



GOVERNMENT OF
WESTERN AUSTRALIA

Western Australia Investment and Trade Plan 2019-20

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1 Strategic context

Investment and trade are fundamental to the growth and diversification of the Western Australian (WA) economy and the creation of local jobs. The State Government's 'Our Priorities' targets and Diversify WA Framework, along with the Asian Engagement Strategy and creation of Invest and Trade WA (ITWA), provide a strategic focus to investment and trade activities. This Western Australia Investment and Trade Plan for 2019-20 provides an overview of the Government's main initiatives to strengthen WA's investment and trade performance, working collaboratively with partners in WA and in-market.

1.1 Strategic focus for the Government's investment and trade goals

Investment and trade are crucial to creating economic growth and diversification while delivering quality jobs in Western Australia (WA). Investment is a fundamental pre-cursor to diversifying the sectors which contribute to the State's economy. To rebalance the drivers of economic growth, continued investment in existing areas of strength needs to be supplemented by attracting investment into new and emerging sectors.

As Australia's most trade-exposed State, WA's goods and services exports underpin WA's economic growth, diversification, and job creation. Economic success requires building on existing export markets while facilitating access to new markets and selling new products and services.

In investment and trade, WA competes globally with other Australian States and international economies. To differentiate WA in the global marketplace and with prospective investment and trade partners, WA has to play to its strengths, including its:

- Rich history in investment and trade, with important and well-established relationships with industry.
- Strong reputation as a reliable investment and trade partner and an economic record based on strong trade outcomes.
- Highly-skilled and educated workforce, leading technology and innovation in high-demand sectors and a unique geographic position that enables WA to contribute to and benefit from the unprecedented growth in Asia and the Indo-Pacific region.

In the context of global competition and opportunities, a focus for State agencies' investment and trade activities is provided by the State Government's strategic direction, including:

- **Our Priorities** which sets clear targets for job creation, state-wide.
- **Diversify WA** which outlines a framework for economic growth, diversification, and job creation; and identifies six priority sectors for development.
- **The Asian Engagement Strategy** (AES) which highlights investment and trade with Asia as a key part of the State Government's economic agenda.

With targeted action in the priority sectors, working in partnership with key stakeholders in WA and in-market, investment and trade will make a critical contribution to achieving the Government's economic goals.

Figure 1 | The Investment and Trade Plan is part of the State Government's economic agenda



1.2 The role of this plan

The Western Australia Investment and Trade Plan 2019-20 (the Plan) is a whole-of-government plan reflecting a cross-agency approach to investment and trade. The Plan provides a clear overview of the Government's main investment and trade initiatives in each priority sector for 2019-20, along with a summary of key activities in relevant markets. A strategy for the State Government's three-year investment and trade agenda will be developed in 2020.

The Plan communicates both across government and to stakeholders, including the Australian Government, industry, and business associations, its strategic, joined-up, collaborative approach to investment and trade. It also shows how the onshore and in-market activities of State agencies align to the Government's six priority sectors, supported by an enhanced investment and trade capability with the creation of Invest and Trade WA in the Department of Jobs, Tourism, Science and Innovation (JTSI).

It demonstrates how the Government is focusing on activities where public sector action is required to unlock opportunities for investment and trade, generate sustained economic activity and create local jobs. Government plays an enabling and navigation role for industry, providing support by:

- Promoting and facilitating trade and investment opportunities.
- Shaping policy and regulatory settings.
- Supporting industry capability building.

Overall, the contemporary approach outlined in this Plan helps to ensure the State Government's investment and trade activities are:

- **Grounded in the needs of business.** Agencies maintain strong relationships with business and understand the different ways that they can support business to achieve WA's investment and trade objectives.
- **Sharp and focused.** Agencies use data, industry guidance, and market intelligence to generate insights that inform the State Government's priorities, initiatives, and activities.
- **Responsive and adaptive.** Agencies adapt their approach and focus as market dynamics change and as industries evolve.
- **Integrated and collaborative.** Agencies work both across and beyond government to bring together industry perspectives, market knowledge, and strategic objectives in order to deliver better investment and trade outcomes.
- **Performance driven.** Agencies develop clear measures of success, report against them and adapt their approach to achieve results.

Section 2 of the Plan outlines four key elements that help to build the foundations of a strategic approach to investment and trade, and related activities that the State Government is undertaking in 2019-20. Section 3 articulates key opportunities for each priority sector and the related initiatives and activities. Appendix A demonstrates the engagement with WA's key markets through effective in-market presence.

2 Building the foundations of a strategic approach to investment and trade

Four elements underpin WA's approach to investment and trade across sectors and markets:

- **Partnership approaches.** Working in partnership with government and industry to support investment and trade activities.
- **Establishing Invest and Trade WA.** Putting in place a whole-of-government approach for WA as a destination for investment.
- **Insight-driven targeting of market opportunities.** Generating and using data, market networks, and intelligence to target activity between and within sectors and markets.
- **Investment and Trade policy settings.** Articulating positions on priority issues to the State, and proactively advocating for WA's interests in national trade and investment policy processes.

The following section outlines these elements and the key activities being undertaken in 2019-20.

2.1 Partnership approaches

As the lead agency for investment and trade, JTSI works with a range of stakeholders across industry and government in a partnership approach to investment and trade in WA. This includes state and federal government departments, the Business Advisory Forum, Business Councils, Chambers of Commerce, various industry Consortia and Industry Associations.

Launched in 2019, the AES articulates a vision for WA's investment, trade and people-to-people relationships with Asia.

Initiative and accountable agency	Objective	Related activities
Establish a Business Advisory Forum including senior stakeholders from industry, State and Federal Government (JTSI)	Enable key stakeholders to provide direct input into the new ITWA model, support the implementation process, and provide critical insights to inform the State's activity in increasing trade from and investment into WA.	Provide advice on the establishment and operation of ITWA, including: <ul style="list-style-type: none"> • Opportunities to establish effective government and industry linkages. • Marketing and communication efforts to promote WA's trade and investment opportunities. • Best practice processes in client service delivery, trade and investment opportunity identification, and qualification. • Advocacy of the functions and role of ITWA as a trusted partner in trade and investment promotion and facilitation. • The strategic direction and operation of ITWA.
Support State Industry Consortia activities <i>Department of Premier and Cabinet (DPC)</i>	Enable industry stakeholders to partner with government to support economic growth activities across key industries.	<ul style="list-style-type: none"> • Convene six State Industry Consortia: Tourism; Aboriginal Tourism; Creative Industries; Innovation; International Education; and Premium Foods. • Work within Consortia to identify measures for government to foster economic growth alongside implementing policy and regulatory settings.
Deliver Access Asia Business Grants <i>(JTSI and Department of Primary Industries and Regional Development (DPIRD))</i>	Support WA small to medium enterprises (SMEs), industry associations and bilateral business councils to advance their international business efforts in Asian markets.	<ul style="list-style-type: none"> • Manage two grant rounds annually. • Develop and implement communications strategies to promote grant recipients and their business success and experiences in Asia. • Manage grants for Asia Market Export Program.
Activate WA's Sister State relationships <i>(JTSI)</i>	Support investment initiatives in WA's Sister States.	<ul style="list-style-type: none"> • Undertake a range of activities including trade missions, business delegations, B2B programs and Government to Government programs, including a focus on: <ul style="list-style-type: none"> • Zhejiang (China) • The East Java (30th Anniversary in 2020) • Andra Pradesh (India) • Hyogo (Japan) • Identify future Sister State development opportunities.
Support WA's Asian Business Councils <i>(JTSI)</i>	Build on the extensive in-market networks and influence of WA's Asian Business Councils to increase trade and investment.	<ul style="list-style-type: none"> • Undertake a range of activities generated by Asian Business Councils including Trade Missions, Business delegations, B2B programs and Government to Government programs. • Develop work experience programs to develop the business capability of Western Australians under 40 years of age through work experience in Asian markets.

