

Defence Teaming Centre

# Connecting

# Developing

# ANNUAL REPORT

FINANCIAL YEAR 2020 - 2021

# Advocating

www.dtc.org.au

# TABLE OF CONTENTS

### **1. INTRODUCTION**

Strategic Plan	1
Chairs' Report	2
CEO's Report	4

### 2. HIGHLIGHTS

Membership	6
Connecting	7
Developing	8
Advocacy	9
Key Highlights	10

### 3. FINANCES

**Financial Stability** 

### 4. MEMBERS

Member Capability Promotions	12
Financial Members	13
Prime Supporters & Sponsors	15

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11

# STRATEGIC PLAN



#### Vision

To be a world leading defence industry association that is professional, relevant and responsive to its members and stakeholders.



To represent the best interests of Australia's defence industry in contributing to the national security of Australia and creating jobs for Australians.



Be Professional

- Be Relevant
- Be Responsive
- Act with Integrity

#### What we do?

We develop and connect Australian industry to meet the needs of Defence and support the creation of sovereign industrial capability.

#### Why we do it?

To represent the best interests of Australia's defence industry in contributing to the national security of Australia and creating jobs for Australians.

#### How we do it?

Our passionate team of professionals form strong relationships with industry, academia, Defence & Government, which is used to inform development and advocacy for Australia's defence industry.

#### Connecting

- Link members to opportunities in defence supply chains.
- Bring members together to develop and build effective competitive business relationships through collaboration.

#### Developing

- Mature Australian SMEs to meet the needs of Defence by providing affordable workshops and services.
- Develop Australia's defence industry workforce through the provision of affordable leadership development workshops.

#### Advocating

- Maintain strong relationships with SMEs, Primes, academia, Defence and Government to promote industry as a Fundamental Input to Capability.
- Represent the best interests of Australian industry to create and sustain Australian jobs.
- Continually grow the DTC community.



"The role of the DTC in preparing, connecting and advocating for all of industry is as important now as it ever has been."

ADAM WATSON

DTC Chairperson

# Chairs' Report

Adam Watson

In my annual report last year I said that 2020 had been a momentous year. Who could have thought that 2021 would compete with the previous year for significance? Not only are we continuing to endure the impacts of COVID and its consequential effects on the supply chain, but arguably the most significant development in Australia's history in trilateral Defence relations was made with the announcement of the AUKUS partnership. 2021 also saw Defence terminate two major projects which is quite rare. So 2021 has been quite the journey for our industry.

Perhaps one of the most significant consequences of COVID has been highlighting supply chain shortages across business in general; however, the shortages are especially evident within Defence industry. New cars are taking months to arrive, essential machines like office printers now have long lead times, and we in Defence are facing increasing challenges with electronic component supply and subsequent obsolescence, especially in microchips. This kind of supply chain vulnerability comes as no surprise to the members of the DTC who have been in defence industry for some time. In the past just-in-time logistics has realised cost savings in inventory holdings and efficient material flows. This worked because borders were open and surety of global supply was fairly certain. Now questions are being asked about what we need to manufacture in Australia to keep us safe and to keep our ADF functioning.

Over the last six years we've seen the continued development of Defence industrial policy. The key differences we noted between the defence white paper of 2016 supported by the integrated investment plan, and the defence strategic update of 2021 supported by the force structure plan were stark. We moved from a 10 year notice to move period for potential conflict and a \$195 billion forecast for defence acquisition to a five year warning period and \$270 billion worth of defence acquisition. All of this is on the back of considerable geopolitical uncertainty with large nation state actors behaving in ways which has not been seen for many decades. So what does this mean for us? And what does this mean for DTC members?

"We are seeing efforts from defence to declare what it is that is important to them with the 14 sovereign industry capability priorities being issued over time."

We are now at a point in time where industry is recognised as a fundamental input to capability and has to perform in delivering the capability required for our ADF. We are seeing efforts from defence to declare what it is that is important to them with the 14 sovereign industry capability priorities being issued over time, most recently this year. This gives us as industry a very clear steer on where we should invest. But this investment does not come without risk. We have seen many of our members invest heavily in relationship building and preparation for the Naval Group submarine contracts. That opportunity is now gone and so is the corresponding return on the investment with the French company. However, in the same breath it was announced that the Collins Class life of type extension and full cycle



docking, and the destroyer's combat system upgrade would all be delivered in the period on or around where the submarines would have been beginning to be built. So while there is some uncertainty, and there has been some real sunk costs for our members, there is some reason to be optimistic.

