

AmCham Defence Lunch, on the eve of Land Forces

HOSTED BY  **AmCham**
access to opportunity

I was at the AmCham defence lunch in Perth today, the day before Land Forces opens. Primes, startups, the US Embassy and the people who fund them, all in one room. Below is who spoke, what was covered, and why it might matter for you. I hope you find it useful.

WHO SPOKE

IN SPEAKING ORDER	ROLE	TALK TO THEM ABOUT	CONNECT
Natalie Meyer	General Manager, WA and NT, AmCham Australia	AmCham WA, US delegations	LINKEDIN
Robert Koepcke	Deputy Chief of Mission, US Embassy Canberra	US advocacy, market entry	EMBASSY PROFILE
Elsabe Muller	President, Alcoa Australia	Critical minerals supply	LINKEDIN
Jessica Keogh	Chief Operating Officer, Parabellum International	WA defence services	LINKEDIN
Paddy Gregg	Managing Director and CEO, Austal	Austal's supply chain	LINKEDIN
James Keane	Co-founder and CEO, Greenroom Robotics	Maritime autonomy partners	WEBSITE
Mark Bennett	Chief Growth Officer, Camgian (US)	US AI partnering	LINKEDIN
David Goodrich OAM	Executive Chairman and CEO, Anduril Asia-Pacific	The Ghost Shark supply chain	LINKEDIN

WHAT WAS COVERED, AND WHAT IT MEANS FOR YOU

01	Back yourself DAVID GOODRICH	Anduril put \$60 million into its Ghost Shark factory 18 months before it had a contract. Then it signed a \$1.7 billion firm fixed-price, firm fixed-time deal. No progress claims, no cost-plus, and the unit price to the Commonwealth falls as volume rises. FOR YOU Price certainty is a position. If you can quote a fixed price, or show your unit cost falling with volume, lead with it. Buyers remember the company that takes the risk off them.
02	The supply chain is the door DAVID GOODRICH · PADDY GREGG	42 Australian SMEs sit inside the Ghost Shark supply chain, and Anduril has funded some of them to make them resilient. Austal said the supply chain needs continuity as much as the shipbuilder does, and it already builds submarine modules in Alabama for the US. FOR YOU For most SMEs, the way in is a prime that needs you to keep pace. Name the two or three primes whose delivery you make easier, and pitch the problem you solve for them, not your product.
03	Capital DAVID GOODRICH · JAMES KEANE	Asked if Australia has the capital to scale its companies, the answer was a clear no. Anduril has raised about US\$13.5 billion in nine years in US markets. The advice was to set up a US entity, raise there and bring it home. Greenroom bootstrapped for eight years and came out capital efficient. FOR YOU Decide early whether a US structure is part of your raise.
04	Critical minerals ELSABE MULLER	Alcoa has started building its gallium plant in Western Australia, backed by Australia, Japan and the US. FOR YOU Allied governments are co-funding supply chains. If your product depends on a constrained material, that belongs in your story.

WHAT WAS COVERED, CONTINUED

05 Autonomy and AI JAMES KEANE · MARK BENNETT	Close the trust gap by putting regulators and assurance teams inside the design process. Rapid test and evaluation builds a data flywheel for assurance and product at once. Humans stay in the loop on lethal decisions. FOR YOU The risk buyers fear is unproven capability. Keep a running record of every trial, test and result, and put it in front of them before they ask.
06 The US wants to hear from you ROBERT KOEPCKE · NATALIE MEYER	<u>Ambassador David Brat</u> is now in place, focused on commercial diplomacy, critical minerals and AUKUS. Every US Embassy and Commerce official in the room was asked to stand up and be found. FOR YOU If the US is on your plan, they want the good, the bad and the ugly. Use them as advocates.
07 What everyone agreed on FULL PANEL	Government needs to send a bolder demand signal, and long-dated contracts unlock people and factories. Australia should be self-reliant in maritime, weapons and rare earths. Hiring is not the problem, mission and culture are. AUKUS Pillar 2 has more room for SMEs than Pillar 1, and less funding. FOR YOU If you're in maritime, weapons or rare earths, say so in your first line. If you're not, show which of them you serve.

WHERE YOUR CATEGORY SHOWED UP

IF YOU BUILD	WHERE THE DEMAND WAS NAMED	START WITH
Maritime autonomy, uncrewed	Ghost Shark, smart shipping, seabed survey, the crewing gap	James, David
AI, C2, kill chain	Sensor to effector automation with humans in the loop	Mark
Critical minerals, materials	Gallium, and rare earths named as a sovereign must	Elsabe, US Embassy
Shipbuilding, manufacturing	Henderson, digital shipyard tools, cobots, US submarine modules	Paddy

“Sheds don't build ships.”

PADDY GREGG, AUSTAL

MY TAKE

One of the things that stood out to me most today was David Goodrich's point about his supply chain. 42 Australian companies are inside one programme because a prime backed itself and needed partners who could keep up.

For most founders I work with, that's the way in. A prime with a delivery problem will move faster than a tender. Your job is to make it easy for them to say yes. Know which programme you fit, what you replace, and what it costs at volume. If they have to work that out themselves, they won't.

Having trouble marketing yourself? We should talk.

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