

1.1 SCOPE OF REPORT

This report provides an overview of the Australian remote sensing sector and examines the potential for collaborative ventures between Australian and Canadian organisations. Canada's geography and demography are similar to Australia's, consequently Canadian expertise and the long term commitment to remote sensing development provide an instructive model for Australia. There are clearly commercial opportunities in Australia for Canadian remote sensing firms..

2. MARKET STRUCTURE

The Australian Space Office (ASO) has been given the task of developing an Australian remote sensing industry as one of the major objectives in the implementation of the National Space Policy. This being said, it should be recognized that the Australian remote sensing industry plays an integral role in an array of industries and as such envelopes research and commercial activity from the private sector, federal and state government agencies, academic institutions and the CSIRO (Commonwealth Scientific and Industrial Research Organization). The latter can be viewed as the Australian counterpart to Canada's National Research Council.

In respect of research and development, a number of organizations have been involved, ranging from institutions such as the University of New South Wales to private companies; however, by far the most active proponent of research and development in the remote sensing area is the internationally respected CSIRO, who's work has provided the foundation for numerous successful commercial initiatives.

Remotely sensed data supply in Australia is available through ACRES (Australian Centre for Remote Sensing) and Technical and Field Surveys. The Bureau of Meteorology, a longstanding service organisation, is also beginning to adopt a commercial approach in this area.

2.1 THE AUSTRALIAN MARKET

Remote sensing activity in Australia can be expected to increase as the monitoring of global environmental factors from a southern hemisphere vantage point assumes greater importance. However, it was the requirement to provide credible data to the mining industry which fostered early initiatives and developments. Currently, in excess of 50 percent of remotely sensed data in Australia, which was estimated at \$A40 million in 1990, is used by mining organizations; a further 30-40 percent is accounted for by natural resource monitoring and management activities in the forestry, fisheries, and agriculture sectors.

The Australian remote sensing sector has probably developed in a less co-ordinated manner than its Canadian counterpart. This in part is attributed to a fragmentation of effort and resources between federal and state departments, academic and private industry. However, the recently received mandate of the ASO to foster and promote remote sensing in Australia should henceforth produce a more national, co-ordinated approach.