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(<https://www.australiandefence.com.au>)



Top 40. Credit: ADM

ADM's Top 40 Defence Contractors 2024 **(<https://www.australiandefence.com.au/industry/top-40/adm-s-top-40-defence-contractors-2024>)**

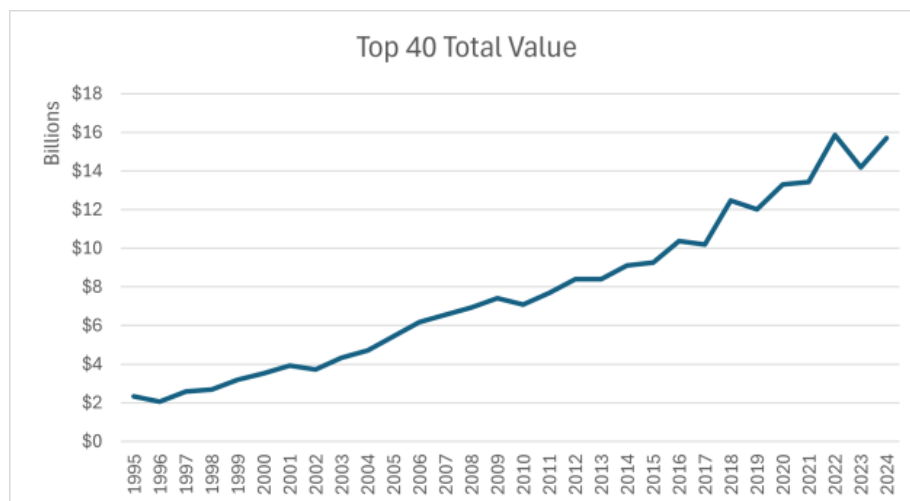
ADM is pleased to present the results of our highly-anticipated annual survey - the Top 40 Defence Contractors 2024 | Kylie Leonard and Ewen Levick

Ewen Levick and Kylie Leonard | Melbourne and Brisbane

Australia's twin-track defence industry

Welcome to the 30th annual *ADM* Top 40/Top 20 SMEs survey. Originally the brainchild of founding publisher Judy Hinz, for three decades now *ADM* has published this important annual snapshot of Australia's defence industry. This 30th anniversary survey also coincides with the centenary celebrations of our family-owned parent company, Yaffa Media.

In the opening of our Top 40 story two years ago, we wrote: "2022, like 2021, was a record year for Australia's defence industry. The jump in revenue... is one of the greatest on record." Total industry turnover had grown 18 per cent year-on-year.



Top 40 total value overtime - 2024. Credit: Kylie Leonard

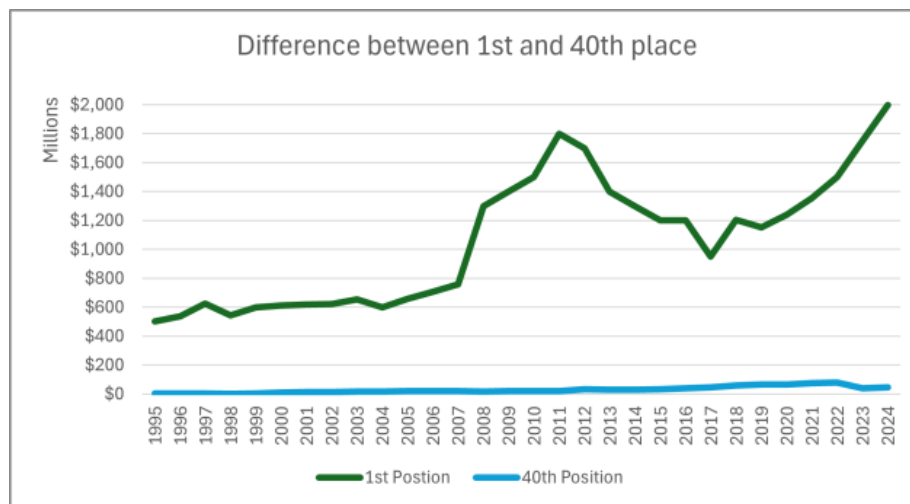
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Total turnover for the Top 40 in the 2023/24 fiscal year is \$15.7 billion; just short of the 2022 record of \$15.87 billion and significantly increased from last year's \$14.19 billion. Some of this can be attributed to the return of several big companies by revenue: Raytheon Australia, NIOA, Safran, and Laing O'Rourke.

Yet a record number of companies declined to enter this year. Reasons given included: 'huge drop in turnover, largely apportioned to the reduction of Defence works being released'; 'after the DSR turnover has not been great'; 'we are still waiting to hear about the outcome on a few major, long-term contracts'.

The most significant absence from this year's survey is Thales Australia, which posted \$1.2 billion in revenue in 2022 (the company's most recent entry). Other major absences include Rheinmetall (most recently recorded \$580 million in turnover in 2022), Accenture, Aspen Medical, Leonardo Australia, Penten, QinetiQ, Airbus, Birdon, Elbit Systems, Jacobs Australia and Hanwha Defence Australia. And of course, the big four consulting companies – PwC, KPMG, Deloitte and EY – continue their longstanding reluctance to disclose their turnover.

This year's Top 40 is a tale of two halves. First, the major success stories. BAE Systems again retains the top spot and has registered \$2 billion in revenue for the first time. The top five companies are rounded out by Boeing (2), Downer (3), Ventia (4) and ASC (5). Of those, Ventia has recorded \$1 billion in revenue for the first time and moves from fifth place to fourth; ASC has also seen a jump in revenue from just over \$700 million last year to over \$800 million in 2024, which is the third year in a row that the company has grown revenue by over \$100 million. ASC also sets the revenue bar for the top five companies at \$810 million.



Top 40 difference between 1st and 40th positions over time - 2024. Credit: Kylie Leonard

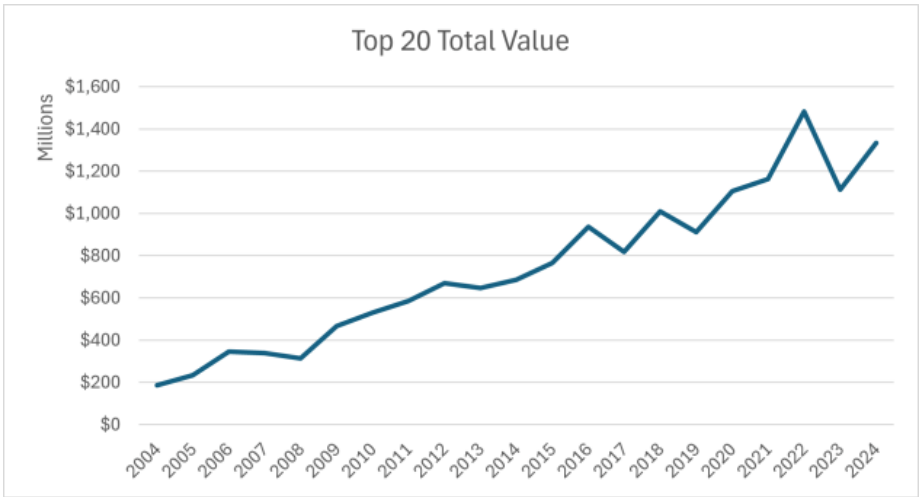
Outside the top five, perhaps the most notable entry is Raytheon Australia (7), who have returned to the survey after a five-year hiatus and posted a turnover of \$738 million. The company is under the new leadership of Ohad Katz, who took over from Michael Ward earlier in 2024. Another major returnee is Laing O'Rourke (24), who make an appearance for the first time in six years with \$212 million in defence turnover.

Lockheed Martin Australia (9) has notched a huge 29 per cent increase in turnover from last year (from \$423 million to \$548 million) under the leadership of former CEO Warren McDonald. The company is now led by former RAAF Air Vice Marshal Steve 'Zed' Robertson.

Another significant entry is NIOA (21), returning after a one-year hiatus and clocking a huge 44 per cent increase in turnover from their last appearance. NIOA's Maryborough plant is producing 40,000 155mm artillery shells per year – currently the most in-demand military consumable in the world.

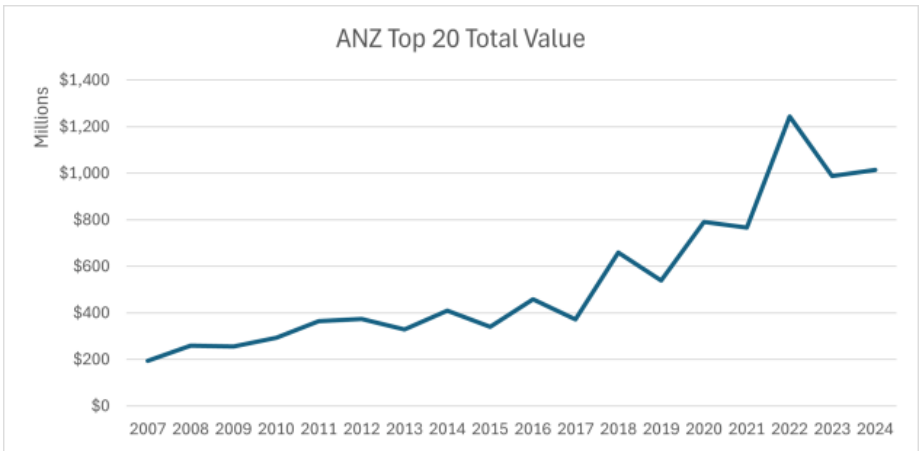
Sitzler (12) has seen a 130 per cent increase in turnover from last year, posting one of the largest revenue increases in dollar terms from \$203 million last year to \$468 million this year. DroneShield (Top 20 ANZ SMEs, number 20) increased revenue by 163 percent, though the largest percentage revenue increase in this year's survey belongs to EPE (Top 20 SMEs, number 11) at a whopping 177 per cent.