2.2 Establish Invest and Trade WA

ITWA provides a 'one-stop-shop', leading a whole-of-government approach to promote WA as a destination for investment, facilitate investment into the State, and assist industry with its export efforts. ITWA was established in 2019 to:

- promote the State's export and industry capability to international buyers and investors
- identify, encourage, and facilitate strategic investment and trade opportunities
- provide information and support to enhance export competitiveness and increase engagement with priority markets
- provide advice to Ministers and logistical support for outbound Ministerial visits and missions.

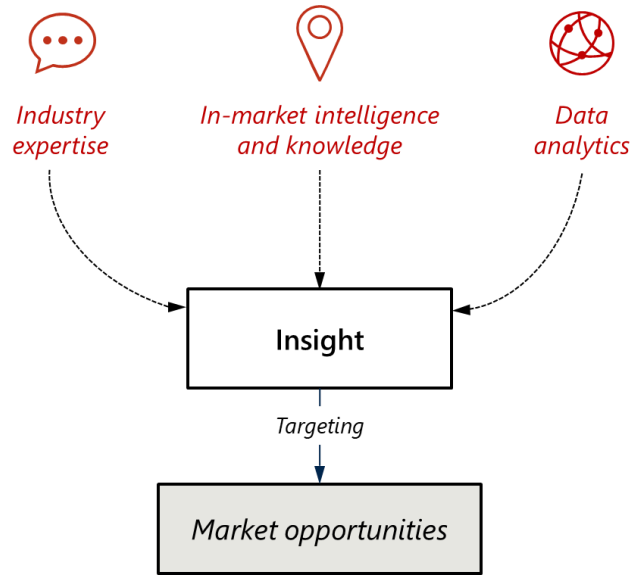
Initiative and accountable agency	Objective	Related activities
Design and develop ITWA's operating model with accompanying systems and support (JTSI)	Implement a contemporary client service model to support WA investment and trade outcomes as part of a whole-of-government effort.	<ul style="list-style-type: none"> • Design ITWA structure and job functions. • Develop systems and processes to support ITWA operations. • Design and implement a customer relationship management (CRM) system to track and record trade and investment enquiries, workflow, services delivered, and outcomes. • Develop marketing collateral to promote WA's trade and investment value proposition.
Develop services and supports for exporters and potential investors (JTSI and DPIRD)	Deliver value to WA businesses and attract investors to WA.	<ul style="list-style-type: none"> • Deliver a regional roadshow program to promote market opportunities, build exporter capability and investor readiness. • Develop a portfolio of investment-ready projects.
Provide enhanced services for inbound customer and investor programs (JTSI)	Promote WA capability and convert investment and trade opportunities.	<ul style="list-style-type: none"> • Coordinate across government programs for inbound government, trade and investor delegations. • Deliver B2B events around major industry programs (AOG Expo, Major Projects 2020, XR: WA virtual reality festival, Gourmet Escape, sporting events). • Establish a 'launching pad' to attract entrepreneurs from key markets.
Deliver targeted programs in-market (JTSI and DPIRD)	Promote WA capability and convert investment and trade opportunities.	<ul style="list-style-type: none"> • Provide a WA presence at targeted in-market events related to priority sectors, including technology and advanced manufacturing, and primary industries.
Explore funding options for Export Hubs (JTSI)	Secure Australian Government funding to support the provision of export development services in key industry areas.	<p>Explore funding opportunities with the Australian Government to support:</p> <ul style="list-style-type: none"> • Digital Mining METS Export Hub • Cybersecurity Export Hub • Subsea (PETS) Export Hub

2.3 Insight-driven targeting of market opportunities

Insight-driven targeting of market opportunities involves gathering quantitative and qualitative information from a range of sources, testing this information, and using it to provide advice on the size, scope, and timing of WA's opportunities in different markets.

This information can be used to make decisions on where, when, and how WA should target its investment and trade activities.

Figure 2 | Insight-driven targeting of market opportunities



Initiative and accountable agency	Objective	Related activities
Provide information and analysis on WA's key and emerging markets (JTSI)	Identify target market opportunities and guide decision making.	<ul style="list-style-type: none"> Provide market-specific political and economic overviews to Ministers travelling in-market. Develop trade profiles that outline WA's merchandise and services trade with key and emerging markets.
Provide information and analysis on WA's priority sectors (JTSI)	Communicate the capabilities and opportunities for WA's priority sectors.	<ul style="list-style-type: none"> Develop commodity and sector profiles that provide information on WA's capabilities and an overview of the global market for that commodity/sector, including iron ore, LNG, and battery minerals.
Provide information and analysis for the State Government's long-term strategies (JTSI)	Identify and communicate the economic, investment, and trade opportunities that guide WA's long-term strategies.	<ul style="list-style-type: none"> Undertake analysis of the size and composition of economic growth in Asian markets to support the development and implementation of the AES. Undertake analysis to determine how WA's investment and trade activities contribute to the State Government's strategic goals.

2.4 Investment and trade policy settings

The State Government's investment and trade policy initiatives seek to ensure that the decisions made in state, national and international arenas help to boost exports and increase inward investment to WA. This requires JTSI to develop and clearly articulate positions on priority issues for the State, and to proactively participate in a range of national trade and investment policy processes to advocate for WA's interests.

Initiative and accountable agency	Objective	Related activities
<p>Convey clear trade and investment priorities for WA to business, government, and community stakeholders (JTSI)</p>	<p>Increase understanding of the State's priorities and activities, and how the State works with business, other governments and the community to strengthen investment and trade.</p>	<ul style="list-style-type: none"> • Develop foundational documents that present State Government priorities and activities, including the WA Government Trade and Investment Plan 2019-20 and the AES.
<p>Advocate for WA's interests in national consultations on trade, investment, and international issues (JTSI and DPIRD)</p>	<p>Influence the national and international environment for trade and investment.</p>	<ul style="list-style-type: none"> • Engage in the Federal, State and Territories' Trade and Investment Ministerial meetings and Senior Officials Trade and Investment Group. • Input to the Australian Government's consultations on free trade agreements, including the Australia-European Union Free Trade Agreement and Australia-UK Free Trade Agreement. • Make submissions to Parliamentary Inquiries on trade and investment matters of importance to WA. • Advocate for WA agrifood industry priorities as part of the Australian Government technical market access negotiation priorities with trading partners.

3 Enabling investment and trade in priority sectors

This section articulates the six priority sectors in WA, and outlines:

- Key opportunities for each sector requiring government support, based on market information.
- Priority initiatives for 2019-20, including their objectives, related activities and accountable agencies.

3.1 The State's priority sectors

The Plan is structured around the six priority sectors outlined in the Diversify WA economic framework:



To support a sharp and focused approach, these priority sectors form the basis of investment and trade activity, both in WA and across different markets. The Plan includes key investment and trade initiatives being undertaken in these sectors across government in 2019-20 including by:

- Department of Jobs, Tourism, Science and Innovation (JTSI)
- Department of Primary Industries and Regional Development (DPIRD)
- Department of Local Government, Sport and Cultural Industries (DLGSC)
- Department of Mines, Industry Regulation and Safety (DMIRS)
- Department of Training and Workforce Development (DTWD)
- Department of the Premier and Cabinet (DPC)
- Department of Health (DOH)
- Department of Education (DOE)

3.2 Energy

3.2.1 Key opportunities and context

The availability of affordable, reliable energy supplies underpins WA's economy. WA has substantial low carbon energy resources, particularly natural gas, and unparalleled opportunities to generate and safely store renewable energy. WA supplies the majority of the world's lithium and has all the other rare earth minerals necessary to produce lithium batteries.

