracey Malmborg	AGO Space Liaison, Australian Geospatial-Intelligence Organisation
Mr Pete Nikoloff	Chair, Industry Advisory Board, SmartSat CRC
Prof Stuart Phinn.....	President, Earth Observation Australia (to February 2022)
Ms Alison Rose.....	Chief of Place, Space and Communities Division, Geoscience Australia
Dr Zaffar Sadiq Mohamed-Ghouse	Immediate Past President, SSSI
Mr Andrew Seedhouse	Chief Intelligence Surveillance and Space, DST Group, Department of Defence (from January 2022)
Mr Todd Settle	Australian Geospatial Intelligence Organisation
Dr Gillian Sparkes AM	Chair, Frontier SI
Mr Paul Trotman.....	Deputy Head, Australian Space Agency (from January 2022)
Ms Britt Walker	Assistant Secretary, Department of Home Affairs (to March 2021)



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Working Group

Dr Peter Woodgate	Chair
Mr David Ball.....	Chair, SIAA (from May to December 2020)
Mr William Barrett.....	Senior Vice President, Asia Pacific Aerospace Consultants
Ms Alison Bowman.....	Senior Communication Advisor, SmartSat CRC
Mr Glenn Cockerton.....	Director, SIBA-GITA
Mr John Dean	Director, Bremer and Co Pty Ltd
Mr Kirby Ikin	Managing Director, Asia Pacific Aerospace Consultants
Prof Allison Kealy.....	Deputy Director, Sir Lawrence Wackett Centre, RMIT University
Dr Ryan Keenan	Principal Consultant, Positioning Insights
Dr Graeme Kernich.....	CEO, Frontier SI
Mr Peter Kerr.....	2030 Director, Coordinator Defence and National Security, SmartSat CRC
Mr Pete Nikoloff.....	Chair, Industry Advisory Board, SmartSat CRC
Ms Eva Rodriguez Rodriguez	Strategy Manager, Frontier SI and EO Program Manager, SmartSat CRC
Mr Tony Wheeler.....	CEO, SSSI
Ms Madison White.....	Marketing & Communications Coordinator, SmartSatCRC

Space+Spatial Industry Growth Roadmap 2030

In this information age **economic success, societal well-being and national security** pivots around our ability to collect, disseminate, understand and exploit complex sets of data in a timely and effective manner.

Space and spatial capabilities are central to achieving this and can provide essential data and services to support areas of national importance such as land and water security, emergency management, and autonomous systems and smart cities management.

The 'SPACE+SPATIAL' Roadmap has been developed to:



HIGHLIGHT

the strategic importance of a strong Australian space and spatial capability



IDENTIFY

the critical characteristics of such a capability



OUTLINE

the steps required to realise an integrated space and spatial eco-system that will be a key national asset

