



Space + Place

Unlocking Regional Potential: Pilot Report Part 2: Social Licence and the Aerospace Sector

An initiative of Regional Development Australia



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Space + Place: RDAMBS 2025

About this report

The 'Space + Place: Unlocking regional potential' pilot was commissioned by Regional Development Australia Moreton Bay and Sunshine Coast (RDAMBSC) in partnership with the Australian National University Institute for Space (InSpace) and Institute for Infrastructure in Society (I2S), and Gungahdjia Aerospace, Australia's only Indigenous owned and operated aerospace company. The pilot project represents RDAMBSC's leadership in setting strategic pathways for the future growth and socio-economic wellbeing of the region, incorporating the City of Moreton Bay, Sunshine Coast and Noosa Local Government Areas. The 'Space + Place' Report (Part 2) explores the current levels of public acceptance for the aerospace sector, internationally, in Australia and locally. This 'social licence to operate' is a core component of successful industries and policies. Where the aerospace sector is viewed by the public as trustworthy, credible and legitimate, faster industry integration, sector growth and support will flow. By understanding social licence at this early stage of emerging industry development RDAMBSC is taking an important step to cultivate the public understanding, industry engagement and policy settings necessary to successful industry investment.

This report is the second in a two-part 'Space + Place' series. Part 1, 'Priority Regional Opportunities 2025' outlines the opportunities and challenges for the emerging aerospace sector in the region. It offers evidence-based recommendations for focused development of three priority sectors: data analytics and digital infrastructure, geospatial and satellite data services, and advanced manufacturing for micro/nanosatellites and related payloads.

The information and advice delivered in this report reflects the combined activities of leading researchers from ANU InSpace, I2S and Gungahdjia Aerospace. Our team completed extensive desktop research, integrated decades of professional industry experience, and interviewed diverse industry and government stakeholders in Queensland and the region to inform the evidence and advice provided. The project was completed between November 2024 and November 2025.

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Space + Place: Executive Summary

Australia's regions are poised for transformation through strategic investment in the aerospace industry. By 2030, the Australian Space Agency aims to triple the space-related industry's value to AUD \$12 billion. This initiative aligns with national goals and leverages regional strengths to create resilient, thriving communities.

This Report is Part 2 of Regional Development Moreton Bay and Sunshine Coast's (RDAMBSC) 'Space + Place' Pilot Project: Unlocking Regional Potential. It investigates what a social licence—the level of acceptance of a project, policy, program or initiative within a defined community—means for Australia's emerging space sector. It explores the ways social licence is currently being applied to the aerospace sector and related technological growth industries, and how regional leaders view the current status of a social licence for an emerging aerospace sector in the City of Moreton Bay, Sunshine Coast and Noosa Local Government Authority (the Region).

SPACE + PLACE PILOT PROJECT: KEY OBJECTIVES

- **Enhance Decision Making:** Provide actionable recommendations for regional infrastructure planning, informed by best practices and Indigenous perspectives.
- **Connect Capabilities:** Link regional capabilities with national space infrastructure to foster growth.
- **Promote Inclusivity:** Encourage participation from underrepresented groups within the space sector and embed space-derived benefits within communities.

IMPACT AND BENEFITS

Participation in the space sector offers numerous benefits, including:

- **Economic Growth:** Attract aerospace businesses and investments, boosting the local economy.
- **Innovation:** Drive technological advancements that improve daily life, from satellite navigation to environmental monitoring.
- **Community Engagement:** Strengthen community involvement and support for space industry initiatives.

PILOT OUTCOMES

The Space + Place Initiative aims to deliver:

1. **Economic Potential:** Identify and explore opportunities related to the International Astronautical Congress 2025 (IAC25).
2. **Social Licence:** Understand community needs and perceptions to build a strong social licence for regional space industry development.
3. **Jobs and Skills:** Develop strategies to enhance the STEM workforce pipeline and attract aerospace businesses.
4. **Infrastructure:** Leverage existing regional infrastructure to support space-related activities.

FINDINGS AND RECOMMENDATIONS

The Space + Place pilot Report 2 findings demonstrate that the aerospace sector is likely to have a strong social licence among business, government and industry stakeholders in the City of Moreton Bay, Sunshine Coast and Noosa Local Government Area. Study results suggest that there are strong opportunities to build a broader social licence for a Regional aerospace sector among the general public, based on the space sector's positive reputation, generally low perceptions of risk and the jobs and education opportunities that can flow to the Region through aerospace sector development.

Findings

The study builds on very recent research from the ANU Institute for Space (InSpace) to highlight key **social considerations related to a social licence** that require attention as RDAMBSC supports development of the Region's aerospace sector. These are:

1. **Geography:** incorporating land access and use, people's connection to place and concerns about changes to local amenity, including visual and aural amenity.

2. **Indigenous lands:** incorporating Native Title, cultural heritage, and environmental changes that affect the nature, access and use of Indigenous lands, among other considerations for land rights and spiritual connection.
3. **Environmental impacts:** including industrial contributions to climate change, for example greenhouse gas (GhG) emissions from data centres or rocket launches, ecosystem, species and habitat impacts, and socio-environmental impacts.
4. **Competition with or threats to existing industries:** including, 'brain drain' from other sectors, resource reallocations, compounding issues formed from workforce influx and local demographic changes.
5. **Introduction of new populations as part of workforce in-migration:** incorporating demographic changes, potential local housing affordability/availability or cost of living price pressures or pressures on local amenities or services, such as education and healthcare.
6. **Politicisation:** acknowledging that research shows that Australian citizens have reduced trust in policies or initiatives where those activities are clearly associated with a political agenda. Reduced trust has direct implications for levels of social licence.
7. **Affiliation with defence industrialisation:** incorporating lack of transparency around dual-use infrastructure or technologies, moral outrage sometimes associated with defence activities and security concerns.

