
INTERNATIONAL ECONOMIC DEVELOPMENT ACTIVITIES PLAN

CITY OF JOONDALUP
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EXECUTIVE SUMMARY

INTRODUCTION

The City of Joondalup is developing an International Economic Development Activities Plan to identify opportunities to generate economic outcomes for the City that are aligned with industry strengths and growth opportunities. The overarching purpose of the International Economic Development Activities Plan is to provide clear guidance to the City of Joondalup on opportunities to facilitate international relationships that will lead to the establishment of Joondalup as a global city based around the development of mutually beneficial relationships and outcomes.

SITUATION ANALYSIS

The situation analysis explores a range of economic and cultural diversity factors to build an evidence base and understanding about Joondalup's capabilities and drivers that are likely to impact upon the City's ability to be successful in the delivery of an International Economic Development Activities Plan.

The economic analysis included factors like industry contribution to Gross Regional Product, the economic growth of the industry, percentage of overall jobs, the number of businesses and other analysis that looks at the strength of jobs and the potential for jobs growth compared to the national position.

HIGH VALUE SECTORS

Through this analysis it was identified that the following industries in almost all criteria have core strengths to be leveraged in the International Economic Development Activities Plan:

- **Health and Medical (Aged Care)**

The Health and Medical sector has been identified as one of Joondalup's high value sectors, based on capabilities in a wide range of areas including ehealth, cancer care, exercise science, mental health, health and wellness, aged care, nursing and midwifery.

From an international perspective aged care service providers in Australia are considered to be high quality, as a result there is demand from Asian markets in particular to learn from local operators in areas such as facility development, aged care and the training and education of professionals in this industry. For this reason aged care is being highlighted as one of the key opportunities for Joondalup to explore and develop further.

- **Education and Training**

International education and the attraction of international students is already a City of Joondalup strength. On this basis, the opportunities are more around adding value to the experience the international students have while they are in Joondalup and identifying ways to stay connected with the students once their studies are completed. There are a range of initiatives suggested in the Program of Activities to support this.

- **Retail**

The retail sector is identified as one of Joondalup's high value sectors, and there is some major retail infrastructure in the region such as Lakeside Joondalup. In terms of this Plan the major opportunities from a retail perspective relate to how the industry contributes and is part of other opportunities. For example, in relation to tourism, retail is part of the overall tourism package that is contributing to Joondalup as an emerging tourism destination. The retail experience in Joondalup is also part of what will make the area attractive to international visitors and students.

- **Tourism.**

Joondalup as a destination has some picturesque coastal areas and access to natural assets that are in close proximity to the Perth CBD. The challenge for Joondalup as a destination is there is not the critical mass of tourism related infrastructure in place to drive the attraction of international visitors. A priority for the existing

tourism operators is to work together collaboratively to identify and develop packages of tourism related opportunities that will enhance the visitor experience in Joondalup and encourage them to spend more time in the area.

The core strategic assets within Joondalup that will support this include:

- **Proximity to Perth:** immediate access to the Perth market and the infrastructure associated with the capital City presents a range of opportunities for Joondalup. Major road and rail infrastructure also help to ensure Joondalup is easily accessible from the Perth CBD and the international airport.
- **Regional Growth:** over 40% of metropolitan Perth's population can be reached within a 30 minute drive of Joondalup. A further 200,000 people are estimated to be moving into Perth's Northern Growth Corridor over the next 20 years.
- **Innovation assets and capability:** the presence of Edith Cowan University, Edith Cowan College, North Metropolitan TAFE and the WA Police Academy, as well as the Joondalup Health Campus (major hospital for Perth's northern corridor) and the Joondalup Private Hospital demonstrate the strengths of the City in catalytic industries such as education and health and medical. In addition to this there are a range of innovation and knowledge based businesses in Joondalup that assist in raising the global profile of the City.
- **Lifestyle and tourism:** the City has significant tourism assets that contribute to an attractive lifestyle and position Joondalup for investment attraction. Some of the key assets include 17 kilometres of coastline including destinations such as Hillarys Boat Harbour, retail experiences such as Lakeside Joondalup and other nature based experiences such as Yellagonga Regional Park.
- **Geographic location:** Joondalup is located in the same time zone as many of the growing Asian economies. Same time zone as Beijing, Shanghai, Hong Kong and Singapore and only one hour difference with Seoul, Tokyo, Bangkok and Jakarta.
- **Access to land and development flexibility:** there are numerous opportunities for development in the Joondalup area, especially around the master planned CBD. Restrictions to development have largely been removed, meaning that a very wide range of developments can be accommodated in the City centre.

TARGET MARKETS

There are a range of markets Joondalup could pursue, however it is very important to target and build strong relationships. The following countries form those best suited to a strategic international alignment with Joondalup.

Criteria	China	India	Japan	South Korea	South East Asia	UK	Africa	USA
Alignment with Joondalup:								
• Education and Training	✓	✓		✓	✓		✓	
• Health and Medical (Aged Care)	✓				✓	✓		
• Retail	✓							
• Tourism	✓		✓	✓	✓	✓	✓	✓
• ICT (links to innovation)	✓		✓	✓	✓			✓
• Creative Industries (links to innovation)	✓		✓	✓	✓			✓
• Finance and Business Services				✓	✓	✓		
Cultural alignment								
Educational links	✓	✓	✓	✓	✓		✓	
Established relationship/ presence:								
• National	✓	✓	✓	✓	✓	✓	✓	✓
• State	✓	✓	✓	✓	✓	✓	✓	
• Joondalup	✓							
Other:								
• Ease of communication						✓	✓	✓
• Market accessibility	✓	✓	✓	✓	✓		✓	✓
• Low risk				✓	✓	✓		✓
Total	11/15	5/15	7/15	10/15	11/15	8/15	8/15	7/15

Source: AEC

GAPS AND OPPORTUNITIES ASSESSMENT

There are many opportunities in the global economy for Joondalup. Following is a summary of some of the key themes and opportunities to be pursued as part of this program (**bolded** sections highlight the subject of the key themes).

- Joondalup has opportunities in the **high value sectors** of education and training (international education), health and medical (aged care), retail and tourism.
- The most significant opportunities for Joondalup exist in the **target markets** of China, South East Asia (Indonesia, Malaysia and Singapore) and South Korea.
- Joondalup is still an **emerging business destination** with a range of challenges and opportunities that need to be addressed if it is to be successful internationally.
- Joondalup is an attractive **tourism** destination but needs to build product critical mass and reasons such as major events to drive the attraction of international visitors.
- The **retail sector** in Joondalup is an important contributor to the overall package of international economic opportunities, e.g. retail tourism, international student experiences and new developments.
- The opportunities based around **international education** are around adding value to the experience the international students have while they are in Joondalup and identifying ways to stay connected with the students once their studies are completed.
- There is demand from Asian markets in particular to learn from **aged care** operators in areas such as facility development, aged care and the training and education of professionals in this industry.

- Part of the solution to addressing some of Joondalup's perception issues is the attraction and development of a range of **catalytic infrastructure projects**.
- Development of **business cases** relating to targeted opportunities.

INTERNATIONAL ECONOMIC DEVELOPMENT ACTIVITIES PLAN

Vision: A Global City: bold, creative and prosperous

There are five strategic priorities under which the program of activities will be developed, these include:

- Export development
- Investment attraction
- International education
- Profile raising
- Infrastructure development.

The table below includes a suite of activities linked to the strategic priorities that need to be implemented to ensure the success of the International Economic Development Activities Plan.

Program of Activities

Activity	2 Year Target
1. Export Development	
1.1 Engage with local businesses to understand their current and potential export capacity	
<ul style="list-style-type: none"> • Engage with local businesses to discuss export interest, current activity and future opportunities. 	50 businesses
<ul style="list-style-type: none"> • Establish a network of local exporters to provide opportunities for them to share market knowledge and to collaborate where appropriate 	1 network (meet quarterly)
1.2 Coordinate events and activities for local businesses to build market knowledge, capacity and to help facilitate export outcomes	
<ul style="list-style-type: none"> • Invite Austrade and DSD to Joondalup to present/ discuss opportunities in identified target markets. 	2 per year
<ul style="list-style-type: none"> • Coordinate a series of export related workshops designed to build the capabilities of local businesses. 	3 workshops
<ul style="list-style-type: none"> • Prepare market research material for identified target markets and distribute to interested local businesses. 	7 target markets
<ul style="list-style-type: none"> • Coordinate and participate in a trade and investment mission (refer to 2.3 below). These events are about both export and investment opportunities 	Refer to 2.3
2. Investment Attraction	
2.1 Identify targeted opportunities requiring investment	
<ul style="list-style-type: none"> • Identify industry opportunities that have the potential to drive economic opportunities across the city. 	As required
<ul style="list-style-type: none"> • Develop business cases that provide a detailed overview of the project, full costing and potential benefits (ROI). 	As required
2.2 Engage with international intermediaries and contacts to promote the investment opportunities	
<ul style="list-style-type: none"> • As part of meetings with Austrade and DSD present and discuss catalytic development opportunities and refine business cases as required. 	As required
<ul style="list-style-type: none"> • Engage with other trade and investment related intermediaries that can help to facilitate international relationships and trade and investment opportunities, e.g. AustCham, Australia China Business Council. 	15 intermediaries
<ul style="list-style-type: none"> • Identify international intermediary organisations/ industry associations to become a member of, e.g. AustCham 	2 organisations
<ul style="list-style-type: none"> • Participate in international business related events held across the region, State and nationally, to promote investment opportunities. Where possible 	4 events, 2 presentations

Activity	2 Year Target
explore options to present at these events.	
2.3 Facilitate and participate in investment attraction related activities	
<ul style="list-style-type: none"> • Coordinate and participate in a trade and investment mission to identified target markets based around identified priorities 	1 mission
<ul style="list-style-type: none"> • Conduct a more detailed analysis of opportunities in the other priority target markets to identify specific opportunities. 	2 market reviews
<ul style="list-style-type: none"> • From trade and investment mission develop a prospective list of investors and possible international companies looking to relocate/ expand. This list of contacts will need to be followed up regularly 	20 leads
3. International Education	
3.1 Support a range of events and activities to welcome international students to the City	
<ul style="list-style-type: none"> • Liaise with educational institutions to participate in and promote welcome events for visiting international students. 	2 events per year
3.2 Develop a range of packages that can be offered to students as well as visiting delegations	
<ul style="list-style-type: none"> • Work with tourism operators to develop local experience packages to be promoted to visiting international students and to be used for study tours and visiting delegations. 	3 packages developed
<ul style="list-style-type: none"> • Promote the packages through the educational institutions 	As required
<ul style="list-style-type: none"> • Bring the tourism operators together to collaborate and develop packages 	Tourism network
3.3 Leverage international students for other investment opportunities	
<ul style="list-style-type: none"> • Engage with local institutions to develop events and activities for international students that raise the profile of trade and investment opportunities in Joondalup. 	1 event, 3 leads
<ul style="list-style-type: none"> • Identify opportunities to establish an international student alumni. If demand exists then establish the alumni. 	Investigation completed
4. Profile Raising	
4.1 Develop and enhance international economic and cultural relationships	
<ul style="list-style-type: none"> • Continue to enhance the Sister City relationship with the City of Jinan by exploring mutually beneficial trade and investment opportunities 	Liaise quarterly
<ul style="list-style-type: none"> • Promote the relationship with the City of Jinan to local businesses to explore opportunities. 	
<ul style="list-style-type: none"> • Explore opportunities for new formal relationships, such as Economic Cooperation Agreements with cities in identified target markets 	2 opportunities identified
<ul style="list-style-type: none"> • Liaise with the State Government to discuss opportunities for a Sister State relationship with Shandong or leverage the existing Sister State relationship with Zhejiang to develop an economic cooperation agreement with Joondalup 	1 relationship or agreement
<ul style="list-style-type: none"> • In line with 3.2 work with tourism operators to develop local experience packages targeting international visitors. 	Refer to 3.2
4.2 Build relationship with Austrade and Department of State Development contacts	
<ul style="list-style-type: none"> • Meet regularly with key government stakeholders to raise the profile of Joondalup and associated opportunities. 	5 meetings
<ul style="list-style-type: none"> • Organise opportunities to present investment focused business cases to them. 	4 investment business cases
4.3 Develop marketing material	
<ul style="list-style-type: none"> • Update and enhance investment attraction related material. 	1 major item and support items as required
<ul style="list-style-type: none"> • Develop fact sheets to promote the capabilities of high value sectors 	As required
<ul style="list-style-type: none"> • Provide all materials in online format for inclusion on the City's website 	As required

Activity	2 Year Target
4.4 Build transparency and raise awareness within the City	
<ul style="list-style-type: none"> Promote the final IEDAP to the local business community and through appropriate media networks to build awareness of the program and anticipated outcomes. 	Annually
<ul style="list-style-type: none"> Provide quarterly progress updates on the implementation of the plan. 	Quarterly
<ul style="list-style-type: none"> Celebrate successes and promote stories relating to outcomes achieved through the implementation of the plan. 	Minimum 5 stories
5. Infrastructure Development	
5.1 Identify priority projects	
<ul style="list-style-type: none"> Identify priority infrastructure/ development projects that require capital investment 	4 projects
<ul style="list-style-type: none"> Prepare infrastructure business cases for each project 	4 business cases
5.2 Work with landowners/ developers	
<ul style="list-style-type: none"> Regularly liaise with landowners/ developers to identify reasons why projects aren't progressing. 	As required
<ul style="list-style-type: none"> Work with internal and external stakeholders to bring projects to fruition. 	As required

Source: AEC

Performance Measurement

In addition to the targets associated with the actions supporting the above focus areas of the Program of Activities, Joondalup should also track overall outcomes generated as a direct result of implementing the program. The recommended headline performance measures are provided below:

Description	Target
Overall investment leads generated	10 leads
New investment attracted for projects	2 new projects
Number of new jobs created	15 new jobs
Amount of capital investment generated	\$10 million

Source: AEC

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1. INTRODUCTION

1.1 PROJECT BACKGROUND

The City of Joondalup is a deliberately planned commercial and residential hub for the North-West Region of Perth that is fast becoming known as the “CBD of the North”. Its economy is driven largely by service and knowledge based sectors, where employment is strong and economic value is high. The Council endorsed Economic Development Strategy titled “Expanding Horizons” has identified a range of different issues and challenges that face the City in realising its potential and aspiration of becoming “A Global City: bold, creative and prosperous” (Joondalup 2022). “Expanding Horizons” aims to provide targeted responses to key areas within the economy that are consistent with the aspirations for the City, these include:

- Business growth and investment
- Creativity and innovation
- Employment and skills development
- City and regional infrastructure

To support these key areas, three specialist themes have been identified as high priorities for the City and these are integrated throughout the strategy, they include:

- Global City – to position and focus the City’s economic activity in an international context.
- Digital City – to support the application of new technologies and innovation to enhance business growth.
- Destination City – to recognise the value and opportunity of the visitor economy and tourism.

1.2 PURPOSE OF REPORT

Based on the specialist themes within “Expanding Horizons”, the City of Joondalup is developing this International Economic Development Activities Plan (IEDAP). The plan is to include research into international markets to identify opportunities to generate economic development outcomes for the City that are aligned with current industry strengths and growth opportunities. The IEDAP is expected to deliver enhanced international networks, and provide opportunities for local businesses to engage in international trade activities.

The overarching purpose of the IEDAP is to provide clear guidance to the City of Joondalup on opportunities to facilitate international relationships that will lead to the establishment of Joondalup as a global city based around the development of mutually beneficial relationships and outcomes.

1.2.1 Project Process

Understanding Local Capabilities	Identifying International Opportunities	Building the IEDAP
<ul style="list-style-type: none"> • Identify, collect and collate all relevant data to understand local economic capabilities • Analyse opportunities associated with identified high value strategic industries • Develop a list of strategic assets and analyse how they are likely to contribute to international economic opportunities • Analyse current international relations 	<ul style="list-style-type: none"> • Review State and Federal priority markets • Identify markets with links to local capabilities • Analyse opportunities generated by Free Trade Agreements • Develop a matrix that outlines opportunities in each market • Identify gaps and opportunities for the City of Joondalup 	<ul style="list-style-type: none"> • Engage with key stakeholders to validate opportunities identified • Develop the vision and goals • Develop strategic priorities • Develop a two year activities plan including - actions, roles, timing, resource requirements, budget and KPIs • Bring all of the project elements together into the final IEDAP

Source: AEC

2. SITUATION ANALYSIS

2.1 INTRODUCTION

The situation analysis builds an evidence base and strong understanding about the City of Joondalup's current capabilities and drivers that are likely to impact upon the City's ability to be successful in the delivery of an international economic development activities plan. Following is a summary of the key points and opportunities identified, the complete situation analysis including all tables and graphs is included as Appendix A.

2.2 ECONOMIC

2.2.1 Gross Regional Product

Between 2006-07 and 2014-15 the Joondalup economy posted an average annual expansion of 3.5%, to reach \$5.6 billion (AEC). In the latest year, the economy contracted by -2.7% after peaking at \$5.7 billion in 2013-14.

The most prominent sectors in the Joondalup economy, in terms of contribution to Industry Value Add in 2014-15, were:

- Health care and social assistance - \$985 million (21.2% of total Industry Value Add)
- Construction - \$792 million (17.0%)
- Retail trade - \$556 million (11.9%)
- Professional, scientific and technical services - \$273 million (5.9%)
- Financial and insurance services - \$263 million (5.7%).

The top five growth sectors between 2009-10 and 2014-15 were:

- Mining (57.9% growth)
- Rental, hiring and real estate services (40.0%)
- Construction (31.3%)
- Accommodation and food services (27.3%)
- Electricity, gas, water and waste services (23.2%).

The only sector to decrease over this timeframe was professional, scientific and technical services, which contracted by -12.7%.

2.2.2 Business Counts by Industry

In 2015, there were 12,907 businesses in operation in Joondalup. In term of business volumes, the most prominent sectors were:

- Construction (28.8% of total)
- Professional, Scientific and Technical Services (14.8%)
- Financial and Insurance Services (9.1%)
- Rental, Hiring and Real Estate Services (8.5%)
- Retail Trade (5.8%).