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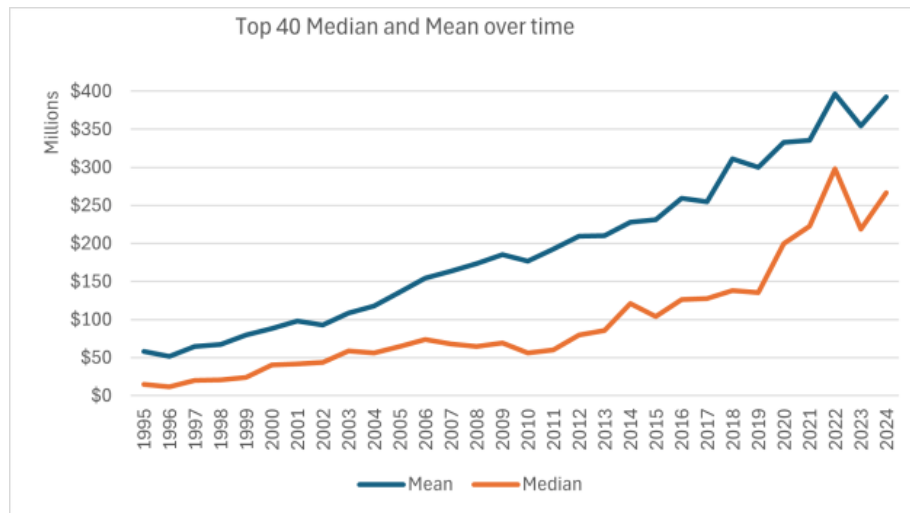
Top 20 Total Value overtime - 2024. Credit: Kylie Leonard

“After a challenging period of lower-than-expected revenues in Australia due to project delays and cancellations related to the DSR, EPE experienced a positive turnaround in FY ending June 2024,” Rob Edye, Chief Operating Officer, told *ADM*. “Several key projects came to fruition: including prime contracts with the NZDF for the Network Enabled Army and Master Service Agreements, and the prime contract for the ADF sustainment and tech refresh of Level 2 Exploitation Weapons Technical Intelligence Deployable Laboratories.”



Top 20 ANZ Total Value overtime - 2024. Credit: Kylie Leonard

Notable drops in turnover amongst the big primes include Boeing, decreasing \$50 million and losing 232 full-time equivalent jobs. “Boeing Defence Australia’s focus throughout 2024 has been on supporting the ADF to be mission-ready and achieve the National Defence Strategy,” Amy List, managing director of Boeing Defence Australia, said to *ADM*. “We’re strengthening capabilities vital to Australia’s security by continuing to develop and flight test MQ-28 Ghost Bat, delivering a networked battlespace communications solution across multiple domains, evolving our training and sustainment solutions that are proven across the largest portfolio of ADF platforms, and preparing for the delivery of AH-64E Apaches from late 2025.”

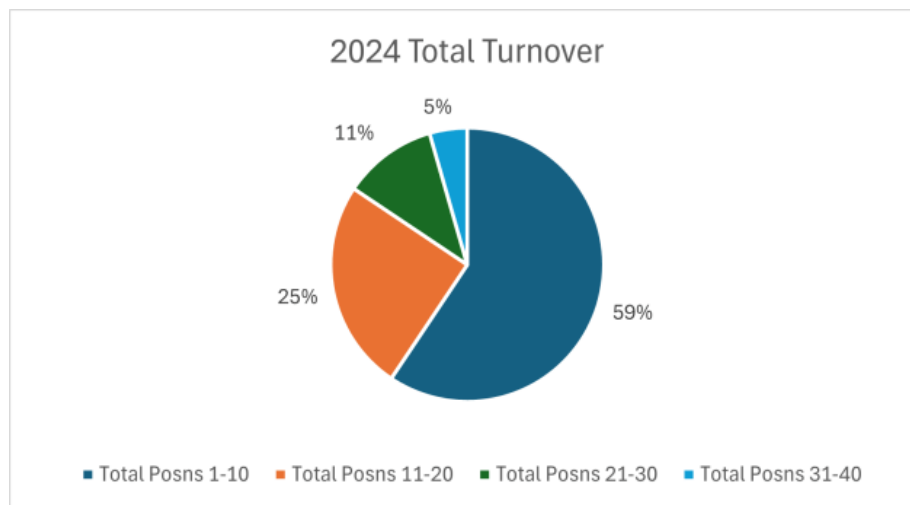
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Top 40 Median and Mean over time - 2024. Credit: Kylie Leonard

Other drops include Lendlease, Toll Group, Northrop Grumman, Beca, and Australian Defence Apparel. Two companies have closed their doors completely: St Hilliers and Atlantic & Peninsula.

Overall a greater number of companies increased their revenue than decreased, although as this is a voluntary survey, this should not be seen as reflective of the industry as a whole: companies with major drops in turnover often choose not to participate. We thank those that do, as it allows us to more accurately represent the state of the industry to our government readers.

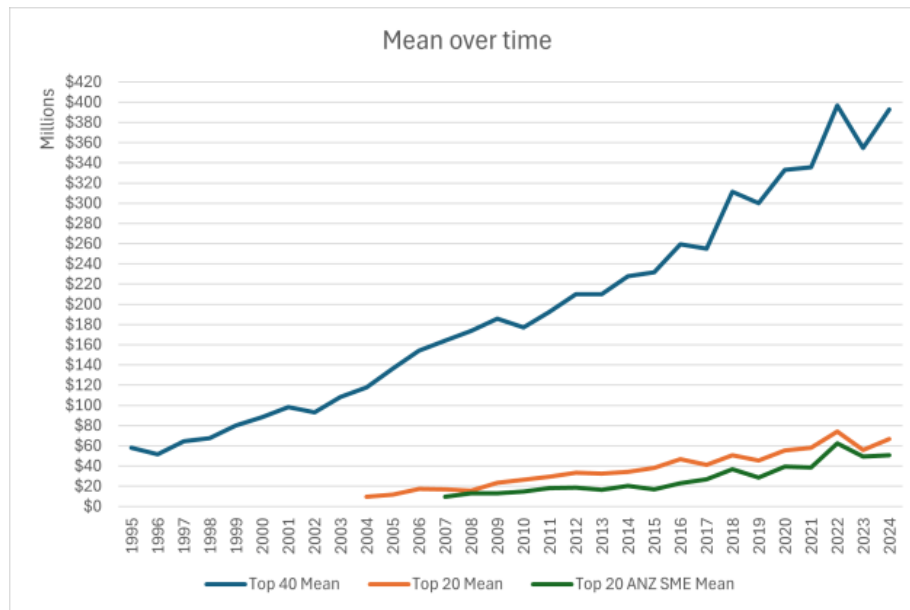
To continue the tale of two halves, our more eagle-eyed readers will notice that this year's survey continues an important trend: the revenue gap between the top of the survey and the bottom continues to grow. In 2017, the largest defence company in Australia (Raytheon) notched \$950 million in revenue; the 40th (Laing O'Rourke) notched \$47 million. In 2024, the largest company (BAE Systems Australia) has notched \$2 billion, whilst the 40th (Eylex) has notched \$45 million.



Top 40 2024 Turnover 10 position grouping pie chart. Credit: Kylie Leonard

Over the same time, the collective revenue of the lowest five (36th to 40th) companies has moved from \$257 million to \$280 million; the collective revenue of the top five has moved from \$4.5 billion to \$6 billion. In percentage terms, that is a nine per cent increase versus a 34 per cent increase.

This trend is also evident when comparing the Top 40 to the Top 20 SMEs. In 2017, the median revenue of the Top 40 was \$127.5 million, and the median for the Top 20 SMEs was \$38.7 million. In 2024, the median revenue for the Top 40 has more than doubled to \$267 million, whilst the median for the Top 20 SMEs remains almost stagnant at \$41.5 million. Whilst there are some companies who are exceptions to this trend, Defence procurement overall appears to be focusing towards the top end of town. The main two exceptions are NIOA and Safran – when removed, Top 20 total turnover drops from \$1.3 billion to \$849 million (36 per cent).

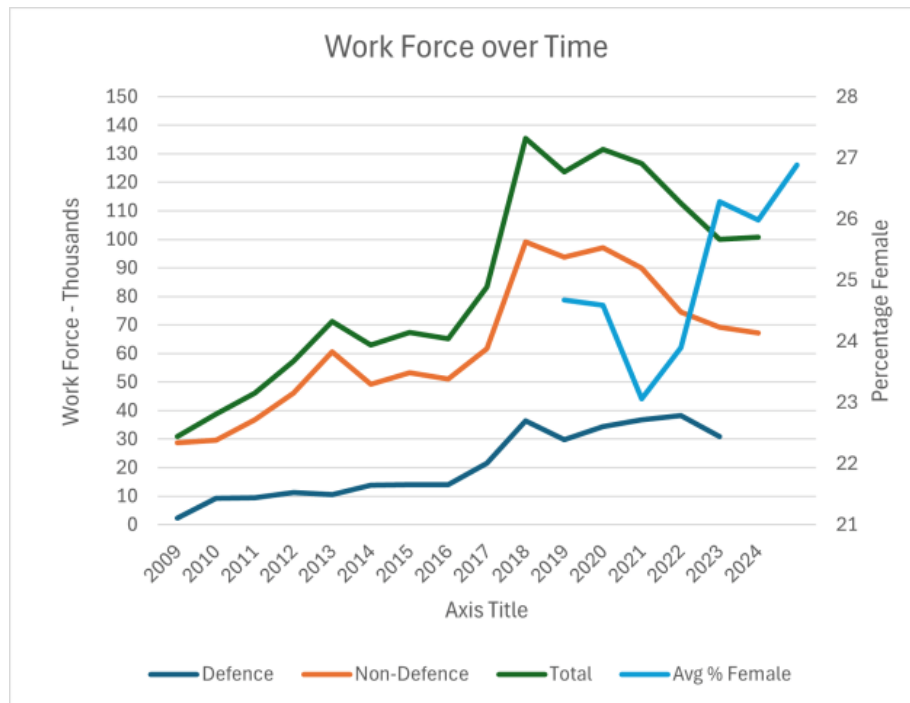
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Top 40 v Top 20 v Top 20 ANZ mean over time - 2024. Credit: Kylie Leonard

In our view, these numbers reflect the long-standing preference of the Department of Defence to procure capability through the US Foreign Military Sales process; as the saying goes, nobody gets fired for using FMS. It also reflects the general difficulty for small Australian companies to successfully win Defence contracts.