We have to traverse our turret for those members who were working towards the Naval Group's Attack Class submarine into the supply chains of the Collins Class submarines, surface ships and other projects which are proceeding. Secondly, we need to understand what does AUKUS mean for us as an industry? Of course there is considerable conversation occurring around nuclear submarines as a capability, and the contingent industrial requirements thereof, which I'm sure there will be much debate to follow; however, the less discussed aspects of the AUKUS media release, but still mentioned within the Prime Minister's announcement, was that of potential other technical data transfer. Technical data transfer is one of the most difficult things to execute in defence industry. Of course people immediately think of International Trafficking in Arms Regulations as a difficult data transfer exercise; however, the real difficulty, and perhaps the toughest challenge we will face, is getting the technical data transfer requirements

approved in the first place and then packaged in such a way that Australians can receive it from either the UK or the US. This is no small task and should not be underestimated. Experience in missile programs demonstrates that the manufacture of components is something that Australian industry can accommodate well, but the most challenging aspects of these programs remains to be data transfer. With all of this work coming down the pipeline we need to be able to deliver it. One of our three key tenants of the DTC is to prepare and we all need to get our shoulder to the wheel in relation to having a skilled workforce that is ready to undertake the tidal wave of defence work that is coming into Adelaide and more broadly Australia. We need to skill up.

The DTC relies heavily on the volunteer board to deliver for the members. I would like to acknowledge the excellent service of and thank Michael Mines, Juniper Watson, Lee Kormany, Davyd Thomas and Tim Dore as they will not be seeking another term as directors. I would like to especially thank Lee and Michael for their service as Vice Chair and Treasurer respectively. All of these departing directors have made a substantial contribution to the DTC.

The role of the DTC in preparing, connecting and advocating for all of industry is as important now as it ever has been. I look forward to an amazing 2022.



Adam Watson Chair



Tim Dore Secretary

Kevin Beaulne

Director

Frederick Hull

Director



Tony Kyriacou Director

#### **BOARD MEMBERS**



Lee Kormany Vice Chair



Director



Andrew McCauley Director



Michael Mines Treasurer



Mike Hartas Director



Davyd Thomas Director



Lee Houlson Director



Juniper Watson Director





Sean Flaherty





# CEO's Report

Audra McCarthy

The rate of change, prompting reactivity and responsiveness accelerated during the 2020/21 financial year. Members went from hoping the snap economic lock-down would flatten the curve, to borders opening only to be suddenly snapped closed at next to no notice. Our ability to plan and deliver events suddenly became fragile, exposing the DTC to financial risk.

During the period of accelerated uncertainty, the DTC remained in constant contact with Government and Defence through weekly defence industry roundtable teleconferences. At these forums we were able to provide feedback and seek resolution on supply chain issues impacting industry's ability to deliver projects on-time and to budget. Defence's decision to fast-track supplier payments was a welcomed decision by the DTC. Some primes took days and weeks to make the necessary changes, progress slowed by the need to seek approval from the parent company, while others were able to implement the changes immediately. This highlighted a whole new dimension to the definition of Australian industry, where the need to exercise delegated control and decision making independent of the overseas parent was discussed by the DTC at the "Inquiry into the Implications of the COVID-19 Pandemic for Australia's foreign Affairs, Defence & Trade" conducted by the Joint Standing Committee on Foreign Affairs, Defence and Trade.

Our Industry Development and Events teams continued to modify our courses, content and delivery channels to ensure members across Australia remained engaged with the DTC. We expanded our monthly online Business Bites program to deliver our first completely virtual two-



"Our events remain the exemplar in the defence industry sector representing high value at an affordable price".

day SME summit in October. This event was attended by over 200 members and nonmembers across Australia which was the first completely virtual multi-day event delivered in Australia's defence industry sector. We provided the benchmark for professionally delivered and affordable events for Australian industry. Our guest speakers included The Honourable Melissa Price, Minister for Defence Industry, the heads of defence capability, Kate Carnell, Australian Small Business and Family Ombudsman and various subject matter experts from across our membership to share knowledge and advice to help members grow their businesses in the defence sector.

