FRONTIER SI

We know where.

ALIGN:

Aligning leadership, integration and governance of PNT in Australia

May 2026

Acknowledgement

FrontierSI respectfully acknowledges the Aboriginal and Torres Strait Islander people of Australia, first custodians of the lands, air and waters that sustain the places we live, work and play. These first peoples have had a vibrant, living culture that has remained in sustainable synergy with the natural environment for tens of thousands of years, and continues to do so.

We recognise that the lands of the Aboriginal and Torres Strait Islander people of Australia coexist with the Commonwealth of Australia.

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Contributions were received via a stakeholder workshop from representatives of Australian government departments, industry, academia, and select international stakeholders.

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Executive Brief

Purpose

ALIGN builds on FrontierSI's "Armouring the Clock" project that assesses the Positioning, Navigation and Timing (PNT) posture of Australia's Department of Defence, and identifies priority actions to strengthen resilience, governance, and capability. This paper is intended for a government audience, policy-makers, decision makers, and industry and research stakeholders.

PNT as a strategic vulnerability

PNT threats are increasing in likelihood and impact. Disruptions to force operations, critical infrastructure, supply chains and public safety are shifting from low probability to high consequence risks. Consequently, PNT has emerged as a national risk and a strategic vulnerability for Defence's integrated force.

Defence's requirement for assured PNT is inherently dependent on civil and commercial PNT capability. However, Australia is not currently structured to govern and implement PNT at the national level. Investment in PNT risk mitigation and capability remains disjointed, leading to duplication, capability gaps, and misalignment with national priorities.

PNT is widely treated as a technical dependency in Australia, often reduced to a 'GPS issue', with fundamental time and frequency services overlooked. Responsibility for PNT is fragmented across Defence, civil agencies and industry, with no central authority to integrate policy, risk, or long-term strategy.

At the same time, threats to PNT are systemic and evolving, ranging from radio frequency interference and cyber vulnerabilities, to physical, environmental, supply chain and geopolitical risks. These are not currently assessed or managed in a cohesive manner across Australia's operational, physical, and social systems enabled by PNT.

Priority actions

The Australian Government should:

1. Establish national leadership for PNT through the creation of a National PNT Office, responsible for coordinating policy, risk oversight, and cross-government alignment.
2. Embed PNT risk within Australia's national risk architecture by developing a National PNT Risk Framework to identify threat scenarios, cross-sector dependencies, and priority resilience outcomes.
3. Set long-term national direction for PNT capability through the development of a National PNT Strategy aligned with national security, industrial, and innovation priorities.

Recommendations

- Establish the National PNT Office within the Department of Home Affairs to align PNT with national security, critical infrastructure resilience, and all-hazards risk management.
- Implement a sequenced approach to governance, risk integration, and strategy development. Early action should be enabled through existing mechanisms such as through Geoscience Australia leadership, with functions transitioning to the National PNT Office upon establishment.
- Align Defence's PNT risk posture and capability development, through engagement of a Defence-led National PNT Coordinator role within the National PNT Office.

Urgency

- Geopolitical tensions are increasing the frequency and sophistication of interference affecting PNT systems (signals, aircraft, energy supply), escalating risks to Defence operations, critical services, and Australia's ability to deter.
- Global supply chain uncertainty is exposing vulnerabilities in the provision and assurance of PNT capabilities, with limited visibility over dependencies on timing, positioning and supporting systems.
- As the Government shapes the conversation around national security and industrial transformation, a critical window exists to elevate threat- and risk-driven PNT onto the national agenda, and to strengthen Australia's resilience in an increasingly contested global environment.

Introduction

Positioning, Navigation and Timing (PNT) services underpin modern Defence capability, critical infrastructure operations, economic activity, and national security.

Australia's growing reliance on satellite-based PNT, particularly Global Navigation Satellite Systems (GNSS), has increased exposure to disruption, which can take the form of radio frequency (RF) interference, cyber vulnerabilities, space weather, and broader supply chain and personnel risks, amongst others.