Given the world's ever-growing demand for energy, especially clean energy, WA has an opportunity to be at the forefront of global energy production.

Future Battery Industry Strategy

WA has strong potential to grow a diverse, value-adding, future battery industry as part of global battery supply chains. In 2019, WA launched its Future Battery Industry Strategy. The Future Battery Industry Strategy has a clear focus on attracting investment into the sector through identifying key players within priority markets (including China, India, East Asia, the United Arab Emirates, Europe and the United States), to better promote WA's comparative advantages and facilitate greater participation in global battery supply chains.

LNG Jobs Taskforce

WA has a well-established energy sector centred on liquefied natural gas (LNG) production that is expected to substantially contribute to global supplies in coming years. In 2018, WA was responsible for 13.9% of world LNG exports. The LNG Jobs Taskforce (the Taskforce) is a joint industry-government collaboration to maximise local jobs and economic benefits from WA's LNG industry. The Taskforce works to promote WA's position as a global LNG hub to attract investment in the sector.

Renewable Hydrogen Strategy

The current global demand for hydrogen is more than 70 million tonnes per year, with strong growth predicted over the next decade resulting from major export markets including Japan and Korea shifting towards a hydrogen-focused economy. The Renewable Hydrogen Strategy was launched in July 2019 and aims to develop the hydrogen industry in WA with a focus on exports, transport, remote operations, and gas blending. The value of Australia's potential low-emissions hydrogen exports could reach \$2.2 billion by 2030 and \$5.7 billion by 2040.

Energy Transformation Strategy

Secure, reliable, and affordable electricity is a key input to industrial activity in WA. The Energy Transformation Strategy outlines the State Government's work program to modernise policy, regulatory, and planning frameworks, remove barriers to connecting new technologies, and ensure grid stability. This will enable investment in new generation and storage technologies that deliver secure, reliable, and affordable electricity to households and businesses.

Key markets | Energy

Battery minerals – China, India, Japan, Korea, United Arab Emirates, Singapore, United Kingdom, Germany, United States

Oil and gas – India, Japan, United Arab Emirates, United Kingdom, Europe

Hydrogen – Japan, Korea, United Kingdom, Europe

Renewables – Indonesia, Korea, United Arab Emirates, Singapore, Europe

3.2.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
Attract investment into the WA's future battery industry (JTSI)	Support the growth of WA's capacity to export a diverse range of future battery minerals, materials, technologies, and expertise.	<ul style="list-style-type: none"> • Develop market-specific investment attraction strategies for target markets, identifying opportunities for greater WA participation in global supply chains. • Identify and exercise opportunities to engage with potential investment partners to highlight WA's comparative advantages.
Facilitate key projects for WA's future battery industry (JTSI)	Develop and diversify WA's capabilities in value-adding activities in the battery value chain.	<ul style="list-style-type: none"> • Provide project facilitation services for the battery industry. • Develop and publish a Funding Assistance Register to assist proponents in accessing funding. • Develop project facilitation and project approvals factsheets outlining the State's approvals process and services offered.
Attract investment into critical minerals projects (JTSI)	Develop WA capabilities in supplying critical minerals including rare earth elements, for the defence, aerospace, and advanced manufacturing industries.	<ul style="list-style-type: none"> • Facilitate understanding of WA's potential as a secure and reliable supplier and processor of critical minerals (including rare earth elements). • Engage with policymakers in target markets to identify WA as a preferred supplier of critical minerals. • Liaise with international industry in the defence, aerospace, and advanced manufacturing sectors.
Facilitate the LNG Jobs Taskforce (JTSI)	Promote the WA energy sector to global markets.	<ul style="list-style-type: none"> • Facilitate joint Taskforce participation at SPE Offshore Europe, Abu Dhabi International Petroleum Exhibition & Conference, the Resources Technology Showcase and AOG Expo and Conference. • Undertake studies through the downstream future energies and renewables working group, focussing on: <ul style="list-style-type: none"> • The State's potential for gas using industries in WA, including the petrochemical and hydrogen industries. • Raising awareness on the carbon capture, use, and storage industry and identify opportunities for development.
Launch the WA Renewable Hydrogen Strategy and fund (JTSI)	Support investment in Renewable Hydrogen Projects in WA.	<ul style="list-style-type: none"> • Manage a \$10 million fund to facilitate private sector investment in the renewable hydrogen industry. • Work closely with the Australian Government and relevant bodies to support regulatory reform that will enable growth of the renewable hydrogen industry. • Provide strategic advice to potential investors and co-ordinate the State's work in growing this industry, both domestically and for export.
Implement the Energy Transformation Strategy and related initiatives (Energy Policy WA)	Attract investment in WA by providing secure, reliable, and affordable electricity as an input to industrial activity.	<ul style="list-style-type: none"> • Modernise policy and regulatory settings governing the connection of generators to the Western Power network and the operation of the Wholesale Electricity Market in the South West Interconnected System (SWIS). • Reform regulation to facilitate the deployment of Distributed Energy Resources in a way that provides maximum network and consumer benefits. • Manage the Clean Energy Future Fund to support innovative clean energy projects. • Work with industry in the Pilbara to implement regulatory reforms to improve access to electricity infrastructure and minimise power costs.

3.3 Tourism, events and creative industries

3.3.1 Key opportunities and context

Tourism, events, and creative industries make an important contribution to the vibrancy and liveability of Perth and WA's regions. Leveraging cultural and sporting events to draw more tourists, while also growing an innovative creative sector, is an important diversification prospect for the State.

Aligned with the AES, a focus on high-growth Asian markets forms a key part of the State's short and longer-term tourism strategy.

Key markets | Tourism, events and creative industries

Tourism – China, India, Indonesia, Singapore, Japan, Malaysia, United Kingdom, Germany, Switzerland

Aviation – China, India, Indonesia, Japan, United Arab Emirates, Philippines

Sport and Culture – Korea, United Arab Emirates

Creative industries – Indonesia

Tourism Strategies

WA has increased its focus on tourism to harness its economic potential. In 2018-19, 2.87 million out-of-state (international and interstate) people visited WA, a record high for the State. The Two-Year Action Plan (2YAP) for Tourism WA 2018 and 2019 aimed to:

- position WA as the western gateway to Australia
- change perceptions of Perth and reignite the East Coast market
- attract more people, more often, to regional WA
- intensify the focus on converting core target audiences to visitors

The 2YAP was designed to maximise visitor spend through focused and bold activity, prioritised to deliver immediate economic impact.

Aboriginal Tourism

Cultural tourism is the fastest growing international tourism sector. Visitors to WA can immerse themselves in Aboriginal traditions, language, history, and custom through cultural tourism experiences. The Aboriginal Tourism Action Plan has been developed in 2019 and will be launched in mid-2020. Opportunities to fund discrete initiatives in the Aboriginal Tourism Action Plan will be identified and available the following financial year, in consultation with local Aboriginal communities.