As Michael Shoebridge at Strategic Analysis Australia recently noted, Exercise Autonomous Warrior – held annually in Jervis Bay since 2018 – has long been described as a proving ground for Australia's future autonomous capabilities. Yet eight years later, many of the capable Australian companies that originally demonstrated – Ocious, DefendTex, DroneShield – still do not have a contract with the Department of Defence. Their success has been found in other government departments or through exporting overseas.

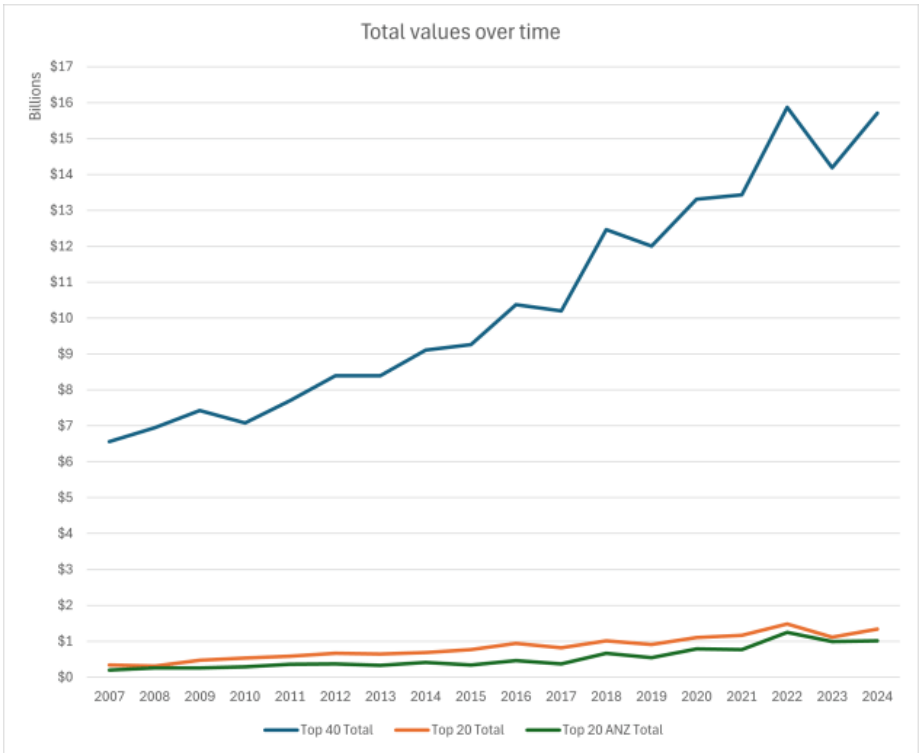
Similarly, AUKUS Pillar 2 focuses on capabilities that Australian companies can deliver, but unlike Pillar 1, it has no line budget. And 'new' money in Australia's defence budget – again per Strategic Analysis Australia – has increased just 0.25 per cent from the \$158 billion laid out in the 2016 Defence White Paper.



Top 40 Report workforce over time - 2024. Credit: Kylie Leonard

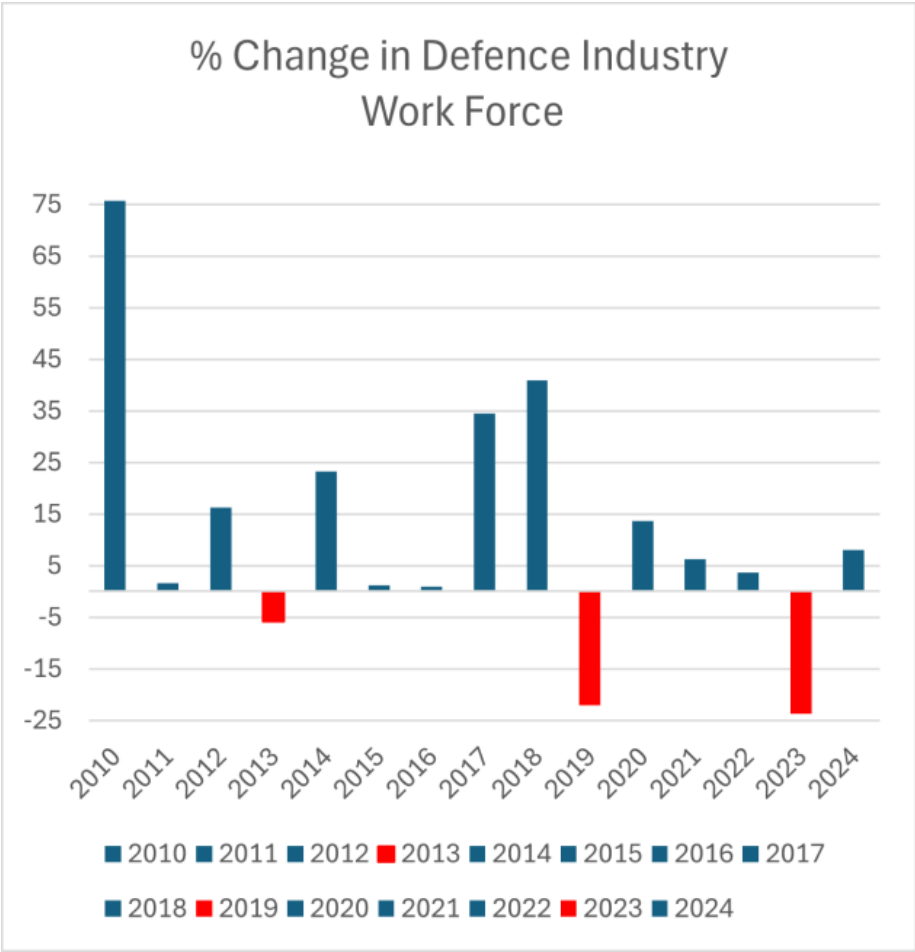
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The government has implicitly acknowledged its tendency to award work to foreign-owned companies. The Defence Industrial Development Strategy (DIDS) states: “A tougher strategic environment necessitates a more holistic view that moves beyond the narrow lens of solely using Australian-owned businesses when seeking to define our sovereign defence industrial capability requirements. Only in limited circumstances is Australian ownership critical to sovereignty.”



Top 40 v Top 20 v Top 20 ANZ total value over time - 2024. Credit: Kylie Leonard

This is not to downplay the major contributions that Australian subsidiaries of overseas primes make to ADF capability; it is hard to argue that Australia could natively meet its entire defence capability requirement. It is to say that Defence’s preference for contracting large primes – now backed by official government policy in the DIDS – is having a clear effect on the sector. While the big companies win work with Defence, the small companies face a tough choice: export, diversify, or perish.



Top 40 Report Change in Workforce over time 2024. Credit: Kylie Leonard

To conclude, we would like to thank all the companies who elected to participate in this year’s survey, and especially those new and returning: Raytheon, NIOA, Laing O’Rourke, Craig International Ballistics, Bisalloy Steels, AeroPM, BMD Group, Orontide, Actus Associates, Indra and Stantec. Your voluntary contribution of your information and your time is crucial to informing all our readers of the true state of Australian defence industry – and, we hope, helpful to informing government policy. We look forward to returning again next year.

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2024 Top 40

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1	1	BAE Systems Australia (/article/138195E0-A60D-11EF-9BF432E9B8E70CEF).	\$2,000	\$1,750
2	2	Boeing Defence Australia (/top-40-companies/2024-top-40-boeing-defence-australia).	\$1,200	\$1,250
3	3	Downer EDI Ltd (/article/9B884540-A623-11EF-A551E6C5C1E298D2).	\$1,010	\$1,030
4	5	Ventia (/article/OAC2F920-A627-11EF-A551E6C5C1E298D2).	\$1,006.82	\$933.8
5	6	ASC Pty Ltd (/article/737E5610-A63D-11EF-A551E6C5C1E298D2).	\$810.66	\$708.24
6	4	Lendlease Construction Pty Ltd (/article/39CAA620-A63E-11EF-A551E6C5C1E298D2).	\$790	\$955

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7		Raytheon Australia (/article/1933A460-A63F-11EF-A551E6C5C1E298D2)	\$738.19	
8	7	Babcock Australasia (/article/0A5447A0-A6BD-11EF-A551E6C5C1E298D2)	\$692	\$621
9	12	Lockheed Martin Australia (/article/B5434850-A6BD-11EF-A551E6C5C1E298D2)	\$547.54	\$423.08
10	10	L3Harris Technologies Australia (/article/3B6CFC50-A6BE-11EF-A551E6C5C1E298D2)	\$535.87	\$515.66
11	9	Leidos Australia (/article/208BC550-A6BF-11EF-A551E6C5C1E298D2)	\$527	\$530
12	21	SITZLER Pty Ltd (/article/3004FE60-A6C0-11EF-A551E6C5C1E298D2)	\$467.79	\$202.98
13	13	Nova Systems (/article/FDECC1C0-A6C3-11EF-A551E6C5C1E298D2)	\$457.4	\$421
14	17	Saab Australia Pty Ltd (/article/98121F20-A6C4-11EF-A551E6C5C1E298D2)	\$400	\$320.97
15	11	Toll Group - Government and Defence (/article/ED9640B0-A6C5-11EF-A551E6C5C1E298D2)	\$392.63	\$440.74
16	16	Serco Australia Pty Ltd (/article/C152CFE0-A6C6-11EF-A551E6C5C1E298D2)	\$388.6	\$324
17	8	KBR (Kellogg Brown and Root) (/article/590E0B10-A6C7-11EF-A551E6C5C1E298D2)	\$365	\$598.48
18	15	Northrop Grumman Australia Pty Ltd (/article/E02E2D00-A6C7-11EF-A551E6C5C1E298D2)	\$330	\$355
19	14	BGIS Pty Ltd (/article/737CC9D0-A6C9-11EF-A551E6C5C1E298D2)	\$315.62	\$384.52
20	18	Austal Limited (/article/1F488400-A6CC-11EF-A551E6C5C1E298D2)	\$280.03	\$301.26
21		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	\$253.64	
22		Safran (/article/E1F409D0-A6D0-11EF-A551E6C5C1E298D2)	\$232.2	
23	19	ASDAM (comprising Marand, TAE Aerospace, Rosebank Engineering and Levett Engineering) (/article/23C39D20-A6D2-11EF-A551E6C5C1E298D2)	\$231.98	\$225.87
24		Laing O'Rourke (/article/27DC8B50-A6D3-11EF-A551E6C5C1E298D2)	\$212.3	
25	22	CEA Technologies (/article/E8F31610-A6D3-11EF-A551E6C5C1E298D2)	\$206.9	\$202.09
26		BMD Group (/article/2AFBEC60-A6D6-11EF-A551E6C5C1E298D2)	\$159.24	
27	26	Navantia Australia (/article/7488C850-A6D9-11EF-A551E6C5C1E298D2)	\$142.65	\$102.1
28	24	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	\$117	\$131
29	25	Australian Defence Apparel Pty Ltd (/article/6E6F7970-A6DC-11EF-A551E6C5C1E298D2)	\$105.37	\$121.94
30	29	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	\$91.51	\$89.63
31	34	VARLEY GROUP (/article/85519990-A6DF-11EF-A551E6C5C1E298D2)	\$89.68	\$72.8
32	31	Quickstep Holdings Ltd (/article/17F19C50-A6E0-11EF-A551E6C5C1E298D2)	\$88.97	\$87.4