Recent Defence commentary (including LTGEN Susan Coyle's PNT2026 address[1]), the National Defence Strategy, as well as establishment of the Department of Defence's Joint Navigation and Spectrum Warfare Directorate, have highlighted the strategic risks associated with disruption to PNT. However no individual government department has the policy ownership and responsibility for identifying, confirming and mitigating PNT risks, strategy, and capability. Given the inherently interconnected nature of Australia's PNT infrastructure across Defence, civil and commercial domains, these risks reinforce the need for a national response that extends beyond Defence alone. A national framework is therefore required to enable joint responsibility for identification, mitigation, response, and resilience to PNT disruption.

This paper builds on analysis conducted through FrontierSI's "Armouring the Clock" project, funded through the Defence Strategic Policy Grants Program. Three preceding papers examined the impacts of PNT disruption to the Department of Defence[2], assessed Australia's PNT governance gaps[3], and analysed the threat and technology environment[4] impacting national PNT resilience.

Findings from these papers were consolidated and refined, via a select stakeholder workshop, into three policy recommendations to strengthen Australia's national PNT posture. They have been designed to establish national governance for PNT, embed PNT risk within Australia's national risk architecture, and inform long-term capability development.

Policy Priority Actions

Priority actions for the Australian Government over the next 24 months, as a realistic timeframe to establish governance and align with near-term policy and budget cycles, should:

1. Establish national leadership for PNT through the creation of a National PNT Office, responsible for coordinating policy, risk oversight, and cross-government alignment.
2. Embed PNT risk within Australia's national risk architecture by developing a National PNT Risk Framework to identify threat scenarios, cross-sector dependencies, and priority resilience outcomes.
3. Set long-term national direction for PNT capability through the development of a National PNT Strategy aligned with national security, industrial, and innovation priorities.

The following recommendations outline proposed actions and implementation pathways.

Australia's growing reliance on satellite-based PNT, particularly Global Navigation Satellite Systems (GNSS), has increased exposure to disruption.

1. Spatial Source (2026), Positioning, navigation and timing within the ADF is a 'no fail', says the Chief of Joint Capabilities. www.spatialsource.com.au/pnt-assurance-in-the-age-of-navwar
2. FrontierSI (2025), Assessing PNT Disruptions and Their Impacts on Defence. https://frontiersi.com.au/wp-content/uploads/2025/09/FrontierSI_PNT-Disruptions-Public-Report_Final.pdf
3. FrontierSI (2025), Beyond GPS: Charting Australia's PNT Future in an Uncertain World. https://frontiersi.com.au/wp-content/uploads/2025/06/FrontierSI_Beyond-GPS_Charting-Australias-PNT-Future_Report.pdf
4. FrontierSI (2026), ANCHOR. https://frontiersi.com.au/wp-content/uploads/2026/02/FrontierSI_ANCHOR_Report_Feb_2026.pdf

Policy Recommendation 1: Establish a National PNT Office

Challenge

Australia lacks a unified national agenda or strategy for PNT, with responsibilities fragmented across Defence, civil agencies and industry, and no clear ownership.

Policy Recommendation

The Australian Government should establish a National PNT Office within a central executive portfolio to provide whole-of-government leadership on PNT policy, coordination, and risk management.

Rationale

A National PNT Office would provide clear ownership and accountability for PNT at the national level, identify cross-sector dependencies, and respond to emerging threats in a more consistent and complete manner.

Purpose

The National PNT Office would provide national leadership by:

- Developing and maintaining a National PNT Strategy
- Coordinating cross-government PNT activities and investment priorities
- Providing oversight of national PNT risk and resilience
- Advising Government on PNT threats, vulnerabilities, and capability requirements
- Representing Australia in international PNT engagements and cooperation

Operational delivery, acquisition, and research functions should remain with relevant agencies.

Primary Authority

Comparable international partners (UK, US, Japan, Canada, Europe) have elevated PNT risk to their national agendas, establishing dedicated national PNT governance mechanisms and plans. These developments provide clear international precedent for Australia to develop an equivalent centralised governance approach. Several options for a primary authority for a National PNT Office are presented below.