Aviation

Aviation access to Perth and key regional WA centres plays a major part in the growth of tourism throughout the State. Perth Airport is the gateway and first point of contact for many visitors to WA (international and domestically). The development of additional routes and direct aviation services has formed a key part of the 2YAP in partnership with Perth Airport and the Department of Transport (regional aviation). In 2019-20, Tourism WA has secured and/or commenced a number of aviation initiatives, including Tokyo-Perth flights (September 2019); Busselton-Melbourne flights (March 2020); Perth-Exmouth trial flights; Perth-Manila flights (March 2020); Affordable Airfare program between Perth and Broome; and Kununurra-Melbourne flights (May 2020).

Cultural Infrastructure and Creative Industries

WA has a large existing audience with a high attendance and participation in arts and culture activities. For example, Perth Fringe World Festival is now one of the largest festivals of its kind in the world, attracting 850,000 people in 2019 to free and ticketed events. The State's cultural infrastructure and creative industries help the public engage with sporting, cultural, and recreational places. They attract tourists to Perth and to the regions, and increase visitor spending in our State. WA is seeking to align its development of screen and immersive technology with the promotion of the State and its unique points of difference, developing immersive experiences in areas such as entertainment, performance, and visitor experience.

3.3.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
Finalise delivery of the Two-Year Tourism Action Plan and develop Long-Term Tourism Strategy (JTSI)	To make WA the most desirable leisure, business, and events destination in Australia.	<ul style="list-style-type: none"> Deliver activities as outlined in the 2YAP. Undertake consultation, research, and analytics to develop the Long-Term Tourism Strategy that sets WA's tourism agenda to 2030.
Develop and implement the Aboriginal Tourism Action Plan (JTSI)	Support the marketing of Aboriginal tourism experiences in WA, and the development of Aboriginal events.	<ul style="list-style-type: none"> Launch the Aboriginal Tourism Action Plan with support from the WA Indigenous Tourism Operators Council (WAITOC). Support marketing of Aboriginal tourism experiences in WA and development of Aboriginal events. Secure editorial opportunities to promote Aboriginal tourism experiences in travel and lifestyle media. Establish a clear and collaborative process to include Aboriginal Tourism Products into key tourism data sets.
Investigate opportunities for additional aviation services to WA (JTSI)	Grow aviation access and capacity.	<ul style="list-style-type: none"> Trial and establish new aviation services and routes for WA.
Plan and invest in WA's cultural infrastructure (DLGSC)	Develop WA's creative industries and tourism sectors.	<ul style="list-style-type: none"> Administer and deliver the Regional Arts and Culture Investment Program (RACIP). Upgrade existing cultural assets through RACIP. Produce an interactive WA Cultural Infrastructure Map. Support Local Governments to develop and implement cultural plans. Build capacity of regional performing arts venue staff and programming through the RACIP's Business Development and Capacity Building initiative. Activate regional performing arts venues through the RACIP's Venue Activation Fund.
Understand and measure the public value of cultural infrastructure (DLGSC)	Develop measurement framework to show the impact of government investment into creative industries and cultural infrastructure.	<ul style="list-style-type: none"> Develop a Cultural Infrastructure Investment Framework for public value appraisals of cultural infrastructure proposals to maximise benefits and determine state significance. Engage a consultant to research and develop further metrics within the Public Value Measurement Framework (PVMF) to better determine economic value of cultural infrastructure, incorporating social and cultural benefits.
Support technical innovation in the screen and immersive technology industries (DLGSC)	Grow the screen and immersive technology industries and bring WA experiences to new audiences.	<ul style="list-style-type: none"> Support XR:WA virtual reality festival. Establish the Creative Industry Consortium to focus on the screen, immersive technology, and games sector. Establish a \$100,000 pilot fund to support the interactive, video games, virtual and augmented reality industries.

3.4 International education

3.4.1 Key opportunities and context

International education represents an important job creation and diversification opportunity for the State's economy. The sector generated \$1.9 billion in export income in 2018, with education-related spending by international students on tuition fees and living expenses such as food, accommodation, transport, and entertainment supporting around 14,600 full time jobs across the State.

The increasing global demand for international education provides a clear opportunity for WA. The number of international students engaged in tertiary education worldwide has expanded over past decades, rising from 2 million in 1998 to 5.3 million in 2017.

International Education Strategy

In 2018 the State Government launched the International Education Strategy 'Where Bright Futures Begin: International Education in Perth, Western Australia 2018-2025' (the Strategy). Consensus between government and industry was that WA needed a coordinated and deliberate response to taking advantage of the opportunities for growth in the international education sector – realised through the development of the new strategy.

The Strategy, developed by JTSI, provides a framework to guide future government and industry action focused on growing the number of students coming to study in Perth and Western Australia. JTSI has responsibility for overseeing the implementation of the Strategy and has worked closely with the sector on the development of action plans to support its implementation. This includes StudyPerth, the peak industry body focused on promoting Perth as a world-class education destination. StudyPerth will play a key role in the Strategy's implementation, primarily through its *International Education Action Plan*.

The delivery and implementation of the International Education Strategy is the joint responsibility of JTSI, StudyPerth, and WA's six in-market Education Business Development Managers (EBDMs) located in China, India, Vietnam, Korea, Japan and Indonesia.

Key markets | International education

Higher Education – China, India, Vietnam, Indonesia, Malaysia, Africa, Middle East

Vocational Education Training (VET) – India, Vietnam, Indonesia, Korea, Malaysia, Africa, Middle East

English Language Intensive Courses for Overseas Students (ELICOS) – China, India, Vietnam, Indonesia, Japan, Korea, Africa, Middle East

Schools – China, Vietnam, Indonesia, Malaysia

3.4.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
<p>Undertake in-market activities to promote WA as an international education destination (JTSI)</p>	<p>Support WA international education efforts via formal and informal relationship building activities in-market to expand the pipeline of overseas students and available education services and providers.</p>	<ul style="list-style-type: none"> • Manage a global network of (EBDMs) through: <ul style="list-style-type: none"> • Establishing a centralised operational plan and reporting process for EBDMs for annual initiatives in key markets. • Providing support to build EBDMs' capacity to develop meaningful strategic relationships with key in-market conduits for international education outcomes (e.g. agents). • Undertake a range of in-market activities, based on market requirements. Activities include: <ul style="list-style-type: none"> • Establishing MOUs between WA education institutions and in-market institutions. • Developing agent relationships through workshops, training, and in-bound visitation opportunities. • Attending student and institution roadshows as part of a 'WA international education team'. • Support visiting dignitaries to link in with key in-market education opportunities. • Liaise with stakeholders to provide support and input on their in-market activities (StudyPerth, Tourism WA universities, TAFEs, service providers), including: <ul style="list-style-type: none"> • Supporting the Schools Curriculum and Standards Authority to expand the number of international schools licensed to deliver the WA Certificate of Education offshore. • Working with the VET sector to actively promote their programs and services. • Provide regular intelligence updates on in-market activities and trends to inform WA's international education policy.
<p>Provide centralised leadership and coordination for International Education activity (JTSI)</p>	<p>Maintain strong governance of industry and government efforts to enhance WA's International Education reputation.</p>	<ul style="list-style-type: none"> • Provide coordination and accountability support for activities across the sector through the establishment of the WA International Education Advisory Group. • Identify coordination mechanisms (such as a Consortia or Summit) to bring together international education stakeholders.
<p>Support Study Perth (JTSI)</p>	<p>Enable StudyPerth to deliver components of the International Education Strategy.</p>	<ul style="list-style-type: none"> • Provide funding to StudyPerth to undertake a range of activities including: <ul style="list-style-type: none"> • Managing Perth-based events and programming to welcome and support international students during their studies. • Undertaking marketing and branding activities, such as 'Destination Perth' marketing campaign, social media, newsletters, and collateral requirements of EBDMs.
<p>Expand market based research and intelligence management (JTSI)</p>	<p>Provide linkages between in-market insights, research, and data analytics to drive targeted decision making.</p>	<ul style="list-style-type: none"> • Establish new reporting mechanisms to harness market insight and local intelligence to inform WA's international education operations and decision-making processes.