2.2.3 Employment by Industry

There were 43,840 persons working in Joondalup in 2011 (by place of work). The industries, which provided the most jobs, were:

- Retail Trade (18.1% of total)
- Health Care and Social Assistance (15.8%)
- Education and Training (15.4%)
- Construction (10.3%)
- Accommodation and Food Services (9.5%).

2.2.4 Unemployment and Labour Force

In the latest quarter, (September 2015) the Joondalup labour force expanded by 0.8% to 101,401. Over the past 5 years, the local labour force has expanded by 9.7%. Over the same time frame, the number of persons unemployed in Joondalup has expanded by 33.1%. As a result, over the past 5 years, the unemployment rate in Joondalup has increased by 0.6% points. In the last quarter, the unemployment rate increased by 0.4% points, to 3.4%.

2.2.5 Economic Summary

Based on the economic analysis the industries that contribute most significantly to the City of Joondalup economy when all datasets are considered include the below, (these industries are listed in order of contribution to GRP):

Table 2.1: Economic Summary

ANZSIC	High Value Sector	GRP	Growth	Jobs	Business Count
Health care and social assistance	Health and Medical	\$985m (21.2%)	18.4%	15.8%	5.6%
Construction	N/A	\$792m (17%)	31.3%	10.3%	28.8%
Retail	Retail	\$556m (11.9%)	15.7%	18.1%	5.8%
Professional and scientific services	Finance and Business Services	\$273m (5.9%)	-12.7%	4.8%	14.8%
Finance and insurance services	Finance and Business Services	\$263m (5.7%)	22.6%	2.2%	9.1%
Education and training	Education	\$222m (4.8%)	3.7%	15.4%	1.5%
Accommodation and food services	Tourism	\$215m (4.6%)	27.3%	9.5%	3.2%
Information media and telecommunications	ICT & Creative Industries	\$94m (2.0%)	9.5%	1.0%	0.7%
Arts and recreation services	Creative Industries	\$65m (1.4%)	2%	1.8%	1.2%

Source: AEC

2.3 CULTURAL DIVERSITY

2.3.1 Place of Birth

Over 60% of Joondalup's population in 2011 were born in Australia. Other key sources of population were:

- United Kingdom, Channel Islands and Isle of Man (19.3% of the population)
- Southern and East Africa (5.2%)
- New Zealand (3.1%)
- Maritime South-East Asia (1.8%).
- Western Europe (1.5%).

2.3.2 Language Spoken at Home

English is the most commonly spoken language in Joondalup, accounting for almost 90% of residents in 2011. Other languages commonly spoken at home included:

- Chinese Languages (1.2% of residents)
- Italian (0.9%)
- Indo-Aryan (0.7%)
- German (0.6%).

2.3.3 Cultural Diversity Summary

The most significant learning from the cultural analysis is that almost a quarter of the City of Joondalup population were born in the United Kingdom (UK) or Southern and East Africa. There is not much insight that can be drawn from the languages spoken at home data as almost 90% of the population speak English and the next highest is Chinese at 1.2%.

However, the City's connection to the UK and South/ East Africa is an opportunity worth exploring further.

2.4 COMPETITIVE ASSESSMENT

2.4.1 Strategic Assets

The purpose of the strategic asset assessment is to identify competitive advantages of the City of Joondalup by highlighting unique and specific assets in the City that can be leveraged for economic development purposes. The following locational, geographical, existing industry characteristics and built assets are the strategic assets that further support growth opportunities:

- **Proximity to Perth:** immediate access to the Perth CBD market and the infrastructure associated with the capital City presents a range of opportunities for Joondalup. Major road and rail infrastructure also help to ensure Joondalup is easily accessible from the Perth CBD and the international airport.
- **Regional Growth:** over 40% of metropolitan Perth's population can be reached within a 30 minute drive of Joondalup. A further 200,000 people are estimated to be moving into Perth's Northern Growth Corridor over the next 20 years.
- **Innovation assets and capability:** the presence of Edith Cowan University, Edith Cowan College, North Metropolitan TAFE and the WA Police Academy, as well as the Joondalup Health Campus (major hospital for Perth's northern corridor) and the Joondalup Private Hospital demonstrate the strengths of the City in catalytic industries such as education and health and medical. In addition to this there are a range of innovation and knowledge based businesses in Joondalup that assist in raising the global profile of the City.
- **Lifestyle and tourism:** the City has significant tourism assets that contribute to an attractive lifestyle and position Joondalup for investment attraction. Some of the key assets include 17 kilometres of coastline including destinations such as Hillarys Boat Harbour, retail experiences such as Lakeside Joondalup and other nature based experiences such as Yellagonga Regional Park.
- **Geographic location:** Joondalup is located in the same time zone as many of the growing Asian economies. Same time zone as Beijing, Shanghai, Hong Kong and Singapore and only one hour difference with Seoul, Tokyo, Bangkok and Jakarta.
- **Access to land and development flexibility:** there are numerous opportunities for development in the Joondalup area, especially around the master planned CBD. Restrictions to development have largely been removed, meaning that a very wide range of developments can be accommodated in the City centre.

2.4.2 Location Quotients

Joondalup has strategic labour specialisations primarily in population-driven sectors. Education and training, retail trade, accommodation and food services and health care and social assistance are all predominantly driven by changes in local population growth. Joondalup has low location quotients in the industries of agriculture, forestry and fishing and mining, reflecting its geographical location within Perth. Joondalup also has a low location quotient in manufacturing.

Joondalup has labour specialisations in every sub-sector (2-digit sector) within the education and training and health care and social assistance sectors. This is supported by the presence of the Edith Cowan University, Edith Cowan College, North Metro TAFE and the Western Australian Police Academy as well as the Joondalup Health Campus and the Joondalup Private Hospital within the local government area (City of Joondalup, 2016).

2.4.3 Cluster Mapping

Industries that are located in the top-right-hand quadrant of the cluster map (refer Appendix A, Figure A.6) are industries that benefit from local labour specialisation (i.e., an LQ above 1.0) and are anticipated to experience positive average annual growth in Western Australia between 2015 and 2025. These sectors should be targeted for economic development activities as they are likely to perform well in the coming years. Industries located in this quadrant for Joondalup are listed below. The sectors in bold are those that are strengths for Joondalup and are also expected to experience solid growth:

- Administrative and Support Services (LQ = 1, Growth Expectation = 6.1%)
- **Construction (LQ = 1.2, Growth Expectation = 3.8%)**
- **Health Care and Social Assistance (LQ = 1.3, Growth Expectation = 2.9%)**
- **Retail Trade (LQ = 1.7, Growth Expectation = 2.4%)**
- **Accommodation and Food Services (LQ = 1.4, Growth Expectation = 1.8%)**
- Personal Services (LQ = 1.1, Growth Expectation = 1.9%)
- **Education and Training (LQ = 1.9, Growth Expectation = 0.7%)**
- Rental, Hiring and Real Estate Services (LQ = 1.3, Growth Expectation = 0.5%).

Industries which are located in the bottom-right-hand quadrant of the cluster map (refer Appendix A, Figure A.6) are industries which do not yet benefit from local labour specialisation (i.e., an LQ below 1.0) but are anticipated to experience positive average annual growth in Western Australia between 2015 and 2025. These sectors should be investigated further, where appropriate, to determine their potential to be targeted for economic development activities as they are may perform well in the coming years if local supply chains and support are available. Industries located in this quadrant for Joondalup are listed below. The sectors in bold are also linked to focus areas for Joondalup:

- **Information Media and Telecommunications (LQ = 0.6, Growth Expectation = 4.5%)**
- Mining (LQ = 0.2, Growth Expectation = 4.6%)
- Electricity, Gas, Water and Waste Services (LQ = 0.2, Growth Expectation = 4.4%)
- Transport, Postal and Warehousing (LQ = 0.4, Growth Expectation = 4.1%)
- **Professional, Scientific and Technical Services (LQ = 0.7, Growth Expectation = 3.2%)**
- Manufacturing (LQ = 0.2, Growth Expectation = 1.6%)
- Wholesale Trade (LQ = 0.3, Growth Expectation = 1.3%)
- **Financial and Insurance Services (LQ = 0.6, Growth Expectation = 0.8%)**
- Public Administration and Safety (LQ = 0.7, Growth Expectation = 0.2%)

- Agriculture, Forestry and Fishing (LQ = 0.0, Growth Expectation = 0%).

Industries which are located in the top-left-hand quadrant of the cluster map (refer Appendix A, Figure A.6) are industries which benefit from local labour specialisation (i.e., an LQ above 1.0) but are anticipated to experience negative average annual growth in Western Australia between 2015 and 2025. Depending on the specific local factors at play for these sectors and indeed the nature of the local businesses themselves, they may require economic development support to guide them through a difficult macro-growth phase. In some instances, if local factors are extremely strong, these sectors could benefit from investment attraction activities. The only industry located in this quadrant for Joondalup is arts and recreation services which recorded an LQ of 1.2 and is anticipated to record an employment decline at an average annual rate of -1.4% in Western Australia between 2015 and 2025.

2.4.4 Import/ Export Analysis

Prominent imports into a region can represent opportunities, where skills and labour can be easily sourced. This could improve local industry supply chains and provide additional job opportunities for locals.

An estimated \$1.5 billion worth of goods and services were sourced from outside of, and imported into, the Joondalup economy in the 2012-13 year. Key imports into Joondalup fill the gap from local service provision, with a high proportion of imports centred on business services, such as wholesale trade, professional, scientific and technical services and manufacturing. Localised provision of business services (particularly office-based services) within the local region could present real opportunities for the local area in the coming years.

Exports from the Joondalup LGA in 2012-13 are estimated to total \$2.6 billion. Aligning with the industry structure of the local economy, key exports of goods and services from Joondalup relate to population-driven sectors, including retail trade, construction services and technical, vocational and tertiary education. These three components form almost 44% of all exports from the City in 2012-13.

2.5 HIGH VALUE SECTORS

The City has previously undertaken research into high value sectors located in Joondalup as part of the development of "Expanding Horizons". These identified high value sectors are to be a starting point for considering international market opportunities. The identified high value sectors in the City of Joondalup include:

- Health and Medical
- Information and Communications Technology
- Education
- Engineering and Technical Education
- Finance and Business Services
- Public Administration
- Creative Industries
- Retail
- Tourism
- Other – ocean resources and marine science, environmental sustainability

Based on the situation analysis there are a number of industries with existing strengths that are projected to continue growing, these include:

- Health and Medical
- Education (including Engineering and Technical Education)
- Retail

- Tourism

Industries where the City of Joondalup does not currently have critical mass or high representation, but which have strong potential for growth include:

- Information and Communications Technology
- Finance and Business Services.

When these sectors are analysed further and compared with the City of Joondalup's major exporters it emphasises the opportunities in the following sectors:

- Education and Training
- Health and Medical
- Retail
- Tourism.

3. TARGET MARKETS

In determining the target markets for the IEDAP key factors that were taken into consideration and how they relate to international markets included the:

- Current economic strengths and drivers of Joondalup
- Existing cultural diversity of the Joondalup community
- Existing Sister City relationships
- Educational links to international student markets
- Countries where Australia and Western Australia have strong economic links
- Countries where Australia and Western Australia have strong cultural and political links

Provided in the sections below is a summary of key information relating to the above factors and an assessment of how Joondalup compares. An analysis of Joondalup's economic strengths and cultural diversity is provided in the previous section and is not revisited below.

3.1 SISTER CITY RELATIONSHIPS

The City of Joondalup currently has one Sister City relationship, with the City of Jinan, in the Shandong Province, China. The two Cities formalised their relationship in September 2004.

The City of Jinan is home to over five million people. This City is significant both culturally and historically, as it is recognised as the birthplace of Chinese civilisation. Jinan is famous for its springs and lakes and is known throughout China as the "City of Springs".

Major industries and economic activities in the City of Jinan include:

- Mining (limestone, iron ore and coal)
- Manufacturing (equipment, machinery, steel and automotive)
- Emerging focus on technology based industries such as software, animation and electronics
- Food processing and pharmaceuticals
- Education (40 universities and colleges).

Major economic infrastructure in the City of Jinan includes:

- Rail – Beijing-Shanghai Railway, Jinan-Qingdao Railway and Jinan-Handan Railway
- Air – Jinan Yaoqiang International Airport.

A delegation from Joondalup visited Jinan as part of a trade mission to China in 2015. During this mission the ten-year anniversary of the Sister City relationship was celebrated. This mission also included a visit to Shanghai to meet with various intermediaries and government representatives to learn more about the Chinese-Australia Free Trade Agreement and opportunities for Joondalup. One of the key focuses of this mission was to promote investment opportunities linked to the strengths of the Joondalup economy.

Two schools within Joondalup also have relationships with schools in the City of Jinan, including:

- Woodvale Secondary College has a 'Sister School Relationship' with Jinan No. 9 School
- St Marks Anglican School has a 'Friendly Relationship' with Jinan No. 11 School

The City of Jinan and the Joondalup have a well-established Sister City relationship and recently celebrated the ten-year anniversary. There are some distinct similarities between the two cities from an economic perspective, especially in the priority areas of education and technology. To identify other specific opportunities at a business-to-business or investment level it is important to proactively pursue opportunities through regular communication to identify specific opportunities for the two cities to connect, and generate mutually beneficial outcomes.

3.2 WESTERN AUSTRALIAN TARGET MARKETS

3.2.1 Western Australian Trading Partners

Western Australia's top 20 trading partners (identified in terms of total sum of exports and imports over the past 10 years) are listed in the table below. Western Australia, like Australia, has particularly strong trade ties with China, Japan. Western Australia also has a strong trade relationship with South Korea and Singapore.

Table 3.1. Top 20 Western Australian Trading Partners, By Total Value of Trade

Country	Total Trade in Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$428
Japan	\$206
Korea, Republic of	\$95
Singapore	\$65
United Kingdom	\$53
India	\$47
United States of America	\$46
Thailand	\$43
Hong Kong (SAR of China)	\$33
United Arab Emirates	\$31
Indonesia	\$31
Malaysia	\$29
Taiwan	\$22
Papua New Guinea	\$17
Germany	\$17
New Zealand	\$13
South Africa	\$9
Viet Nam	\$8
Italy	\$8
Netherlands	\$7

Source: ABS (2016a)

Western Australia's major export partners, identified by total value of exports (*FOB Value – where the supplier covers the cost of shipping*) in the last 10 years, are listed below. The most prominent export destinations for Western Australia's exports are China, Japan, Korea and India.

Table 3.2. Top 20 Western Australian Export Partners, By Total Value of Exports (FOB Value)

Country	Total Exports of Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$395
Japan	\$180
Korea, Republic of	\$79
India	\$44
United Kingdom	\$38
Singapore	\$33
Hong Kong (SAR of China)	\$32
Thailand	\$22
Taiwan	\$18
United States of America	\$16
Indonesia	\$14
Malaysia	\$13
United Arab Emirates	\$12
South Africa	\$7
Germany	\$7
Viet Nam	\$6
Netherlands	\$6
New Zealand	\$5
Philippines	\$4
Belgium	\$4

Source: ABS (2016a)

Western Australia's major import partners, identified by total value of imports (Custom Value) in the last 10 years, are listed below. The most prominent import origins for Western Australia are China, Singapore, United States and Japan.

Table 3.3. Top 20 Western Australian Import Partners, By Total Value of Imports (Customs Value)

Country	Total Imports of Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$33
Singapore	\$32
United States of America	\$31
Japan	\$26
Thailand	\$21
United Arab Emirates	\$19
Indonesia	\$17
Korea, Republic of	\$17
Malaysia	\$16
United Kingdom	\$14
Papua New Guinea	\$13
Germany	\$10
New Zealand	\$8
Italy	\$6
Canada	\$4
Taiwan	\$4
France	\$3
Sweden	\$3
India	\$2
Viet Nam	\$2

Source: ABS (2016a)

3.2.2 Department of State Development

The State government department charged with the responsibility of facilitating trade and investment opportunities on an international scale is the Department of State Development (DSD). DSD works to attract investment to Western Australia (WA), assist the development of export markets, and enable the development of strategic industrial land and infrastructure.

To facilitate international trade opportunities the WA government operates trade and investment offices in various locations around the world. The department and its overseas offices provide the following services:

- Information – including economic trends, statistics and market analysis, market demand, market competitions, import compliance, rules and regulations
- Contacts and introductions – including advice on overseas programs, associations, government, regulators and supply chain
- Marketing advice – including business culture, as relevant to different countries and regions.

WA's trade and investment offices are located in the following locations:

- China – offices in Shanghai and Hangzhou look after China, Taiwan and Hong Kong
- India – office in Mumbai looks after South Asia, including Sri Lanka and Pakistan
- Indonesia – office in Jakarta
- Japan – offices in Tokyo and Kobe
- South Korea – office in Seoul
- Kenya – office in Nairobi looks after opportunities for Eastern and Southern Africa

- Singapore – office looks after the island republic and the wider region
- United Arab Emirates – office in Dubai looks after the Middle East and North Africa
- United Kingdom – office in London looks after Europe, Russia and the Commonwealth of Independent States.

3.3 AUSTRALIAN GOVERNMENT TARGET MARKETS

3.3.1 Australian Trading Partners

Australia's top 20 trading partners (identified in terms of total sum of exports and imports over the past 10 years) are listed in the table below. Australia has particularly strong trade ties with China, Japan and the USA. Australia's trade relationship with China has been considered one of the reasons Australia avoided the severity of the Global Financial Crisis in the late 2000s.

Table 3.4. Top 20 Australian Trading Partners, By Total Value of Trade

Country	Total Trade in Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$1,041
Japan	\$609
United States of America	\$359
Korea, Republic of	\$270
Singapore	\$178
Thailand	\$154
New Zealand	\$153
India	\$143
United Kingdom	\$136
Malaysia	\$132
Germany	\$129
Taiwan	\$113
Indonesia	\$100
Italy	\$64
Viet Nam	\$61
France	\$54
United Arab Emirates	\$53
Papua New Guinea	\$51
Netherlands	\$43
Hong Kong (SAR of China)	\$42

Source: ABS (2016a)

Australia's major export partners, identified by total value of exports (FOB Value) in the last 10 years, are listed below. The most prominent export destinations for Australia's exports are China, Japan and Korea.