We have continued to embrace online tools with the majority of events now delivered by the DTC being done so under hybrid models. This has helped us mitigate the risk of the event being suddenly cancelled due to COVID, ensuring all members are afforded the opportunity to remain engaged with the DTC. In May we delivered the two-day Defence Security Summit, which was attended by over 227 people from across Australia, with 140 attending in person. This event was delivered in Hahndorf South Australia to help deliver much needed economic benefit to the Adelaide Hills region which devastated by the 2020 bushfires. Our events remain the exemplar in the defence industry sector representing high value at an affordable price. This aligns to our vision of being a world leading defence industry association that is professional, relevant and responsive to its members and stakeholders. With COVID restrictions preventing the physical delivery of events, we shifted our focus to the development of tools and guides to better support our members navigate the defence sector. This year we launched the "DTC's Guide to Preparing Quad Charts". Prepared in close consultation with our prime members, the guide is full of advice and recommendations on how to prepare a quality quad chart. DTC members not only have access to advice, but the resources needed to help navigate the defence industry sector.

During the year the DTC teamed with Shipley Wins Asia Pacific to deliver world-class defence business winning courses with programs delivered to members and industry located both in Australia and New Zealand. The program we have designed in partnership with Shipley Wins gives our members affordable access to the same tools and techniques used by defence primes to win defence business. Collectively, our goal is to maximise the probability of win for our members in defence supply chains, while reducing the cost of doing business in defence.

Our ongoing focus on developing and supporting industry led us to launch our Industry Development Framework. DTC members now have a framework upon which they can base their development journey, which includes both individual leadership programs and business maturity programs. Our industry development framework provides a maturity scale, ranging from "Exploring", where a company is completely new to the defence sector and learning how to approach the market; to "Established", where the company routinely pursues and wins defence work and is actively engaged in exporting into global defence supply chains.

Our leadership programs continue to grow from strength to strength, despite COVID forcing us to delay the commencement of the 2020 program to July 2020. We are very proud of the 280+ graduates we have produced to date and in the coming year, we will continue to evolve our suite of leadership programs to ensure our growing alumni continue to engage in ongoing defence leadership development. This will be in addition to our existing partnership with the University of Adelaide who deliver the Professional Certificate in Defence Industry Leadership program. As the defence industry sector continues to suffer a skilled staff shortage, more organisations are looking to individuals with exceptional leadership skills combined with defence sector experience, highlighting the need for the DTC to evolve and grow its programs to meet our member's needs.

#### "DTC members not only have access to advice, but the resources needed to help navigate the defence industry sector."

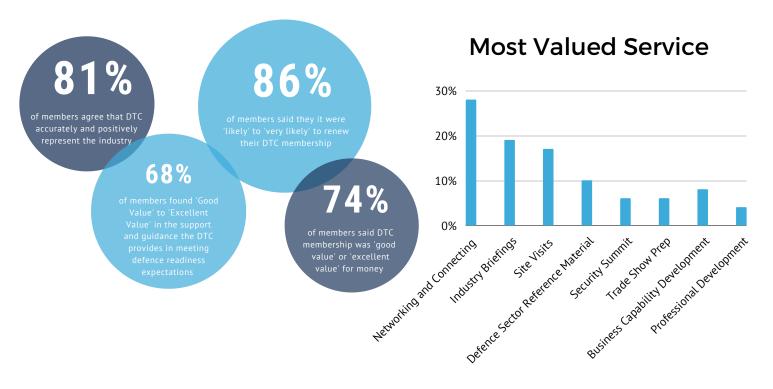
Our financial position shows little impact by COVID-19 restrictions due to the organisations' ability to diversify into hybrid events and the delivery of customised industry development programs. In addition, the business implemented tight fiscal controls resulting in savings in travel, meeting expenses and salary costs. Our business qualified for the JobKeeper and other state based COVID related relief payments which will be added to DTC's reserves for future financial years. We are now seeing members become increasingly "zoom" fatigued and sudden snap border closures have resulted in the cancellation of many events in the 2021/22 financial year, which will cause the DTC to draw down the COVID payment reserves created in 2021.