3.5 Mining and Mining Equipment, Technology and Services

3.5.1 Key opportunities and context

WA's mining sector is one of the most productive and diversified in the world. The economic importance of the mining industry is demonstrated by the value of royalties returned to the State (\$5.7 billion in 2018-19) and the number of people employed (an average of 124,000 in 2018-19).

While the State's production of minerals is dominated by the iron ore, gold, alumina, and nickel sectors WA is also the world's largest producer of lithium and has reserves of all other minerals used to manufacture batteries.

WA also holds significant reserves of other critical mineral minerals such as rare earths and vanadium that are currently the subject of development proposals. A new brine industry is also set to produce potash, a premium fertilizer that significantly increases agricultural yields and productivity.

Underpinning the minerals industry are considerable Mining Equipment, Technology and Services (METS) capabilities that have supported the development of a range of innovations including remote control technologies, automated system solutions, and exploration and 3D mine design software. Many of these innovations are also applicable to other industry sectors, helping to facilitate international competitiveness and economic growth across the wider economy.

The State Government supports the mining sector through the frameworks and the systems necessary to encourage investment and innovation. Mature and stable approvals systems and low sovereign risk provide security for investors, as well as reassurance to the community that resources will be developed in a responsible manner. The State Government also recognises the importance of exploration to the ongoing sustainability of the industry and continues to support initiatives such as the Exploration Incentive Scheme.

Mineral and Energy Resources Development Strategy

The State Government is developing a mineral and energy resources development Strategy, due for completion mid-2020, which will outline development priorities for both the mineral and energy sectors to ensure sustainable growth and production.

The Strategy will set out the State Government's objectives for the resources sector, ensuring alignment of the activities of government, industry, research institutions, as well as the equipment, technology, and service sectors for both the mining and petroleum sectors (METS and PETS).

The Strategy will also promote WA's resources development potential and competitive advantages, with a focus on the key role WA will play in world-wide efforts to reduce greenhouse gas emissions.

Key markets | Mining and METS

Mining – China, India, Japan, Saudi Arabia

Mining Equipment, Technology and Services (METS) – China, India, Indonesia, Saudi Arabia, United Arab Emirates, Singapore

Resources downstream processing – Japan, Korea

3.5.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
Develop Mineral and Energy Resources Development Strategy (DMIRS)	Outline development priorities for the sector to ensure sustainable growth and production.	<ul style="list-style-type: none"> • Consultation with key stakeholders, including industry and other government agencies.
Continue the Exploration Incentive Scheme (DMIRS)	Facilitate increased private sector resource exploration, leading to new resource discoveries. This will increase knowledge of the State's geology and resources and help increase employment opportunities. Most of the activities are focused in under-explored areas of WA.	<ul style="list-style-type: none"> • Establish a government-industry co-funded drilling program. • Conduct 3D prospectivity mapping and encouraging exploration through cover via 4D mapping. • Support strategic research conducted through initiatives such as the Mineral Exploration (MinEx) Cooperative Research Centre and the Minerals Research Institute of Western Australia. • Support the acquisition of geophysical data e.g. Passive seismic, Airborne Electromagnetics.
Streamline WA's Mining Environmental Approvals Project (DMIRS)	Improve the mining environmental approval process to encourage investment, make it easier to do business and create more jobs for Western Australians.	<ul style="list-style-type: none"> • Develop a high-level, end-to-end mining environmental approvals process map and complementary user journey maps. • Conduct ongoing stakeholder engagement to progress proposals that relate to: <ul style="list-style-type: none"> • environmental standards and frameworks that ensure consistent decision making • consolidated and simplified application guidelines • inclusive State Government and stakeholder training • clear and defined processes for secondary approvals and amendments to primary approvals.
Showcase the WA Mining Sector (JTSI, DMIRS)	Present stakeholders with the latest information and innovations in the resources sector.	<ul style="list-style-type: none"> • Host the following events: <ul style="list-style-type: none"> • Resource Technology Showcase 2019. • GSWA Open Day.
Promote WA METS and PETS capabilities (DMIRS)	Connect WA capabilities in upstream and downstream mining and energy sector services across the Middle East.	<ul style="list-style-type: none"> • Work with Chamber of Minerals and Energy (WA) to market regional opportunities to WA METS and PETS industry. • Offer Middle East market intelligence, in-market support, business matching, and attendance at industry-focused trade events and trade missions. • Expand Mining and Oil and Gas sector and related networks across government and private sectors in the Middle East. • DMIRS Geological Survey WA to host African delegations in Perth. • Involvement in Africa Down Under Conference in September 2019 in Perth.

3.6 Technology and advanced manufacturing

3.6.1 Key opportunities and context

Global demand for new technologies, pharmaceutical and medical products and techniques, and defence and maritime capability and assets continues to grow at a rapid pace.

WA has built strengths in large-scale ship building, sustainment and specialised manufacturing. WA also has globally-recognised research and development capability and unique flora and fauna with potential medicinal benefits. Exploiting the State's abilities in technology and advanced manufacturing activities is a clear pathway for economic growth and diversification.

Key markets | Technology and advanced manufacturing

Defence – Europe

Technology (automation) – Japan, Singapore, Europe

Big data – Europe

Space – Europe

Smart Cities – Indonesia, Japan, Europe

Biotechnology – Korea

Agriculture and food technologies – Japan, Europe

Future Health Research and Innovation Fund

Health and medical research and innovation is a key opportunity to retain WA's best and brightest health researchers and innovators and attract leading research from around the world. The Future Health Research and Innovation (FHRI) Fund will provide a secure source of funding to support health and medical research and innovation and commercialisation opportunities, stemming from local research discoveries and innovative practices.

Enabling legislation is being progressed to repurpose interest from the \$1.3 billion Western Australian Future Fund to fund health and medical research. Subject to the successful passage of the FHRI Fund legislation, first disbursements from the fund will occur in 2020-21.

New Industries Fund

WA has a range of competitive advantages in areas such as life sciences, space, education and training, as well as underpinning technologies such as data science and cybersecurity to grow innovation, entrepreneurship and commercialisation to catalyse areas of regional competitiveness. Emerging businesses and SMEs active in these areas have the potential for high growth and related positive flow-on effects. The \$16.7 million New Industries Fund (NIF) is a central component of the State Government's Plan for Jobs. The NIF supports and accelerates new and emerging businesses in these areas to support the diversification of the WA economy, create new jobs and industries, and build capability and capacity in the workforce.

Defence West

WA has a long and proud history of supporting Australia's national security and defence. Challenges and emerging threats to national security continue to become more demanding and complex. Satisfying the requirements of the Australian Department of Defence (DoD) so that it can continue to meet these challenges and successfully complete assigned missions is a significant opportunity for WA.

The vision is for the defence industry to continue to grow and become a key pillar of the WA economy, with the annual contribution to double by 2030. Priority markets for the WA defence industry include the DoD and overseas governments including alliance partners (such as the United States, United Kingdom, and Canada) and Indo-Pacific nations.