Table 3.5. Top 20 Australian Export Partners, By Total Value of Exports (FOB Value)

Country	Total Exports of Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$614
Japan	\$426
Korea, Republic of	\$181
India	\$118
United States of America	\$105
New Zealand	\$82
Taiwan	\$73
United Kingdom	\$67
Singapore	\$59
Thailand	\$49
Indonesia	\$46
Malaysia	\$43
Hong Kong (SAR of China)	\$29
United Arab Emirates	\$27
Netherlands	\$26
Viet Nam	\$21
Papua New Guinea	\$20
Saudi Arabia	\$19
Germany	\$18
South Africa	\$17

Source: ABS (2016a)

Australia's major import partners, identified by total value of imports (Custom Value) in the last 10 years, are listed below. The most prominent import origins for Australia are China, USA and Japan.

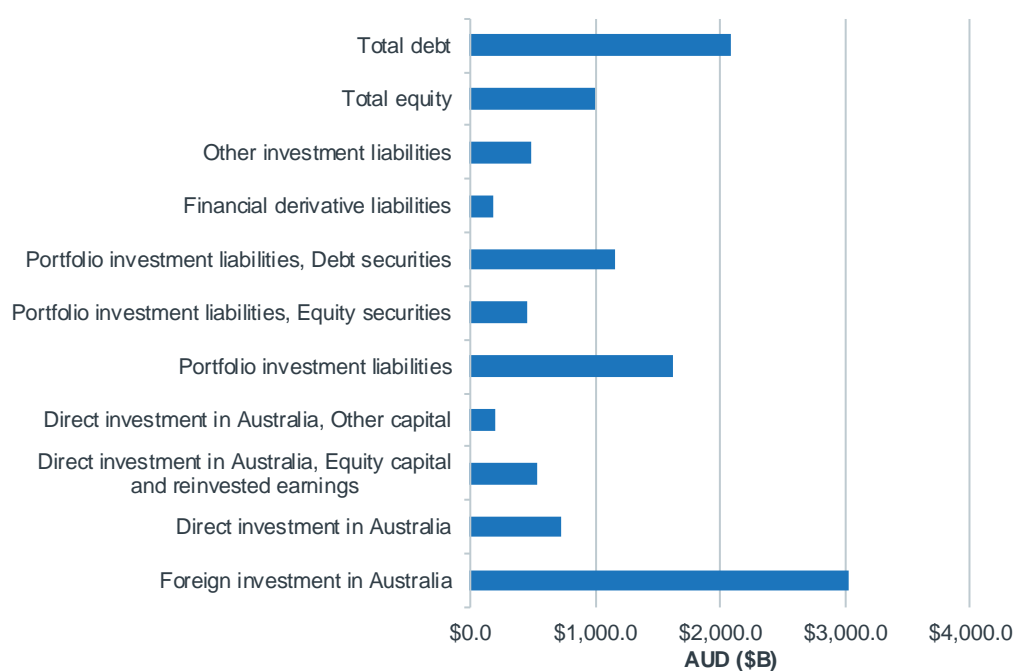
Table 3.6. Top 20 Australian Import Partners, By Total Value of Imports (Customs Value)

Country	Total Imports of Goods and Services (\$bn)
China (excluding SARs and Taiwan)	\$427
United States of America	\$254
Japan	\$182
Singapore	\$119
Germany	\$110
Thailand	\$105
Malaysia	\$89
Korea, Republic of	\$89
New Zealand	\$71
United Kingdom	\$70
Indonesia	\$54
Italy	\$53
France	\$42
Taiwan	\$40
Viet Nam	\$40
Papua New Guinea	\$31
United Arab Emirates	\$27
Switzerland	\$26
India	\$25
Sweden	\$22

Source: ABS (2016a)

The level of foreign investment in Australia exceeded \$3,000 billion in the year ended December 2015 (ABS, 2016b). Portfolio investment was the primary source of foreign investment in Australia, accounting for 53.7% of total investment (driven by debt portfolio investments). Financial derivatives accounted for just 6% of all foreign investment in Australia.

Figure 3.1. Foreign Investment in Australia, by Investment Type (\$bn), 2015



Source: ABS (2016b), AEC

The stand out industry in Australia that receives the most foreign investment is the mining and quarrying sector at \$295,028 million, with the next best being manufacturing (\$85,929m) and real estate activities (\$64,027m).

The top countries with businesses/ individuals investing in Australia in 2015 were the USA, UK, Belgium and Japan. Together, these countries formed 59% of total investment in Australia.

Table 3.7. Top 20 Foreign Investor Countries in Australia, 2015

Country	Value of Investment (\$bn)
United States of America	\$860.3
United Kingdom	\$499.9
Belgium	\$238.5
Japan	\$199.6
Singapore	\$98.6
Hong Kong (SAR of China)	\$85.4
China (excludes SARs and Taiwan)	\$74.9
Netherlands	\$63.0
Luxembourg	\$58.3
Switzerland	\$50.2
Germany	\$41.2
New Zealand	\$39.7
Canada	\$38.8
Bermuda	\$25.9
Korea, Republic of (South)	\$23.3
Virgin Islands, British	\$22.9
France	\$22.1
Malaysia	\$20.5
Ireland	\$18.4
EU Unspecified	\$18.0

Source: ABS (2016b)

3.3.2 Austrade

The Australian Trade Commission, or Austrade, is the Australian Government's trade, investment and education promotion agency. It is a statutory agency within the Foreign Affairs and Trade portfolio, with offices in overseas embassies and consulates, and representative arrangements in some other locations.

Through a global network of offices, Austrade aims to assist Australian companies to connect with buyers in offshore markets, attract foreign direct investment into Australia, and promote Australia's education sector internationally.

In Australia, Austrade's services and programs are delivered through a national network of offices and TradeStart locations in metropolitan and regional areas, operating in partnership with Australian state and territory governments, industry associations and regional development bodies. Austrade provides advice to exporters on prospective markets and opportunities; on-the-ground support in target countries; trade exhibitions; and assistance in finding potential investors. No charge is made for general information, though fees may be required for specific tailored advice.

Austrade provides information and advice to assist Australian companies in exporting goods and services to markets all over the world. For Australian exporters and education providers, Austrade has a comprehensive mix of information and customised services to assist doing business within overseas markets and to understand foreign regulations and business practices.

Austrade is responsible for the promotion, attraction and facilitation of productive foreign direct investment (FDI) into Australia, and is the first point of contact for all investment enquiries nationally. Services to international companies are free, comprehensive and confidential. Working in partnership with Australian state and territory governments, Austrade provides international investors with information needed to establish or expand a business in Australia. Austrade also assists international buyers to source goods and services from Australia or to identify strategic Australian business partners.

3.4 TARGET MARKET ASSESSMENT

A suitability matrix has been developed that ranks the target markets. The criteria used to assess each target market and a short definition of the criteria is provided below:

- Alignment with Joondalup economic strengths – an analysis was done on the market to identify whether the region has demand or strengths in the high value sector for Joondalup
- Cultural alignment – this is based on cultural diversity figures gathered and analysed for Joondalup
- Educational links – this is based on whether the market is either a current or future target for local institutions
- Established relationship/ presence – this is based on whether Austrade (national) or DSD (State) have a presence or focus in these markets. In relation to local, it is based on whether Joondalup has an existing relationship in that market, e.g. Sister City relationship
- The criteria listed under ‘other’ are additional factors that need to be taken into consideration when investigating options in these target markets, and it includes:
 - Ease of communication – whether there are language barriers and how easy it is to overcome these
 - Market accessibility – relates to geographic accessibility and how easy it is to do business in these markets
 - Risk – relates to political volatility and whether doing business in that market is considered risky or not

Ultimately, this suitability matrix is to be used as a guide, as doing business internationally presents a range of challenges no matter how compatible the region is. Likewise, a region that is deemed to be less compatible could also present significant opportunities, the only way to identify and progress these opportunities is by doing the research, building the relationships, presenting the business case and proactively pursuing the opportunity.

A complete summary of each target market is provided at Appendix B.

Table 3.5: Target Markets Suitability Matrix

Criteria	China	India	Japan	South Korea	South East Asia	UK	Africa	USA
Alignment with Joondalup:								
• Education and Training	✓	✓		✓	✓		✓	
• Health and Medical (Aged Care)	✓				✓	✓		
• Retail	✓							
• Tourism	✓		✓	✓	✓	✓	✓	✓
• ICT (links to innovation)	✓		✓	✓	✓			✓
• Creative Industries (links to innovation)	✓		✓	✓	✓			✓
• Finance and Business Services				✓	✓	✓		
Cultural alignment						✓	✓	
Educational links	✓	✓	✓	✓	✓		✓	
Established relationship/ presence:								
• National	✓	✓	✓	✓	✓	✓	✓	✓
• State	✓	✓	✓	✓	✓	✓	✓	
• Joondalup	✓							
Other:								
• Ease of communication						✓	✓	✓
• Market accessibility	✓	✓	✓	✓	✓		✓	✓
• Low risk				✓	✓	✓		✓
Total	11/15	5/15	7/15	10/15	11/15	8/15	8/15	7/15

Source: AEC

4. GAPS & OPPORTUNITIES ASSESSMENT

The purpose of this section is to provide an overview of the opportunities in the global economy for Joondalup based on the learnings from the preceding stages undertaken to prepare the IEDAP, which include:

- A detailed analysis of the regional economy
- An analysis of various target markets in comparison to a range of criteria and how they relate to Joondalup
- Detailed consultation with a range of internal and external stakeholders.

Based on this, provided below is a summary of the opportunities to be pursued as part of this program. These opportunities will form the basis for the development of the Program of Activities (outlined in section 5.3).

4.1 HIGH VALUE SECTORS FOCUS

The City of Joondalup has identified a number of industries that are to be the focus of future economic development activities. When each of the high value sectors were considered against a range of criteria such as existing strengths, import and export markets, future growth sectors, etc. the industries identified that present the most significant opportunities include:

- Education and Training – represented in the International Economic Development Activities Plan as the strategic priority International Education, on the basis that not all elements of this high value sector are relevant to international markets.
- Health and Medical – in this Plan the priority relates to opportunities in the aged care sector.
- Retail – in this Plan this sector is not considered on its own, but rather how it contributes to overall opportunities, which are discussed in more detail below.
- Tourism.

Prioritising these sectors as the focus of future economic development activities provides some direction, but it is important to highlight this will not automatically translate to outcomes, and it should not mean that opportunities that arise in other sectors should be ignored. When it comes to building the capacity and capability of a business for export purposes, or whether it is about attracting investment for a specific project it will come down to the specific opportunity, and these could exist across any number of industries. The key point is to use these high value sectors as a guide, but continue to explore and pursue opportunities that are based on the best economic opportunities for the City, not just the industry they are linked to.

4.2 TARGET MARKETS

Similar to the high value sectors, a range of target markets have been identified based on their assessment against criteria as detailed in Appendix B. This assessment suggests the best opportunities exist within the markets of:

- China
- South East Asia (Indonesia, Malaysia and Singapore)
- South Korea.

These markets should be focused on as the initial priority, but it is important to ensure that it is not at the expense of opportunities that arise in other markets.

The key point in relation to both the high value sectors and target markets is to keep an open mind when it comes to exploring international opportunities and to not expect all the success and outcomes to come from the priorities that have been identified.

4.3 EMERGING DESTINATION

Joondalup has certain critical soft and hard infrastructure in place that provides the foundation for a strong international economic development program, including:

- The Joondalup Health Campus
- High quality educational institutions and research strengths, including – Edith Cowan University, Edith Cowan College, North Metropolitan TAFE, WA Police Academy and a number of internationally capable secondary schools
- Transport infrastructure, while not perfect, the City of Joondalup is easily accessible by road and rail to the Perth CBD and the (international) Perth Airport. In addition to this Joondalup is also easily accessible to identified target markets, being a closer time zone than the east coast.

While Joondalup has the foundations in place to support international economic development activities, it is still an emerging business destination in several ways. A summary of the challenges that need to be addressed include:

- The perception that Western Australia is just a mining state
- The perception that Joondalup is just a retail shopping destination
- There is a lack of visitor and lifestyle related tourism attractions/ infrastructure that will attract longer term visitors
- There is also a lack of critical mass of creative/ innovative entrepreneurs that will assist in facilitating new economic opportunities

The implementation of the Program of Activities will assist in addressing some of the perception issues, but ultimately the need to address the lifestyle related infrastructure needs to be addressed if Joondalup is going to establish itself as an international business destination. Catalytic developments planned for the City will help to address the current gaps, therefore part of the role of the City and other stakeholders in raising the profile of the City is to promote and effectively communicate the fact that these developments are happening or are planned.

4.4 TOURISM

Joondalup as a destination has some picturesque coastal areas and access to natural assets that are in close proximity to the Perth CBD. The challenge for Joondalup as a destination is there is not the critical mass of tourism related infrastructure in place to drive the attraction of international visitors. Based on industry feedback the majority of visitors to the area are visiting friends and relatives and are day trippers from Perth. One of the opportunities that should be explored further is the development of an events program (e.g. major events), that are connected to the strengths of the City and help to raise the profile and generate exposure for Joondalup in a way that will attract new visitors while also generating flow on benefits for the broader economy.

A priority for the existing tourism operators is to work together collaboratively to identify and develop packages of tourism related opportunities that will enhance the visitor experience in Joondalup and encourage them to spend more time in the area. In addition to this, these packages will also be attractive to visiting delegations and international students who are looking for a more complete experience when they study in an area, beyond just the educational institution.

4.5 RETAIL

The retail sector is identified as one of Joondalup's high value sectors, and there is some major retail infrastructure in the region such as Lakeside Joondalup. In terms of this Plan the major opportunities from a retail perspective relate to how the industry contributes and is part of other opportunities. For example, in relation to tourism, retail is part of the overall tourism package that is contributing to Joondalup as an emerging tourism destination. The retail experience in Joondalup is also part of what will make the area attractive to international visitors and students. Retail is also an important part of the development mix that is being considered for inclusion in new catalytic developments that are discussed in more detail below, e.g. Boas Place.

Therefore, in relation to international opportunities retail isn't being highlighted as a major target, but rather as an important contributor to what will help drive existing and emerging economic opportunities.

4.6 EDUCATION

International education and the attraction of international students is already a City of Joondalup strength. On this basis, the opportunities are more around adding value to the experience the international students have while they are in Joondalup and identifying ways to stay connected with the students once their studies are completed. There are a range of initiatives suggested in the Program of Activities to support this. In addition to this, institutions such as Edith Cowan University, the College and certain secondary schools already have very strong relationships in a number of international markets, and the opportunity exists to work with these institutions to add value, support and enhance these relationships. There is no real need for the City to be involved in the direct attraction of international students, because the institutions in the City are already well advanced in this space, but it is critical that the City and other stakeholders work with them to enhance the experience.

4.7 HEALTH AND MEDICAL (AGED CARE)

The Health and Medical sector has been identified as one of Joondalup's high value sectors, based on capabilities in a wide range of areas including ehealth, cancer care, exercise science, mental health, health and wellness, aged care, nursing and midwifery.

From an international perspective aged care service providers in Australia are considered to be high quality, as a result there is demand from Asian markets in particular to learn from local operators in areas such as facility development, aged care and the training and education of professionals in this industry. For this reason aged care is being highlighted as one of the key opportunities for Joondalup to explore and develop further.

In addition to this, there is a growing demand in Australia for the provision of a more efficient delivery of services throughout the aged care sector targeting friendly higher density living. There is opportunity for investment in this space to support local providers.

With an aging population, there is also the opportunity for regions such as Joondalup to address infrastructure issues and make the city more accessible for elderly people. This has the potential to also generate flow on tourism related opportunities at both an international and national level.

4.8 CATALYTIC DEVELOPMENT

Part of the solution to addressing some of the perception issues is the attraction and development of a range of catalytic infrastructure projects. These particular developments are relevant at the time of preparing this plan, and have the potential to help diversify and shape the economic future of Joondalup. In addition to this, where these particular developments require investment to bring them to fruition then business cases that outline the specific requirements and potential return on investment need to be developed.

Some of the major development projects planned for Joondalup include:

- Ocean Reef Marina
- Joondalup Performing Arts and Cultural Facility
- Boas Place – student accommodation, short-term accommodation (hotel), commercial, retail, health and medical, aged care, etc
- Art House development.

4.9 BUSINESS CASES & TARGETED OPPORTUNITIES

One of the keys to delivering successful international economic development outcomes is building sustainable relationships. The key to translating these relationships from a connection into economic outcomes is the identification of specific opportunities. It is important when targeting international markets to have a clear understanding about what it is you are trying to achieve, and in turn understanding what you are not there to do.

If the focus is on attracting investment to bring a specific catalytic development or project to fruition then a targeted business case needs to be developed that outlines what you are trying to achieve, what the overall cost will be, what the risks and opportunities will be and a summary of the potential return on investment.

The alternative to this is a range of visionary master plan type strategic documents, which will promote a good image of the city, but without the specific detail the investor will be left wondering exactly what the opportunity is and how they go about investing.

5. INTERNATIONAL ECONOMIC DEVELOPMENT ACTIVITIES PLAN

5.1 VISION

The City of Joondalup has two existing high level strategic documents that provide insight into the vision and objectives the city has in relation to economic development, including the 'Joondalup 2022, Strategic Community Plan 2012-22' and the Economic Development Strategy titled 'Expanding Horizons'.

Rather than create a new vision that duplicates or confuses the focus the vision from the Strategic Community Plan has been adopted as the preferred vision for the IEDAP.

"A Global City: bold, creative and prosperous" (Joondalup 2022, Strategic Community Plan 2012-2022).

A Global City: bold, creative and prosperous

5.2 STRATEGIC PRIORITIES

The IEDAP is designed to provide the City of Joondalup with clear direction regarding priorities to be implemented that will assist in achieving the vision for the City.

There are five strategic priorities under which the program of activities will be developed. The purpose of this section is to outline the objectives and rationale behind each strategic priority, and from this the program of activities will be developed.

The five strategic priorities include:

- Export development
- Investment attraction
- International education
- Profile raising
- Infrastructure development

5.2.1 Export Development

Objective: To assist local businesses to build their knowledge, capability and capacity to grow their business through exporting products and services to identified target markets.