The outcomes delivered to members this year is a significant achievement for the DTC under the circumstances. We have continued to evolve the business of the DTC, reducing overheads where possible. We have implemented business improvements to realise efficiencies in onboarding and maintaining members and in 2021/22 we will be modernising our member management system to enable our members to better connect and transact with one another through a DTC Member Portal. We will continue to deliver the high quality, affordable networking events and development programs our members need and value as we embrace the new COVID-19 world of business.

# MEMBERSHIP HIGHLIGHTS

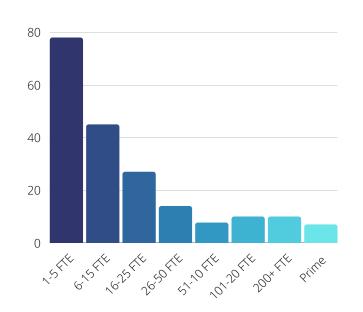
### **MEMBER SURVEY HIGHLIGHTS**

The Annual Member Survey is an important feedback mechanism to measure the organisation's effectiveness in meeting members' needs and expectations. Overall, members rated their membership as 'Good' to 'Moderately Good' value and are generally satisfied with how DTC advocates.

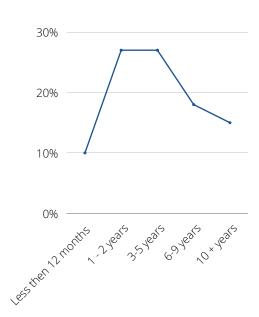


### **MEMBERSHIP SUMMARY**

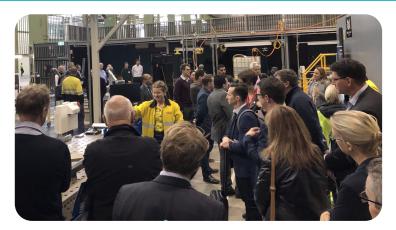
Membership by Full-time employee (FTE)



Duration of Membership



# CONNECTING HIGHLIGHTS



#### **Member Exclusive Site Tours**

Member Exclusive tours remain in high demand and COVID-19 restrictions meant spaces for each event have been limited.

During the year we hosted:

• 3 tours to the Line Zero:

Factory of the future tour, (pictured)

• 1 tour to the Defence Coating Systems and PMB Defence

Over 130 people attended



Two Defence Leaders' Breakfasts were delivered with each event attracting over 150 attendees to each. The first breakfast featured a Prime procument pannel. While the second breakfast had guest speaker Sheryl Lutz (pictured) First Assistant Secretary Ships at CASG provided industry with an excellent overview of Australia's Continuous Shipbuilding Program.

#### **BD After Five**

Our BD After Five events continue to be our most popular networking events. During the year we hosted five events attended by over 350 people.



#### **Land Forces**

DTC supported over 30 members at Land Forces trade show with 15 members choosing to exhibit on the Defence SA stand. At the expo DTC staff provided members with facilitated introductions to Defence, defence primes, government and other businesses.

This year's trade delegation were treated to site visits at Airbus and Rheinmetall, which will be incorporated into future interstate trade show support activities.



# DEVELOPING HIGHLIGHTS



#### **Defence Industry** Leadership Program

Despite a delay in the commencement of the 2020 programd, 24 participants graduated from our flagship Defence Industry Leadership Program in March 2020.

#### **Key Highlights**

TINA-MARIE BOWEN FROM KADEGO CADGILE WAS AWARDED THE ACHIEVEMENT AWARD

PRESENTATIONS FROM PREMIER THE HON. STEVEN MARSHALL MP, AND JOHN DAVIS, CEO NAVAL GROUP AUSTRALIA

ADRIEN DOUCET FROM NEUMANN SPACE RECEIVED THE HON. DAVID THE MERIT AWARD **PISONI MP, MINISTER** AND SKILLS OPENED

\$6,084 RAISED FOR MILITARY EMERGENCY SERVICES HEALTH AUSTRALIA

**OVERNIGHT** LEADERSHIP **RETREAT AT THE** WOODSIDE BARRACKS

SITE VISIT ТО СОВНАМ

#### **BAE Systems Graduate Rotation**

DTC hosted Vi Le (pictured) from BAE Systems for one of her Graduate Rotation placements. This allowed Vi to learn about the daily operations of an Industry association and contribute her skill set to industry.