Recommended areas for attention to build and protect social licence

The report details qualitative findings from semi-structured interviews with industry, government and education leaders in the region, state and nationally, with aerospace sector expertise. Interview findings suggest that there is a strong social licence baseline for aerospace sector development in the region, with more work required to understand levels of social licence among the general population. Interview findings inform **eight recommended areas for attention** as RDAMBSC seeks to earn and build a social licence for a regional space sector. These are:

1. **The aerospace industry's perceived alignment with existing industries and industrial expertise**
2. **The Region's appeal to a highly skilled workforce in terms of lifestyle opportunities and location**
3. **The potential for aerospace businesses to immediately engage ASEAN and Pacific markets**
4. **The appeal of business' leveraging existing investments to generate value through the space sector (e.g., via existing data centres and the data cable landing port)**
5. **The potential to attract new investments to the Region**
6. **The opportunity to use the aerospace sector as a means of bolstering research and development in the Region**
7. **Potential pitfalls** and issues that need to be addressed and managed to protect social licence include, defence-related activities, the necessity of early and substantial government support and investment, flow-on effects of highly skilled workforce development for housing access/affordability and increased cost of living.

Overall, this Report makes clear that a space sector for the region makes sense, from business, government and educational perspectives. The likelihood for broader community acceptance is high, and can be supported through clear, transparent, early and regular public communications, involvement of local community members in education and co-design of sector development and through long-term, place-based visioning that integrates the aerospace sector into the Region's future community fabric.

Introduction

This Report is Part 2 of Regional Development Moreton Bay and Sunshine Coast's (RDAMBSC) 'Space + Place' Pilot Project: Unlocking Regional Potential. It investigates what a social licence means for Australia's emerging space sector. It explores the ways social licence is currently being applied to the aerospace sector and related technological growth industries, and how regional leaders view the current status of a social licence for an emerging aerospace sector in the City of Moreton Bay, Sunshine Coast and Noosa Local Government Authority (the Region).

A social licence to operate (SLO) is the level of acceptance of a project, policy, program or initiative among a defined community.¹

'Social licence' dates back to at least 1997 when it was widely popularised in relation to the mining sector.² The term is now ubiquitous, used by diverse industries, governments, politicians and stakeholders. It is common to hear that a project 'does not have a social licence' or that a government initiative must 'earn a social licence to operate'. In practice, this means that a project/policy/initiative must demonstrate trust, credibility and legitimacy made possible through procedural fairness. In other words, decision-making processes are seen by participants as transparent, accessible, reasonable and fair; participants will agree the process to reach a decision was fair, even if they disagree with the final decision. Understanding SLO is important for Australia's emerging aerospace sector. It offers a robust and assessable way to understand stakeholders' perceptions about this emerging sector and to begin pinpointing any issues that will need to be addressed to support industry buy-in and acceptance, and to mitigate or prevent negative social impacts.

The Report proceeds by briefly introducing the Australian space sector, with a focus on the Queensland and Regional space sectors. Readers interested in a deeper dive into Australia's space sector, including region- and sector-specific economic development, jobs, skills and educational opportunities, are encouraged to read Part 1 of this series, 'Unlocking Regional Potential: Pilot Report'.³ This Report then surveys how a social licence is playing out in the international space sector. It reviews lessons from how SLO affects other major Australian industries, especially mining and renewable energy, drawing insights to inform early practice in Australia's aerospace sector. The Report considers Regional opinion leaders' perceptions of SLO for aerospace sector opportunities in the City of Moreton Bay, Sunshine Coast and Noosa Local Government Authority. It concludes with a framework for SLO to help guide future initiatives in the Region's aerospace sector with a view towards preserving and building SLO.



The Australian Space Sector

The Australian aerospace industry is more than satellite stations or rocket launches. Today, the space industry contributes to the nation's economy, innovation ecosystem and international collaborations, following a period of substantial growth over the past decade. While Australia's industry remains relatively young compared to international sector leaders, our unique geographic advantages, strategic policy initiatives and a growing network of public and private stakeholders are positioning the nation as an important contributor to the global space economy. Most recently, for example, Australia hosted the 76th Annual International Astronautical Congress (IAC) in Sydney in October 2025.

The Australian space industry is currently concentrated in several key areas, including, satellite technologies, earth observation, and space communications.⁴ These activities underpin essential applications, such as environmental monitoring, agriculture, disaster management, and national security. The development of space exploration capabilities, including partnerships with international missions, has also become a priority, with Australia contributing through expertise in robotics, autonomous systems and advanced manufacturing.