Table 1. National PNT Office placement options

Option	PNT Office Placement	Consideration
1	**Home Affairs** — new entity	Strong alignment with national risk and critical infrastructure resilience; well-positioned for whole-of-government coordination.
2	**Home Affairs** — within National Emergency Management Authority (NEMA)	Existing coordination capability and emergency management, however scope is focused on natural hazards rather than cross-sector hazard governance.
3	**Prime Minister and Cabinet (PMC)** — within Economic, Industry and Resilience group	Strong central coordination and enabling authority, however less operational policy ownership and operational delivery.
4	**Industry, Science and Resources (DISR)** — new entity	Aligns with technology development and innovation policy, but weaker linkage to national security and cross-sector risk.
5	**Industry, Science and Resources** — within Geoscience Australia	Established leadership in civilian positioning and navigation, however mandate is focused on civilian PNT services and capability rather than whole-of-government risk integration.
6	**Industry, Science and Resources** — within National Measurement Institute	Leadership in national timing and frequency services, however scope is limited to metrology and standards rather than national PNT risk and governance.
7	**Department of Defence** — Joint Capabilities Group	Leads Defence of the nation and assured PNT for force operations, however limited remit for civilian PNT and broader national coordination.

Policy Recommendation 1:
Establish a National PNT Office cont.

This paper recommends Option 1.

Justification for placement within Home Affairs

PNT disruption arises from multiple systemic risks, extending far beyond GPS failure or natural hazards. The spread of risks encompasses cyber, information, physical, supply chain, and personnel threats[5]. As such, PNT should be treated as a national resilience issue requiring whole-of-government coordination, rather than a purely Defence or technology function. Locating the National PNT Office within Home Affairs (option 1) aligns with its responsibilities for critical infrastructure protection, national security coordination, and all-hazards risk management.

NEMA (option 2) is focused on natural hazard response rather than cross-sector risk governance. While PMC (option 3) is well placed to support initial establishment, it does not provide enduring policy ownership. FrontierSI's 2025 Beyond GPS paper3 initially considered DISR (Option 4) the most appropriate candidate for a National PNT Office. However, the analysis presented in this paper finds that while DISR plays a critical role in PNT science and technology, it is not primarily structured to lead whole-of-government coordination of national resilience and risk management outcomes.

Geoscience Australia (GA) (option 5), as an agency within DISR, plays a central role in the provision of civilian positioning and navigation services. It has freshly articulated an expanded leadership role through its national strategy[6], including the development of a Commonwealth PNT roadmap. However, GA's mandate remains focused on civilian PNT capability and service delivery. It does not extend to whole-of-government coordination of PNT risk, including integration of Defence requirements, or oversight of national resilience outcomes across critical infrastructure sectors. These functions still require a broader policy and risk governance remit than what may be covered within GA's scope.

Similarly, the National Measurement Institute (option 6) provides national leadership in timing and frequency services as critical components of PNT. While its remit closely aligned to both civilian and Defence timing requirements, it does not extend to positioning and navigation. Nor does it encompass whole-of-government coordination of PNT, capability, and cross-sector integration.

An alternative option is Defence ownership of a National PNT Office, and therefore leadership of a nationally-integrated PNT approach. However this would require Defence to assume responsibility for civilian PNT governance, alongside civilian and industrial PNT capability development, which is beyond Defence's core remit.

Home Affairs, with its central national security portfolio, would be better suited to integrate both military and civilian PNT policy, risk-driven outcomes, and capability, with requisite input from both sides. A National PNT Office could still incorporate Defence leadership through the appointment of a National PNT Coordinator from Defence, similar to the role of the National Cyber Security Coordinator within Home Affairs. Such a model would ensure Defence leadership within a nationally coordinated framework.

Accordingly, the Department of Home Affairs is best positioned to host a National PNT Office, for whole-of-government and critical infrastructure coordination of PNT policy, risk, and resilience. An implementation pathway is detailed in the Appendix for Policy Recommendation 1 and sequenced visually in Figure 1.

