INDO-PACIFIC GEOINTELLIGENCE FORUM 2026

Space to Intelligence, Surveillance, and Reconnaissance (ISR)

Enabling Intelligence Superiority in the Indo-Pacific

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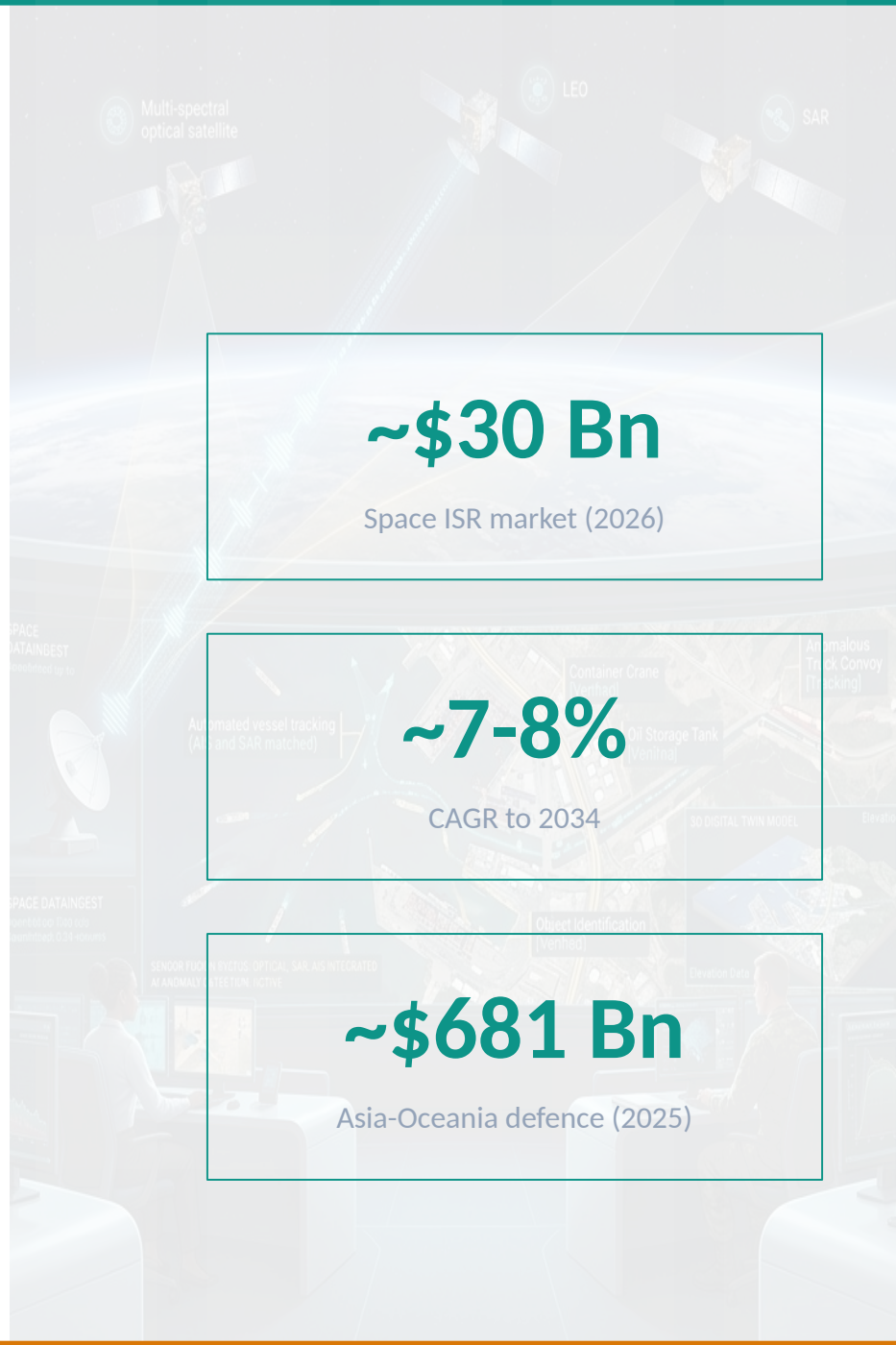


WHY ISR MATTERS: THE STRATEGIC IMPERATIVE

Vast maritime distances

Indian Ocean: 70.5M km². No surface or airborne platform can cover it persistently. Satellites can.

AIS-dark vessel problem

State and non-state actors routinely disable AIS transponders. Radar is the only reliable detection method.