The Australian Space Agency (ASA), established in 2018, serves as the cornerstone of the nation's space efforts, providing strategic leadership, coordinating civil space matters, and fostering international partnerships.¹ The Commonwealth Scientific and Industrial Research Organisation (CSIRO) plays a complementary role by advancing research and innovation in space-related fields. State governments, particularly in Queensland, South Australia and Western Australia, have also demonstrated strong support for the industry, with space-specific strategies and investments in regional infrastructure and targeted programs. Private sector, companies, such as Gilmour Space Technologies (QLD), Southern Launch (SA), and Fleet Space Technologies (SA), develop satellites and launch systems and deliver data services.² Queensland-based Gungahndji Aerospace, a partner in this research, is Australia's first and only Indigenous owned and led aerospace consultancy, providing defence, aviation and aerospace advice, research and development while pursuing the aligned mission of fostering the capabilities of Aboriginal and Torres Strait Islanders to contribute to Australia's sovereign capabilities.³

The Australian Government aims to increase national space revenue to AU\$12 billion and create an additional 20,000 jobs over the next decade to 2035.⁵ The Civil Space Strategy (2019–2028) provides a roadmap to triple the size of the national space economy by 2030, with a focus on building capabilities in communication technologies, earth observation, positioning systems and space situational awareness.⁴ The Moon to Mars initiative, which includes collaboration with NASA, seeks to strengthen Australia's role in global space exploration efforts while fostering technological innovation and local industry growth.⁵ Additionally, the Modern Manufacturing Initiative has allocated funding to support the development of advanced manufacturing capabilities critical to the space sector.⁶

The potential for national development and expansion in the space industry spans multiple sectors. Precision agriculture, enabled by satellite data and Internet of Things (IoT) technologies, holds promise for enhancing productivity and sustainability in the agricultural sector.⁶ The mining industry is leveraging space-based technologies for resource exploration and remote monitoring,⁷ while simultaneously developing more widespread critical minerals mining necessary to aerospace and other advanced technologies.⁸ Meanwhile, emerging industries including space tourism⁹ and renewable energy systems, including space-based solar power,¹⁰ are gaining traction as future opportunities.

¹ [About the Agency | Australian Space Agency](#)

² [Gilmour Space Technologies | Launching rockets and satellites to orbit from Australia](#)

³ [Gungahndji Aerospace](#)

⁴ The Civil Space Strategy (2019–2018). Available at: <https://www.space.gov.au/sites/default/files/media-documents/2023-11/Advancing%20Space%20Australian%20Civil%20Space%20Strategy.pdf>

⁵ [Moon to Mars initiative: Launching Australian industry to space | Department of Industry Science and Resources](#)

⁶ [The Modern Manufacturing Initiative opens funding for National Manufacturing Priority areas | Department of Industry Science and Resources](#)

Regional Space Industry Opportunities

Queensland is very well-placed to take a central role in Australia's rapidly growing space industry. The state offers geographic advantages, regional strengths, and government support that differentiate it from other parts of Australia. Queensland's current space industry work is strongly focussed on satellite technology, earth observation, and launch services. This includes satellite-enabled applications in agriculture, environmental monitoring, and disaster management. These sub-sectors align strongly with Queensland's economic profile, with agriculture, mining and tourism among the top contributors to the State's economy.¹¹ This alignment allows Queensland to leverage space technology for economic and societal benefits. The region also supports advanced manufacturing and research in robotics and autonomous systems, areas that are critical to both national security and international collaborations in space exploration.

Queensland's progress in the space industry is bolstered by several key agencies and organizations. The Queensland Government has prioritized the sector, offering funding and infrastructure support to encourage growth. Public institutions such as the University of Queensland, the University of the Sunshine Coast (UniSC) and Queensland University of Technology are instrumental in driving research and workforce development. UniSC, for example, is host to the Space to Sea Accelerator, a major initiative to support entrepreneurs integrating geospatial intelligence with a variety of emerging technologies, including AI, drones and robotics.⁷ Private companies, including Gilmour Space Technologies, a leader in hybrid rocket technology, and Black Sky Aerospace, specializing in launch systems, are important contributors to the state's reputation as a hub for aerospace innovation.

Policy initiatives at both the state and federal levels play an integral role in shaping Queensland's space industry. The Queensland Government's Aerospace 10-Year Roadmap and Action Plan explicitly identifies space as a critical area for investment and development, with a focus on creating a thriving aerospace ecosystem. Active collaboration between the Queensland government and the Australian Space Agency highlights the importance of Queensland as a key regional player. The Queensland Sovereign Industry Development Fund (SIDF) recently announced its intention to invest almost AUD \$181 million in priority industries, including aerospace.⁸ This direct investment is occurring alongside heavy investment in upstream aerospace sector components, especially critical minerals.¹² The undersea data cable landing station at Maroochydore, the co-location of data centres, and the advanced manufacturing potential provided by this infrastructure is yet another example of the state's readiness to grow the aerospace sector. The co-location and close interworking of advanced technology with the aerospace sector is a vital component to any successful national aerospace industry.

The expansion of Queensland's space industry presents immediate opportunities for workforce expansion, skills development and economic growth.¹³ A successful space sector demands expertise in engineering, data analytics, advanced manufacturing, and robotics, among other skills. The Queensland aerospace sector can also drive significant innovation across allied industries including aviation, telecommunications, and defence. Existing and future partnerships with international space agencies and corporations further integrate Queensland into the global space economy, enhancing its competitive position.

Research demonstrates that Australia and Queensland hold potential for sustained growth in its space sector, provided that strategic investments and collaborative efforts continue.¹⁴ With its combination of geographic advantages, policy support, and innovative spirit, Queensland is well-positioned to be a leader in Australia's space industry. Social licence for Queensland's emerging aerospace sector will be a key factor in the industry's growth and sustainability.

⁷ [UniSC Space to Sea Accelerator](#)

⁸ [Queensland Government, State Development, Infrastructure and Planning: Sovereign Industry Development Fund](#)

Priority regional sectors

The City of Moreton Bay, Sunshine Coast and Noosa Local Government Authority can take advantage of Australia's emerging space sector by adopting a targeted approach to industry development that leverages existing local strengths and skills and actively pursues a social licence to operate for industry initiatives.