5. FrontierSI (2026). Australia's Navigation and Timing Challenges on Hazards, Operations, and Resilience (ANCHOR). https://frontiersi.com.au/wp-content/uploads/2026/02/FrontierSI_ANCHOR_Report_Feb_2026.pdf
6. Geoscience Australia (2026). Shaping Our Future: Geoscience Australia Strategy 2026-2028. www.ga.gov.au/__data/assets/pdf_file/0007/189421/Geoscience-Australia-Strategy-2036-Accessible.pdf

Policy Recommendation 2: Establish a National PNT Risk Framework

Challenge

PNT risks are not well understood beyond RF interference and space weather, limiting the ability to identify, assess and anticipate broader threat vectors across systems and sectors.

Policy Recommendation

Under the authority of the National PNT Office, the Australian Government should embed PNT risk within the national risk architecture through the establishment of a dedicated National PNT Risk Framework.

Rationale

Embedding PNT within the national risk architecture[7] ensures alignment with existing risk management mechanisms and enables coordinated mitigation across government and industry. A National PNT Risk Framework would provide a structured and consistent approach to identifying and assessing Australia's cross-sector PNT risk posture.

Purpose

The National PNT Risk Framework would:

- Define nationally-coordinated and threat-informed requirements for PNT resilience.
- Establish clear benchmarks for the level of resilience required to maintain essential services and national security functions.
- Assess cross-sector vulnerabilities and dependencies.
- Inform prioritisation of mitigation measures and investment aligned to identified risks and resilience requirements.

Primary Authority

Development should commence under existing cross-government mechanisms, with ownership and ongoing oversight transitioning to the National PNT Office upon its establishment. Existing mechanisms may include the Geoscience Australia-led National PNT Working Group, the Trusted Information Sharing Network (TISN), or a taskforce established within the PMC.

An implementation pathway is detailed in the Appendix for Policy Recommendation 2 and sequenced visually in Figure 1.

7. Australia's Commonwealth Risk Management Framework is a general coordinating body for national risk, however there is no national risk register. Risk management is specific to each government departmental level.

Policy Recommendation 3: Develop a National PNT Strategy

Challenge

PNT capability development in Australia is uncoordinated. Investment decisions are made across Defence, civil agencies, and industry without a shared set of national priorities. This gap results in duplication, capability gaps, and missed opportunities to build sovereign capability.

Policy Recommendation

Under the authority of the National PNT Office, the Australian Government should develop and maintain an Australian PNT Strategy to provide long-term strategic direction for national PNT capability.

Rationale

A National PNT Strategy would provide a unifying framework to align stakeholders, guide investment, and define long-term objectives for resilience, capability, and innovation. By providing long-term strategic direction, it would also enable alignment with national industrial, economic, and innovation priorities, and position Australia to respond to emerging technological and geopolitical challenges.

Purpose

The PNT Strategy would:

- Articulate national objectives for PNT resilience and capability
- Clarify roles and responsibilities across Defence, civil agencies, and industry
- Align stakeholders towards a coordinated resilient national PNT capability
- Establish implementation roadmaps and regulatory instruments (e.g. Radio Navigation Plan)

Primary Authority

Development should commence under existing cross-government mechanisms, such as the Geoscience Australia's proposed leadership of a Commonwealth PNT Roadmap. Ongoing sustainment and responsibility would transition to the National PNT Office upon its establishment.

An implementation pathway is detailed in the Appendix for Policy Recommendation 3 and sequenced visually in Figure 1.

Implementation of the 3 policy recommendations is recommended to proceed in a sequenced manner. Establishing national governance for PNT provides the foundation for integrating PNT risk within Australia's national risk architecture. This then enables the development of a long-term National PNT Strategy. Early phases can commence under existing interim arrangements, with functions progressively transitioning to the National PNT Office on establishment.

A National PNT Strategy would provide a unifying framework to align stakeholders, guide investment, and define long-term objectives for resilience, capability and innovation.