Contested sub-surface

Submarine activity and undersea infrastructure demand multi-modal space fusion, not single-sensor coverage.

Decision speed

Modern operations compress timelines from days to minutes. Space ISR directly enables kill-chain compression.

Indo-Pacific Defence Spending

Asia-Oceania Total

~$681 Bn [+8.1% in 2025 — highest since 2009]

India

~$83 Bn [in 2026]

Japan

~$70 Bn [in 2025]

Indonesia

~$9 Bn [in 2025]

You cannot deter, defend, or respond to what you cannot see

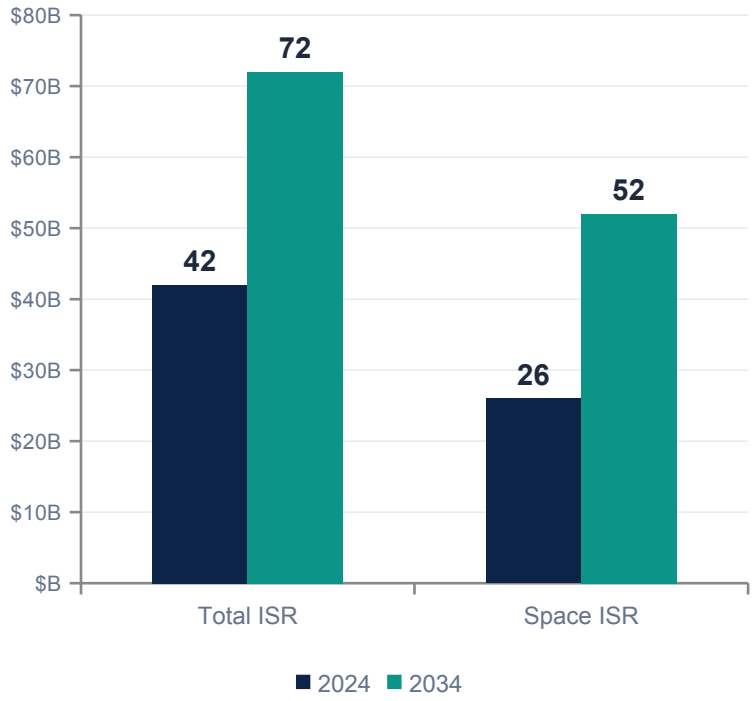
Source: SIPRI Military Expenditure Database, April 2026