Rationale: Doing business in the global economy is not a simple process, especially for those businesses that have only operated domestically. It is therefore important businesses build an understanding and knowledge base around what is required to operate in global markets, and determine what they need to do to build their own capacity and capabilities to operate internationally.

If businesses are successful at achieving growth through exports, and in turn build the capacity of their business then they have the potential to expand and create new jobs.

Key Activities:

In order to facilitate growth in export development opportunities the following key activities will be required:

1. Engage with local businesses to understand their current and potential export capacity

The first key activity is about engaging with local businesses to understand their desire and in turn capability and capacity to export. This type of engagement can be built around other planned economic development related activities and engagement programs.

2. Coordinate events for local businesses designed to build market knowledge, capacity and to help facilitate export outcomes
3. Coordinate events and activities that connect local businesses to intermediaries involved in export development (e.g. DSD, Austrade and other non-government related contacts)

The other key activities are about providing those local businesses that have a desire to export with opportunities to build their capacity and knowledge around what is involved in exporting. These could come in the form of workshops or mentoring type programs. There are also a range of government departments and other local business mentors that provide a range of workshops and capability building services that will assist with this. There is no need for Joondalup to duplicate what is already being provided, but rather promote and connect these opportunities to local businesses and where not held locally work with the providers to attract them to the City to deliver the information.

Anticipated Outcomes:

- Increased contact and understanding of the export potential of local businesses
- Local businesses have an increased awareness and understanding of international markets
- Increased exports from Joondalup
- Stronger international relationships.

5.2.2 Investment Attraction

Objective: To attract investment to Joondalup that will help to facilitate expansion of the local economy.

Rationale: Attraction of investment will assist in bringing to fruition identified industry development/ expansion plans and other initiatives that have the potential to generate economic outcomes for Joondalup.

Key Activities:

In order to facilitate investment attraction opportunities key activities will include:

1. Identify targeted opportunities requiring investment across the high value sectors (e.g. investment in new technology, capital requirements, etc.)
2. Prepare business cases that clearly outline what is required to deliver the opportunity, the cost, risks and opportunities for return on investment

The first key activity is about identifying those industry expansion related projects that require investment to bring them to fruition. International investors want to know what specific projects are available for investment and what is required to get involved, hence the need to prepare business cases that outline project details and investment opportunities/ needs. When participating in international activities, as recommended under this strategic priority, it is critical to have these business cases prepared and ready for discussion. Relationship building is an important part of the international economic development process, but equally important is the need to have specific investment opportunities ready to go.

3. Engage with international intermediaries and contacts to promote the investment opportunities

Engaging with international contacts is about ensuring partners such as the Department of State Development, Austrade and other business intermediaries are familiar with Joondalup's priorities and are able to perform their role in promoting these opportunities to potential investors. Regular engagement with these intermediaries will also help to raise the profile of Joondalup and build the relationships required to establish a presence in these markets.

Another important element to engaging with international contacts is the opportunity to leverage off relationships that already exist. A number of the key business stakeholders across Joondalup in the high value sectors have existing relationships in various markets. It is important to work with these stakeholders to leverage these relationships where possible to identify additional economic opportunities for the City.

- Facilitate and participate in investment attraction related activities.

The final key activity is to conduct and participate in targeted international trade and investment missions. The focus of these missions should be based around facilitating opportunities for businesses that are looking to attract investment or develop new trade related relationships. Various government and industry stakeholders organise these missions throughout the year and, where possible, Joondalup should explore the opportunity to participate in those missions linked to their own identified target industries and markets. Alternatively, where practical it is also valuable for Joondalup to organise its own trade and investment missions. However, these missions are time consuming and resource intensive and Joondalup should only facilitate their own missions where the resources are available to ensure sufficient time can be allocated to not just organising the mission, but also to following up opportunities and leads generated.

Anticipated Outcomes:

- Industry expansion and development
- Build the profile of the City internationally
- Stronger international relationships.

5.2.3 International Education

Objective: Enhance the experience of international students when visiting Joondalup and explore opportunities to leverage off their time spent in the City.

Rationale: The educational institutions in Joondalup with a focus on attracting international students already have strong relationships in a variety of markets, and as a result do not need the assistance of the City in the attraction of students. However, the opportunity exists for the City to work in partnership with the schools to facilitate a range of events and activities designed to enhance the experience the students have in Joondalup. If the students have a well-rounded and complete experience in the City they are likely to take away positive memories and act as future advocates/ champions for the City, which could lead to future economic opportunities.

Key Activities:

In order to enhance the experience of international students the following key activities will be pursued:

1. Attend a range of events and activities arranged by relevant institutions to assist in welcoming international students to the City.

The first key activity is about assisting to make visiting international students feel welcome in the City. This type of event would be developed and delivered by the relevant institutions and would involve the Mayor and/ or other senior City representatives providing an official welcome to the students. This type of event would also present the opportunity to promote a range of other information and activities recommended for the international students to participate in that will enhance their experience.

2. Develop a range of packages that can be offered to students as well as visiting delegations to experience a variety of activities

There are a range of different activities that are available to people visiting Joondalup that if packaged up and prepared as an itinerary could be actively promoted to visiting international students. In addition to this, a number of the educational institutions host a range of study tours and visiting delegations. There is the opportunity to develop a package of tourism related options to use as a way to show the visiting delegations what Joondalup has to offer.

3. Leverage international students for other investment opportunities.

The final key activity is about learning more about the visiting international students, their interests and the interests of their families to determine whether there is any opportunity to promote trade and investment opportunities to them. Options such as alumni programs or a 'friends' of Joondalup network are about identifying ways to stay in contact with the visitors and their families once their studies have finished, as a way to promote trade and investment opportunities to them.

Anticipated Outcomes:

- Increased international students
- Positive experiences leading to return business/ investment
- Access to new sources of trade and investment
- Stronger international relationships

5.2.4 Profile Raising

Objective: Raise the profile of Joondalup as an international business destination by promoting the City's capabilities and success stories.

Rationale: The IEDAP includes a range of opportunities that will contribute to raising the profile of Joondalup as an international business destination. It is important key stakeholders at a local, national and international level are aware of the City's capabilities and success stories to change perceptions and ultimately facilitate economic opportunities.

Key Activities:

In order to raise the profile of Joondalup as an international business destination the following key activities will be pursued:

1. Continue to enhance the economic and cultural relationship with the City of Jinan and explore opportunities for formal economic cooperation relationships with other cities

Joondalup currently has one Sister City relationship with the City of Jinan, which has been quite productive. It is important to continue to develop this relationship and explore mutually beneficial opportunities for businesses across both cities. In addition to this Joondalup should explore opportunities for relationship with other cities in the identified target markets, but it is not essential that these be Sister City relationships. An effective alternative is Economic Cooperation Agreements, which are entirely focused on building economic relationships and facilitating trade and investment opportunities between the cities.

2. Build relationships with key stakeholders in Austrade and Department of State Development

The second key activity is about building relationships with key government agencies including Austrade and DSD. These agencies have offices in WA and in key markets all over the world, and they are an extremely valuable resource in relation to sharing market knowledge, promoting trade and investment opportunities. The key to gaining the most from these relationships is maintaining regular contact, and ensuring these agencies have the latest information about specific trade or investment opportunities in Joondalup.

3. Develop and regularly update targeted marketing material

The third key activity is about ensuring Joondalup has up to date marketing material that communicates the key messages and information that international target markets want to know about. At the time of preparing this plan the City has a variety of quality marketing material that promotes its capabilities. There is a need to prepare marketing material that promotes the specific investment related opportunities the City will be promoting.

4. Build transparency and raise awareness of the International Economic Development Activities Plan.

The final key activity is about promoting this plan, the opportunities associated with it and the successes that are achieved during implementation. Some local governments make the mistake of trying to keep their international activities under the radar, and this leads to community feelings of a lack of transparency. It is important to take the community and key stakeholders on the journey with this program so they appreciate the value of the opportunities it will present for the City.

Anticipated Outcomes:

- Increased levels of understanding about the International Economic Development Plan
- Increased awareness of the successes achieved
- Enhanced profile of Joondalup as a business destination.

5.2.5 Infrastructure Development

Objective: Facilitate the development of catalytic infrastructure required to enhance Joondalup's reputation as an international business destination.

Rationale: There are a range of development and/ or infrastructure projects planned for Joondalup that will assist in raising the profile of Joondalup as an international business destination, and will also add value to the complete package of 'lifestyle' services required to make Joondalup a more attractive destination. These types of projects need to be facilitated for Joondalup to further develop itself as an international business destination.

Key Activities:

In order to facilitate the development of infrastructure required the following key activities will be pursued:

1. Identify those infrastructure/ development projects that are priorities for the City, e.g. Ocean Reef Marina, Joondalup Performing Arts and Cultural Facility, Boas Place, etc.
2. Identify those projects that require capital investment to bring them to fruition
3. Work with the land owner/ developer to prepare a business case designed to attract investment
4. Where the development does not require investment, work with the land owner/ developer to bring the project to fruition.

Each of the above mentioned activities are about the City working with land owners/ developers to support bringing the identified catalytic infrastructure and development projects to fruition. Where there is a need for capital investment, the City can play a role through the IEDAP to attract investment to the project. To be successful at this it is important to develop appropriate businesses cases for each project so that the specific details can be promoted to potential investors.

Where the project does not require additional investment then the role of the City is to do what it can to help streamline or fast track the development. This is the sort of role the City would play in any development it deems as a priority, however, this is being highlighted in the IEDAP because there are certain developments that will help to raise Joondalup's profile as an international business destination.

Anticipated Outcomes:

- Increased investment
- Development of catalytic development and infrastructure projects
- Improved international profile.

5.3 PROGRAM OF ACTIVITIES

The International Economic Development Plan is designed to provide the City of Joondalup with guidance in relation to the international opportunities that will contribute to the economic growth and diversification of the City. The below Program of Activities is an extension of the Strategic Priorities section and also includes a range of targets to be met over the next 2 years.

Table 5.1: Program of Activities

Activity	2 Year Target
1. Export Development	
1.1 Engage with local businesses to understand their current and potential export capacity	
<ul style="list-style-type: none"> Engage with local businesses to discuss export interest, current activity and future opportunities. 	50 businesses
<ul style="list-style-type: none"> Establish a network of local exporters to provide opportunities for them to share market knowledge and to collaborate where appropriate 	1 network (meet quarterly)
1.2 Coordinate events and activities for local businesses to build market knowledge, capacity and to help facilitate export outcomes	
<ul style="list-style-type: none"> Invite Austrade and DSD to Joondalup to present/ discuss opportunities in identified target markets. 	2 per year
<ul style="list-style-type: none"> Coordinate a series of export related workshops designed to build the capabilities of local businesses. 	3 workshops
<ul style="list-style-type: none"> Prepare market research material for identified target markets and distribute to interested local businesses. 	7 target markets
<ul style="list-style-type: none"> Coordinate and participate in a trade and investment mission (refer to 2.3 below). These events are about both export and investment opportunities 	Refer to 2.3
2. Investment Attraction	
2.1 Identify targeted opportunities requiring investment	
<ul style="list-style-type: none"> Identify industry opportunities that have the potential to drive economic opportunities across the city. 	As required
<ul style="list-style-type: none"> Develop business cases that provide a detailed overview of the project, full costing and potential benefits (ROI). 	As required
2.2 Engage with international intermediaries and contacts to promote the investment opportunities	
<ul style="list-style-type: none"> As part of meetings with Austrade and DSD present and discuss catalytic development opportunities and refine business cases as required. 	As required
<ul style="list-style-type: none"> Engage with other trade and investment related intermediaries that can help to facilitate international relationships and trade and investment opportunities, e.g. AustCham, Australia China Business Council. 	15 intermediaries
<ul style="list-style-type: none"> Identify international intermediary organisations/ industry associations to become a member of, e.g. AustCham 	2 organisations
<ul style="list-style-type: none"> Participate in international business related events held across the region, State and nationally, to promote investment opportunities. Where possible explore options to present at these events. 	4 events, 2 presentations
2.3 Facilitate and participate in investment attraction related activities	
<ul style="list-style-type: none"> Coordinate and participate in a trade and investment mission to identified target markets based around identified priorities 	1 mission
<ul style="list-style-type: none"> Conduct a more detailed analysis of opportunities in the other priority target markets to identify specific opportunities. 	2 market reviews
<ul style="list-style-type: none"> From trade and investment mission develop a prospective list of investors and possible international companies looking to relocate/ expand. This list of contacts will need to be followed up regularly 	20 leads
3. International Education	
3.1 Support a range of events and activities to welcome international students to the City	
<ul style="list-style-type: none"> Liaise with educational institutions to participate in and promote welcome events for visiting international students. 	2 events per year

3.2	Develop a range of packages that can be offered to students as well as visiting delegations	
	<ul style="list-style-type: none"> • Work with tourism operators to develop local experience packages to be promoted to visiting international students and to be used for study tours and visiting delegations. 	3 packages developed
	<ul style="list-style-type: none"> • Promote the packages through the educational institutions 	As required
	<ul style="list-style-type: none"> • Bring the tourism operators together to collaborate and develop packages 	Tourism network
3.3	Leverage international students for other investment opportunities	
	<ul style="list-style-type: none"> • Engage with local institutions to develop events and activities for international students that raise the profile of trade and investment opportunities in Joondalup. 	1 event, 3 leads
	<ul style="list-style-type: none"> • Identify opportunities to establish an international student alumni. If demand exists then establish the alumni. 	Investigation completed
4.	Profile Raising	
4.1	Develop and enhance international economic and cultural relationships	
	<ul style="list-style-type: none"> • Continue to enhance the Sister City relationship with the City of Jinan by exploring mutually beneficial trade and investment opportunities 	Liaise quarterly
	<ul style="list-style-type: none"> • Promote the relationship with the City of Jinan to local businesses to explore opportunities. 	
	<ul style="list-style-type: none"> • Explore opportunities for new formal relationships, such as Economic Cooperation Agreements with cities in identified target markets 	2 opportunities identified
	<ul style="list-style-type: none"> • Liaise with the State Government to discuss opportunities for a Sister State relationship with Shandong or leverage the existing Sister State relationship with Zhejiang to develop an economic cooperation agreement with Joondalup 	1 relationship or agreement
	<ul style="list-style-type: none"> • In line with 3.2 work with tourism operators to develop local experience packages targeting international visitors. 	Refer to 3.2
4.2	Build relationship with Austrade and Department of State Development contacts	
	<ul style="list-style-type: none"> • Meet regularly with key government stakeholders to raise the profile of Joondalup and associated opportunities. 	5 meetings
	<ul style="list-style-type: none"> • Organise opportunities to present investment focused business cases to them. 	4 investment business cases
4.3	Develop marketing material	
	<ul style="list-style-type: none"> • Update and enhance investment attraction related material. 	1 major item and support items as required
	<ul style="list-style-type: none"> • Develop fact sheets to promote the capabilities of high value sectors 	As required
	<ul style="list-style-type: none"> • Provide all materials in online format for inclusion on the City's website 	As required
4.4	Build transparency and raise awareness within the City	
	<ul style="list-style-type: none"> • Promote the final IEDAP to the local business community and through appropriate media networks to build awareness of the program and anticipated outcomes. 	Annually
	<ul style="list-style-type: none"> • Provide quarterly progress updates on the implementation of the plan. 	Quarterly
	<ul style="list-style-type: none"> • Celebrate successes and promote stories relating to outcomes achieved through the implementation of the plan. 	Minimum 5 stories
5.	Infrastructure Development	
5.1	Identify priority projects	
	<ul style="list-style-type: none"> • Identify priority infrastructure/ development projects that require capital investment 	4 projects
	<ul style="list-style-type: none"> • Prepare infrastructure business cases for each project 	4 business cases
5.2	Work with landowners/ developers	
	<ul style="list-style-type: none"> • Regularly liaise with landowners/ developers to identify reasons why projects aren't progressing. 	As required
	<ul style="list-style-type: none"> • Work with internal and external stakeholders to bring projects to fruition. 	As required

Source: AEC

5.4 ROLE OF THE CITY

The role of the City in international economic development is sometimes difficult to define and will vary depending on the priorities and opportunities to drive economic growth. The role of the City will always fall into one of the following categories.

5.4.1 Advocacy

The City to act as a leader that engages with the business community and other levels of government to develop commitment, energy and attitude towards identified priorities. In the case of the IEDAP there is a role for the City to play in advocating for the needs of businesses and for the delivery of critical infrastructure to support economic development priorities.

5.4.2 Facilitation

The key role in this program that the City can play is as a facilitator of opportunities. There is a really important role for the City to play in connecting the various stakeholders in order to achieve desired outcomes.

The City can act as the information link between government, business and consumers, as this information is vital in generating local awareness and demand for identified priorities.

The City can promote events and activities that support business capacity building and other economic development related initiatives, such as workshops to build the knowledge of businesses around export development.

5.4.3 Planning and Regulation

The City's planning framework provides a mechanism to regulate and/or encourage certain activities and developments that influence economic activity. Specific opportunities that relate to the IEDAP is the role the City has played in master planning the City and the flow on effect this will have in the development of catalytic infrastructure that will enhance Joondalup's reputation as a business destination.

5.4.4 Provider of Services

Service provisions and access is one of the major functions of Local Government. A consistent and reliable supply of services and information can support economic development related opportunities.

5.4.5 Stakeholder

There are many economic development related initiatives that are developed and implemented across the community that the City does not 'own' or is not viewed as the service provider for, but still remains a critical contributor to the successful implementation of the desired outcome.

Ultimately the City needs to have a clear understanding of the role it will play in all economic opportunities identified and how they will drive, facilitate, encourage or communicate the desired outcomes.

5.5 PERFORMANCE MEASUREMENT

It is important to monitor and measure the success of the Program of Activities. The annual targets established assume at least one FTE is dedicated to the implementation of the program, with other City staff involved in various elements of the program on an as needs basis. The City will require at least one skilled FTE to coordinate and drive the program to ensure the optimum outcomes are achieved.

It is important to monitor progress on at least a quarterly basis so that if certain activities need to be reassessed in the middle of the program they can be, and also to make sure that there are not any major surprises at the end of the year, which could have been addressed if they were being monitored throughout the course of implementing the program.