Three priority aerospace development sectors for the region are:⁹

Data analytics and digital infrastructure: This sector involves analysing raw satellite data to create actionable insights for business, government and communities. This sector's success relies on cloud computing, cybersecurity and artificial intelligence (AI), all of which are represented in Queensland's current digital innovation ecosystem. Common applications include, agricultural monitoring and planning, natural disaster preparedness, urban development monitoring and planning, and environmental compliance monitoring, to name just a few.

Geospatial and satellite-enabled data collection: One step in the value chain before data analytics, the earth observation is currently valued at approximately \$5 billion and is projected to exceed \$8 billion by 2033.¹⁵ Current regional workforce demographics demonstrate exceptional alignment with space industry requirements, hosting 8,500 professionals in engineering and technology fields directly applicable to data processing and analytics and geospatial, satellite data services and earth observation, all benefitting from subsea data cable connectivity, as well as advanced manufacturing of targeted payloads, including microsatellites.¹⁶

Advanced manufacturing for microsatellites and payloads: The region's priority upstream opportunity focuses on advanced manufacturing of microsatellites (10kg to 100kg), nanosatellites (1kg to 10kg) and payloads. Small-scale, specialised production of microsatellites, cube satellites, or payload components offers a viable niche for the region. This activity relies on expertise in precision engineering, additive manufacturing, and electronics, areas where the Region can build on its existing industrial base.

The jobs and industry growth potential of these sectors is considerable. A social licence will be an important part of supporting the region to achieve its potential in these priority sectors in a timely way that acknowledges and responds to any stakeholder concerns while creating the most benefit possible.



⁹ See, 'Space + Place' Pilot Report: Part 1 for details on Priority Sectors and regional development.

SLO for Space?

Historically, the story for space has been a very positive one; a narrative of human bravery and scientific endeavour taking us to new frontiers. The space sector is widely respected for the rigour of its science and engineering, and for the many applications that space science has delivered since the 1950s.¹⁷ While national security and defence operations are an intrinsic part of the sector, the benefits, imagination and lofty character of the sector have largely sustained societal acceptance, at a global level.¹⁸

Concerns about the aerospace sector's social licence to operate are, however, beginning to emerge. As more private sector companies enter the space race, questions are being raised about the appropriateness of wealthy players 'owning' knowledge or access to space. There is even concern about the space the private sector is taking up in space; Elon Musk's Star Link Satellite chain is but one example.¹⁹ So is the almost total handover of NASA's space shuttle program to the private sector, including Musk's Space-X.²⁰ The increasing role of non-state entities in the space sector shifts space from a public good to a commercial arena raising new and challenging questions about how we understand and use space, who participates and takes decisions, and how space and the sectors related to it should be governed.

A social licence lens helps us to consider important aspects of the aerospace sector that are not usually part of conversations most often focused on technology, defence, engineering, scientific advancement and extreme frontiers. The SLO lens involves three main elements:

Trust: a willingness to rely on others based on the belief that they will act in good faith.²¹ Trust is visible through listening and promise-keeping.

Legitimacy: a pre-condition for granting trust. Legitimacy means that processes and performance of an individual or institution demonstrate competency, effectiveness and relevance.

Credibility: relates to the establishment of credentials, whether through formal processes, behaviours or experiences the establish a positive, stable reputation.

These elements must be demonstrated through procedural fairness: open, accessible, transparent and fair decision-making processes.

Applying an SLO lens to the aerospace sector raises interesting and important questions:

- Who is ultimately responsible for governing space?
 - Who do we trust as the stewards of space?
 - Who has the legitimacy and credibility to make decisions about space on our behalf?
- What are the characteristics of a legitimate aerospace sector actor or organisation?
 - What competencies need to be demonstrated?
- What makes for a credible aerospace sector organisation?
 - What credentials or experiences are valued and recognised?
 - What does it take to establish a positive and stable reputation in the aerospace sector?
- What does procedural fairness look like in relation to the aerospace sector?
 - From the position of government?
 - Of industry?
 - Of civil society?
 - Of individual community members?

The SLO lens offers a unique and helpful framing for investigating emerging aerospace sector opportunities. It reminds us that, no matter how distant the operations of the space sector may be, they have very real implications on Earth. As the sector continues to grow, it will be increasingly vital to actively consider the social and community hopes and concerns related to our study, industrialisation and enjoyment of space.

Social considerations for Australia's space sector

Very recent research using the Earth observation sector as an example is revealing the implications of aerospace activities for social considerations.²² Table 1, below, summarises seven social considerations that commonly occur as a result of the Earth observation sector, noting both the potential benefits and negative impacts of these activities. As even this simple table demonstrates, the social implications of the aerospace sector are complex and multifaceted. It is often the case that one consideration will offer both benefits and drawbacks, meaning it is critical for policymakers, investors and other decision-makers to consider carefully the balance between positive community outcomes and negative social impacts.

Impact Area	Potential Benefits	Potential Negative Impacts
Material impacts of EO infrastructure	Jobs & connectivity	Pollution, land-use change
Conditions of data access	Open data empowers communities	Unequal access, limits Indigenous data sovereignty
Distance from local context	Info for remote regions	Disembodied knowledge, top-down management
Trust, privacy & surveillance	Transparency in conflicts	Military use, unwanted surveillance
Commercialisation of space	Investment & innovation	Profit over public good
Access to night sky	Scientific insights, connectivity	Light pollution, cultural disruption
Indigenous data sovereignty	Supports self-determination	Rights overlooked, extractive framing

Table 1: Social impacts of the Earth observation sector. Adapted from Griffin et al, forthcoming.