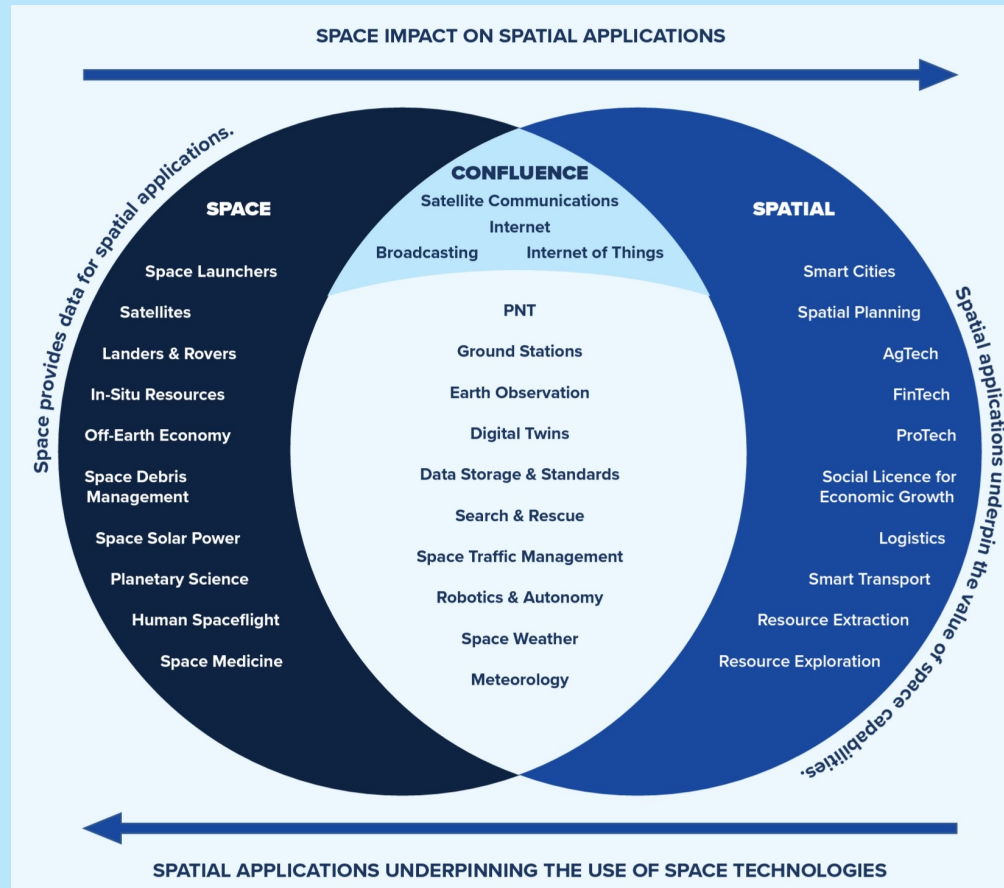


IDENTIFY

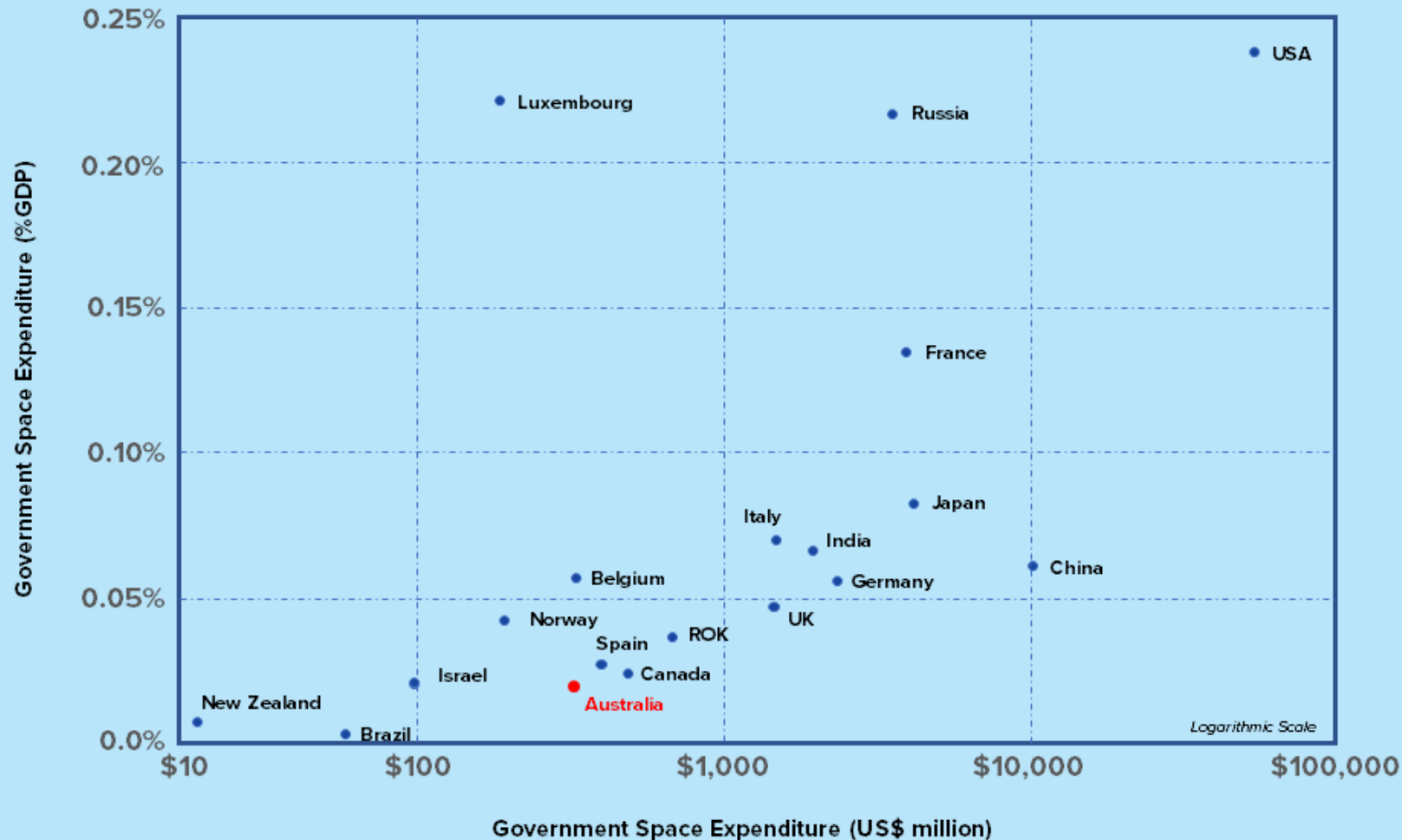
industry growth opportunities and propose actions to grow the space and spatial sectors