In addition to the targets set in the Program of Activities Joondalup should also track overall outcomes generated as a direct result of implementing the program. The recommended headline performance measures are provided below:

Description	Target
Overall investment leads generated	10 leads
New investment attracted for projects	2 new projects
Number of new jobs created	15 new jobs
Amount of capital investment generated	\$10 million

Source: AEC

The combination of these headline targets and those included in the Program of Activities demonstrates a successful program needs to measure both activity and outcomes.

Quarterly reports should be generated that demonstrate the tasks completed and the performance and variance against the target. At the six month stage an assessment should be carried out to understand what progress has been made on the program, and whether any modifications need to be made to the program.

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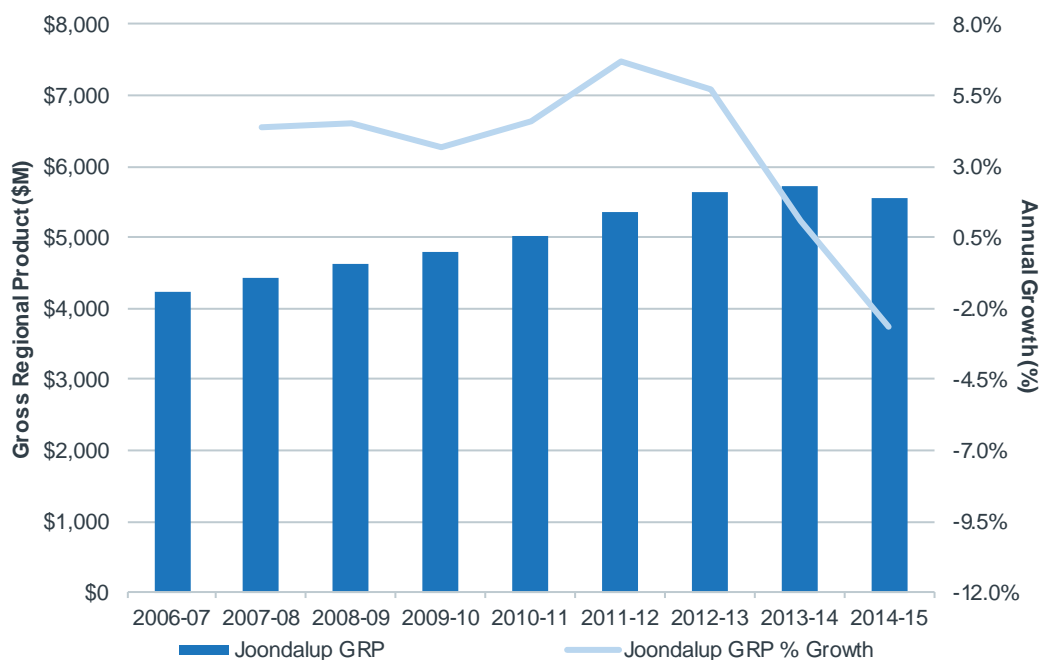
APPENDIX A: SITUATION ANALYSIS

ECONOMIC

Gross Regional Product

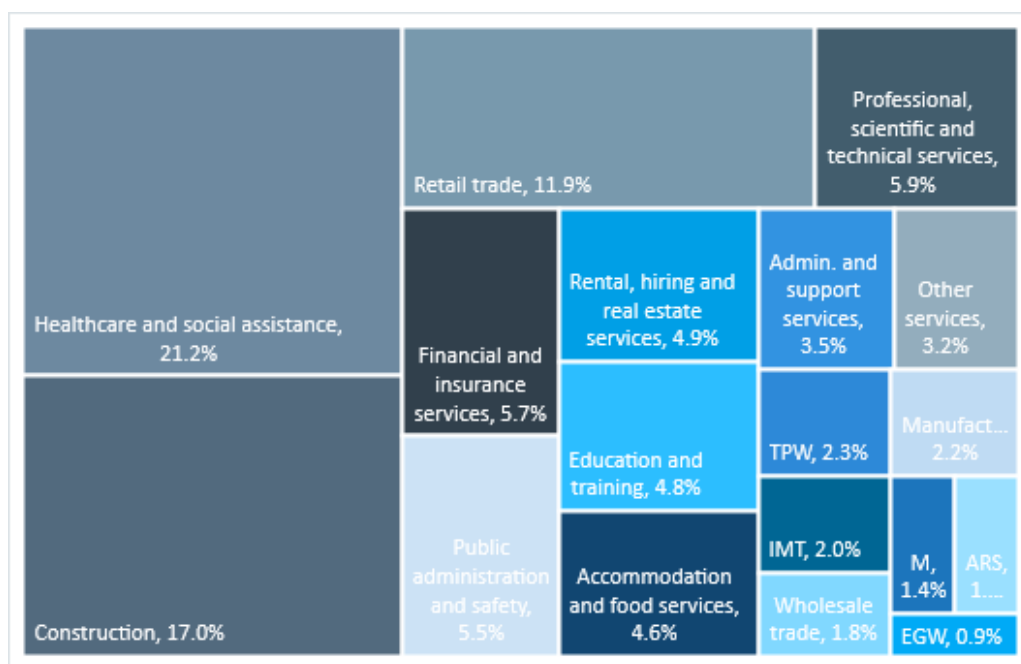
Between 2006-07 and 2014-15 the Joondalup economy posted an average annual expansion of 3.5%, to reach \$5.6 billion. In the latest year, the economy contracted by -2.7% after peaking at \$5.7 billion in 2013-14.

Figure A.1. Gross Regional Product, 2006-07 to 2014-15



Source: AEC (unpublished a)

Figure A.1. Gross Regional Product, Contribution to Industry Value Added, 2006-07 to 2014-15



Note: TPW = Transport, postal and warehousing, IMT = Information, Media and Telecommunications, ARS = Arts and Recreational Services (1.4%), EGW = Electricity, Gas, Water and Waste Services, M= Mining

Source: AEC (unpublished a)

Business Counts by Industry

Table A.1. Business Counts by Industry, 2014, Contribution to Total

Industry	Joondalup
Agriculture, Forestry and Fishing	1.3%
Mining	0.6%
Manufacturing	2.9%
Electricity, Gas, Water and Waste Services	0.2%
Construction	28.8%
Wholesale Trade	2.6%
Retail Trade	5.8%
Accommodation and Food Services	3.2%
Transport, Postal and Warehousing	4.6%
Information Media and Telecommunications	0.7%
Financial and Insurance Services	9.1%
Rental, Hiring and Real Estate Services	8.5%
Professional, Scientific and Technical Services	14.8%
Administrative and Support Services	3.8%
Public Administration and Safety	0.4%
Education and Training	1.5%
Health Care and Social Assistance	5.6%
Arts and Recreation Services	1.2%
Other Services	4.4%
Total	13,035

Source: ABS (2015a)

Employment by Industry

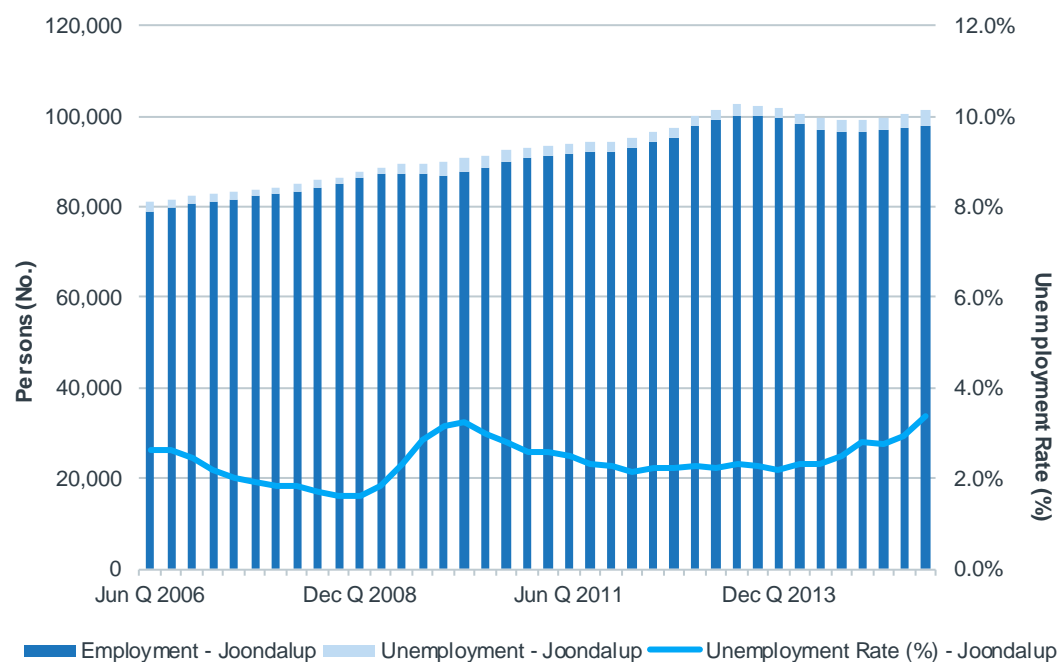
Table A.2. Employment by Industry, 2011, Contribution to Total

Industry	Joondalup
Retail Trade	18.1%
Health Care and Social Assistance	15.8%
Education and Training	15.4%
Construction	10.3%
Accommodation and Food Services	9.5%
Public Administration and Safety	5.1%
Professional, Scientific and Technical Services	4.8%
Other Services	4.4%
Administrative and Support Services	3.4%
Manufacturing	2.2%
Financial and Insurance Services	2.2%
Rental, Hiring and Real Estate Services	2.1%
Transport, Postal and Warehousing	1.9%
Arts and Recreation Services	1.8%
Wholesale Trade	1.3%
Information Media and Telecommunications	1.0%
Mining	0.3%
Electricity, Gas, Water and Waste Services	0.3%
Agriculture, Forestry and Fishing	0.1%
Total	43,840

Source: ABS (2015a)

Unemployment and Labour Force

Figure A.2. Unemployment and Labour Force, 2006 to 2016



Source: Department of Employment (2016)

CULTURAL DIVERSITY

Place of Birth

Table A.3. Place of Birth, 2011

Place of Birth	Joondalup
Australia	60.9%
United Kingdom, Channel Islands and Isle of Man	19.3%
Southern and East Africa	5.2%
New Zealand	3.1%
Maritime South-East Asia	1.8%
Western Europe	1.5%
Ireland	1.3%
Southern Asia	0.9%
Southern Europe	0.7%
Northern America	0.7%
Elsewhere	4.5%
Total	100.0%

Source: ABS (2012)

Language Spoken at Home

Table A.4. Language Spoken at Home, 2011

Place of Birth	Joondalup
English	89.9%
Chinese Languages	1.2%
Italian	0.9%
Indo-Aryan	0.7%
German	0.6%
Arabic	0.4%
French	0.4%
Iranic	0.3%
Dutch	0.3%
Greek	0.2%
Other Languages	5.2%
Total	100.0%

Source: ABS (2012)

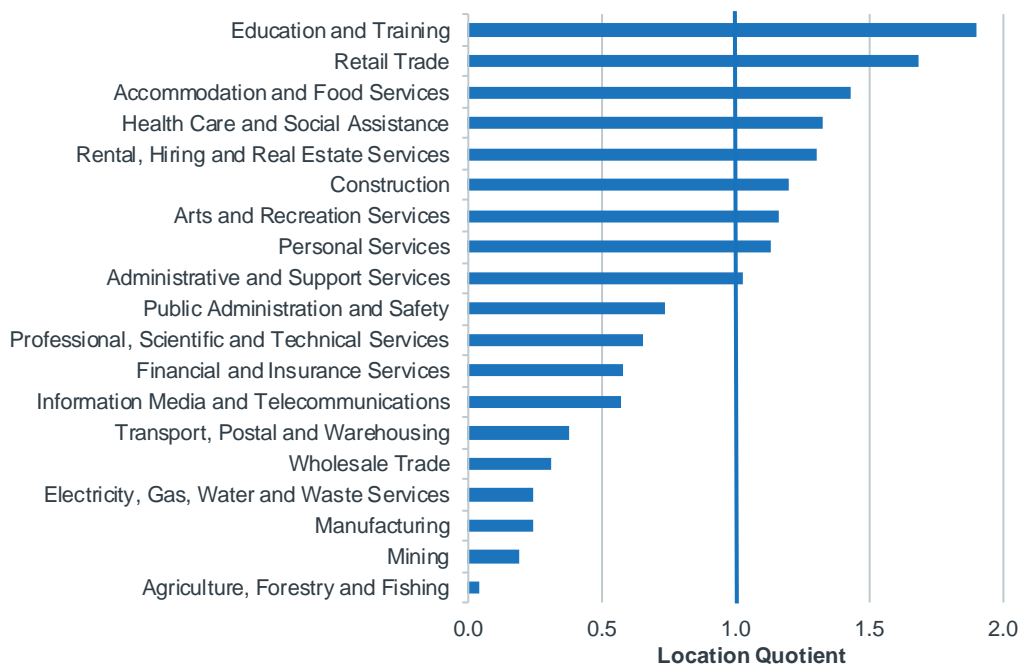
COMPETITIVE ASSESSMENT

Location Quotients

In order to demonstrate the specialisation of the economy, location quotients based on employment have been calculated. The location quotients demonstrate the degree to which a local or regional economy is specialised by examining the proportion of employment (by industry sub-sector) compared to a larger economy (Australian economy). Location quotients can be used to indicate strengths and weaknesses of a local or regional economy (i.e. its natural competitive advantage).

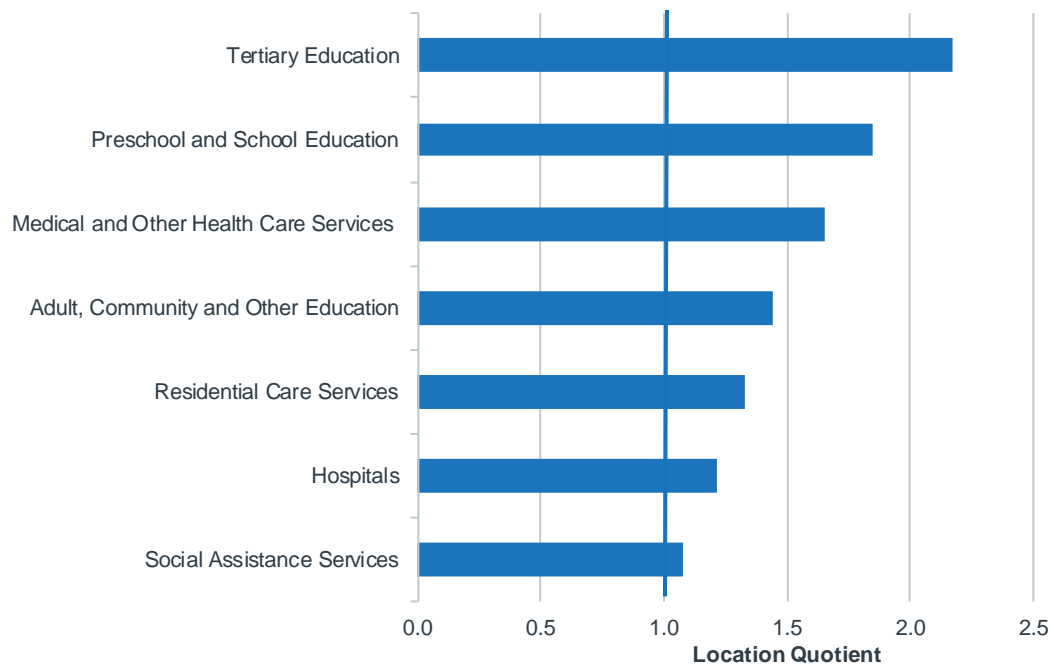
For this project, the analysis has compared the Joondalup economy with that of Australia. A location quotient of “1” means that Joondalup has an equal share of employment (compared to the Australia) for a specific industry sector, thus no potential advantage either way. A location quotient above “1” indicates a specialisation of labour and therefore an area of potential competitive advantage. If the location quotient is below “1”, the area has a weakness in this particular industry sector.