#### **Defence Industry 101**

Defence Industry 101 sessions are a valued member offering, with many

members joining either online or in-person at Lot Fourteen.

9 117 **ESSIONS** MEMBERS

#### **Business Bites**

**Business Bites webinars** have become a regular offering with topics specifically chosen to ensure members have the necessary information and knowledge to undertake business in defence supply chains. This year's topics included:

- UK Export Controls
- Cyber Security
- Indigenous
- Addressing the Urgent **Skills Gap in Defence**

#### **Shipley Workshops**

Our partnership **OVER 100** with Shipley Asia **Pacific means** PARTICIPANTS **DTC** members had access to world leading business winning and capture tools. This year we covered topics:

- **Customer-Focussed Value** (online) = 10 members
- Customer-Focussed Writing (ADL) = 10 members
- Quad Chart Workshop preparing for Land Forces (April) = 90 attendees

#### **Skilling Australia's Defence Industry**

The Skilling Australia's Defence Industry grant enabled the DTC to support 16 staff from 12 member companies to complete a Diploma of Digital Technologies at Flinders University.

Procurement

# ADVOCACY HIGHLIGHTS

The DTC continues to provide a credible and informed voice for Australia's defence industry. Key highlights include;

- Submission into the Department of Defence's review of the ASDEFCON templates and procurement process
- Input to Defence to shape the Defence Industry Secondments program with Australian SMEs
- Provided input to Defence's review of the Major Service Provider Panel Review
- Objection to Defence for passing on the 25% price increase for security clearances with less than 12 hours-notice.

Through the AiGroup Defence Council working groups, we were able to advocate for changes to Defence policy and guidelines such as:

- More timely processing of DISP applications
- Improved processing times for security clearances
- Contractual relief to accommodate escalating freight costs for Australian industry during COVID-19
- Proposed Sovereign Industrial Capability Priority guideline documents

Our affiliation with AiGroup has meant DTC members' interests were also represented on Australia-wide issues extending beyond the defence sector including advice and feedback on:

- Home Affairs' proposed changes to regulations to strengthen Australia's cyber Security
   Regulations & Incentives
- AiGroup's Strategic Directions Concept Paper
- Major Reforms to the Foreign Investment Review Board
- Australia's Proposed Critical Infrastructure Legislation
- Submission to South Australian Inquiry into Essential Production and Supply Chain Security
- Successfully lobbied South Australian Government for defence industry to be classified as an essential service during COVID-19 lockdown provisions
- Advice and input provided to South Australian Deptartment of Skills Discussion Paper on micro-credentials for cyber security
- Represented South Australian members on the Defence and Aerospace Industry Skills
   Council
- Represented the skilling needs of DTC members at the Naval Shipbuilding Industry Reference Committee
- Provided input to Defence's update of the Naval Shipbuilding and Sustainment Plan

# KEY HIGHLIGHTS



### **SME Virtual Summit**

Noting the need for members' to engage with key defence personnel, it took the DTC only 6 weeks to plan and deliver its first completely virtual SME Summit.

OVER 220 PEOPLE ATTENDED THE INAUGURAL EVENT

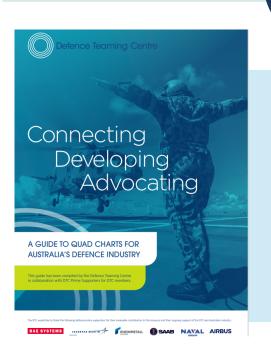
19 SPEAKERS OVER TWO DAYS

### Defence Industry Security Summit

The DTC were successful in being added to the Approved Business Events grant scheme which entitled eligible sponsors and attendees to apply for grant funding of 50% of their attendance costs. HELD EVENT IN THE ADELAIDE HILLS TO PROMOTE SUPPORT FOR THE BUSHFIRE AFFECTED REGION