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33	32	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2)	\$81.39	\$77.88
34	30	SME Gateway Pty Ltd (/article/7ABA54F1-A6E8-11EF-A551E6C5C1E298D2)	\$80	\$89.07
35	33	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	\$79.92	\$76.91
36	28	Beca Pty Ltd (/article/54651CA0-A6EC-11EF-A551E6C5C1E298D2)	\$72.45	\$90.84
37	38	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	\$67.6	\$44.5
38		Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	\$47.7	\$38.2
39	39	Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2)	\$47.01	\$40.3
40		Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	\$45.6	\$38

2024 Top 20 SMEs

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	253.64	
2		Safran (/article/E1F409D0-A6D0-11EF-A551E6C5C1E298D2)	232.2	
3	1	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	117	131
4	3	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	91.51	89.63
5	5	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2)	81.39	77.88
6	6	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	79.92	76.91
7	10	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	67.6	44.5
8	13	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	47.7	38.2
9	11	Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2)	47.01	40.3
10	14	Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	45.6	38
11		EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2)	37.51	13.55
12	16	Alkath Group (Incorporating Global Defence Solutions Pty Ltd & Mellori Solutions Pty Ltd) (/article/ACB04840-A6FF-11EF-A551E6C5C1E298D2)	37.29	36.43
13	17	HIFraser Pty Ltd (/article/3F357000-A700-11EF-A551E6C5C1E298D2)	35	34
14		NACP Projects Australia Pty Ltd (/article/E9791580-A700-11EF-A551E6C5C1E298D2)	30.5	23.26

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15	19	Kinexus (/article/6649D571-A703-11EF-A551E6C5C1E298D2)	25.7	29.61
16	12	Milspec Services Pty Ltd (/article/227473B0-A789-11EF-A551E6C5C1E298D2)	25	38.7
17		Aero PM Pty Ltd (/article/F7575BE0-A704-11EF-A551E6C5C1E298D2)	21.2	
18		Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2)	21.19	20.15
19		Supacat Pty Ltd (/article/3284EFB0-A706-11EF-A551E6C5C1E298D2)	20.6	17.89
20	8	WSU Civil Pty Ltd (/article/B0D7A6A0-A706-11EF-A551E6C5C1E298D2)	17.3	48.63

2024 Top 20 ANZ SMEs

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	253.64	
2	1	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	117	131
3	3	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	91.51	89.63
4	5	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	79.92	76.91
5	8	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	67.6	44.5
6	10	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	47.7	38.2
7	11	Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	45.6	38
8		EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2)	37.51	13.55
9	13	Alkath Group (Incorporating Global Defence Solutions Pty Ltd & Mellori Solutions Pty Ltd) (/article/ACB04840-A6FF-11EF-A551E6C5C1E298D2)	37.29	36.43
10	14	HIFraser Pty Ltd (/article/3F357000-A700-11EF-A551E6C5C1E298D2)	35	34
11	18	NACP Projects Australia Pty Ltd (/article/E9791580-A700-11EF-A551E6C5C1E298D2)	30.5	23.26
12	16	Kinexus (/article/6649D571-A703-11EF-A551E6C5C1E298D2)	25.7	29.61
13	9	Milspec Services Pty Ltd (/article/227473B0-A789-11EF-A551E6C5C1E298D2)	25	38.7
14		Aero PM Pty Ltd (/article/F7575BE0-A704-11EF-A551E6C5C1E298D2)	21.2	
15	19	Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2)	21.19	20.15
16	6	WSU Civil Pty Ltd (/article/B0D7A6A0-A706-11EF-A551E6C5C1E298D2)	17.3	48.63
17		Craig International Ballistics (/article/27134271-A784-11EF-A551E6C5C1E298D2)	17.24	

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18	Coras (/article/FB02D640-A789-11EF-A551E6C5C1E298D2).	16.4	14.7
19	Bisalloy Steels Pty Ltd (/article/A13DA840-A78B-11EF-A551E6C5C1E298D2).	16	
20	DroneShield Group Pty Ltd (/article/8B124310-A78A-11EF-A551E6C5C1E298D2).	11.36	4.32

2024 Top 20 Exporters

2024 Rank	2023 Rank	Company	2024 Export Value (\$millions)	2023 Export Value (\$millions)
1	1	ASDAM (comprising Marand, TAE Aerospace, Rosebank Engineering and Levett Engineering). (/article/23C39D20-A6D2-11EF-A551E6C5C1E298D2).	178.8	173.02
2	2	Electro Optic Systems (/article/D9811830-B916-11EF-A551E6C5C1E298D2).	166.81	110.83
3		BAE Systems Australia (/article/138195E0-A60D-11EF-9BF432E9B8E70CEF).	150	
4	3	Quickstep Holdings Ltd (/article/17F19C50-A6E0-11EF-A551E6C5C1E298D2).	68.88	70.5
5	4	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2).	54.38	53.85
6	6	CEA Technologies (/article/E8F31610-A6D3-11EF-A551E6C5C1E298D2).	32.15	43.67
7	7	Toll Group - Government and Defence (/article/ED9640B0-A6C5-11EF-A551E6C5C1E298D2).	29.76	35.74
8	11	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2).	20	17
9	8	L3Harris Technologies Australia (/article/3B6CFC50-A6BE-11EF-A551E6C5C1E298D2).	19.5	20.38
10	12	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2).	13.65	9.5
11	10	Saab Australia Pty Ltd (/article/98121F20-A6C4-11EF-A551E6C5C1E298D2).	13.2	19.39
12	5	Austal Limited (/article/1F488400-A6CC-11EF-A551E6C5C1E298D2).	12.14	50.88
13		VARLEY GROUP (/article/85519990-A6DF-11EF-A551E6C5C1E298D2).	11.62	
14	13	EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2).	11.59	7.88
15	9	DroneShield Group Pty Ltd (/article/8B124310-A78A-11EF-A551E6C5C1E298D2).	6.9	19.91
16		Navantia Australia (/article/7488C850-A6D9-11EF-A551E6C5C1E298D2).	5.56	0.73
17	14	Leidos Australia (/article/208BC550-A6BF-11EF-A551E6C5C1E298D2).	5	4.7
18	16	Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2).	2.75	2.65
19		Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2).	2.4	
20		Stantec (/article/B59BAEC0-B917-11EF-A551E6C5C1E298D2).	1.5	

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Credit: ADM

ADM November 2024 **(<https://www.australiandefence.com.au/magazine/past-editions/adm-november-2024>)**

Hello and welcome to the November 2024 edition of ADM: Comms & C4I.

Hello and welcome to the November 2024 edition of *ADM*: **Comms & C4I**.

Editor **Nigel Pittaway** begins over coverage with a discussion about the importance of Australia's allies and partners to Defence and industry alike. Publisher **Ewen Levick** then examines that principle in action, with a review of KADEX and the first *ADM* Australia-Korea Defence Congress.

Closer to home, *ADM Staff Writers* wrap up Land Forces 2024 in Melbourne, with a wide-ranging review of the show and its exhibitors. Nigel also looks at Kongsberg Defence Australia's growing footprint in the country and attends the opening of the company's new facility in Mawson Lakes.

Keira Joyce speaks with Flight Lieutenant Brodie Sweeney about her journey towards joining the Roulettes. **Kate Banville** then examines the applications, and challenges, of Artificial Intelligence and Machine Learning in the Defence context.

Nigel also looks at ongoing upgrades to Air Force's fleet of KC-30A aircraft as well as Boeing Defence Australia's prospects for battlefield communication technology beyond Currawong. **Grant McHerron** then examines Electronic Warfare and the lessons learnt out of Ukraine.

Julian Kerr speaks with Edith Cowan University about their virtual reality parachuting simulator for Special Operations Command, while **Ben Felton** speaks to Nova Systems about the future of digital Test and Evaluation capabilities.

Our **From The Source** for this edition is **Craig Lockhart** the CEO of BAE Systems Australia.

The digital edition can be read [here](https://online.flipbuilder.com/YaffaMedia/jwkh/) (<https://online.flipbuilder.com/YaffaMedia/jwkh/>).