Figure A.3. Location Quotients, 1 Digit ANZSIC, 2011



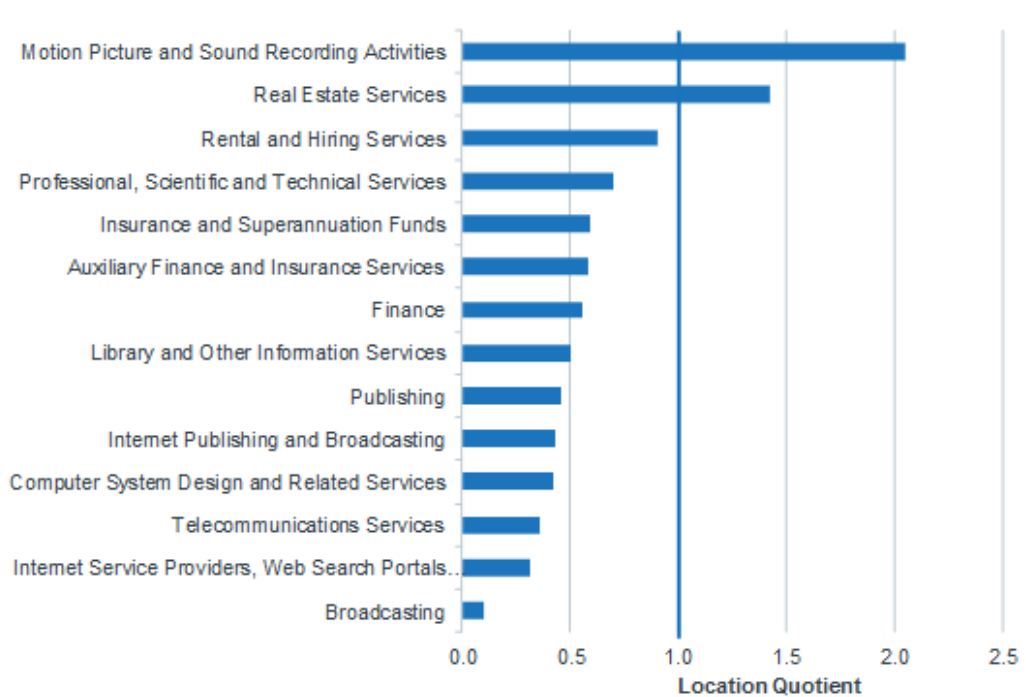
Source: ABS (2012), AEC

Figure A.4. Location Quotients, 2 Digit Education and Training and Health Care and Social Assistance, 2011



Source: ABS (2012), AEC

Figure A.5. Location Quotients, 2 Digit ANZSIC Business Services*, 2011



Note: * Includes: Information Media and Telecommunications, Financial and Insurance Services, Rental, Hiring and Real Estate Services and Professional, Scientific and Technical Services

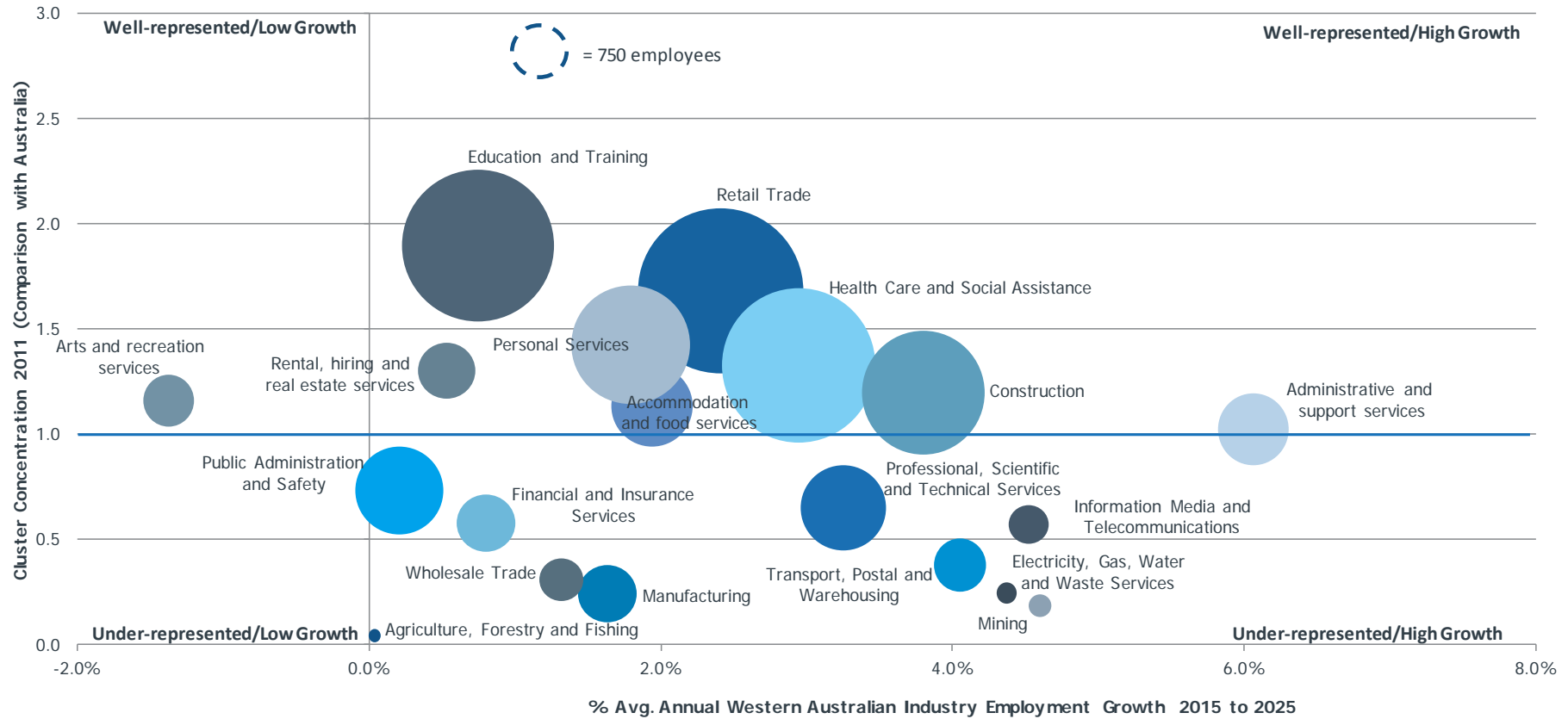
Source: ABS (2012), AEC

Cluster Mapping

Cluster mapping builds on the location quotient analysis by portraying the regional location quotients against Western Australian industry estimated employment growth over time (from 2015 to 2025). By incorporating industry growth, cluster mapping allows for the identification of growth opportunities in specific industry sectors, where a natural competitive advantage already exists against a backdrop of an expanding sector nationally.

Industry clusters located above the “1” on the vertical axis indicate an existing industry concentration (strength or competitive advantage, as discussed previously) within the region being examined. The Western Australian industry average annual employment growth estimate for 2015 to 2025 (AEC, unpublished b) is plotted along the horizontal axis, with 0% average annual growth over the ten years creating a midline. The further to the right of this central horizontal axis, the faster the industry is expected to expand. Similarly, the farther to the left of the zero percent midline, the faster it is expected to shed jobs during this ten-year period. The size of the cluster (circle/ blob) in the map demonstrates the size of the local workforce in that industry sector. Figure 2.7 outlines the cluster map for Joondalup at the 1 digit ANZSIC level.

Figure A.6. Joondalup Cluster Map, 1 Digit ANZSIC

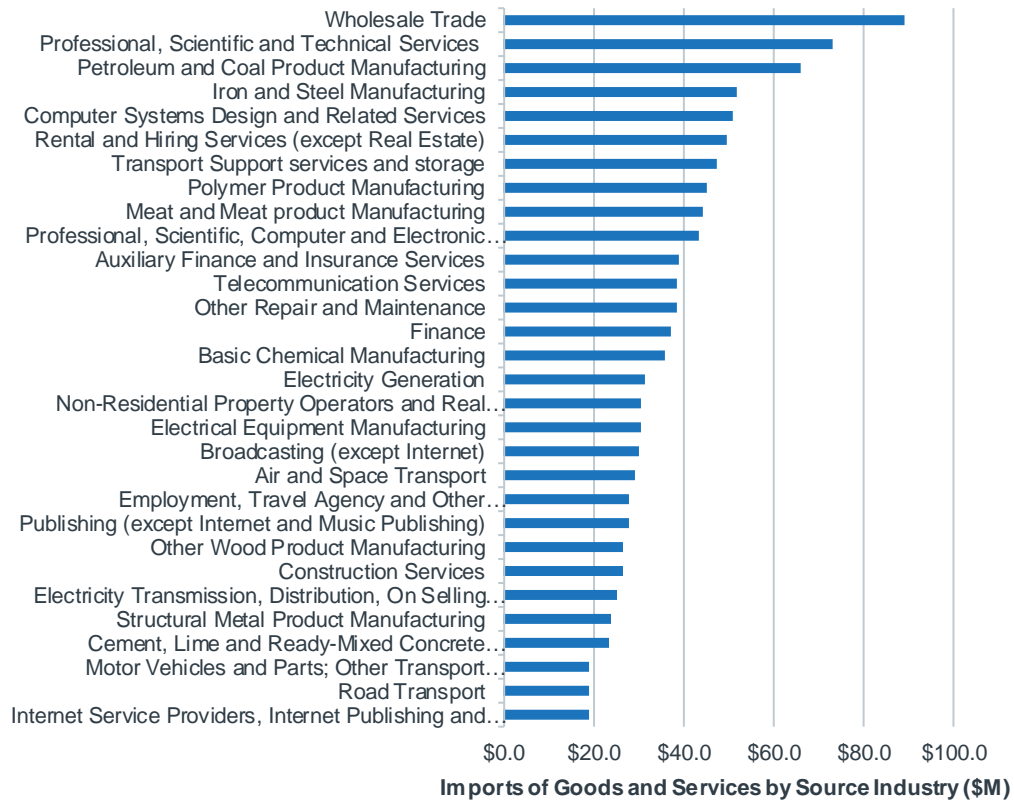


Source: ABS (2012), AEC (unpublished b)

Import/ Export Analysis

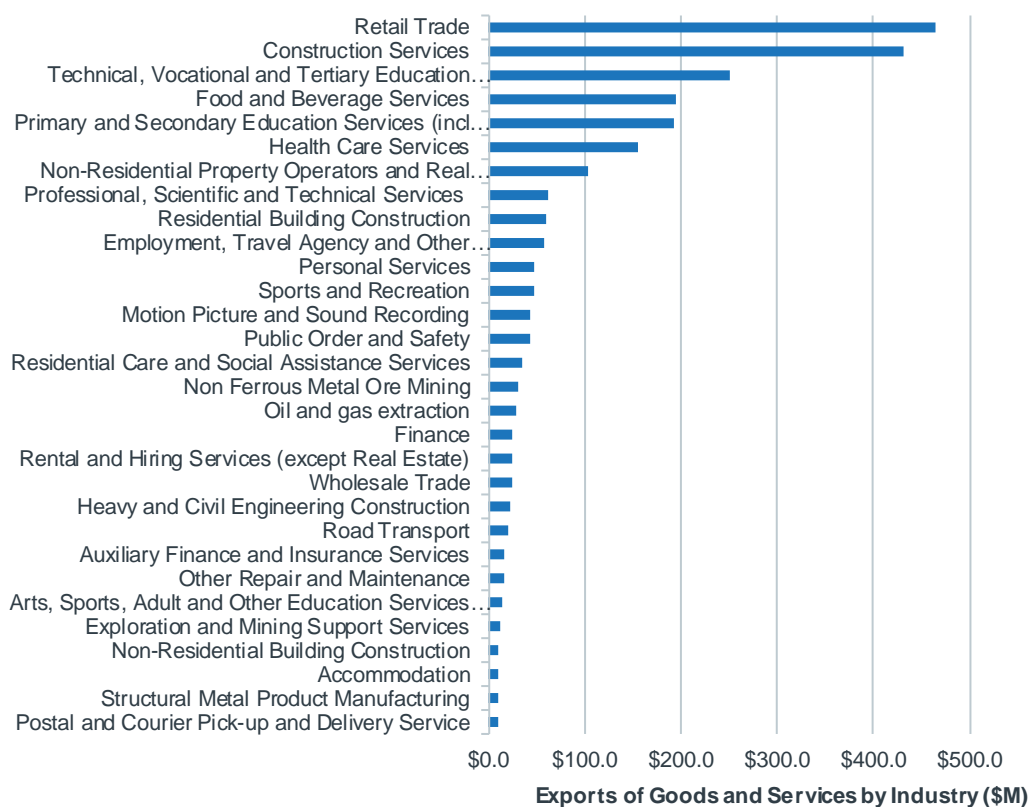
Prominent imports into a region can represent opportunities, where skills and labour can be easily sourced. This could improve local industry supply chains and provide additional job opportunities for locals.

Figure A.7. Imports of Goods and Services, 2012-13



Source: ABS (2012, 2015b), AEC

Figure A.8. Exports of Goods and Services, 2012-13



Source: ABS (2012, 2015b), AEC

APPENDIX B: TARGET MARKET SUMMARY

CHINA

China is Australia's largest two-way trading partner in goods and services (valued at \$155.5 billion in 2015, up 2 per cent on the previous year). China is our largest export market (\$91.3 billion in 2015) and our largest source of imports (\$64.2 billion in 2015). The Government is pursuing a number of initiatives to strengthen and diversify this relationship.

The China-Australia Free Trade Agreement (ChAFTA) entered into force on 20 December 2015. The Agreement has the potential to enhance the growing trade and investment relationship between our highly complementary economies. It will ensure the competitiveness of Australia's agricultural and manufacturing industries, protect and ensure the competitiveness of our services providers and attract greater investment in Australia. Over 86 per cent of the value of Australia's goods exports to China enter duty free following establishment of the ChAFTA, rising to 96 per cent when ChAFTA is fully implemented. Australian services providers benefit from new access to China's growing services sector.

The Federal government has been promoting its open investment regime and Foreign Investment Review Board process, which continues to attract Chinese investors. The stock of Chinese direct investment in Australia has grown in recent years reaching \$35 billion in 2015 (our fifth largest direct investor). The majority of investment has been in resources but is now moving into agriculture, tourism and infrastructure.

Increasing numbers of Australian businesses are entering the Chinese market. However, like all cross border commercial activities, the benefits of doing business in China are coupled with considerable risks. There are a range of programs designed to inform Australian companies about how to manage the risks.

The following table provides a summary of some of the key facts about China.

Table B.1: China Key Facts

Description	Fact
Capital	Beijing
Population	1,374.6 million (2015)
GDP (US\$b) (current prices)	\$11,383.0
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Iron ore and concentrate - \$38,864 • Coal - \$6,105 • Gold - \$3,252 • Copper - \$2,197
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Telecom equipment and parts - \$6,709 • Computers - \$5,371 • Furniture, mattresses and cushions - \$2,749 • Prams, toys, games and sporting goods - \$2,092
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Education related travel - \$4,971 • Personal travel excluding education - \$3,029
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$760 • Transport - \$708
China's principal export destinations	<ol style="list-style-type: none"> 1. United States – 18.0% 2. Hong Kong – 14.6% 3. Japan – 6.0% 13. Australia – 1.8%
China's principal import destinations	<ol style="list-style-type: none"> 1. Republic of Korea – 10.4% 2. United States – 9.0% 3. Taiwan – 8.6% 7. Australia – 4.4%

Source: Department of Foreign Affairs and Trade

INDIA

In 2012, India became the world's third largest economy in terms of purchasing power parity and is forecast to be the fastest growing major economy in the world from 2016. Achieving India's growth potential will require continued economic reforms to drive the modernisation of the Indian economy and ensure sustainable growth in key sectors.

For a decade from the late 1990's, the Indian economy had an annual average growth rate above seven per cent but this started to slow in early 2011 when GDP growth dipped to below five per cent. In 2014 India started to show signs of economic recovery, aided by more buoyant sentiment and a sharp slide in inflation to multi-year lows. Steps taken by the Reserve Bank of India to restore balance of payments stability and reduce currency volatility also contributed to an improvement in India's fundamentals. But despite the improved outlook, significant challenges remain to be addressed, including inadequate infrastructure, the ease of doing business and agricultural productivity.

The World Bank describes India as the "bright spot" in a generally gloomy global outlook for developing countries. It forecasts India's GDP will grow at 7.8 per cent in 2016 and 7.9 per cent in 2017 and 2018, making it the fastest growing major economy.

Australia has placed India at the forefront of its international partnerships. Both governments recognise there is significant potential for further cooperation across a broad range of areas. Two-way Prime Ministerial visits in 2014 built significant momentum in the relationship and affirmed the Strategic Partnership agreed to in 2009.

Table B.2: India Key Facts

Description	Fact
Capital	New Delhi
Population	1,292.7 million (2015)
GDP (US\$b) (current prices)	\$2,288.7
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Coal - \$5,241 • Gold - \$930 • Vegetables, f.c.f. - \$775 • Copper ores and concentrates - \$682
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Refined petroleum - \$1,650 • Medicaments (inc veterinary) - \$277 • Pearls and gems - \$258 • Jewellery - \$171
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Education related travel - \$2,148 • Personal travel excluding education - \$406
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$572 • Professional, technical and other business - \$534
India's principal export destinations	<ol style="list-style-type: none"> 1. United States – 15.2% 2. UAE – 11.3% 3. Hong Kong – 4.6% 21. Australia – 1.2%
India's principal import destinations	<ol style="list-style-type: none"> 1. China – 15.8% 2. Saudi Arabia – 5.5% 3. Switzerland – 5.4% 14. Australia – 2.4%

Source: Department of Foreign Affairs and Trade

JAPAN

The Australia–Japan partnership is our closest and most mature in Asia, and is fundamentally important to both countries' strategic and economic interests.

Japan's highly industrialised market economy is the third-largest in the world (GDP at market exchange rates). It was the world's second largest from 1968 until 2010, when it was overtaken by China. Japan has a well-educated, industrious work force and its large, affluent population makes it one of the world's largest consumer markets.

From the 1960s to the 1980s, Japan achieved one of the highest economic growth rates in the world. This growth was led by high rates of investment in productive plant and equipment, the application of efficient industrial techniques, a high standard of education, good relations between labour and management, ready access to leading technologies and significant investment in research and development, an increasingly open world trade framework, and a large domestic market of discerning consumers, which has given Japanese businesses an advantage in their scale of operations.

Manufacturing has been the most remarkable, and internationally renowned, feature of Japan's economic growth. Today, Japan is a world leader in the manufacture of electrical appliances and electronics, automobiles, ships, machine tools, optical and precision equipment, machinery and chemicals. However, in recent years Japan has ceded some economic advantage in manufacturing to China, South Korea and other manufacturing economies. Japanese firms have countered this trend to a degree by transferring manufacturing production to low-cost countries. Japan's services sector, including financial services, now plays a far more prominent role in the economy, accounting for about 75% of GDP.

International trade contributes significantly to the Japanese economy, with exports equivalent to approximately 17 per cent of GDP in April 2016. Key exports include vehicles, machinery and manufactured goods. In 2015, Japan's major export destinations were the United States (20.1 per cent), China (17.5 per cent) and the Republic of Korea (7.0 per cent).

Japan has few natural resources and its agricultural sector remains heavily protected. Japan's main imports include mineral fuels, machinery and food. In 2015, leading suppliers of these goods were China (24.8 per cent), the United States (10.3 per cent) and Australia (5.4 per cent). Recent trends in Japanese trade and foreign investment have reflected a much greater engagement with China, which overtook the United States as Japan's largest trading partner in 2008.

In the medium term, the Japanese economy faces challenges over its energy policy, as well as external risks including weak economic conditions in Europe. To address these challenges, the Japanese government is encouraging firms to secure stable energy and commodity supplies through increased investment in overseas natural resources. Australia, as well as Papua New Guinea and Indonesia, are a few of the major beneficiaries of this investment.