140 PEOPLE ATTENDED



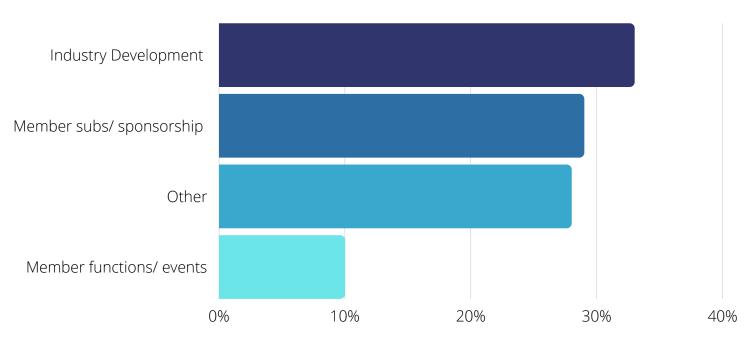


## **Quad Chart Guide**

The DTC produced this free guide to provide industry with a resource to decrease the cost of doing business in defence. The Guide was developed with the support of DTC Prime Supporters, Airbus Australia Pacific, BAE Systems Australia, Lockheed Martin Australia, Naval Group Australia, Rheinmetall Defence Australia, and Saab Australia, who reviewed the Guide, contributing their insights and expertise.

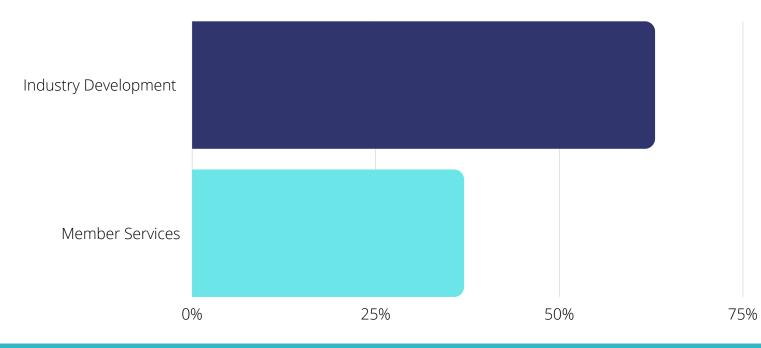
# FINANCIAL STABILITY

The diversity of income sources continued to grow with Industry Development now being an important source of revenue to the DTC. The 2021 year has had many challenges with the cancellation of the 2020 annual dinner significantly reducing event income. Membership income continues to grow at a steady rate.



### 2020/21 Income Sources

### 2020/21 Expenses

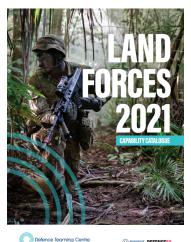


# MEMBER CAPABILITY PROMOTIONS



#### Member Matrix now online

The DTC Member Matrix enables the DTC staff to actively promote our members' capabilities to key decision makers in the defence industry sector. It is quickly becoming and useful reference for procurement and AIC staff looking for suppliers and undertaking market testing activities. We are upgrading our member management tools so that members can maintain this information directly themselves through the DTC website and member portal.



#### **Capability Catalogue**

DTC member Quard Charts were published in the 2021 Land Forces Capability Catalogue. The stand alone document was given to attendees of the tradeshow free of charge and offered DTC members who were not able to attend the trade show the opportunity to still be seen by other SMEs and Primes who were in attendance.



#### **Informing Industry**

We continued to provide our members and stakeholders with thought-leading, defence sector insights through our Defence Business publication. In 2020 COVID-19 directly impacted magazine advertising sales, resulting in Edition 52 and 53 being available only as an online edition. The lifting of restrictions in time for Land Forces meant we were able to return to physical a publication in June.



## THANK YOU TO OUR FINANCIAL MEMBERS FOR THEIR CONTINUED SUPPORT

- 3na
- 4th Harmonic
- Acacia Research
- Adelaide Relocations
- Adelaide Training & Employment Centre
- Adept Technology
- Adlingtons Australia
- Aerobond
- AFL Services
- Airbus Australia Pacific
- Airspeed Pty Ltd
- AJ Distributors
- Alliance Automation
- Altair
- Aluminium Dynamics
- AMC Search (the training consultancy division of Australian Maritime College)
- AMI Group
- AML Technologies (AMLT)/ AML3D
- APC Technology
- archTIS Limited
- Arentz & KKG Engineering
- ASC
- ASG Group
- ATPI
- Austal
- Austbrokers Terrace
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- De Stefano & Co
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- Defence Coating Systems
- Defence Seals
- Dematec Automation
- Derby Rubber Products Pty Ltd
- DEWC
- DHL Global Forwarding
- Draeger Australia
- Dtwin
- Easy Skill Australia
- Electromek
- Elexon Eletronics
- elmTEK
- EM Solutions
- Engie Electrical & Communications
- Environmental Fluid Systems
- Eptec
- Ezy-Fit Engineering Group
- Finlaysons
- Force Ordnance
- Form Cut Pty Ltd
- Frazer-Nash Consultancy
- Fuller Brand Communication
- Fyfe
- GBT Industries
- General Dynamics Land Systems Australia (GDLS)