National PNT Implementation Pathway and Outcomes

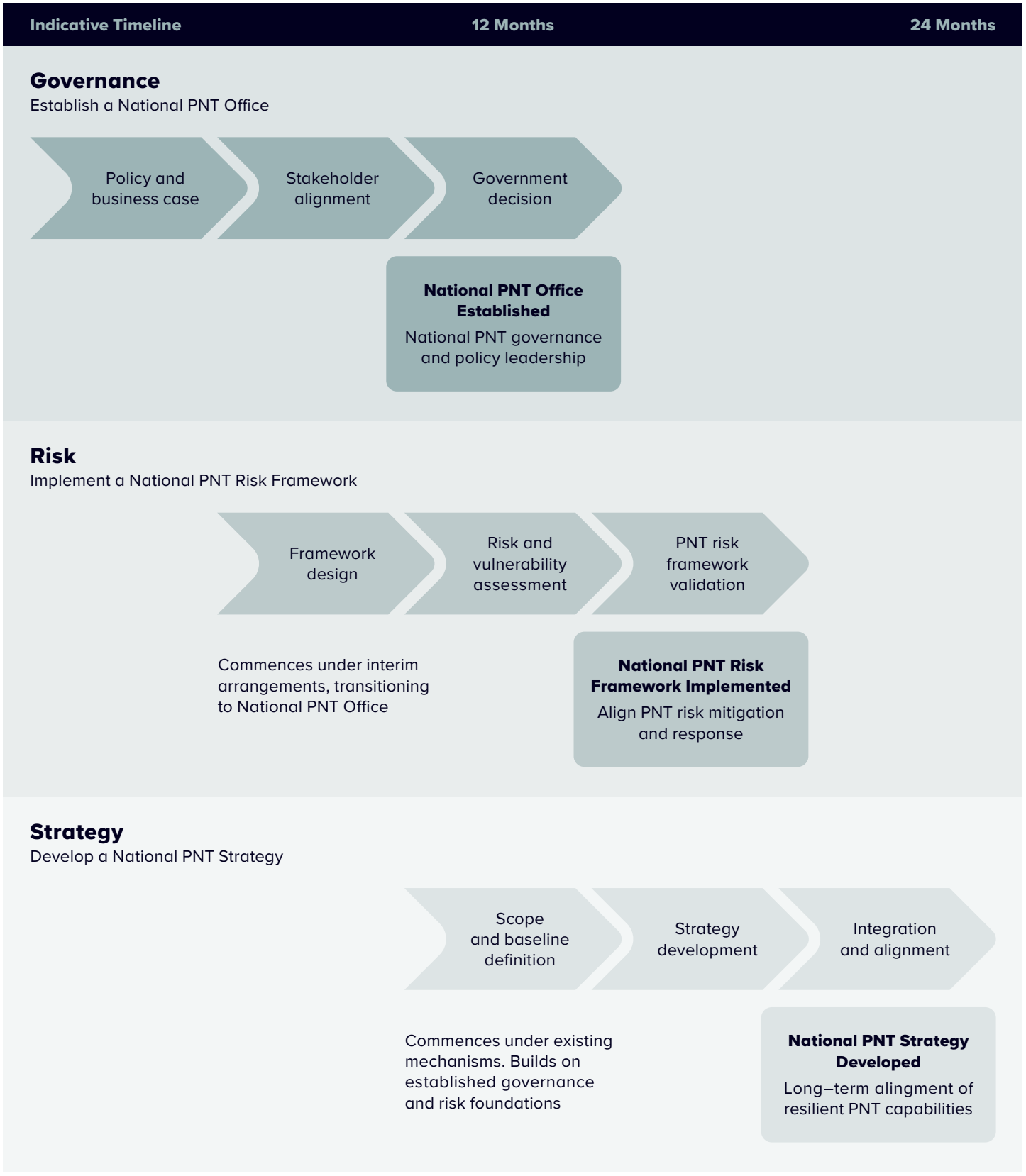

Figure 1. National PNT implementation pathway, progressing from governance, PNT risk integration, to long-term strategic alignment for PNT capability.