3.6.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
Establish the FHRI Fund Strategy (DOH)	Identify health and medical research and innovation needs and opportunities in WA.	<ul style="list-style-type: none"> Consult with stakeholders to obtain input for development of the FHRI Fund Strategy. Support passage of the FHRI Fund Bill through State Parliament. Develop and implement communications tools to enable engagement with current and potential FHRI Fund stakeholders.
Manage the New Industries Fund (JTSI)	Support and accelerate new and emerging businesses to diversify the WA economy and create new jobs and industries.	<ul style="list-style-type: none"> Identify the number of jobs created and commercialisation results of each program, including: Innovation Vouchers Program, WA Innovator of the Year, X-TEND, and International Access Program.
Establish State Innovation Hubs (JTSI)	Unite industry, the innovation community, the research sector, and government to develop local industries and build capacity and capability for the current and future workforce.	<ul style="list-style-type: none"> Attract investment in innovative enterprises through supporting appropriate delegations and missions, including BIO Convention (USA), and London Tech Week. Evaluate, as and when relevant data becomes available and in consultation with stakeholders, outcomes of the State's now established: <ul style="list-style-type: none"> WA Data Science Innovation Hub MTPConnect WA Life Sciences Innovation Hub WA AustCyber Innovation Hub Provide clients with connections to investors, access to education and support, connect researchers, users and suppliers of innovations across the value chain, and identify and optimise synergies between key enabling technologies.
Facilitate the transition of Collins class submarine full cycle docking (FCD) to WA (JTSI)	Secure Henderson as the hub for all sustainment, maintenance, upgrade and repair work for the Royal Australian Navy's Collins class submarines.	<ul style="list-style-type: none"> Complete the Henderson Strategic Infrastructure and Land Use Plan (SILUP) and associated infrastructure development. Prepare WA industry for Defence (Maritime) Workforce Development Plan. Work with local defence industry to build capability and capacity of the supply chain.
Deliver key promotional Defence events (JTSI)	Deliver a nationally and regionally significant showcase of events that highlight WA's defence industry capability and examines WA's strategic importance in the Indo-Pacific region.	<ul style="list-style-type: none"> Host the 2019 WA Indo-Pacific Defence Conference. Undertake a Defence West roadshow, including: <ul style="list-style-type: none"> Participation at Pacific 2019 International Maritime Exposition in Sydney, NSW. Attendance at the Defence and Security Equipment International (DSEI) trade show in London, UK.
Engage with international defence prime contractors (JTSI)	Attract prime contractors to invest directly in WA.	<ul style="list-style-type: none"> Provide engagement opportunities to local industry for upcoming domestic and international defence programs. Attract international defence prime contractors to visit WA to deliver local industry engagement activities.

3.7 Primary industries

3.7.1 Key opportunities and context

Diversify WA recognises the importance of increasing productivity in the primary industries sector and capturing more value from food and fibre exports as part of transitioning to a more diversified economy. World food production will need to increase by 70 per cent by 2050 to keep up with demand.

The ability to tailor technologies and farming methods to respond to both climatic changes and changing consumer preferences provides an opportunity for WA to become a world leader in food and beverage production.

A competitive value-added sector has the potential to increase WA's agriculture revenue substantially by 2025, attracting new investment and creating additional jobs. WA's isolated location, strict biosecurity regime, and innovation in value-adding will ensure that increasing global demand for niche products.

Primary Industries Plan

WA's agricultural exports represent 51 per cent of WA's non-mining exports. WA exports significantly more raw commodity food products than any other Australian State, but lags significantly behind other States in post farm-gate food and beverage processing. As consumer interest around food sustainability continues to grow, WA can attract premium prices by providing information about content and origins. By showing that value-added food and beverages are safe, WA will capture a greater share of this growing market, creating jobs and aiding economic growth.

DPIRD is developing a Primary Industries Plan that outlines the development priorities for the sector. Actions will focus on promoting WA's competitive advantages and increasing industry capability. Work has also commenced on industry development action plans, with growth opportunities identified for aquaculture, wine, lamb, culinary oats, and malting barley.

A number of funding programs and grants have been implemented to progress growth and diversification in regional WA, including Asian market success, regional new industries fund, regional economic development grants, and the Agribusiness Investment Attraction Fund.

Key markets | Primary industries

Agrifood – China, India, Indonesia, Japan, Korea, United Arab Emirates, Singapore, United Kingdom, Europe

Regional industries – China, Indonesia, United Arab Emirates

3.7.2 Priority initiatives for 2019-20

Initiative and accountable agency	Objective	Related activities
Support grain industry value through partnership with Australian Export Grains Innovation Centre <i>(DPIRD)</i>	Increase the value of the WA grains industry by ensuring that grain exports meet the needs of international customers and end-users.	<ul style="list-style-type: none"> • Provide intelligence about key export markets (incl. Indonesia, Philippines, Vietnam and rising competitors). • Engage with export customers on the quality and functionality of Australian grains. • Conduct research to identify new uses for WA grains. • Provide commercial grain quality testing and food analysis services.
Promote agrifood products and businesses <i>(DPIRD, JTSI)</i>	Develop WA's profile and increase visibility of WA's agrifood commodities and premium products in key overseas markets.	<ul style="list-style-type: none"> • Lead, host, and support inbound buyer delegations to WA. • Support business matching activities at international trade exhibitions. • Offer workshops and assistance to agrifood businesses wanting to export. • Implement the Partnering for Customer Value initiative.
Improve and maintain market access for WA agrifood produce <i>(DPIRD)</i>	Help WA agrifood industries in gain access to new markets and improve access to existing markets.	<ul style="list-style-type: none"> • Advocate for WA agrifood industry's market access priorities. • Participate in Australian Government activities aimed at improving and gaining new market access for WA agrifood products.
Deliver agribusiness grants, funding, programs, and guidelines <i>(DPIRD)</i>	Support WA companies to invest in new projects or expansion opportunities to build competitiveness and adopt innovative technologies.	<ul style="list-style-type: none"> • Administer the mechanisms to support agribusiness sector development, including the Agribusiness Investment Attraction Fund, Investor Readiness Program for WA agriculture and food businesses, AFT Business Assistance, and Investment Sector guides.
Manage specific location based initiatives <i>(DPIRD, Peel Development Commission/Shire of Murray)</i>	Provide expertise to support successful implementation of location-based agriculture opportunities.	<ul style="list-style-type: none"> • Support the Peel Agri-Innovation Precinct (PAIP) through: <ul style="list-style-type: none"> • New Zealand Study Tour. • Representation on the precinct Steering Group. • Support for investment into PAIP. • Supporting relevant business access to advanced manufacturing technologies. • Manage Cotton on the Ord development through: <ul style="list-style-type: none"> • Market research and contract negotiations for the precinct. • Delivery on the Ord Final Agreement. • Release of other suitable land for development of cotton.
Manage ag-tech growth programs <i>(DPIRD)</i>	Support WA's ag-tech and food-tech ecosystem to develop investable businesses and trade in services.	<ul style="list-style-type: none"> • Support evokeAG 2020 partnership and delegations. • Support Harvest Accelerator (2020). • Undertake ag-tech accelerator missions in key markets.
Pilot Industry Growth partnerships <i>(DPIRD)</i>	Create partnerships between government and industry that promote and increase private investment in innovation across primary industries.	<ul style="list-style-type: none"> • Establish Industry Growth Partnerships (IGP) Framework including research, technology development, new product development, regulatory reform and/or market research and development. • Support and assess success of partnerships.

Appendix A **Investment and Trade Activities by market**

This Appendix summaries investment and trade activities by sector and market.