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Top 40. Credit: ADM

ADM's Top 40 Defence Contractors 2024 **(<https://www.australiandefence.com.au/industry/top-40/adm-s-top-40-defence-contractors-2024>)**

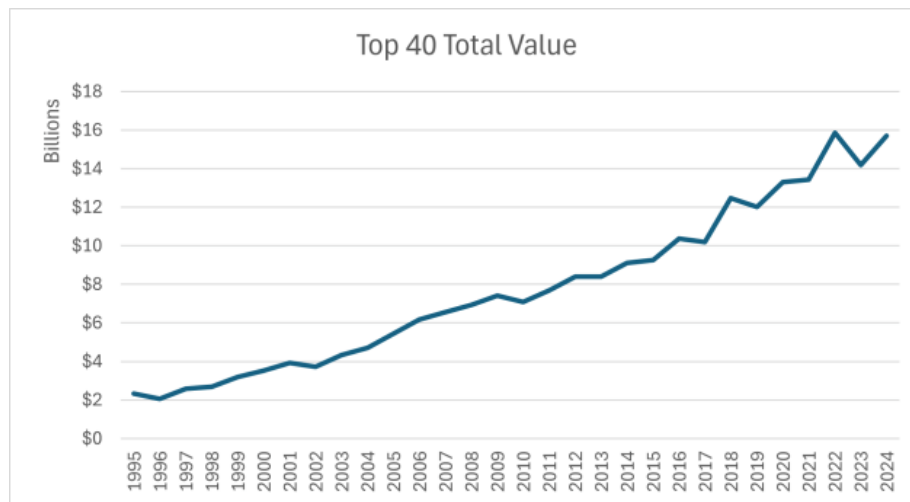
ADM is pleased to present the results of our highly-anticipated annual survey - the Top 40 Defence Contractors 2024 | Kylie Leonard and Ewen Levick

Ewen Levick and Kylie Leonard | Melbourne and Brisbane

Australia's twin-track defence industry

Welcome to the 30th annual *ADM* Top 40/Top 20 SMEs survey. Originally the brainchild of founding publisher Judy Hinz, for three decades now *ADM* has published this important annual snapshot of Australia's defence industry. This 30th anniversary survey also coincides with the centenary celebrations of our family-owned parent company, Yaffa Media.

In the opening of our Top 40 story two years ago, we wrote: "2022, like 2021, was a record year for Australia's defence industry. The jump in revenue... is one of the greatest on record." Total industry turnover had grown 18 per cent year-on-year.



Top 40 total value overtime - 2024. Credit: Kylie Leonard

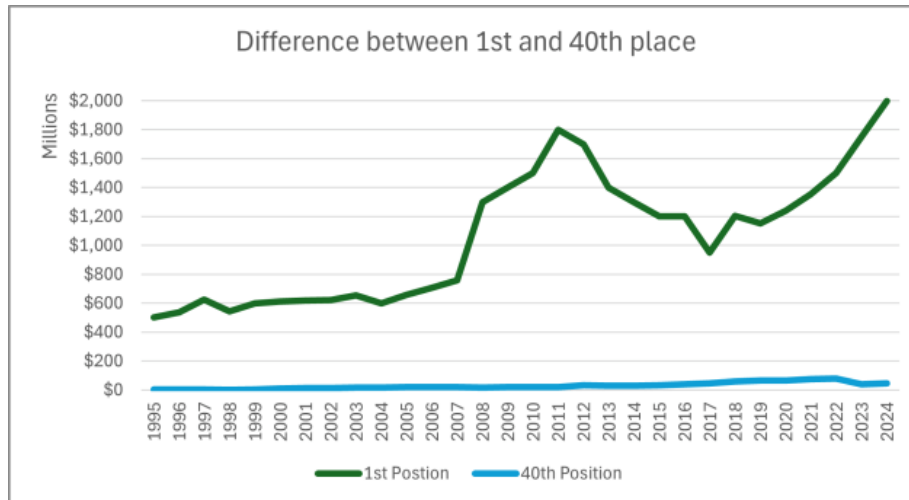
Total turnover for the Top 40 in the 2023/24 fiscal year is \$15.7 billion; just short of the 2022 record of \$15.87 billion and significantly increased from last year's \$14.19 billion. Some of this can be attributed to the return of several big companies by revenue: Raytheon Australia, NIOA, Safran, and Laing O'Rourke.

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Yet a record number of companies declined to enter this year. Reasons given included: 'huge drop in turnover, largely apportioned to the reduction of Defence works being released'; 'after the DSR turnover has not been great'; 'we are still waiting to hear about the outcome on a few major, long-term contracts'.

The most significant absence from this year's survey is Thales Australia, which posted \$1.2 billion in revenue in 2022 (the company's most recent entry). Other major absences include Rheinmetall (most recently recorded \$580 million in turnover in 2022), Accenture, Aspen Medical, Leonardo Australia, Penten, QinetiQ, Airbus, Birdon, Elbit Systems, Jacobs Australia and Hanwha Defence Australia. And of course, the big four consulting companies – PwC, KPMG, Deloitte and EY – continue their longstanding reluctance to disclose their turnover.

This year's Top 40 is a tale of two halves. First, the major success stories. BAE Systems again retains the top spot and has registered \$2 billion in revenue for the first time. The top five companies are rounded out by Boeing (2), Downer (3), Ventia (4) and ASC (5). Of those, Ventia has recorded \$1 billion in revenue for the first time and moves from fifth place to fourth; ASC has also seen a jump in revenue from just over \$700 million last year to over \$800 million in 2024, which is the third year in a row that the company has grown revenue by over \$100 million. ASC also sets the revenue bar for the top five companies at \$810 million.



Top 40 difference between 1st and 40th positions over time - 2024. Credit: Kylie Leonard

Outside the top five, perhaps the most notable entry is Raytheon Australia (7), who have returned to the survey after a five-year hiatus and posted a turnover of \$738 million. The company is under the new leadership of Ohad Katz, who took over from Michael Ward earlier in 2024. Another major returnee is Laing O'Rourke (24), who make an appearance for the first time in six years with \$212 million in defence turnover.

Lockheed Martin Australia (9) has notched a huge 29 per cent increase in turnover from last year (from \$423 million to \$548 million) under the leadership of former CEO Warren McDonald. The company is now led by former RAAF Air Vice Marshal Steve 'Zed' Robertson.

Another significant entry is NIOA (21), returning after a one-year hiatus and clocking a huge 44 per cent increase in turnover from their last appearance. NIOA's Maryborough plant is producing 40,000 155mm artillery shells per year – currently the most in-demand military consumable in the world.

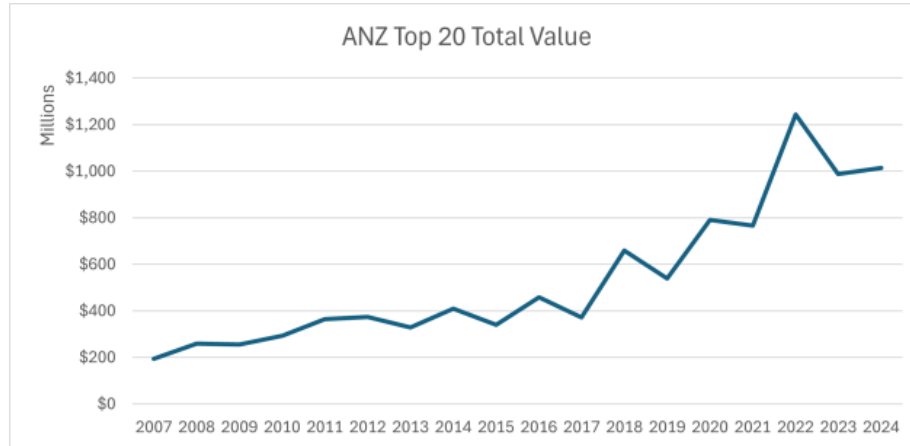
Sitzler (12) has seen a 130 per cent increase in turnover from last year, posting one of the largest revenue increases in dollar terms from \$203 million last year to \$468 million this year. DroneShield (Top 20 ANZ SMEs, number 20) increased revenue by 163 percent, though the largest percentage revenue increase in this year's survey belongs to EPE (Top 20 SMEs, number 11) at a whopping 177 per cent.



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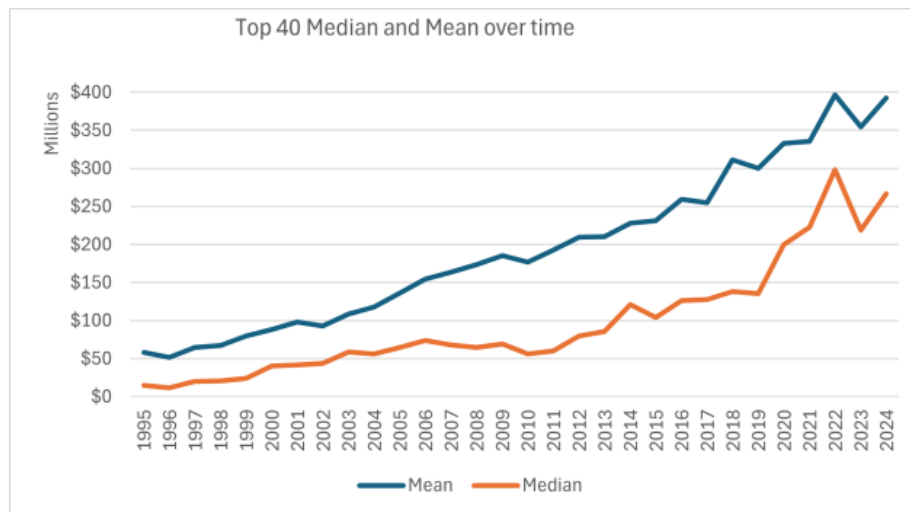
Top 20 Total Value overtime - 2024. Credit: Kylie Leonard

"After a challenging period of lower-than-expected revenues in Australia due to project delays and cancellations related to the DSR, EPE experienced a positive turnaround in FY ending June 2024," Rob Edye, Chief Operating Officer, told *ADM*. "Several key projects came to fruition: including prime contracts with the NZDF for the Network Enabled Army and Master Service Agreements, and the prime contract for the ADF sustainment and tech refresh of Level 2 Exploitation Weapons Technical Intelligence Deployable Laboratories."



Top 20 ANZ Total Value overtime - 2024. Credit: Kylie Leonard

Notable drops in turnover amongst the big primes include Boeing, decreasing \$50 million and losing 232 full-time equivalent jobs. "Boeing Defence Australia's focus throughout 2024 has been on supporting the ADF to be mission-ready and achieve the National Defence Strategy," Amy List, managing director of Boeing Defence Australia, said to *ADM*. "We're strengthening capabilities vital to Australia's security by continuing to develop and flight test MQ-28 Ghost Bat, delivering a networked battlespace communications solution across multiple domains, evolving our training and sustainment solutions that are proven across the largest portfolio of ADF platforms, and preparing for the delivery of AH-64E Apaches from late 2025."