Table B.3: Japan Key Facts

Description	Fact
Capital	Tokyo
Population	126.9 million (2015)
GDP (US\$b) (current prices)	\$4,412.6
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Coal - \$12,145 • Iron ores and concentrates - \$5,288 • Beef, f.c.f. - \$1,887 • Copper ores and concentrates - \$1,545
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Passenger motor vehicles - \$6,418 • Refined petroleum - \$3,264 • Tubes and pipes of iron or steel - \$1,759 • Goods vehicles - \$1,273
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$676 • Transport - \$542
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Transport - \$1,057 • Personal travel excluding education - \$946
Japan's principal export destinations	<ol style="list-style-type: none"> 1. United States – 20.2% 2. China – 17.5% 3. Republic of Korea – 7.0% 9. Australia – 2.1%
Japan's principal import destinations	<ol style="list-style-type: none"> 1. China – 25.6% 2. United States – 10.9% 3. Australia – 5.6% 4. Republic of Korea – 4.3%

Source: Department of Foreign Affairs and Trade

SOUTH KOREA

Australia and South Korea are strong economic, political and strategic partners with common values and interests. People-to-people links between the two countries are increasing and make a significant contribution to the relationship.

Our important economic relationship continues to expand with the entry into force of the Korea Australia Free Trade Agreement (KAFTA) on 12 December 2014. South Korea is a key market for Australian minerals, energy and travel and education services and Australia is a major market for South Korea passenger vehicles, petroleum, and electronic goods and parts.

Australia's trade relationship with South Korea developed rapidly during the 1960's, as South Korea pursued industrialisation requiring large amounts of raw materials. The two countries have historically shared a complementary trade relationship, with Australia providing raw materials, manufactured products and food to South Korea, and importing products such as cars, telecommunications equipment and computers, as well as refined petroleum.

South Korea is Australia's fourth-largest overall trading partner. Two-way goods and services trade was worth around \$36 billion in 2014-15, representing 5.4 per cent of all of Australia's international trade. South Korea was Australia's fourth-largest market for goods and services exports combined in 2015, totalling \$20 billion.

South Korea was Australia's third-largest merchandise export market in 2015 (\$19 billion, down 10 per cent from the previous year). As well as coal iron ore and aluminium, South Korea remains an important market for Australian beef, sugar, medicaments and wheat.

South Korea is Australia's fourth-largest source of goods and services imports totalling \$16 billion in 2015. The primary imports from South Korea in 2015 were refined petroleum, passenger motor vehicles, and civil engineering equipment and parts. Total bilateral trade in services during 2015 was valued at \$2.6 billion; services exports being worth \$1.7 billion, mostly education-related and recreational travel.

The Korea-Australia Free Trade Agreement (KAFTA) entered into force on 12 December 2014. As a world-class and comprehensive bilateral agreement, KAFTA is one of Australia's most comprehensive trade agreements,

delivering significant improvements in market access and tariff liberalisation for merchandise trade. Under KAFTA, Australian services providers receive the best treatment South Korea has agreed with any trade partner. Investment commitments in the Agreement protect and enhance investment in both directions.

Business links are also supported by the Korea-Australia Business Council and the Australia-Korea Business Council. Their annual joint meeting allows members to exchange views and expand private sector links between the countries.

The level of investment between Australia and South Korea is relatively small but there is scope for stronger investment flows. South Korean investment into Australia has grown from a low base in 2005 (A\$0.9 billion) to A\$23 billion at the end of 2015, but South Korea still only ranks as the 15th largest foreign investor, representing only 0.8 per cent of Australia's total foreign investment stock. It is beginning to diversify into other areas such as tourism. Australian investment into South Korea was A\$15 billion at the end of 2015, representing 0.7 per cent of Australian investment abroad. Korea is the 16th largest destination for Australia's foreign investment abroad.

Australian financial services providers in South Korea are active in areas such as funds management and infrastructure investment. South Korea's current account surplus continues to grow and investors are looking for greater opportunities to invest their surplus savings for higher returns overseas. The state-owned Korean Development bank, which has about US\$284 billion of assets, on 8 December 2015 opened its first Australian office in Sydney in order to manage its growing Australian portfolio. A higher FIRB threshold under KAFTA may encourage Korean private investment in Australia and the Asia Region Funds Passport will further improve the bilateral investment climate.

In the other direction, major South Korean investments have included the \$6 billion iron ore project at Roy Hill in Western Australia is the South Korean single largest foreign investment in Australia, with POSCO holding a 12.5 per cent stake in the project. It is currently South Korea's largest overseas construction project, with Samsung C&T being the lead mine-construction contractor. Other major South Korean companies such as Korea Zinc, KOGAS, KEPCO, SK Energy and KORES have also invested in Australia.

Table B.4: South Korea Key Facts

Description	Fact
Capital	Seoul
Population	50.6 million (2015)
GDP (US\$b) (current prices)	\$1,321.2
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Coal - \$5,141 • Iron ores and concentrates - \$3,563 • Beef, f.c.f. - \$1,244 • Aluminium - \$981
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Refined petroleum - \$5,622 • Passenger motor vehicles - \$2,173 • Civil engineering equipment and parts - \$1,364 • Heating and cooling equipment and parts - \$916
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Education related travel - \$784 • Personal travel excluding education - \$707
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Transport - \$517 • Charges for use of IP - \$165
South Korea's principal export destinations	<ol style="list-style-type: none"> 1. China – 25.4% 2. United States – 12.3% 3. Japan – 5.6% 11. Australia – 1.8%
South Korea's principal import destinations	<ol style="list-style-type: none"> 1. China – 17.1% 2. Japan – 10.2% 3. United States – 8.7% 7. Australia – 3.9%

Source: Department of Foreign Affairs and Trade

SOUTH EAST ASIA

Indonesia

Indonesia is one of Australia's most important bilateral relationships. As strategic partners, we enjoy an extensive framework of cooperation spanning political, economic, security, development, education and people-to-people ties.

There is considerable opportunity for Australia to expand its trade, investment and economic cooperation relationship with Indonesia, which is the largest economy in south east Asia and 16th largest economy in the world.

Demand in Indonesia for consumer goods and services, particularly for premium food and beverages, education and healthcare, financial and ICT services and tourism, and its ambitious infrastructure investment agenda aligns well with Australian industry capabilities. Australian companies are among the leading investors in Indonesia's resources and energy sector.

There are over 470 Australian businesses operating in Indonesia. Two-way investment between Australia and Indonesia was valued at \$9.8 billion in 2015, with Australian investment in Indonesia at \$8.4 billion and Indonesia investment in Australia at \$1.4 billion.

Australia's two-way trade with Indonesia was worth \$15 billion in 2015, making Indonesia our 12th largest trade partner. Agricultural products (such as wheat, live animals and sugar) are Australia's key merchandise exports to Indonesia, valued at \$2.3 billion in 2015, while crude petroleum (\$1.4 billion) and manufactured goods are key imports (\$0.7 billion).

Two-way trade in services was valued at \$3.8 billion in 2015. Education is Australia's key services export to Indonesia (\$608 million) and tourism is our main services import from Indonesia (almost \$2 billion).

On 17 November 2015, it was announced that Australia intends to reinvigorate negotiations towards the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA), to boost two-way trade and investment flows and provide a framework for closer economic cooperation.

Australia's existing trade agreement with Indonesia, the Association of Southeast Asian Nations-Australia-New Zealand Free Trade Area (AANZFTA), has reduced a wide range of tariffs on trade between Australia and Indonesia. We are both negotiating the Regional Comprehensive Economic Partnership (RCEP), which will build on the outcomes of AANZFTA to promote further growth in the region.

Table B.5: Indonesia Key Facts

Description	Fact
Capital	Jakarta
Population	255.5 million (2015)
GDP (US\$b) (current prices)	\$937.0
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Wheat - \$1,373 • Live animals (exc seafood) - \$549 • Sugars, molasses and honey - \$467 • Coal - \$253
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Crude petroleum - \$1,405 • Specialised machinery and parts - \$703 • Wood, simply worked - \$206 • Gold - \$163
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Education related travel - \$608 • Personal travel excluding education - \$215
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$1,989 • Transport - \$250
Indonesia's principal export destinations	<ol style="list-style-type: none"> 1. Japan – 12.0% 2. United States – 10.8% 3. China – 10.0% 11. Australia – 2.5%
Indonesia' principal import destinations	<ol style="list-style-type: none"> 1. China – 20.6% 2. Singapore – 12.6% 3. Japan – 9.3% 8. Australia – 3.4%

Source: Department of Foreign Affairs and Trade

Malaysia

Located just north of the equator, Malaysia borders Thailand, Indonesia and Brunei Darussalam, and has maritime boundaries with Indonesia, Singapore and the Philippines.

Australian expertise in education and training is highly regarded in Malaysia. In 2015, Malaysia ranked third as a source country for international students in higher education in Australia and fifth overall across all sectors. There were over 24,000 Malaysian student enrolments in Australia in 2015, a 7.9 per cent increase on 2014. Malaysian-Australian alumni are estimated to number over 300,000. The Malaysian Australian Alumni Council (MAAC) is an organisation for Malaysian alumni associations of Australian universities. The MAAC spearheads the Malaysia-Australia Colombo Plan Commemoration Scholarship initiative, which provides for a two-way exchange of scholars between Australia and Malaysia.

In relation to trade and foreign investment Malaysia is a strong supporter of the multilateral trading system, in particular the World Trade Organization (WTO). Malaysia participates actively in regional economic arrangements such as the Association of South East Asian Nations (ASEAN) Free Trade Area (AFTA) and the Asia-Pacific Economic Cooperation (APEC). Malaysia is also a member of the Cairns Group, which advocates more liberalised global trade in agriculture. In 2015, Malaysia's largest trading partners were China, Singapore, the United States and Japan.

Malaysia has concluded and implemented bilateral FTA's with Australia, Japan, Pakistan, New Zealand, Chile, India and Turkey. ASEAN has concluded FTA's with China, Japan, South Korea, Australia, India and New Zealand. Malaysia is also pursuing bilateral FTA negotiations with the European Union. Malaysia and Australia were among the twelve countries which signed the Trans-Pacific Partnership (TPP) Agreement in February 2016 and remain parties to the current negotiations on the Regional Comprehensive Economic Partnership (RCEP).

Foreign Direct Investment (FDI) has played a key role in Malaysia's development, although over the past decade, annual net FDI inflows have fallen. In 2015, Malaysia's FDI fell by 21% decrease in value compared to 2014 due to global economic conditions, including the drop in oil and commodity prices, as well as the rise of the US dollar.

Malaysia is Australia's second-largest trading partner in ASEAN and eighth-largest partner overall. In 2014-15, total merchandise trade between Australia and Malaysia was A\$16.4 billion, with Australian exports of A\$6.1 billion and imports of A\$10.4 billion. Total two-way services trade in 2014-15 was A\$3.2 billion, with Australian exports of A\$1.8 billion and imports of A\$1.3 billion.

Major merchandise exports from Australia to Malaysia include copper, nickel, coal and wheat. Australia is a major provider of education services to Malaysia. Major Malaysian merchandise exports to Australia include crude and refined petroleum, monitors, projectors, televisions and computers.

Combined, Australia-Malaysia two-way investment more than doubled over four years from 2010 to a value of A\$30.6 billion in 2014. In 2014, Malaysian investment in Australia stood at A\$21 billion. Australian companies continue to pursue opportunities in Malaysia, with the stock of Australian foreign investment in Malaysia at \$9.6 billion in 2014.

The Australia Malaysia Business Council (AMBC) and the Malaysia Australia Business Council (MABC) are important coordinating bodies for commercial linkages.

The Malaysia-Australia Free Trade Agreement (MAFTA) was signed in Kuala Lumpur on 22 May 2012, and came into force on 1 January 2013.

MAFTA builds on the commitments made by both countries under the ASEAN-Australia-New Zealand FTA (AANZFTA) and provides improved access for Australian exporters to the Malaysian market. Under the MAFTA, 97.6 per cent of Australia's exports (2011 figures) became tariff-free on entry into force. This will rise to 99 per cent by 2017.

Table B.6: Malaysia Key Facts

Description	Fact
Capital	Kuala Lumpur
Population	31.0 million (2015)
GDP (US\$b) (current prices)	\$309.3
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Coal - \$527 • Copper - \$435 • Wheat - \$290 • Aluminium - \$191
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Crude petroleum - \$2,531 • Refined petroleum - \$1,037 • Computers - \$530 • Heating and cooling equipment and parts - \$438
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Education related travel - \$780 • Personal travel excluding education - \$554
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Transport - \$433 • Personal travel excluding education - \$351
Malaysia's principal export destinations	<ol style="list-style-type: none"> 1. Singapore – 13.9% 2. China – 13.0% 3. Japan – 9.5% 9. Australia – 3.6%
Malaysia's principal import destinations	<ol style="list-style-type: none"> 1. China – 18.9% 2. Singapore – 12.0% 3. United States – 8.1% 11. Australia – 2.5%

Source: Department of Foreign Affairs and Trade

Singapore

The Republic of Singapore sits 137 kilometres north of the equator, separated from Malaysia by the Strait of Johor and from Indonesia by the Strait of Singapore. Singapore is made up of the main island, which is 42

kilometres long by 23 kilometres wide, and 63 surrounding islets. The highest point is 163 metres at Bukit Timah Peak. Singapore has a total area of approximately 714 square kilometres.

The Singapore-Australia Free Trade Agreement (SAFTA) was signed on 17 February 2003 and came into force on 28 July 2003. Singapore is also a party to the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA), which entered into force on 1 January 2010.

In addition, Singapore has concluded bilateral FTA's with a large number of countries, including New Zealand (2000); the European Free Trade Association, a group of countries covering Switzerland, Norway, Iceland and Liechtenstein (2002); Japan (2002); the United States (2003); the Republic of Korea, India, Jordan and Panama (2005); China (2008); Peru (2008). Free Trade Agreements were also concluded with Costa Rica (2008) and the Gulf Cooperative Council countries of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the United Arab Emirates (2010) and the European Union (2013), although some are yet to enter into force. Singapore also finalised a comprehensive economic cooperation agreement with India (2005).

Regionally, Singapore concluded the Trans-Pacific Strategic Economic Partnership Agreement ('Trans-Pacific SEP') with Brunei, Chile and New Zealand (2005). This formed the basis of the Trans-Pacific Partnership (TPP) Agreement, negotiations for which are now concluded. Singapore is also a member of the ASEAN Free Trade Area and ASEAN Free Trade Agreements with China, India, Japan and Korea, as well as Australia and New Zealand. The Regional Comprehensive Economic Partnership (RCEP) negotiations (involving ASEAN, China, Korea, India, Japan, Australia and New Zealand), launched in November 2012, are also a high priority for Singapore.

Singapore is Australia's largest trade and investment partner in ASEAN and our fifth largest trading partner overall. In 2015, Australian merchandise exports to Singapore were A\$6.9 billion (our seventh largest export market) and our imports from Singapore were A\$9.4 billion (our eighth largest source). Services are a key part of our bilateral trade, with exports to Singapore valued at A\$4.1 billion and imports at A\$5.3 billion in 2015.

Major services exports include technical, business and professional services and transport. Singapore is also one of Australia's major sources of short-term visitors. In 2015, Singapore was Australia's 5th largest inbound market for visitor arrivals and expenditure. In 2015-16, Australia received 428,200 visitors from Singapore. Singaporean visitors to Australia spent almost \$1.4 billion in 2015. Singapore's investment in Australia is substantial. At A\$98.59 billion in 2015, up from A\$80.2 in 2014, Singapore was ranked fifth overall as a source of foreign investment in Australia.

Singaporean investment has traditionally been concentrated in real estate, but has become more diversified in recent years. Key investments include Singapore Power's purchase of the US TXU Corporation's assets in Victoria and South Australia in 2004; Singapore's Government Investment Corporation's acquisition of the Mayne Group's portfolio of private hospitals in 2003; and the SingTel acquisition of Optus in 2001. In December 2015 a Singapore / Chinese consortium – Jemena – was approved to build a gas pipeline in the Northern Territory.

Australia's investment in Singapore in 2015 was A\$67.06 billion, up from A\$50.7 billion in 2014. A large number of Australian businesses have a presence in Singapore including Australia's major banks; mining companies such as BHP Billiton and Rio Tinto; engineering design and construction firms including Lend Lease Asia Holding and Leighton Pty Ltd; and logistics groups such as Toll Holdings.

The ASEAN-Australian-New Zealand Free Trade Agreement (AANZFTA) came into force on 1 January 2010 reducing or eliminating tariffs across a region that is home to 600 million people and a combined GDP of around US\$2.2 trillion.

Singapore maintains some import restrictions relating to environmental, health and public security considerations. Rice is subject to import licensing for food security and price stability reasons. Imports of cars that are three or more years old are prohibited for environmental and road safety reasons.

Foreign investment has traditionally been welcomed in Singapore and has accounted for a significant share of total investment in the economy. Through foreign investment, Singapore has evolved into a base for multinational companies to engage in high-end manufacturing and product development, deliver services and coordinate regional procurement, production, marketing and distribution operations. The restrictions that exist are mostly in broadcasting, the domestic news media, legal and other professional services, multi-level marketing, property ownership and retail banking.

The Singapore Government is working towards transforming Singapore from an investment-driven economy to an innovation-driven economy. It has introduced double deduction for qualifying research and development expenses against income and operational headquarters' income from the provision of approved services in Singapore taxed at 10 per cent. Innovation development projects may obtain grants of between 30–50 per cent of approved direct development costs. Two areas specifically identified for further development are environmental and water technologies, and interactive and digital media.

Table B.7: Singapore Key Facts

Description	Fact
Capital	Singapore
Population	5.5 million (2015)
GDP (US\$b) (current prices)	\$294.6
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Gold - \$2,067 • Crude petroleum - \$983 • Refined petroleum - \$329 • Animal oils and fats - \$233
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Refined petroleum - \$4,843 • Edible products and preparations, nes - \$651 • Computers - \$543 • Taps, cocks and valves - \$197
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Professional, technical and other business - \$1,709 • Personal travel excluding education - \$576
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Transport - \$1,969 • Professional, technical and other business - \$1,250
Singapore's principal export destinations	<ol style="list-style-type: none"> 1. China – 13.8% 2. Hong Kong – 11.4% 3. Malaysia – 10.9% 11. Australia – 3.3%
Singapore's principal import destinations	<ol style="list-style-type: none"> 1. China – 14.2% 2. United States – 11.2% 3. Malaysia – 11.1% 22. Australia – 1.1%

Source: Department of Foreign Affairs and Trade

UK

The United Kingdom of Great Britain and Northern Ireland, also known as the UK, has a population of 64.5 million (2014). The UK is a multi-national state composed of four parts: England, Wales, Scotland and Northern Ireland.