Markets identified in the 2019-20 plan align to WA's existing International Offices:

- China (Shanghai Office)
- India (Mumbai Office)
- Indonesia (Jakarta Office)
- Japan (Tokyo Office)
- Korea (Seoul Office)
- Middle East and Africa (Dubai Office)
- Singapore, Malaysia and Vietnam (Singapore Office)
- United Kingdom, Europe and Israel (London Office)

For some sectors, WA's investment and trade activities may extend to markets where there is not presently an International Office.

Figure 3 | Priority Investment and Trade activities by sector and International Office

Sector	Energy	Tourism, events and creative industries	International education	Mining and METS	Technology and advanced manufacturing	Primary industries
Market						
China	Battery minerals	Tourism, Aviation	Higher Education, VET, ELICOS, Schools	Mining, METS	Aged care and Health	Agrifood, Regional Industries
India	Battery minerals, Oil and Gas	Tourism, Aviation	Higher Education, Schools	Mining, METS	Advanced mining, Hydrocarbon, Agriculture, Defence	Agrifood
Indonesia	Renewables	Tourism, Aviation, Creative Industries, Screen and immersive technology	Higher Education, VET, ELICOS, Schools	METS	Smart Cities	Agrifood, Regional Industries
Japan	Battery minerals, Oil and Gas, Hydrogen	Tourism, Aviation	Higher Education, VET, ELICOS, Schools	Mining, Resources downstream processing	Automation, Smart Cities, Aged care and Health, Agriculture and food tech	Agrifood
Korea	Battery minerals, Hydrogen, Renewables	Sport and Culture	Higher Education, VET, ELICOS, Schools	Resources downstream processing	Biotechnology, Aged care and Health	Agrifood
Middle East and Africa	Battery materials, Oil and Gas, Renewables	Tourism, Aviation, Sport and Culture	Higher Education	Mining, METS, PETS	Smart Cities	Agrifood, Regional Industries
Singapore, Malaysia and Vietnam	Renewables	Tourism, Aviation	Higher Education, VET, ELICOS, Schools	METS, PETS	Automation technology, Aged care and Health	Agrifood
United Kingdom, Europe and Israel	Battery minerals, Oil and Gas, Renewables	Tourism	Higher Education		Big data, Space, Defence, Automation, Smart Cities, Agriculture and food tech	Agrifood

China – Shanghai Trade Office

Initiative	Objective	Related activities	Sector
Support delivery of WA's Future Battery Industry Strategy	Raise market awareness of downstream battery mineral processing in WA to promote investment opportunities.	<ul style="list-style-type: none"> • Host WA Battery Mineral roadshow in China. • Establish China industry supply chain document. • Develop map of whole industry chain for battery sector in China market. 	
Identify opportunities to increase tourism activity	Promote WA as a tourist destination through aviation and sports diplomacy.	<ul style="list-style-type: none"> • Deliver China Eastern Direct Flight Strategy and secure trial flights from Shanghai to Perth. • Manage Tourism Minister's visit, providing linkages between investors in WA into agriculture sector, property development, hotels, media and influential outbound operators. 	
Strengthen international education relationships in-market	Build the pipeline of prospective international students.	<ul style="list-style-type: none"> • Host education employability career workshops for business and accounting students and IT and engineering students. • Host WACE conference in Shanghai to support uptake of WACE in identified schools. • Help develop, support and promote StudyPerth's new campaign 'Destination Perth' through: <ul style="list-style-type: none"> • StudyPerth Careers/Open Day. • Agent workshop in target Tier 2 cities. 	
Support key roadshows, promoting WA's agrifood strengths to meet growing consumer demand for premium products	Increase awareness of WA food and wines, and the opportunities and challenges of China market.	<ul style="list-style-type: none"> • Coordinate recruitment and companies to display at China International Import Expo (CIIE) with Shanghai CRED. • Set up one-on-one meetings with distributors for WA export companies. • Attend and contribute to promotion of WA wineries at Wine Australia events. 	
Support Treasurer-led investment delegation mission	Present to potential investors from multiple sectors and articulate available investment opportunities in WA.	<ul style="list-style-type: none"> • Pre-visit/roadshow presentation by the Trade Commissioner to financial sector in Shanghai to highlight broader opportunities and invite qualified guests. • Manage roadshow to Hangzhou and Shanghai. 	

India – Mumbai Office

Initiative	Objective	Related activities	Sector
Promote WA's strategic minerals capabilities	Promote WA's strategic minerals capabilities across a range of forums to encourage awareness and future partnerships.	<ul style="list-style-type: none"> Coordinate activities with the Future Battery Industries Taskforce and the Cooperative Research Centre (CRC). Partner with stakeholders (such as Invest India) to promote investment in WA's battery minerals. Support and leverage in-market visits by WA mining companies and relevant Ministers. Attend relevant conferences or events, including Mining Mazma and International Mining Exhibition Kolkata. 	
Promote Perth as a direct flight destination	Increase tourism and other visitors from India to WA.	<ul style="list-style-type: none"> Support promotion campaigns and partnerships marketing Perth and WA as a destination. Support visits by 'Team Perth' to meet airlines and relevant Ministers and Government officials. Meet travel agents across Mumbai and Delhi to understand the Indian travel sector and introduce them to WA. Work with India-based Inbound Tourism Operators to support agent knowledge of WA. 	
Promote WA as a favoured education option within India and South Asian markets	Make WA a preferred education destination for students from South Asia.	<ul style="list-style-type: none"> Coordinate with StudyPerth and individual education providers. Support promotional activities undertaken in-market by providers. Identify potential partners in VET in South Asia and WA for offshore delivery. Support relationship building between WA and South Asian universities to identify opportunities for research collaboration. 	
Promote WA as a technology partner for Indian interests	Present the case for WA being a significant technology partner for India with world-class technologies derived from advanced mining, hydrocarbon, agriculture and defence industries.	<ul style="list-style-type: none"> Promote to Indian businesses, government and students WA's world-class innovations, skills and operational practices available by partnering with businesses in WA or studying in Perth. Promote key educational and skill transfer opportunities provided in WA, including robotics, Internet of Things, remote control and space industries. 	
Support investment and trade of WA agricultural commodities	Provide an investment ready framework for food products to support business confidence in supply.	<ul style="list-style-type: none"> Promote WA as a source of quality in-demand commodities. Support visits to India by WA farmers or commodity sellers seeking partnerships with importers. 	