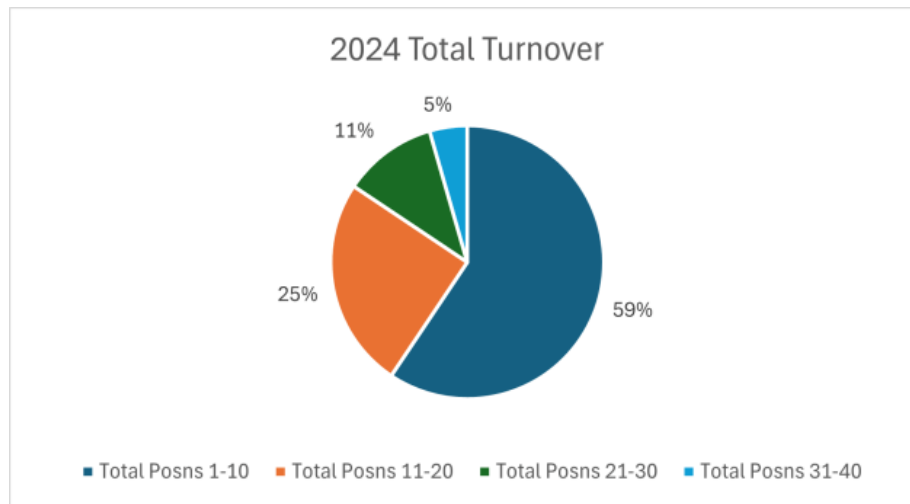


Top 40 Median and Mean over time - 2024. Credit: Kylie Leonard

Other drops include Lendlease, Toll Group, Northrop Grumman, Beca, and Australian Defence Apparel. Two companies have closed their doors completely: St Hilliers and Atlantic & Peninsula.

Overall a greater number of companies increased their revenue than decreased, although as this is a voluntary survey, this should not be seen as reflective of the industry as a whole: companies with major drops in turnover often choose not to participate. We thank those that do, as it allows us to more accurately represent the state of the industry to our government readers.

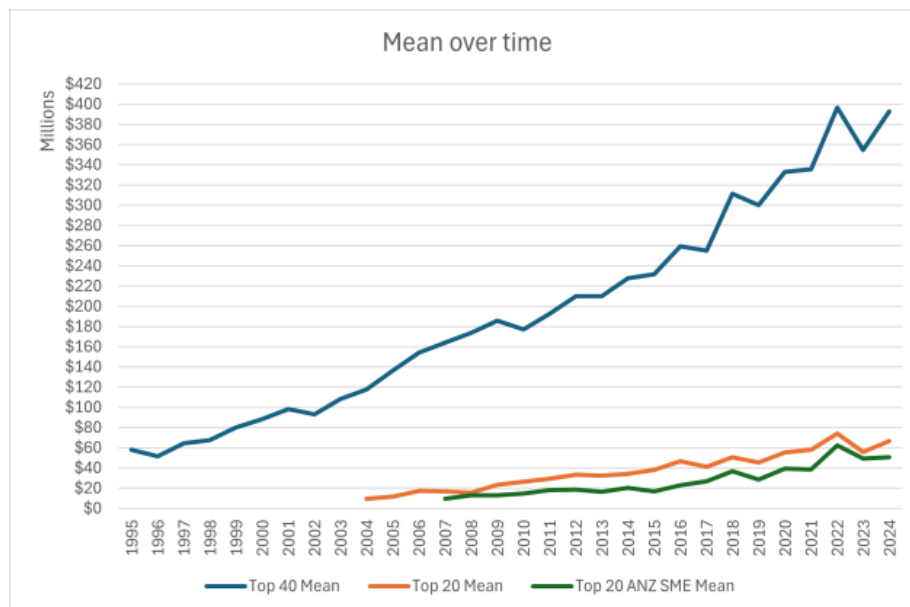
To continue the tale of two halves, our more eagle-eyed readers will notice that this year's survey continues an important trend: the revenue gap between the top of the survey and the bottom continues to grow. In 2017, the largest defence company in Australia (Raytheon) notched \$950 million in revenue; the 40th (Laing O'Rourke) notched \$47 million. In 2024, the largest company (BAE Systems Australia) has notched \$2 billion, whilst the 40th (Eylex) has notched \$45 million.

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Top 40 2024 Turnover 10 position grouping pie chart. Credit: Kylie Leonard

Over the same time, the collective revenue of the lowest five (36th to 40th) companies has moved from \$257 million to \$280 million; the collective revenue of the top five has moved from \$4.5 billion to \$6 billion. In percentage terms, that is a nine per cent increase versus a 34 per cent increase.

This trend is also evident when comparing the Top 40 to the Top 20 SMEs. In 2017, the median revenue of the Top 40 was \$127.5 million, and the median for the Top 20 SMEs was \$38.7 million. In 2024, the median revenue for the Top 40 has more than doubled to \$267 million, whilst the median for the Top 20 SMEs remains almost stagnant at \$41.5 million. Whilst there are some companies who are exceptions to this trend, Defence procurement overall appears to be focusing towards the top end of town. The main two exceptions are NIOA and Safran – when removed, Top 20 total turnover drops from \$1.3 billion to \$849 million (36 per cent).

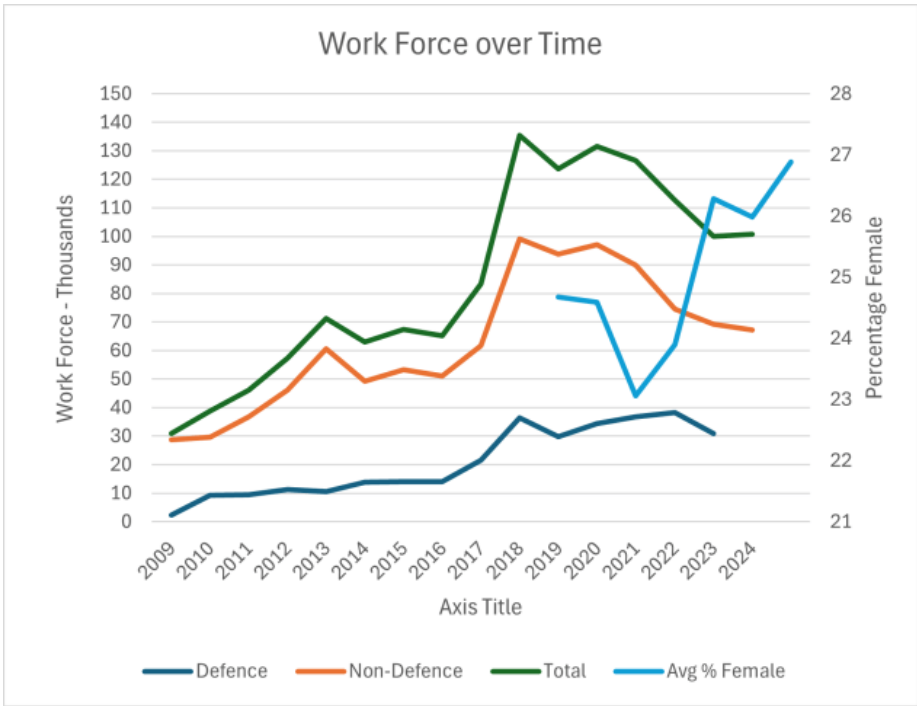


Top 40 v Top 20 v Top 20 ANZ mean over time - 2024. Credit: Kylie Leonard

In our view, these numbers reflect the long-standing preference of the Department of Defence to procure capability through the US Foreign Military Sales process; as the saying goes, nobody gets fired for using FMS. It also reflects the general difficulty for small Australian companies to successfully win Defence contracts.

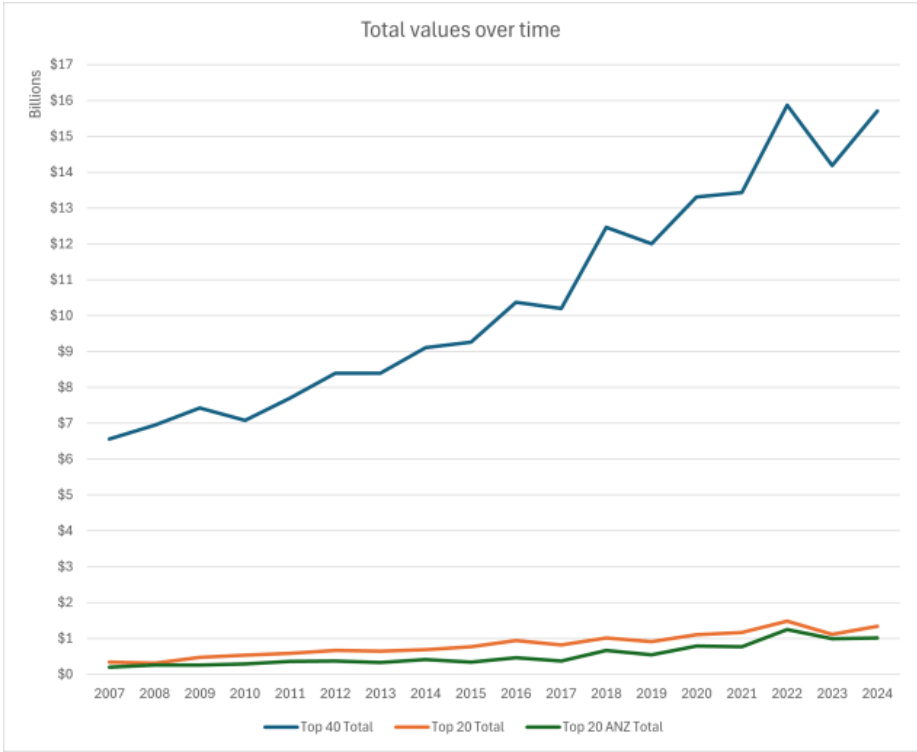
As Michael Shoebridge at Strategic Analysis Australia recently noted, Exercise Autonomous Warrior – held annually in Jervis Bay since 2018 – has long been described as a proving ground for Australia's future autonomous capabilities. Yet eight years later, many of the capable Australian companies that originally demonstrated – Ocious, DefendTex, DroneShield – still do not have a contract with the Department of Defence. Their success has been found in other government departments or through exporting overseas.