Space+Spatial Industry Growth Roadmap 2030

This national industry road map is not just about developing our **space** and **spatial capabilities and technologies**. It is also about highlighting the current and potential value for Australia arising from **the intersection of the two**.



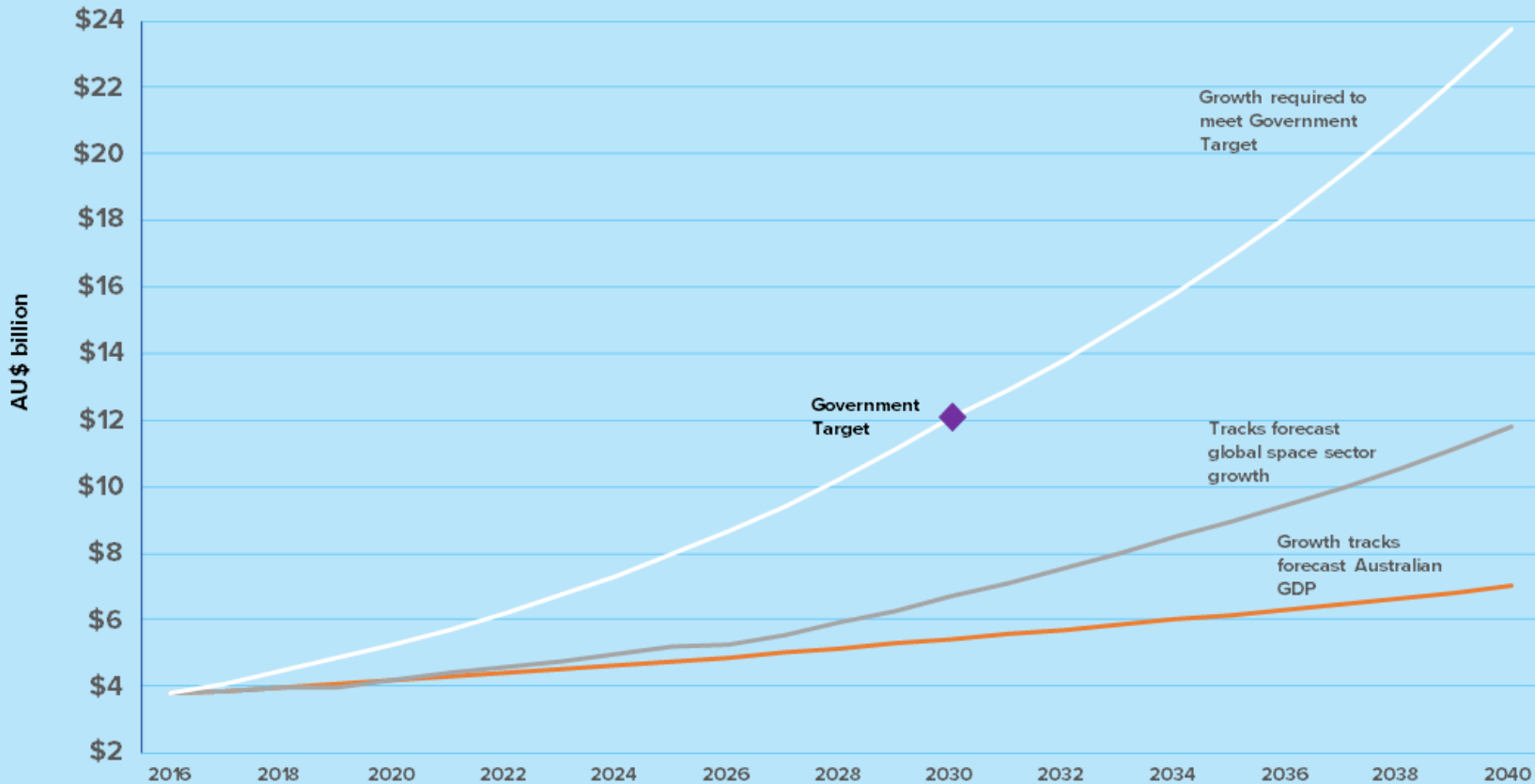
2021 Government Space Expenditure compared to % National GDP