There are eight major social considerations for the space sector, more widely, that should be part of Regional and National conversations about the emerging aerospace sector.²³ These considerations are summarised alongside common impacts/concerns in Table 2, below. The eight common concerns noted in relation to social considerations affecting a social licence for the Region's aerospace sector are:

Geography

Individuals' and communities' identities and expectations are closely related to geographic location. Agricultural communities, for instance, hold strong expectations about preservation of prime agricultural land and open-space access. For many Regional community members, the City of Moreton Bay, the Sunshine Coast and Noosa Local Government Area are sought-after geographies because of their unique ecosystems, pleasant weather and the lifestyle that goes along with that. Introduction of new industries that may change people's perceptions or experiences of their local geography often face considerable opposition. Community opposition to overhead electricity transmission towers in New South Wales as part of Australia's green energy transition²⁴ is but one example of the importance of geography as a social consideration, and the loss of social licence that can occur when the relationship between communities and geography is poorly considered.

Indigenous lands

Implications for Indigenous land access and use and conservation must be priority concerns for Australia's developing aerospace sector. Research demonstrates that the satellite and Earth observation sectors, for example, regularly take advantage of Indigenous lands to support their operations with appropriate recompense for Indigenous owners.²⁵ In the worst cases, Indigenous land owners can be marginalised and their traditional land use practices deeply, negatively impacted.²⁶ Rocket launch sites have also been sites of considerable tension and disenfranchisement for Indigenous peoples in Aotearoa New Zealand and Australia, with Indigenous communities expressing concerns about a wide range of issues occurring on their lands, including: limited local employment; environmental impacts; effects on native species and habitats; impacts on sacred spaces; noise pollution that changes the nature of their relationship to land; and concerns about space debris polluting culturally important lands.²⁷

Environmental impacts

The aerospace sector also brings environmental impacts that must be considered as part of both socio-environmental impact mitigation and in relation to the industry's social licence in the Region. Common environmental impacts include the massive electricity requirements of the data centres that drive Earth observation and satellite data analytics, most of which still rely on fossil fuel generated power.²⁸ Aerospace manufacturing relies on rare earth elements and critical minerals that bring land, air and water impacts.²⁹ Launch sites, although unlikely for the Region, involve use of propellants, can generate greenhouse gas emissions through propellant leaks and influence ozone depletion from rocket combustion and related gasses.³⁰ Re-entry of space debris,³¹ ground stations located in environmentally sensitive areas, radio frequency interference and an increased Regional carbon footprint due to aerospace industry operations, are all further environmental impacts that require considerable attention and which could generate community concerns or opposition.

Competition with or threats to existing industries

When new industries are introduced, especially into areas with long-standing and widely accepted industries, both innovation and competition can occur. The aerospace sector's reliance on highly skilled workers, for example, will open new opportunities for Regional locals, but it may also drain these individuals from existing industries. Skills growth is also associated with population flux, including the introduction of new populations who may 'flood' an area as new industrial opportunities emerge. Recent studies of the aerospace sector show that it often results in resource reallocation (labour forces and investment shift from existing industries to aerospace), jobs competition and commensurate losses to other sectors.

Introduction of new populations

Workforce in-migration is another expected implication of any new industrial development, including aerospace. The Region is currently amongst the highest growth corridors in the nation, and is host to Australia's largest population of retired veterans, according to experts interviewed for this study. As with many of the other social considerations for the aerospace sector, workforce in-migration and introduction of new populations to the Region is neither inherently positive nor negative. What matters in terms of the sector's social licence, is that this consideration is acknowledged early, considered in strategic regional development plans, and that existing communities are engaged to inform how they envisage the growth of their local areas and the integration of new populations who may be introduced due to the aerospace sector.

Politicisation

The aerospace sector could potentially become a hot button political issue, for instance, in relation to its defence applications. Its development may also be used by politicians as 'announceables' to demonstrate the Government's innovative or forward-looking investment agenda. In either situation, research from the ANU Institute for Infrastructure in Society (I2S) demonstrates that the majority of members of the Australian public (74%) lose faith in their opportunities for genuine engagement on major project developments that they perceive as politicised.³² Politicisation of the Region's aerospace sector could very well make gaining a social licence more difficult, as research links it directly with mistrust. And trust is a core component of social licence.

Affiliation with defence industrialisation

While the region is host to a large proportion of Australian veterans, a complex relationship with defence and defence industry applications is prevalent in much of the country.³³ The aerospace sector is particularly open to societal concerns about defence applications, given that much of the technology used in the industry is ‘dual-use’. This means that it can be deployed for both civilian and military applications. Importantly, defence applications associated with aerospace are often secret with only limited (if any) public transparency. In relation to Earth observation, for example, citizens may be unaware of defence access to data, nor understand how that data is being accessed or used by defence, resulting in surveillance that may be unwilling, unwanted or unrecognised.³⁴ Potential concerns about defence applications should comprise strategic considerations for the social licence for the Region’s aerospace sector. Incorporating citizens’ questions and concerns about defence, and engaging the Department directly, are good, early ways to both acknowledge and address defence-related concerns and build trust and procedural fairness.