Similarly, AUKUS Pillar 2 focuses on capabilities that Australian companies can deliver, but unlike Pillar 1, it has no line budget. And 'new' money in Australia's defence budget – again per Strategic Analysis Australia – has increased just 0.25 per cent from the \$158 billion laid out in the 2016 Defence White Paper.



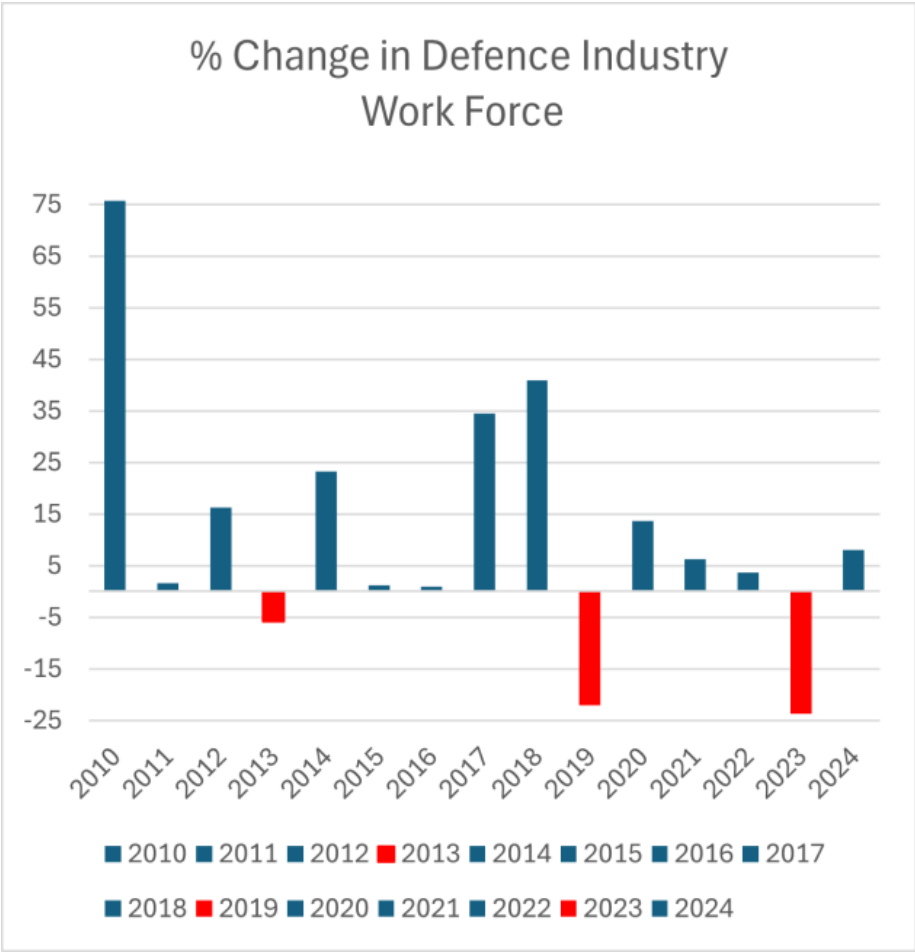
Top 40 Report workforce over time - 2024. Credit: Kylie Leonard

The government has implicitly acknowledged its tendency to award work to foreign-owned companies. The Defence Industrial Development Strategy (DIDS) states: “A tougher strategic environment necessitates a more holistic view that moves beyond the narrow lens of solely using Australian-owned businesses when seeking to define our sovereign defence industrial capability requirements. Only in limited circumstances is Australian ownership critical to sovereignty.”



Top 40 v Top 20 v Top 20 ANZ total value over time - 2024. Credit: Kylie Leonard

This is not to downplay the major contributions that Australian subsidiaries of overseas primes make to ADF capability; it is hard to argue that Australia could natively meet its entire defence capability requirement. It is to say that Defence’s preference for contracting large primes – now backed by official government policy in the DIDS – is having a clear effect on the sector. While the big companies win work with Defence, the small companies face a tough choice: export, diversify, or perish.



Top 40 Report Change in Workforce over time 2024. Credit: Kylie Leonard

To conclude, we would like to thank all the companies who elected to participate in this year’s survey, and especially those new and returning: Raytheon, NIOA, Laing O’Rourke, Craig International Ballistics, Bisalloy Steels, AeroPM, BMD Group, Orontide, Actus Associates, Indra and Stantec. Your voluntary contribution of your information and your time is crucial to informing all our readers of the true state of Australian defence industry – and, we hope, helpful to informing government policy. We look forward to returning again next year.

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2024 Top 40

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1	1	BAE Systems Australia (/article/138195E0-A60D-11EF-9BF432E9B8E70CEF).	\$2,000	\$1,750
2	2	Boeing Defence Australia (/top-40-companies/2024-top-40-boeing-defence-australia).	\$1,200	\$1,250
3	3	Downer EDI Ltd (/article/9B884540-A623-11EF-A551E6C5C1E298D2).	\$1,010	\$1,030
4	5	Ventia (/article/OAC2F920-A627-11EF-A551E6C5C1E298D2).	\$1,006.82	\$933.8
5	6	ASC Pty Ltd (/article/737E5610-A63D-11EF-A551E6C5C1E298D2).	\$810.66	\$708.24
6	4	Lendlease Construction Pty Ltd (/article/39CAA620-A63E-11EF-A551E6C5C1E298D2).	\$790	\$955

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7		Raytheon Australia (/article/1933A460-A63F-11EF-A551E6C5C1E298D2)	\$738.19	
8	7	Babcock Australasia (/article/0A5447A0-A6BD-11EF-A551E6C5C1E298D2)	\$692	\$621
9	12	Lockheed Martin Australia (/article/B5434850-A6BD-11EF-A551E6C5C1E298D2)	\$547.54	\$423.08
10	10	L3Harris Technologies Australia (/article/3B6CFC50-A6BE-11EF-A551E6C5C1E298D2)	\$535.87	\$515.66
11	9	Leidos Australia (/article/208BC550-A6BF-11EF-A551E6C5C1E298D2)	\$527	\$530
12	21	SITZLER Pty Ltd (/article/3004FE60-A6C0-11EF-A551E6C5C1E298D2)	\$467.79	\$202.98
13	13	Nova Systems (/article/FDECC1C0-A6C3-11EF-A551E6C5C1E298D2)	\$457.4	\$421
14	17	Saab Australia Pty Ltd (/article/98121F20-A6C4-11EF-A551E6C5C1E298D2)	\$400	\$320.97
15	11	Toll Group - Government and Defence (/article/ED9640B0-A6C5-11EF-A551E6C5C1E298D2)	\$392.63	\$440.74
16	16	Serco Australia Pty Ltd (/article/C152CFE0-A6C6-11EF-A551E6C5C1E298D2)	\$388.6	\$324
17	8	KBR (Kellogg Brown and Root) (/article/590E0B10-A6C7-11EF-A551E6C5C1E298D2)	\$365	\$598.48
18	15	Northrop Grumman Australia Pty Ltd (/article/E02E2D00-A6C7-11EF-A551E6C5C1E298D2)	\$330	\$355
19	14	BGIS Pty Ltd (/article/737CC9D0-A6C9-11EF-A551E6C5C1E298D2)	\$315.62	\$384.52
20	18	Austal Limited (/article/1F488400-A6CC-11EF-A551E6C5C1E298D2)	\$280.03	\$301.26
21		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	\$253.64	
22		Safran (/article/E1F409D0-A6D0-11EF-A551E6C5C1E298D2)	\$232.2	
23	19	ASDAM (comprising Marand, TAE Aerospace, Rosebank Engineering and Levett Engineering) (/article/23C39D20-A6D2-11EF-A551E6C5C1E298D2)	\$231.98	\$225.87
24		Laing O'Rourke (/article/27DC8B50-A6D3-11EF-A551E6C5C1E298D2)	\$212.3	
25	22	CEA Technologies (/article/E8F31610-A6D3-11EF-A551E6C5C1E298D2)	\$206.9	\$202.09
26		BMD Group (/article/2AFBEC60-A6D6-11EF-A551E6C5C1E298D2)	\$159.24	
27	26	Navantia Australia (/article/7488C850-A6D9-11EF-A551E6C5C1E298D2)	\$142.65	\$102.1
28	24	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	\$117	\$131
29	25	Australian Defence Apparel Pty Ltd (/article/6E6F7970-A6DC-11EF-A551E6C5C1E298D2)	\$105.37	\$121.94
30	29	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	\$91.51	\$89.63
31	34	VARLEY GROUP (/article/85519990-A6DF-11EF-A551E6C5C1E298D2)	\$89.68	\$72.8
32	31	Quickstep Holdings Ltd (/article/17F19C50-A6E0-11EF-A551E6C5C1E298D2)	\$88.97	\$87.4

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33	32	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2)	\$81.39	\$77.88
34	30	SME Gateway Pty Ltd (/article/7ABA54F1-A6E8-11EF-A551E6C5C1E298D2)	\$80	\$89.07
35	33	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	\$79.92	\$76.91
36	28	Beca Pty Ltd (/article/54651CA0-A6EC-11EF-A551E6C5C1E298D2)	\$72.45	\$90.84
37	38	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	\$67.6	\$44.5
38		Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	\$47.7	\$38.2
39	39	Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2)	\$47.01	\$40.3
40		Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	\$45.6	\$38

2024 Top 20 SMEs

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	253.64	
2		Safran (/article/E1F409D0-A6D0-11EF-A551E6C5C1E298D2)	232.2	
3	1	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	117	131
4	3	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	91.51	89.63
5	5	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2)	81.39	77.88
6	6	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	79.92	76.91
7	10	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	67.6	44.5
8	13	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	47.7	38.2
9	11	Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2)	47.01	40.3
10	14	Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	45.6	38
11		EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2)	37.51	13.55
12	16	Alkath Group (Incorporating Global Defence Solutions Pty Ltd & Mellori Solutions Pty Ltd) (/article/ACB04840-A6FF-11EF-A551E6C5C1E298D2)	37.29	36.43
13	17	HIFraser Pty Ltd (/article/3F357000-A700-11EF-A551E6C5C1E298D2)	35	34
14		NACP Projects Australia Pty Ltd (/article/E9791580-A700-11EF-A551E6C5C1E298D2)	30.5	23.26