SPACE TO INTELLIGENCE, SURVEILLANCE, AND RECONNAISSANCE

Market Outlook: Global, Indo-Pacific, & India

Three lenses on the same opportunity — each telling a different growth story

GLOBAL ISR MARKET

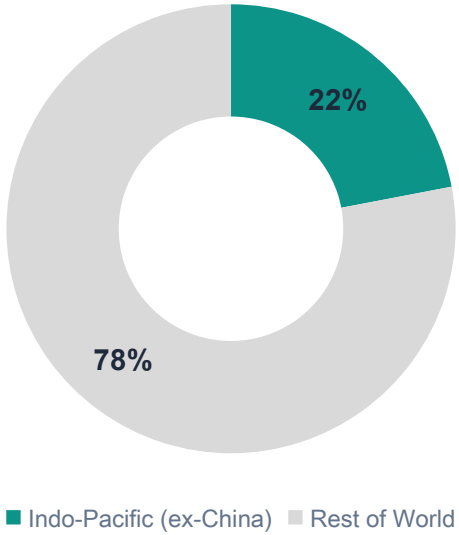


~$30 Bn
Space ISR 2026

~7-8%
CAGR to 2034

~56%
Military and Defence Applications

INDO-PACIFIC DEFENCE SPEND

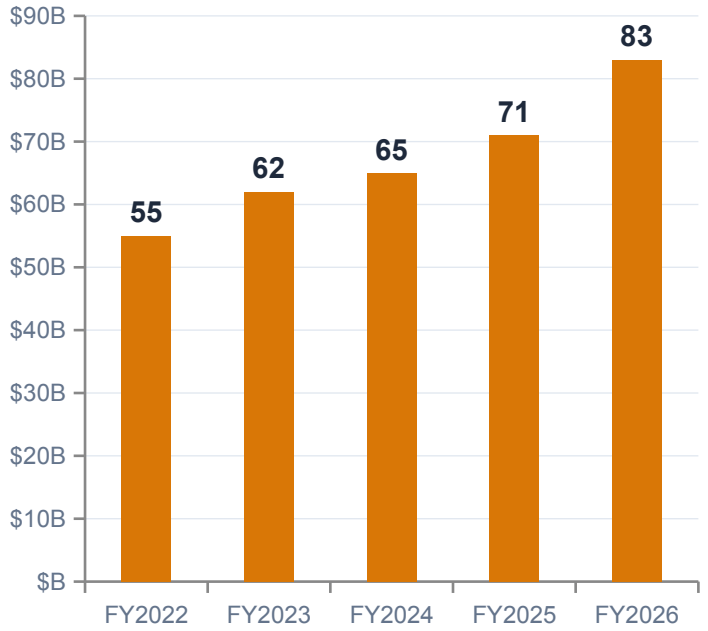


$681 Bn
Asia-Oceania Defence 2025
+8.1% — highest since 2009

22%
of Global Defence Spend
Indo-Pacific (ex-China)

$120 Bn+
Extra Cumulative 2025–30
India + Japan + Australia

INDIA DEFENCE BUDGET



~$83 Bn
Defence budget 2025

~17%
Growth from FY2025

52 sats
SBS Phase III approved

~$3.2 Bn
Space ISR programme

Sources: Growth Market Reports 2024 · SIPRI April 2026 · HANetf projections · Indian Cabinet Committee on Security Oct 2024 · SpaceInsider 2025

GW CONSULTING

STRUCTURAL GROWTH DRIVERS

- Institutional
- Technological
- Strategic

Sovereignty Demand

Nations want capability they own, control, and can share selectively. Sovereign constellation programmes, ground infrastructure, and national data custody are now procurement requirements.

Rising Defence Budgets

Japan's 2022–2027 build-up is statutory. India's budget could exceed $120 Bn by 2030 even at current GDP share. Australia targeting 3%+ of GDP.

Multi-Modal Sensor Fusion

Value no longer lies in raw imagery but in fusing EO, SAR, RF, and IR streams into a single intelligence product. Competitive advantage is in the fusion layer.

AI-Accelerated Exploitation

AI compresses the intelligence cycle from hours to minutes. Automated target recognition and change detection unlock the operational value of data that analysts alone cannot process.

Commercial GEOINT Integration

Commercial constellations now routinely deliver imagery at resolutions that were classified a decade ago. Defence agencies are integrating commercial data into operational architectures.

Strategic Choices for Indo-Pacific ISR Cooperation

The region needs trusted interoperability without forcing every country into identical sovereign architectures.

Sovereign Core

National tasking, classified analytics, secure ground stations, mission data repositories.

Trusted Sharing

Common maritime picture, incident alerts, humanitarian response data, IUU fishing detection.

The Cooperation Sweet Spot

Share what improves regional security;
Protect what preserves national sovereignty.

Commercial Augmentation

Surge capacity, specialized sensors, rapid revisit, open-source intelligence enrichment.

Standards & Governance

Data schemas, confidence scores, access controls, auditability, legal basis for sharing.

Quad IPMDA is a reference model for maritime domain awareness cooperation, with adaptation needed across the wider region.

RECOMMENDATIONS

Actionable Priorities for Indo-Pacific Space ISR — Near, Mid & Long Term

NEAR TERM

0–2 Years

1. Expand radar satellite coverage across the Indian Ocean for all-weather, day-night surveillance
2. Accelerate geospatial data integration into frontline decision chains
3. Deploy AI for real-time intelligence exploitation — automated detection, tracking, and alerting
4. Deepen Indian Ocean maritime awareness through multi-source, real-time data fusion.

MEDIUM TERM

2–5 Years

1. Build Space Situational Awareness — monitor and protect orbital assets through dedicated sensor networks
2. Unify tri-service space command — single architecture for tasking, collection, and exploitation
3. Compress sensor-to-decision cycle from hours to minutes through end-to-end automation
4. Establish multilateral intelligence fusion with key regional partners for shared early warning

LONG TERM

5–10 Years

1. Achieve persistent Indo-Pacific coverage — continuous, sub-hourly intelligence revisit across the region
2. Rapid asset reconstitution — replace any lost satellite within 24 hours
3. Lead regional space norms — shape Indo-Pacific rules for responsible space use
4. Quantum-secure intelligence pipelines — tamper-proof data sharing across allied networks

INDO PACIFIC
GEOINTELLIGENCE FORUM

THANK YOU.

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