Changes to local identity

The Region is clearly at an inflection point, with the potential for major demographic and industrial changes in the years to come. Increasing populations, regional strategies to shift from tourism to broader, innovative sectors, and the legacy of the Brisbane Olympics will all affect local identity. The superdiversity growth of Australia’s capital cities and regional centres will also be a major factor in changes to local identity.³⁵ While these shifts may not be as a direct result of aerospace industry development in the Region, they will occur alongside and be influenced by the industry. Where established local communities undergo rapid and considerable changes to their local identity, including in relation to changed amenities, industries or land access, loss of social licence often follows. It is important to understand and integrate local community members’ likely concerns about the changing nature of the places they live. Development that is informed by co-design, which is place-based and community centred offers a critical means of supporting social licence; more importantly, it protects communities’ interests, acknowledges their perspectives and helps to create long-term visions that better meet the needs of local people.³⁶

Social consideration	Issues for awareness
Geography	<ul style="list-style-type: none"> - Land access and use - People’s connection to place - Concerns about changes to geographic amenity
Indigenous lands	<ul style="list-style-type: none"> - Native Title - Cultural heritage - Environmental changes that affect the nature, access and use of Indigenous lands
Environmental impacts	<ul style="list-style-type: none"> - Industrial contributions to climate change (e.g., GhG emissions) - Ecosystem, species and habitat impacts - Socio-environmental impacts
Competition with or threats to existing industries	<ul style="list-style-type: none"> - ‘Brain drain’ - Resource reallocation - Compound issues with workforce influx and Regional demographic changes
Introduction of new populations as part of workforce in-migration	<ul style="list-style-type: none"> - Demographic changes - Potential local housing or price pressures - Potential pressure on local amenities and services
Politicisation	<ul style="list-style-type: none"> - Citizens tend to lose or have reduced trust where a project/sector/policy/initiative is politicised
Affiliation with defence industrialisation	<ul style="list-style-type: none"> - Lack of transparency around dual-usage - Moral outrage - Security concerns

Changes to local identity, including via amenity or land-access changes

- Sense of loss of local identity
- Potential to develop entrenched opposition
- Genuine psychological distress due to changes outside individuals' control.

Table 2: Eight important social considerations for the aerospace sector. Adapted from: Griffin et al, forthcoming.

Social licence baseline: Opinion leaders' perspectives on a Regional aerospace industry

The pilot study also involved select interviews with business and industry opinion leaders in both the Region and Australia's aerospace sector. Interviewees were recommended by RDAMBSC staff and Board Members. All were invited to participate in a 45-minute semi-structured qualitative interview with ANU researchers. A total of 15 opinion leaders were invited to participate and 12 were interviewed. Interviewees represented the following types of organisations/sectors:

- Queensland State Government – Aerospace Industry
- Representatives of local councils in the region
- Education (secondary and tertiary levels)
- Renewable energy
- Defence
- Technology/Innovation
- Aviation
- Telecommunications and satellite technology-related
- Geospatial data collection and analysis
- Local business.

The research was approved by the ANU Human Research Ethics Committee (Protocol no.2025/0344).

The interviews focused on three central issues:

- **perceptions of likely barriers or enablers to aerospace sector development** in the City of Moreton Bay, the Sunshine Coast and Noosa Local Government Area
- **anticipated level of public acceptance of an emerging aerospace sector** and
- **recommendations for how best to support the sector's social licence.**

Overall, interviewees suggested that aerospace sector development would be welcome throughout the Region, as long as the development articulates clear value, engages with existing regional strengths, and avoids or limits engagement with parts of the aerospace industry that may be seen as controversial by members of the local public (e.g., explicit defence-related activities, such as weapons manufacturing).

Summary results of the interviews suggest that the Region has a strong baseline for a social licence for the aerospace industry. Six key insights emerged as important to the SLO baseline for the Region's aerospace industry.

1. The aerospace industry's perceived alignment with existing industries and industrial expertise

Many interviewees suggested there would be solid support for a Regional aerospace sector due to the sector's alignment with existing industries, skills and experience. The general consensus was that the aerospace sector would be seen as an enrichment to the local market, as opposed to a competing

industry that might reduce value in other sectors. For instance, one interviewee suggested how certain aerospace applications could be used to boost long-standing regional industries:

“Geospatial data and AI applications can support agriculture, climate adaptation, and community resilience.”

Another noted, “[There are] strong opportunities in crossover between space and defence sectors, given Australia’s increasing defence spend.”

While another interviewee explained that local business leaders would be well placed to create investment returns from an aerospace sector, saying, “The ecosystem here is very good. There are a number of those companies and people who understand the opportunity from the infrastructure that is here.”

2. The Region’s appeal to a highly skilled workforce in terms of lifestyle opportunities and location

Almost all interviewees noted the region’s appeal in terms of lifestyle and local environment, including easy accessibility to Brisbane, quality education and healthcare facilities, the coastal location and climate, and employment opportunities in a growing region.

As one interviewee summed up in relation to the Sunshine Coast, “Sunshine Coast positions itself as a data-driven, lifestyle-attractive hub....”

The obvious appeal of the Region’s lifestyle is an important strength that can be leveraged to build public acceptance of a local aerospace sector. By attracting highly skilled workforces to the Region, overall socio-economic development also increases. While it will be important to balance this with the earlier concerns about geography, land access/use and community identity, as well as gentrification or increased living costs, attraction of a highly skilled workforce is a major strength for the aerospace sector.