Australian Government vs Comparable Nations. Note the **expenditure axis is logarithmic**, highlighting the proportionately very large expenditures of those nations to the right of the figure.

<https://www.euroconsult-ec.com/press-release/government-space-budgets-driven-by-space-exploration-and-militarization-hit-record-92-billion-investment-in-2021-despite-covid-with-1-trillion-forecast-over-the-decade>
(Accessed 19 March 2022)

Australian Space+Spatial Industries: Growth Scenarios



Scenario 1

Transformational Growth:

8.6% annual growth. Meets Government target of 20K jobs and a \$10B industry

Scenario 2

Medium Growth:

5% annual growth. No change to Australia's share of global space economy at 0.8%. Fails to grow Australian primes.

Scenario 3

Modest Growth:

2.6% annual growth. Few if any of the objectives met. Global share falls to 0.5%

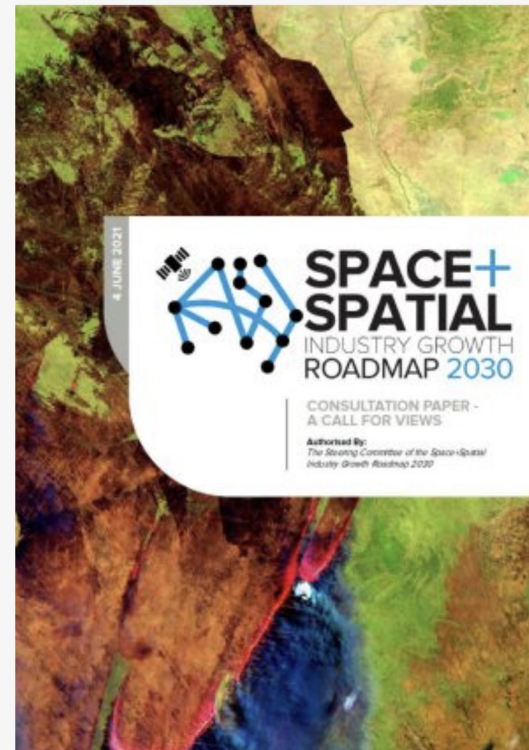
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CONSULTATION PAPER: EXECUTIVE SUMMARY



SSIGR Consultation Document – Executive Summary (June 2021)

CONSULTATION PAPER: FULL DOCUMENT



SSIGR Consultation Document – full (June 2021)

Extensive Industry Consultation

Space+Spatial Industry Growth Roadmap 2030



The **Roadmap** is the product of extensive, industry-wide consultation, setting out nine high-priority objectives that, if undertaken, will help ensure Australia's interlinked space and spatial industries maximise their growth potential, and deliver critical services to Australia's governments, commercial and defence sectors, and the wider community.

Published in March 2023 the Roadmap was presented to the **Australian Space Agency**, the Roadmap lays out how Australia should develop its space and spatial capabilities and technologies.