Indigenous Training and Recruitment Pty Ltd

Insight Via Artificial Intelligence (IVAI)

- Gibbs & Cox Australia
- GPA Engineering
- Green Door Vetting and Security
- Grove Scaff
- H & M Ferman Importers Distributors
- Hastwell
- Heatlie BBQs
- Hendon Semiconductors
- HTR Engineering Solutions
- Hughes Public Relations
- Humanihut Pty Ltd
- HYDAC

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locane

• ICF Insurance Brokers P/L

**Inventure Partners** 

## THANK YOU TO OUR FINANCIAL MEMBERS FOR THEIR CONTINUED SUPPORT

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- Jim Allen and Associates
- Johnson Winter & Slattery
- KAEFER Integrated Services
- Kennewell Pty Ltd
- Key Tubing and Electrical Industries Pty Ltd
- Kinexus People
- Lecon
- Leedall
- Lencom Antennas
- Level 5 Solutions Pty Ltd
- Levett Engineering Pty Ltd
- Lockheed Martin Australia
- Logi-tech Pty Ltd
- Luerssen Australia Pty Ltd
- MacTaggart Scott Australia
- Maxiport Engineering Pty Ltd
- MECHVAC Engineering
- MG Engineering
- Migration Solutions
- Mincham Aviation
- Mine Tech Operations Pty Ltd trading as Plasteel SA
- Monkeystack
- Morgan Advanced Materials
- Mott MacDonald
- MRS Property
- Naval Group Australia
- Naval Shipbuilding Institute (Naval Shipbuilding College)
- Navantia Australia
- Neumann Space
- Nobles
- Norseld Pty Ltd
- Nova Systems
- Nylastex Engineering Solutions
- Odense Maritime Technology
- Oliver Technolgies Pty Ltd
- Para Bellum Solutions
- PeerThinc
- Pfitzner Performance Gearbox Pty Ltd
- Piper Alderman
- Pirtek (Adelaide) Pty Ltd
- PMB Defence
- Praxis Aerospace Pty Ltd
- Precise Machining and Manufacturing
- PREDICT Australia
- Prism Defence
- Protube Engineering Pty Ltd
- PRP Manufacturing
- QinetiQ Australia
- Quisk Design
- Rainy Day Recruitment

- Raytheon Australia Pty Ltd
- REALM Solutions (SA) Pty Ltd
- REDARC Electronics
- Rheinmetall Defence Australia
- Rowlands Metalworks
- RUAG Australia Pty Ltd
- SA Simulation
- Saab Australia Pty Ltd
- SABRN Tech
- Sage Automation Sage Group
- SAI Global� Assurance
- Sarah Constructions
- School of Information Operations
- Shadow Business Development
- Shipley Asia Pacific
- SiNAB
- Sinclair Product Design
- SkillSpeak Consulting On Hold Membership
- Smart Fabrication Pty Ltd
- Sonnex Pty Ltd
- Sphere Advisory
- St Patrick's Technical College Northern Adelaide
- Stramech Engineering
- Sungard Data Centre Services SA Pty Ltd
- Supashock
- Sydney City Marine
- TAFE SA
- Talent International
- TBH
- Technoweld
- Thales Australia
- Toolcraft Australia
- Totalseal Group Australia Pty Ltd
- TQCSI-Yaran
- Trident Cyber
- Trymoss Engineering Pty Ltd
- Ultra Electronics Australia
- Unique Subsea Australia
- United Fasteners SA Pty Ltd
- Ventia
- Verseng Group
- Vintek Pty Ltd
- Vipac Engineers & Scientists Ltd
- Vocus
- Walter Breunig Intelligent Platforms Pty Ltd

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randstad defence.

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