Conclusion

PNT risk is a systemic national vulnerability underpinning Defence operations, critical infrastructure and economic activity. Disruptions to PNT can arise from a wide range of threats, extending far beyond RF interference and space weather.

Cost of inaction to Defence

- Continued reliance on fragmented, technology-led approaches will fail to address systemic PNT risk.
- Without strong military-civilian alignment on PNT risks and capability investment, Defence will face increasing exposure to degraded or denied PNT environments, including in non-combat environments, with implications for operational effectiveness and mission assurance.
- Incremental improvements within existing structures are insufficient to address the scale and complexity of the challenge for Defence and requires a whole-of-nation approach.

Next steps

- The measures set out in this paper are interdependent and must be implemented as a sequenced, coordinated package rather than standalone initiatives.
- Without planning and governance, risk cannot be understood and integrated. Without risk-driven outcomes, strategy lacks direction.
- Early action can be taken through existing arrangements while ongoing progress will require ownership and leadership of a National PNT Office.
- Sustained Defence engagement and leadership is essential to ensure the national risk posture, capability priorities and investment decisions across the full spectrum of Defence operations, i.e. contested, domestic, and non-combat environments.

If left unaddressed, PNT will remain a national vulnerability that continues to grow and escalate. Treated properly, it becomes a capability that anchors Australia's resilience

Appendix

Policy 1 Implementation

Key Stakeholders

- Department of Defence (including Joint Navigation and Spectrum Warfare Directorate, National Support Division, Australian Geospatial Intelligence Organisation, Defence Science and Technology Group)
- Department of Prime Minister and Cabinet
- Department of Science, Industry and Resources (including Australian Space Agency, Geoscience Australia, National Measurement Institute, CSIRO)
- Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts (including the Australian Maritime Safety Authority, Airservices Australia, Australian Communications and Media Authority)
- State Government Transportation agencies and authorities

Implementation pathway (next 24 months)

Implementation should proceed in phased manner.

Phase 1 – Policy / Remit / Business case development

- Conduct a scoping study through an Expert Reference Group
- Define the mandate and functions of the National PNT Office
- Identify Machinery of Government arrangements for placement of the Office.

Phase 2 – Stakeholder alignment

- Establish a time-bound cross-government and industry taskforce. This could be led through existing mechanisms (for example the Geoscience Australia-led National PNT Working Group or equivalent) or established within the PM&C to support the development the Office.
- Undertake consultation across Defence, civil government, critical infrastructure, industry.
- Integrate PNT risk considerations into existing national risk and resilience mechanisms.

Phase 3 – Government decision

- Develop a business case aligned with the Commonwealth budget process
- Prepare a National Policy Paper articulating governance options, costs, and implementation pathways.

Division of functional responsibilities across Australia's PNT ecosystem

- Defence – focus on RF interference, assured PNT including time and frequency, navigation and electronic warfare
- Department of Industry, Science and Resources – focus on science, innovation, technology
- Geoscience Australia – focus on civil positioning and navigation infrastructure
- National Measurement Institute – focus on timing infrastructure
- Australian Maritime Safety Authority or the Civil Aviation Safety Authority – focus on maritime / aviation navigation infrastructure and regulation
- Prime Minister and Cabinet – focus on the all-hazards approach to crisis management
- Home Affairs – focus on all-hazards risk management for the security of critical infrastructure
- Australian Media and Communications Authority – national spectrum management

Defence-specific actions to support implementation

- Nominate a Defence lead for national PNT coordination, with a likely candidate being a representative from the Joint Navigation and Spectrum Warfare Directorate (JNSWD), to act as the primary Defence interface with the National PNT Office.
- Participate in the governance mechanisms of the National PNT Office.
- Integrate Defence PNT threat intelligence into national risk and resilience assessments.
- Coordinate with the National Support Division[8] within the Joint Capabilities Group to ensure that whole-of-nation capabilities relevant to PNT (including communications, energy, industry, supply chain) can be mobilised to support Defence preparedness and national resilience.
- Use the National PNT Office as a coordination mechanism for joint civil-military resilience planning by contributing Defence expertise on contested electromagnetic environments and/or degraded PNT scenarios.