2030 SPACE & SPATIAL INDUSTRY GROWTH ROADMAP



Vision

- Australia becomes a global leader in space and geospatial systems and services

Objectives

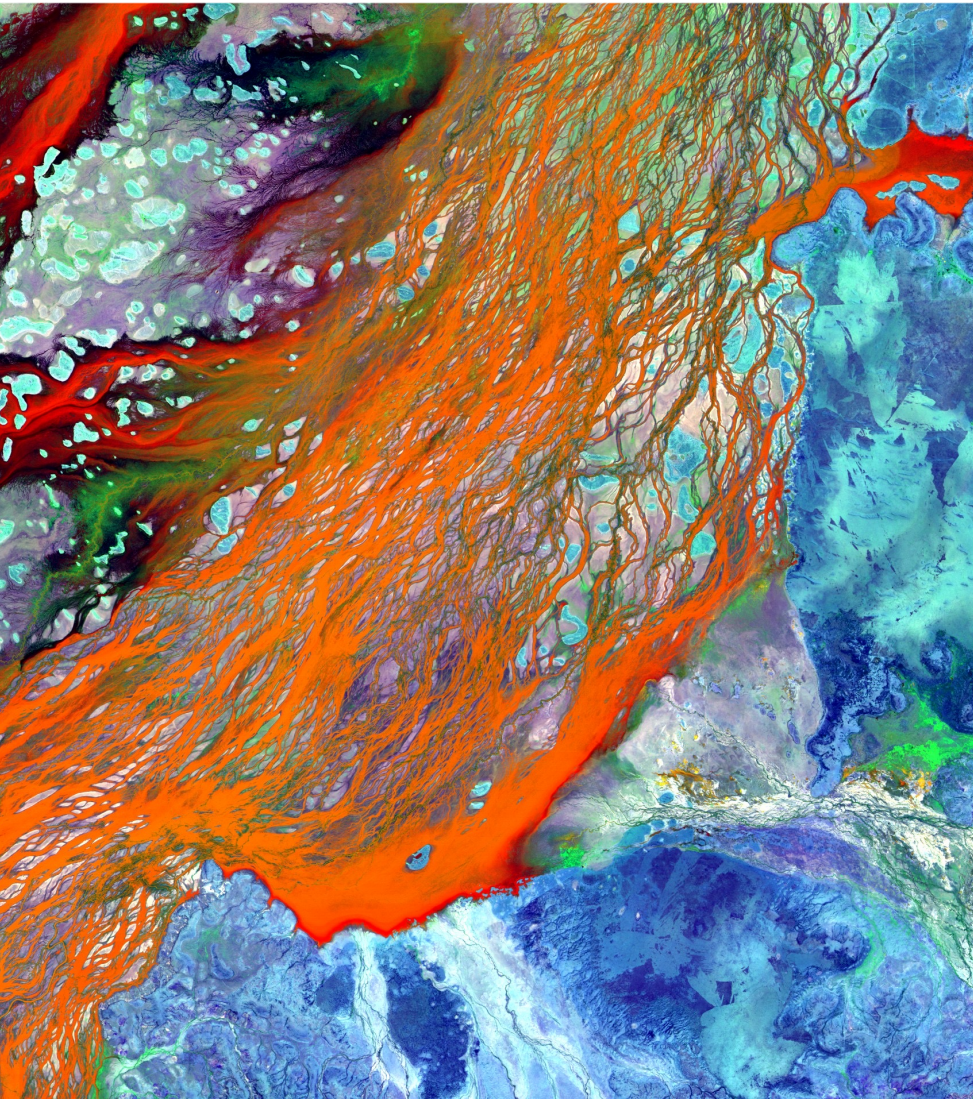
- National Action Plan to accelerate growth of the space and spatial industries working together in the national interest

Industry led

- Space Industry Association of Australia (SIAA)
- Spatial Industries Business Association - Geospatial Information & Technology Association (SIBA-GITA)
- Surveying and Spatial Sciences Institute (SSSI)
- Earth Observation Australia (EOA)
- SmartSAT CRC
- Leading government bodies including the Australian Space Agency (ASA), the Australia and New Zealand Land Information Council (ANZLIC) the Department of Defence, Geoscience Australia, Bureau of Meteorology and CSIRO amongst others also contributed

Now **Geospatial
Council of Australia**

Key Objectives



- 1** Establish a national Blueprint for the development of the Space and Spatial industries and National Space Missions
- 2** Drive sustainable long-term growth through development of a robust ecosystem of space and spatial companies
- 3** Strengthen and coordinate publicly funded research for space and spatial industries
- 4** Increase industry capability through a technologically capable workforce by building space and geospatial skills
- 5** Build Australia's capability in Spatial Digital Twins
- 6** Further invest in Australia's PNT capabilities to meet national needs and to capture a bigger global market share
- 7** Facilitate development of Australia's sovereign capability in critical space and spatial infrastructures
- 8** Support Australia's future Defence requirements
- 9** Enhance Australia's National Mapping Base and Foundation Geospatial Data



THANK YOU