Australia and the UK have an extensive economic and trade relationship. For trade in goods and services, the UK is Australia's seventh largest two-way trading partner, our eighth largest export market and our eighth largest source of imports. The UK is also our leading EU trade partner. We each have a large commercial presence in the other's country.

In 2014-15, two-way trade was worth around \$21.1 billion, with Australian exports worth \$8.6 billion and imports from the UK \$12.6 billion. Services trade is an important element of our bilateral trade relationship. The UK was Australia's third largest services export market in 2014-15. Australia's services exports to the UK were valued at \$4.9 billion and services imports from the UK valued at \$6.23 billion.

Gold (\$583 million) was Australia's primary merchandise export to the UK in 2014-15. Other significant exports included alcoholic beverages (\$376 million), lead (\$311 million) and pearls and gems (\$294 million). Significant

imports from the UK included passenger motor vehicles (\$1.0 billion), medicaments (including veterinary) (\$552 million), pharmaceutical products (\$332 million) and printed matter (\$275 million).

The UK is the second largest source of total and direct foreign investment in Australia. As at the end of 2014, total UK foreign investment in Australia was valued at \$484.16 billion. Direct UK foreign investment in Australia was valued at \$87.37 billion.

As at the end of 2014, total Australian investment in the UK was \$304.54 billion, making the UK Australia's second most important foreign investment destination.

British businesses have traditionally viewed Australia as an attractive base for regional operations and have invested in a wide range of industries, including the infrastructure, pharmaceuticals, energy and travel industries. Approximately a third of all regional headquarters operations in Australia are European, and of these almost half are British. Major UK investors in Australia include Shell, BP, British Aerospace, BT and Vodafone.

Australian goods and services exports to the UK have a broad base, covering a wide range of sectors. This base includes major firm activity (such as in financial services, with Australian banks having a longstanding presence in the market), through to small and medium enterprises. The results of Australia's International Business Survey 2014 (AIBS 2014), found that Australian businesses considered the UK their fourth most important current and future market. The UK was rated the most important market for software and media, and the third most important market for elaborate manufactures, professional services, and wholesale trade.

Table B.8: UK Key Facts

Description	Fact
Capital	London
Population	65.1 million (2015)
GDP (US\$b) (current prices)	\$2,761.0
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Lead - \$467 • Gold - \$424 • Alcoholic beverages - \$387 • Pearls and gems - \$359
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Passenger motor vehicles - \$1,300 • Medicaments (inc veterinary) - \$462 • Pharm products (exc medicaments) - \$315 • Printed matter - \$271
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$1,974 • Professional, technical and other business - \$813
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$2,667 • Professional, technical and other business - \$1,351
UK's principal export destinations	<ol style="list-style-type: none"> 1. United States – 14.9% 2. Germany – 10.0% 3. Switzerland – 7.3% 20. Australia – 1.2%
UK's principal import destinations	<ol style="list-style-type: none"> 1. Germany – 15.0% 2. China – 10.0% 3. United States – 9.2% 36. Australia – 0.5%

Source: Department of Foreign Affairs and Trade

AFRICA

South Africa

With a population of 53 million (2013), South Africa has 11 official languages. Zulu, Xhosa, Afrikaans and English are the most commonly spoken first languages. The country has three capital cities: Pretoria/Tshwane (administrative), Cape Town (legislative) and Bloemfontein (judicial). It is Africa's second largest economy by

GDP (after Nigeria) and the continent's only member of the G20. South Africa is a member of the Commonwealth and an active participant in international forums.

South Africa is Australia's largest export market in Africa with two-way trade totalling A\$2 billion in 2014. An MOU between Australia and South Africa was signed in 2010, recognising the long history of cooperation between the two countries and aiming to strengthen political, economic and strategic engagement.

Australia maintains a High Commission in Pretoria. South Africa is represented in Australia by a High Commission in Canberra.

Table B.9: South Africa Key Facts

Description	Fact
Capital	Pretoria/ Tshwane (administrative); Cape Town (legislative); Bloemfontein (judicial)
Population	55.0 million (2015)
GDP (US\$b) (current prices)	\$266.2
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Aluminium ores and conc (incl alumina) - \$114 • Coal - \$113 • Wheat - \$35 • Meat (excl beef), f.c.f. - \$29
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Passenger motor vehicles - \$560 • Gold - \$48 • Specialised machinery and parts - \$26 • Other ores and concentrates - \$22
Major Australian services exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$106 • Transport - \$80
Major Australian services imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Personal travel excluding education - \$306 • Transport - \$102
South Africa's principal export destinations	<ol style="list-style-type: none"> 1. China – 8.3% 2. United States – 7.5% 3. Germany – 6.1% 27. Australia – 0.9%
South Africa's principal import destinations	<ol style="list-style-type: none"> 1. China – 18.3% 2. Germany – 11.8% 3. United States – 6.7% 23. Australia – 1.1%

Source: Department of Foreign Affairs and Trade

Kenya

Kenya is the largest economy in East Africa. Positive economic growth is expected to continue through the medium term, with recent discoveries of oil, gas and minerals.

The country's capital, Nairobi, is one of the fastest-growing cities in Africa and is home to over 3.3 million people (of an estimated 43 million across the country). Nairobi is also a major regional hub for the United Nations, multilateral organisations and diplomatic missions.

In 2015, Australia and Kenya celebrated 50 years of bilateral relations. Our strengthened ties are evident through collaboration on agriculture and food security, counter-terrorism and piracy, mining exploration and education. Also in recent years, Australia and Kenya have undertaken a number of high-level visits and significant bilateral contact between senior officials. In October 2012, the Australian International Food Security Centre (AIFSC) opened an office in Nairobi. The AIFSC is funding applied research and capacity building activities to identify the barriers to and incentives for faster agricultural technology adoption across ten countries in Eastern and Southern Africa.

Australia maintains a High Commission in Nairobi. Kenya is represented in Australia by a High Commissioner based in Canberra.

Table B.10: Kenya Key Facts

Description	Fact
Capital	Nairobi
Population	44.2 million (2015)
GDP (US\$b) (current prices)	\$64.7
Major Australian exports, 2015 (A\$000)	<ul style="list-style-type: none"> • Civil engineering equipment and parts - \$24,893 • Wheat - \$11,005 • Aluminium - \$7,386 • Passenger motor vehicles - \$6,497
Major Australian imports, 2015 (A\$000)	<ul style="list-style-type: none"> • Crude vegetable matter, nes - \$30,195 • Coffee and substitutes - \$8,835 • Fish, f.c.f. - \$891 • Tea and mate - \$704
Kenya's principal export destinations	<ol style="list-style-type: none"> 1. Uganda – 11.9% 2. United Kingdom – 7.9% 3. Tanzania – 7.7% 34. Australia – 0.6%
Kenya's principal import destinations	<ol style="list-style-type: none"> 1. India – 18.3% 2. China – 12.9% 3. United Arab Emirates – 8.3% 26. Australia – 0.9%

Source: Department of Foreign Affairs and Trade

UNITED STATES OF AMERICA

The United States is the world's largest economy. US GDP (nominal) was projected at nearly US\$18.56 trillion in 2016 or around 24.5% of global GDP. The United States is a major driver of the global economy and a world leader in terms of international trade and investment, innovation and new technologies, research and development expenditure, stock market capitalisation and its share of large global corporations. Information about the US economy and economic outlook is widely available and constantly updated. The latest official economic indicators are available at the US Census Bureau and the US Bureau of Labor Statistics.

The US market comprises 50 states and one federal district. The country includes a range of markets with distinct regional characteristics. It is the world's fourth largest country in terms of geographic area and spans six time zones.

Although the United States operates foreign investment restrictions in some sectors of the economy (airline ownership, telecommunications, and radio services), foreign investors are generally treated on an equal footing

with domestic business. There are no restrictions on moving capital in or out of the United States (or between states) or on the repatriation of profits. A protocol amending the double taxation convention for Australia and the United States entered into force on July 2003. The agreement between the Government of Australia and the Government of the United States of America to Improve International Tax Compliance and to Implement the Foreign Account Tax Compliance Act (FATCA) entered into force on 30 June 2014.

The United States is Australia's largest two-way investment partner, with the two-way investment stock reaching over \$1.45 trillion in December 2015. In 2015, the United States was Australia's second-largest two-way trading partner in goods and services (after China), at \$70.2 billion.

The Australia-United States Free Trade Agreement (AUSFTA) entered into force on 1 January 2005. Upon AUSFTA's entry into force, more than 97% of Australia's non-agricultural exports to the United States (excluding textiles and clothing) became duty free and two-thirds of agricultural tariff lines went to zero. Under AUSFTA, for the first time, Australian companies also have access to the federal government procurement market in the United States and the government procurement markets of 31 US states.

Australia and the United States have a shared record of working together closely to promote global trade liberalisation for over 50 years. Australia and the United States worked closely in establishing the G20, and work together in global and regional trade and economic fora, including the World Trade Organisation and the Asia-Pacific Economic Cooperation (APEC) forum. Australia and the United States were both involved in negotiations for the Trans Pacific Partnership (a regional free trade arrangement between Asia-Pacific countries).

In 2015-16, 1,036,700 Australian residents visited the United States (up 6.1% on the previous year), making it the third most popular short-term destination for Australians after New Zealand and Indonesia. At the same time, 683,100 US visitors arrived in Australia, an increase of 17.4% on the previous year. The US is Australia's fourth largest inbound market by arrivals and third by tourism expenditure. In 2015, US visitors to Australia spent \$3.4 billion. Tourism Research Australia forecasts that, by 2022-23, arrivals from the US will reach 720,000. Expenditure for the same period is forecast to reach \$3.1 billion.

In 2015-16, over 8,400 US citizens were issued with student visas. In US FY 2015, almost 2,500 Australians received F-1 student visas to pursue full-time academic studies in the United States.

Australian culture, from Indigenous art to Australian films, continues to stimulate interest in the United States. The annual 'G'Day USA' program showcases all things Australian from trade and investment, food and wine, film, arts, fashion and lifestyle, to Indigenous culture and tourism.

Australia and the United States enjoy strong people-to-people links based on common values and our deep historical and cultural bonds. The relationship is characterised by a very high flow of people in both directions (including tourists, students, long-term professional workers, temporary business travellers and working holiday makers). Our Embassy estimates there are upwards of 225,000 Australians in the United States at any one time (both residents and visitors). According to Australia's 2011 Census, there were over 77,000 US-born residents in Australia.

Australians can apply for E-3 visas to work in the United States. Australia also has a Work and Holiday visa arrangement with the United States, further strengthening our strong relationship and people-to-people links. In US FY 2015, Australians were issued with over 5,500 E-3 professional work visas and over 8,300 B-1/B-2 visas for temporary visits for a combination of business and/or leisure travel. The working holiday visa allows eligible Australians to stay and work for 12 months in the United States. In US FY 2015, over 5,500 Australians entered the United States on J-1 work and study exchange visas.

In October 2002, the Australian and US Governments signed a bilateral social security agreement to provide improved social security protection to people who have lived and/or worked in both Australia and the United States. The social security agreement also exempts Australian employers from the requirement to provide American social security support for Australian employees sent temporarily to work in the United States.

The United States Studies Centre (USSC) was co-founded by the University of Sydney and the Australian American Association and supported with a federal government grant of \$25 million in 2006. In November 2012, then-US Secretary of State Clinton opened the Perth USAsia Centre, a partner organisation to the USSC, at the University of Western Australia. These Centres collaborate to help deepen Australian knowledge and

understanding of the United States and strengthen the underlying links between people and institutions in the two countries. The USSC has also been the coordinating body for the Alliance 21 project, which receives federal funding to identify new challenges and opportunities for the bilateral relationship.

Table B.11: United States of America Key Facts

Description	Fact
Capital	Washington DC
Population	321.6 million (2015)
GDP (US\$b) (current prices)	\$18,561.9
Major Australian exports, 2015 (A\$m)	<ul style="list-style-type: none"> • Beef, f.c.f. - \$2,488 • Aircraft, spacecraft & parts - \$1,118 • Meat (exc Beef), f.c.f. - \$902 • Alcoholic beverages - \$481
Major Australian imports, 2015 (A\$m)	<ul style="list-style-type: none"> • Passenger motor vehicles - \$2,407 • Aircraft, spacecraft & parts - \$1,389 • Telecom equipment & parts - \$1,080 • Medical instruments (incl veterinary) - \$1,071
USA's principal export destinations	<ol style="list-style-type: none"> 1. Canada – 18.6% 2. Mexico – 15.7% 3. China – 7.7% 15. Australia – 1.7%
USA's principal import destinations	<ol style="list-style-type: none"> 1. China – 21.8% 2. Canada – 13.0% 3. Mexico – 12.9% 29. Australia – 0.5%

Source: Department of Foreign Affairs and Trade

APPENDIX C: CASE STUDY ANALYSIS

There are several different Cities and regions around Australia that have been successful in the development and implementation of international economic development programs. A summary of some of the key observations from these regions is provided below.

CANBERRA

Canberra has all the key attributes and infrastructure of a city capable of performing in the global economy, and has developed its International Engagement Strategy to bring all these attributes together to help raise the profile of the city to become globally recognised and respected. Canberra's strategy is guided by four key directions, including:

- Attracting and retaining talented people, focusing on those with Science, Technology, Engineering, arts and Maths (STeAM) skills to drive the city's productivity and economic growth.
- Diversify the economy by growing key industries such as education and research and building relationships that will help to facilitate economic diversification.
- Develop the critical infrastructure required to help define Canberra as a global city, such as key transport infrastructure and the activation of the city heart.
- Ensuring Canberra is a smart city that delivers more efficient and effective operations and engagement.

The priority outcomes to be achieved through the International Engagement Strategy are focused on promoting Canberra as a place to invest, do business, visit and study.

The Canberra approach has a distinct focus on ensuring the right infrastructure is in place that will support its ambitions to be a globally recognised and respected city. It also highlights the importance of relationship building, and emphasises the need to attract the right people to the city as well. Infrastructure and suitably skilled people are two critical elements to a successful international program.

GOLD COAST

The City of Gold Coast Economic Development International Plan is part of a suite of strategic documents designed to provide the direction to assist in the economic diversification of the region. Gold Coast has a strong focus on collaboration with businesses and other levels of government in delivering international economic development outcomes.

Gold Coast City Council has actively been involved in international relations and associated economic development programs since the 1990's, and are a leader in this space. Gold Coast City Council has approximately 13 active sister city relationships for which they have focused primarily on the economic opportunities that can be generated through each market. They have built and maintained these relationships over a long period of time, which emphasises the importance of establishing a long-term commitment to this type of program.

The Gold Coast's international plan is guided by five key objectives:

- Raise the city's global profile as an emerging world class business destination
- Strengthen the city's international network underpinned by effective non-government and government relationships including sister cities
- Double the Gold Coast's export base across key industry sectors
- Rank within the top 10 Australian cities for inward investment
- Maximise legacy opportunities for business, sport and events from hosting the Gold Coast 2018 Commonwealth Games

These objectives highlight the importance of raising the profile of the city, developing strong relationships and the importance of export development and investment attraction.

As part of their reporting requirements officers from Gold Coast City Council present an annual report on the outcomes of the program, focusing on leads generated, investment attracted, jobs created and export opportunities generated.

WARRNAMBOOL

Warrnambool is Victoria's largest coastal city and is the fastest growing economy and population centre in the Great South East. The City is a major provider in the areas of commerce, governance, social services, health, education, culture, the arts and recreation. Warrnambool is a major destination for people travelling along tourist routes, such as the Great Ocean Road.

Warrnambool is being highlighted within these case studies because of its focus on Sister City relationships and the economic opportunities that can be facilitated.

Warrnambool established a Sister City relationship with Changchun City, China in 2012. Changchun is a major manufacturing area, which produces approximately 2 million motor vehicles per annum, 2,500 train carriages and is a large producer of farm equipment.

The Sister City agreement is based around the two cities carrying out economic, educational and cultural exchanges that promote common prosperity and development.

Warrnambool City Council led a delegation to Changchun in 2015 that had a targeted focus on the agricultural and education sectors. Council leading this delegation provided the participants with access to a diverse mix of decision makers. Deakin University participated in this delegation with Council, and as a result entered into an agreement with Universities in Changchun focused on staff and students exchanges and research opportunities.

In addition to this Warrnambool City Council and their colleagues in Changchun have been working on identifying supply and demand opportunities for both cities, and the capacity and capability of businesses to participate in identified trade and investment opportunities.

One of the key learnings from this example is that Warrnambool is undertaking the research required to identify what the specific opportunities are for their local business community and economy in general, and then beyond this they are working with the local business community to ensure they have the capacity and capability to meet the identified demand.

LOGAN

Logan City is located between Brisbane and the Gold Coast in south east Queensland, and is part of the fast growing western-growth corridor that also includes Ipswich. Logan has an economy that has been built around the traditional industries of manufacturing, construction and retail trade, but is proactively working to diversify its economic base with a focus on knowledge based sectors such as health and medical, education and the professional services sector.

Logan has a number of Sister City relationships that over the years have been focused on cultural activities and exchanges, but in recent years Council has redirected its attention to economic opportunities that can be derived from these relationships.

A couple of the major factors that have contributed to the success of this program have been the appointment of an officer with a strong background in international business and relationships that can provide strong and credible advice to decision makers within Council, and also the understanding that to generate results it will take a long-term commitment with a strong focus on relationship building. In addition to this Logan City Council has also had a strong focus on communication, in relation to the overall strategy, upcoming activities, anticipated outcomes and the achievements delivered by both Council and businesses that have participated.

SUMMARY

Each of the case studies highlighted above are based on cities and regions across Australia with different socio-economic structures and priorities when it comes to economic development, but there are some consistent themes within each area, a summary of the key learnings and themes is provided below:

- All regions highlight the importance of relationship building, and the need to maintain regular contact and have a long-term focus.
- Each region has a clear understanding about what it is trying to achieve and has identified specific opportunities to pursue. This is critical, because while relationships are important, if there isn't a business opportunity identified then the relationship can only go so far.
- Understanding the importance of getting the foundations right, such as transport networks, city centre activation, local business networks, etc.
- Dedicated resource(s) that can advise Council and community stakeholders, and that appreciate the needs of the local community while at the same time understand what is involved in international economic development activities.

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