Other interviewees noted the relatively untapped retired/semi-retired communities spread throughout the region as a key opportunity for skilled workforce development. These individuals and families are largely drawn to the region for the late-work or retirement lifestyle options available, and interviewees reported that many remain keen to make a contribution and stay involved in interesting industries and projects. The substantial proportion of defence veterans in the region, as well as highly educated and highly skilled retirees offers yet another opportunity to support aerospace sector development that would appear to have a high level of community support and acceptance.

3. The potential for aerospace businesses to immediately engage ASEAN and Pacific markets

The Region’s location and the Maroochydore data cable landing port were also noted consistently across interviews as key strengths in support of a Regional aerospace sector. As one interviewee noted, “Export opportunities [are] essential for growth in both defence and space-related industries.” The Region’s positioning, including potential to develop its littoral domain, means that genuine export potential is likely to support industry acceptance.

The interconnection between location, industries and the broader region was also seen as an integral strength within the Region’s aerospace sector potential. For example, it was noted that there is, “Strong potential in Earth observation and geospatial applications, particularly for monitoring natural assets across the region’s three biospheres.”

4. The appeal of business leveraging existing investments to generate value through the space sector (e.g., via existing data centres and the data cable landing port)

The social licence baseline for aerospace in the region also appears strong because the sector demonstrates rational and strong alignment with existing sectors. Connections between existing technology companies, data centres, the data cables and a general sense of entrepreneurialism throughout the region, as noted in Point 1, above were highlighted by several interviewees.

Interviewees noted immediate opportunities to connect with well established industries, including mining and defence, to enhance the immediate value and appeal of the space sector. For example:

“Defence and mining sectors could leverage space-derived data for mission planning and operational efficiencies.”

Interviewees also noted that it will be important for any investments to be well focused in order to gain and maintain support. Many suggested that this would be possible through a well-targeted investment and development strategy, as outlined in Part 1 of this Report Series. For example, multiple interviewees emphasised the importance of focusing primarily on downstream opportunities:

“Downstream activities present more immediate opportunities than upstream manufacturing.”

Or, as another interviewee noted in relation to the Sunshine Coast, “potential [lies] in downstream space activities rather than upstream launch”.

5. The potential to attract new investments to the Region

All interviewees noted that the aerospace sector offers an important means of attracting new investments to the Region. Many emphasised the need for investment and development approaches to be widescale and strategic in order to gain interest and acceptance. For instance, one interviewee suggested, “For me, it’s about getting those key private sector players together and almost getting a Venn diagram of what they’re working on.” This interviewee also noted the importance of relationships to local investments, an insight borne out in what we know about how social licence is established. As they put it, “Once you establish a working relationship with them and they trust you, they want to work with you and partner with you.”

Interviewees also acknowledged that gaining investments is time-consuming and challenging. It will require government support and resources. One interviewee captured this sentiment succinctly, saying,

“Early-stage companies require substantial government support.”

Interviewees also discussed general levels of public awareness of the aerospace sector and its potential for the Region, Queensland and Australia. The general view amongst this group of well-informed industry, government and education leaders was that the general population’s awareness of Australia’s aerospace sector is quite low. While this was not seen as a barrier to development or investment, it was highlighted as a key issue for attention. As one official with a national purview noted, “General public and business awareness of the sector in Queensland remains limited compared to South Australia.”

6. The opportunity to use the aerospace sector as a means of bolstering research and development in the Region

Finally, many interviewees saw the aerospace sector’s direct connection to research/development and education as a key to both business and public acceptance. Interviewees discussing this link emphasised opportunities to be gained through enriching existing university and TAFE programs and, potentially through the establishment of innovation precincts or science and technology parks. “[We need to] establish a research anchor to underpin industry growth.”

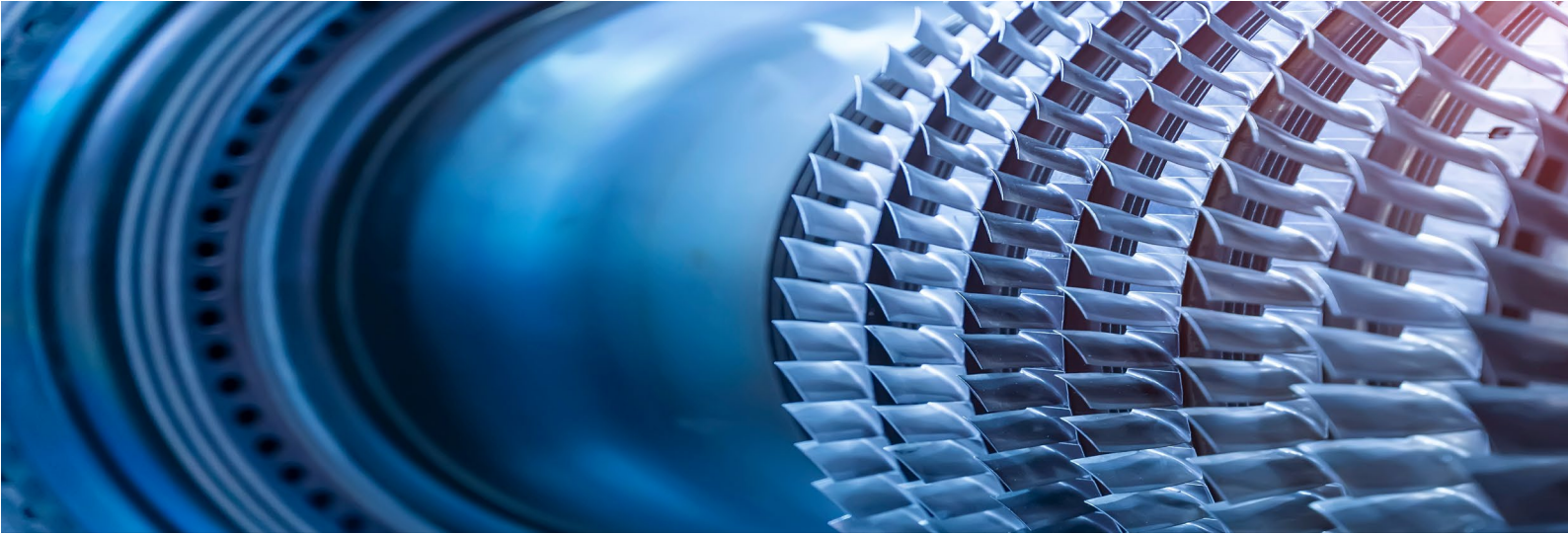
While some interviewees were excited to consider the short-term establishment of aerospace-related science and technology parks or innovation precincts, the majority focused on the need to bolster existing educational institutions and offerings to better align with aerospace sector requirements. Science parks (and similar) make good sense as longer-term initiatives. Considering these options in early Regional strategy development and involving communities in discussions about these opportunities offers an important means of long-term visioning for what the Regional aerospace sector could become and how it could support the Region's future identity. Even where the results may be decades down the track, involving local communities in future visioning is another important way to build social licence and, more importantly, produce substantial and lasting social benefits.