8. Department of Defence. Joint Capabilities Group. www.defence.gov.au/about/who-we-are/organisation-structure/joint-capabilities-group accessed 6 March 2026.

Appendix

Policy 2 Implementation

Key Stakeholders

- Defence and civil government agencies
- Critical infrastructure entities and regulators
- Trusted Information Sharing Network (TISN)
- Department of Prime Minister and Cabinet

Implementation pathway (next 24 months)

Implementation should proceed through a phased approach, leveraging existing mechanisms before transitioning to the National PNT Office.

Phase 1 – Framework design

- Identify the appropriate Commonwealth risk management[9] construct under which a PNT Risk Framework will operate.
- Establish PNT as a recognised national risk within an appropriate mechanism (e.g. a national-level risk register or legislative instrument).

Phase 2 – Risk and vulnerability assessment

- Identify and categorise PNT threat vectors beyond RF interference and space weather, including systemic, cyber, supply chain, and geopolitical risks to establish a national PNT threat profile (drawing for example on FrontierSI's ANCHOR and Department of Home Affair's TISN analysis).
- Map cross-sector dependencies using a civil-military risk framework
- Undertake national vulnerability assessment extending beyond the Space CI sector.
- Align terminology and methodology with existing risk frameworks (e.g. SOCI CIRMP).

Phase 3 – Risk framework development and validation

- Develop a PNT Risk Framework, including thresholds for escalation and mitigation.
- Validate the framework through cross-sector consultation and scenario-based testing.
- Prepare for transition to National PNT Office oversight.

Defence-specific actions to support implementation

- Ensure Defence operational requirements inform the national resilience posture, including minimum viable PNT performance and continuity levels.
- Contribute to the identification and assessment of PNT threat vectors through the national intelligence community.
- Map Defence PNT dependencies across mission-critical, operational, and enabling systems.
- Leverage the JCG National Support Division to coordinate civil infrastructure dependencies that support Defence operations.

9. Department of Finance. Commonwealth Risk Management Framework. www.finance.gov.au/government/comcover/commonwealth-risk-management-framework accessed 6 March 2026.

Appendix

Policy 3 Implementation

Key Stakeholders

- Defence
- Geoscience Australia
- Critical infrastructure operators
- ACMA
- CSIRO
- National Measurement Institute
- Transport and communications agencies
- Emerging technology sectors

Implementation pathway (next 24 months)

Phase 1 – Scope and baseline definition

- Define scope and objectives of the National PNT Strategy
- Conduct a structured review of existing Commonwealth PNT investments, regulatory instruments, Defence and civil PNT capability pathways
- Identify gaps, overlaps, and opportunities for alignment

Phase 2 – Strategy development

- Prepare a draft Strategy for a 5–10-year horizon
- Defining strategic principles and requirements for timing, integrity, interoperability
- Identify priority capability areas and investment pathways

Phase 3 – Integration and alignment

- Align regulatory and planning instruments, e.g.:
  - Radio Nav Plan (with ACMA, AirServices Australia, AMSA and other relevant bodies)
  - National timing governance arrangements
  - Integrity monitoring requirements
  - Architectural studies
- Coordination and integration of the Strategy with Commonwealth budget cycles
- Identify resourcing requirements for delivery of the Strategy

Defence-specific actions

- Provide Defence operational requirements for spectrum warfare, assured PNT, and counter PNT to inform national capability priorities.
- Contribute to national architectural studies and technology roadmaps, drawing on expertise from JNSWD, DSTG, AGO, and Defence capability groups.
- Support the identification of civil and commercial PNT capabilities that enhance Defence resilience (e.g. timing infrastructure, emerging technologies, commercial satellite services).
- Ensure that the Defence capability planning (including the Integrated Investment Program priorities) align with the National PNT Strategy.
- Align Defence PNT investments with national resilience priorities.

We know where.

Get in touch

FrontierSI's head office is in Melbourne, Australia. We also have dedicated team members co-located with partners across Australia and New Zealand.

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