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15	19	Kinexus (/article/6649D571-A703-11EF-A551E6C5C1E298D2)	25.7	29.61
16	12	Milspec Services Pty Ltd (/article/227473B0-A789-11EF-A551E6C5C1E298D2)	25	38.7
17		Aero PM Pty Ltd (/article/F7575BE0-A704-11EF-A551E6C5C1E298D2)	21.2	
18		Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2)	21.19	20.15
19		Supacat Pty Ltd (/article/3284EFB0-A706-11EF-A551E6C5C1E298D2)	20.6	17.89
20	8	WSU Civil Pty Ltd (/article/B0D7A6A0-A706-11EF-A551E6C5C1E298D2)	17.3	48.63

2024 Top 20 ANZ SMEs

2024 Rank	2023 Rank	Company	2024 Turnover (\$millions)	2023 Turnover (\$millions)
1		NIOA (/article/D52912C0-A6CD-11EF-A551E6C5C1E298D2)	253.64	
2	1	Shamrock Civil Engineering Pty Ltd (/article/25938181-A6DA-11EF-A551E6C5C1E298D2)	117	131
3	3	Barpa Pty Ltd (T/A Barpa Construction Services) (/article/5215AC30-A6DD-11EF-A551E6C5C1E298D2)	91.51	89.63
4	5	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2)	79.92	76.91
5	8	Daronmont Technologies (/article/EEA2D540-A6F2-11EF-A551E6C5C1E298D2)	67.6	44.5
6	10	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2)	47.7	38.2
7	11	Eylex Pty Ltd (/article/9B8C6610-A6F6-11EF-A551E6C5C1E298D2)	45.6	38
8		EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2)	37.51	13.55
9	13	Alkath Group (Incorporating Global Defence Solutions Pty Ltd & Mellori Solutions Pty Ltd) (/article/ACB04840-A6FF-11EF-A551E6C5C1E298D2)	37.29	36.43
10	14	HIFraser Pty Ltd (/article/3F357000-A700-11EF-A551E6C5C1E298D2)	35	34
11	18	NACP Projects Australia Pty Ltd (/article/E9791580-A700-11EF-A551E6C5C1E298D2)	30.5	23.26
12	16	Kinexus (/article/6649D571-A703-11EF-A551E6C5C1E298D2)	25.7	29.61
13	9	Milspec Services Pty Ltd (/article/227473B0-A789-11EF-A551E6C5C1E298D2)	25	38.7
14		Aero PM Pty Ltd (/article/F7575BE0-A704-11EF-A551E6C5C1E298D2)	21.2	
15	19	Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2)	21.19	20.15
16	6	WSU Civil Pty Ltd (/article/B0D7A6A0-A706-11EF-A551E6C5C1E298D2)	17.3	48.63
17		Craig International Ballistics (/article/27134271-A784-11EF-A551E6C5C1E298D2)	17.24	

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18	Coras (/article/FB02D640-A789-11EF-A551E6C5C1E298D2).	16.4	14.7
19	Bisalloy Steels Pty Ltd (/article/A13DA840-A78B-11EF-A551E6C5C1E298D2).	16	
20	DroneShield Group Pty Ltd (/article/8B124310-A78A-11EF-A551E6C5C1E298D2).	11.36	4.32

2024 Top 20 Exporters

2024 Rank	2023 Rank	Company	2024 Export Value (\$millions)	2023 Export Value (\$millions)
1	1	ASDAM (comprising Marand, TAE Aerospace, Rosebank Engineering and Levett Engineering). (/article/23C39D20-A6D2-11EF-A551E6C5C1E298D2).	178.8	173.02
2	2	Electro Optic Systems (/article/D9811830-B916-11EF-A551E6C5C1E298D2).	166.81	110.83
3		BAE Systems Australia (/article/138195E0-A60D-11EF-9BF432E9B8E70CEF).	150	
4	3	Quickstep Holdings Ltd (/article/17F19C50-A6E0-11EF-A551E6C5C1E298D2).	68.88	70.5
5	4	PMB Defence Pty Ltd (/article/5A2BF3D1-A6EB-11EF-A551E6C5C1E298D2).	54.38	53.85
6	6	CEA Technologies (/article/E8F31610-A6D3-11EF-A551E6C5C1E298D2).	32.15	43.67
7	7	Toll Group - Government and Defence (/article/ED9640B0-A6C5-11EF-A551E6C5C1E298D2).	29.76	35.74
8	11	Depth Defence Logistics (/article/EE0BB370-A6F4-11EF-A551E6C5C1E298D2).	20	17
9	8	L3Harris Technologies Australia (/article/3B6CFC50-A6BE-11EF-A551E6C5C1E298D2).	19.5	20.38
10	12	Cubic Defence Australia and Cubic Defence New Zealand (/article/CA301A90-A6E0-11EF-A551E6C5C1E298D2).	13.65	9.5
11	10	Saab Australia Pty Ltd (/article/98121F20-A6C4-11EF-A551E6C5C1E298D2).	13.2	19.39
12	5	Austal Limited (/article/1F488400-A6CC-11EF-A551E6C5C1E298D2).	12.14	50.88
13		VARLEY GROUP (/article/85519990-A6DF-11EF-A551E6C5C1E298D2).	11.62	
14	13	EPE Trusted to Protect (/article/E2F7A840-A6FE-11EF-A551E6C5C1E298D2).	11.59	7.88
15	9	DroneShield Group Pty Ltd (/article/8B124310-A78A-11EF-A551E6C5C1E298D2).	6.9	19.91
16		Navantia Australia (/article/7488C850-A6D9-11EF-A551E6C5C1E298D2).	5.56	0.73
17	14	Leidos Australia (/article/208BC550-A6BF-11EF-A551E6C5C1E298D2).	5	4.7
18	16	Customs Agency Services Pty Ltd (/article/38CD9680-A704-11EF-A551E6C5C1E298D2).	2.75	2.65
19		Rohde & Schwarz Australia (/article/E2CB7E40-A6F5-11EF-A551E6C5C1E298D2).	2.4	
20		Stantec (/article/B59BAEC0-B917-11EF-A551E6C5C1E298D2).	1.5	

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Credit: Blackberry

ADM Podcast 87 - Securing communication networks in an insecure world **(<https://www.australiandefence.com.au/podcasts/adm-podcast-87-securing-communication-networks-in-an-insecure-world>)**

In this episode, Grant McHerron and Ben Felton talk with David Wiseman, Vice President for Secure Communications at BlackBerry, about ensuring mobile communications can remain secure.

In this episode, Grant McHerron and Ben Felton talk with David Wiseman, Vice President for Secure Communications at BlackBerry, about ensuring mobile communications can remain secure.

We start the discussion by getting an overview of David's talk 'Spying on mobile' at the Military Communications and Information Systems (MilCIS) Conference, which highlights the need for sovereign communication systems. David shares his views on the recent hack of US telecom networks in the lead up to their election, giving us an insight into the vulnerabilities and implications that such attacks involve, and the value that metadata is presenting for wiretapping operations. We also discuss how Australia could be at risk for similar attacks, and how BlackBerry has designed their technology to protect calls, texts, messages, and files whilst still ensuring they can be shared in real-time.

We wrap up with David giving us his opinion on what leaders in Australia should be doing to mitigate the growing risks of communications spills, the implications of conversations being exposed, as well as how sovereign secured communication systems can be established.

LINKS:

[BlackBerry Secure Communications \(https://www.blackberry.com/us/en/products/secusuite?utm_medium=paid_digital&utm_source=adm-podcast&utm_campaign=fy25-q3_secusmart-uem-ues_milcis-canberra_ev_anz&utm_content=secure-comms-podcast\)](https://www.blackberry.com/us/en/products/secusuite?utm_medium=paid_digital&utm_source=adm-podcast&utm_campaign=fy25-q3_secusmart-uem-ues_milcis-canberra_ev_anz&utm_content=secure-comms-podcast)

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ADM Podcast 86 - JP9102 defunded, GWEO announcements, Black Hawks, Ukraine donations and other news
(<https://www.australiandefence.com.au/podcasts/adm-podcast-86-jp9102-defunded-gweo-announcements-black-hawks-ukraine-donations-and-other-news>)

In this News Review episode, Grant McHerron, Nigel Pittaway and Ben Felton review and discuss some of the recent news of interest published on the ADM site.

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We open the discussion by looking at the big news from Defence that JP9102 for a Geostationary communications satellite capability is no longer going ahead as originally intended (aka it's pretty much been cancelled). It's not surprising given the ways a satellite can be compromised these days, along with the transition to Low Earth Orbit constellations for sensing & comms, and the need for agility with construction and launch of replacements.

Next up are the recent Guided Weapons and Explosive Ordnance announcements, including Thales Australia being contracted to establish a 155mm shell construction line, despite NIOA having an existing facility that produces 155mm shells for Germany. We discuss the differences between US 155mm and European 155mm shells along with the effort required to obtain certification for Australian built munitions to be used with US weapons and aircraft.

We start wrapping up the episode by looking at the Black Hawk fleet numbers and their uses as they ramp up the new capability, the ANAO looking into the MRH-90 disposal process, and our latest donations to Ukraine of M1A1 Abrams, RHIBs and JDAM-ERs. We also have a quick chat about the recent Senate Estimates hearings and some of the highlights from a Defence perspective.

LINKS:

Defence confirms JP9102 cancellation:

www.australiandefence.com.au/news/news/defence-confirms-jp9102-cancellation

Government announces GWEO initiatives:

www.australiandefence.com.au/news/news/government-announces-gweo-initiatives

Army Black Hawk fleet hits ten airframes:

www.australiandefence.com.au/news/news/army-black-hawk-fleet-hits-ten-airframes

Ukraine to receive Australian Abrams:

www.australiandefence.com.au/news/news/ukraine-to-receive-australian-abrams

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Australia to donate RHIBs to Ukraine:

www.australiandefence.com.au/news/news/australia-to-donate-rhibs-to-ukraine

Australian JDAM-ERs sent to Ukraine:

www.australiandefence.com.au/news/news/australian-jdam-ers-sent-to-ukraine

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Defence Industry Guide **(<https://www.australiandefence.com.au/defence-industry-guide>)**

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