7. Areas for awareness: Potential pitfalls

While interviewees were overwhelmingly positive towards development of a Regional aerospace sector, they were also realistic in their expectations and open about the challenges the sector's social licence may face. In particular, they noted that defence-related activities will likely face more scrutiny and potentially draw opposition. They also emphasised that realisation of the aerospace opportunities in the region will be highly dependent on major and early government investment and support, including through establishment of policies that encourage industry development. Interviewees cautioned that highly skilled workforces will likely see increased regional housing pressures, both in relation to affordability and availability, and that cost of living increases may be a related challenge.

It is important to note that the social licence baseline discussed here is based on expert but limited data. While the opinions expressed are well-informed, they do not represent replicable or quantitatively assessable measures of SLO. Instead, interview results offer an early indicator of the types of public attitudes and receptions the Region's emerging aerospace industry may receive. Importantly for social licence, interviewees suggested that the space sector seems generally to be perceived positively, due to its scientific and technological advancements, its perception as relatively low-risk and as being beneficial to local jobs and education.

Overall, this Report makes clear that a space sector for the region makes sense, from business, government and educational perspectives. The likelihood for broader community acceptance is high, and can be supported through clear, transparent, early and regular public communications, involvement of local community members in education and co-design of sector development and through long-term, place-based visioning that integrates the aerospace sector into the Region's future community fabric.



Appendix A: Characteristics influencing social licence to operate in major reforms

The ANU Institute for Infrastructure in Society (I2S) recently completed work with the Australia New Zealand School of Government (ANZSOG) on social licence to operate for major policy reforms.¹⁰ Much like the major industrial development explored through the ‘Space + Place’ project, major policy reforms require integrated approaches that engage governments, industries and communities. High level findings of the Report outline the internal and external factors that shape public acceptance for major reform and note specific approaches that can be taken to enhance social licence. These insights are highly adaptable to the efforts of the City of Moreton Bay, Sunshine Coast and Noosa Local Government Area to support public acceptance of aerospace industry development.

See, following page for Table overview.

¹⁰ O’Connor, R., Bice, S., Henderson, H., & Thayuman, M. (2025). Strengthening Australia’s reform ‘muscle’ via SLO: Evidence & practice. Canberra: ANZSOG. Available: <https://anzsog.edu.au/research-insights-and-resources/current-research-projects/strengthening-australias-reform-muscle-via-slo-evidence-and-practice/>

External factors that determine acceptance	Internal factors that determine acceptance	How policymakers are building a social licence
<p>Crises: Crises can create momentum for reform, but lasting changes with sustained legitimacy depend on evidence-based responses & community trust.</p>	<p>Public service capability: Building a skilled, adaptive public service with strong domain expertise is key to effective reform & trust-building.</p>	<p>Participatory processes: Meaningful engagement informs robust policy, & procedural fairness is linked to acceptance.</p>
<p>Systems of government: Effective reform often relies on collaboration across all levels of government, with local councils playing a key role in building community trust.</p>	<p>Political factors: Politicisation can erode trust, but well-prepared, community-backed reforms can be seized for uptake during political windows of opportunity.</p>	<p>Communication & civic education: Providing information effectively and transparently can build both capacity for dialogue & trust.</p>
<p>Mass and social media: Social media amplification of negative narratives underscores the need for government capacity in consistent, balanced & evidence-informed communication.</p>	<p>Transparency: Transparent reform processes, supported by a capable & well-resourced public service, help build acceptance.</p>	<p>Boundary spanning & partnerships: Collaboration expands access to knowledge & resources & improves coordination. It also builds input legitimacy, credibility and confidence.</p>
<p>Features of community and action: Understanding community attitudes is vital as is constructively relating with organised community action that can drive or modify the course of reform.</p>	<p>Fairness, equity: Perceived fairness in processes and the distribution of benefits and costs are highly important factors underlying acceptance of reform.</p>	<p>Formal advisory committees: Advisory groups can build trust and legitimacy when credible advice is sought & transparently acted upon.</p>

Table 3: External and internal factors that influence public acceptance of major reforms, with recommended approaches. Source: O'Connor et al, 2025.



Endnotes

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