Indonesia – Jakarta Office

Initiative	Objective	Related activities	Sector
Promote WA LNG export capabilities	Position WA as a potential LNG export partner to support Indonesia's new renewable energy targets.	<ul style="list-style-type: none"> Partner with Austrade to promote WA capability. Provide in-market support to WA industry in meeting Indonesia's remote power needs. Facilitate ongoing liaison with Indonesian Government for current review of investment opportunities in LNG. 	
Promote greater awareness of WA as a western gateway to Australia	Grow inbound tourism to WA from key Indonesian market segments.	<ul style="list-style-type: none"> Grow visitor numbers with airline carriers to build the case for more direct and transit services. Position WA as Western gateway with focus on close proximity for weekend/short holiday for families and free independent travellers. Support Tourism WA in promotion of WA as a premier tourism destination, including in-market campaign activities. 	
Strengthen international education relationships in-market	Build the pipeline of prospective international students.	<ul style="list-style-type: none"> Coordinate Western Australian education exhibitions in-market. Conduct joint social media campaigns with Tourism WA. Support conversion activities with higher education, VET and Registered Training Organisations in-market. Conduct alumni and agent networking activities. Agent familiarisation visits to Perth. Encourage Indonesian High Schools' engagement, conduct workshops and curriculum development. Support greater local government (central and provincial) engagement with international education activities. 	
Facilitate METS Report Launch, Delegation and Roadshow	Promote WA as an option to fulfil mining industry skills shortages and create opportunities for training providers.	<ul style="list-style-type: none"> Develop a joint strategy with Austrade to identify and promote WA capability in mining software, specialised and innovative equipment, education and training services and mining consulting. Launch the 'Opportunity for METS in Indonesia' Report and joint initiatives with Austrade and Ausmincham. Attend Mining Investment Seminar to promote METS and mining-related capabilities. 	
Plan Western Australia-East Java Sister State 30th Anniversary	Promote trade and investment with East Java in key sectors.	<ul style="list-style-type: none"> Plan for an anniversary mission with major stakeholders. Support WA business missions (including Business Forum) to East Java in WA's vocational training, energy, technology and advanced manufacturing, and agribusiness sectors. Launch report on VET opportunities in East Java. Strengthen linkages at local government level, including existing Sister City arrangements. 	
Promote agricultural exports to Indonesia	Address WA capacity to meet rising demand for high quality agricultural products.	<ul style="list-style-type: none"> Maintain and develop relationships in commodity exports (wheat, meat, live cattle). Promote WA fruit and vegetables through inbound buyer mission and inbound visit to WA. Provide in-country market support and market insights regarding priority commodities/products. Monitor Aus-Indo Red Meat and Cattle Partnership. Leverage Indonesia-Australia Comprehensive Economic Partnership Agreement. 	

Japan – Tokyo Office

Initiative	Objective	Related activities	Sector
Support WA energy and resources sector efforts through formal and informal relationship actions	Maintain and expand energy and resources investment and trade links.	<ul style="list-style-type: none"> Support visiting decision-makers to meet and brief in-market stakeholders. Assist and assure Japanese companies on government resource-related policies. Regularly meet and brief Japanese companies. 	
Profile WA renewable energy credentials in H2, Future Battery Industry and strategic minerals	Raise the profile of key energy sector opportunities.	<ul style="list-style-type: none"> Support visiting decision-makers to meet and brief in-market stakeholders. Inform Japanese companies and government about WA's capacity, capability and role in H2, FBI/strategic minerals. Join Japanese networks active in technology research. Negotiate MOU with Japan government lead agencies (H2 – NEDO, FBI – JOGMEC). 	
Investigate opportunities deliver increased visitation to Perth and WA	Support establishment of direct flight path between Tokyo and Perth.	<ul style="list-style-type: none"> Coordinate working group visits between Perth and Tokyo, working with airlines, Japanese Government and Embassy support. 	
Strengthen international education relationships in-market	Build the pipeline of prospective international students.	<ul style="list-style-type: none"> Attend student and institution roadshows as part of a 'WA international education team' (e.g. Study Australia). Assist in-market clients to link in WA-based education opportunities (e.g. Tokyo City University and the Kobe Shinwa Women's University). 	
Develop a strategy to attract investment capital, expertise, and technology partnerships into WA's technology and services fields	Raise profile of WA across life sciences, biotechnology, defence, cybersecurity, Artificial Intelligence, big data, and robotics.	<ul style="list-style-type: none"> Determine the alignment between WA technology needs and gaps, and Japan's capabilities and interests. 	
Develop a strategy to broaden & deepen WA's agri-food links with Japan	Support the agri-food sector to maximise market access under Japan-Australia Economic Partnership Agreement, by increasing and diversifying its links with the Japanese market.	<ul style="list-style-type: none"> Promote WA fresh produce (such as avocados) to the Japanese market. Promote value-added food product exports to the Japanese market. 	

Korea – Seoul Office

Initiative	Objective	Related activities	Sector
Confirm WA as a key partner in Korean hydrogen development	Support WA's hydrogen roadmap by securing Korea as a key hydrogen market for WA.	<ul style="list-style-type: none"> • Draft WA Hydrogen Strategy Report specific for the Korean market. • Organise high-level inbound and outbound hydrogen visits to understand WA's hydrogen capabilities. • Collaborate with H2Korea's hydrogen activities. 	
Promote critical battery material investment and offtake	Support WA's Future Battery Industry Strategy.	<ul style="list-style-type: none"> • Provide Korean stakeholders investment and trade opportunities for WA's critical battery material projects and products. • Arrange face-to-face meetings between Korean key battery and precursor producers and WA stakeholders. 	
Engage people to people development via sports and cultural activities	Enhance sports and cultural engagement between WA and Korea as a mechanism to revitalise WA tourism promotion in the Korean market.	<ul style="list-style-type: none"> • Establish sports training camp in Perth for Korean players. • Investigate opportunity for sports competition and exchange games between WA and Korean teams. • Undertake various cultural exchange activities between WA and Korea. 	
Support educational activities promoting international student recruitment programs	Develop linkage between in-market and WA education program providers.	<ul style="list-style-type: none"> • Attend ICEF Japan-Korea Agent Roadshow to support WA education program promotion. • Attend Study Australia to promote WA higher education, VET, ELICOS program. • Assist WA education providers visiting Korea to develop the market. • Promote VET programs by making connection between in-market education institutions and WA institutions. 	
Explore and introduce WA Life Science opportunities in Korean market	Understand WA capacity and introduce Korean opportunities to WA stakeholders.	<ul style="list-style-type: none"> • Attend seminars/exhibitions of related fields in Korea, to understand the market trends and meeting with relevant people. • Meet with Korean life science companies/organisations via relevant organisations to expand WA's network and understand Korea's needs across this sector. 	
Maximise WA agri-food product opportunities	Expand and develop existing and new market opportunities for WA grown agri-food products.	<ul style="list-style-type: none"> • Provide updates on WA supply capacities of key products, with a focus on meat products. • Search for new opportunistic products by collaborating with DPIRD and other stakeholders for the Korean market. • Enhance grain (wheat and lupin) research and development collaboration between Korean grain importers and WA exporters. • Support WA wine and beverage industry's promotion activities. 	

Middle East and Africa – Dubai Office

Initiative	Objective	Related activities	Sector
Increase investment into key energy resource opportunities	Market Perth and WA as an attractive investment destination across energy, resources, and renewables; with focus on specific projects and qualified opportunities.	<ul style="list-style-type: none"> Identify prequalified investment opportunities in WA, and market them to target audience in Gulf Cooperation Council (GCC) and promote specific projects to Sovereign Wealth Funds (SWFs) and High Net Worth Individuals (HNWs). Leverage official WA visits to Gulf by marketing investment attraction opportunities to SWFs and HNWs (across UAE, Qatar, Saudi Arabia, and Kuwait). Work with Austrade and DFAT to attract inward investment missions. 	
Promote WA at the World Expo 2020 in Dubai	Project a contemporary image of WA as a great place to visit, study, invest and do business.	<ul style="list-style-type: none"> Sign partnership-sponsorship contract with DFAT. Organise WA-focused networking dinner to promote inward investments, tourism and education opportunities. Market WA as a diverse market by identifying critical industries such as agribusiness, education, and cross-industry sectors. 	
Proactively promote WA tertiary education and TAFE colleges to International students	Raise the profile of WA as an innovative State with excellent education, training and scientific research capabilities.	<ul style="list-style-type: none"> Collaborate with StudyPerth and attend education exhibitions, conferences, and student recruitment roadshows as required - offering market intelligence. Support WA universities based in Dubai (Murdoch, Curtin, and ECU) to expand their Gulf and Indian students' network links. Support UWA programs to Saudi Arabia and Kuwait. Increase WACE in the Gulf region. Recruit Dubai-based EBDM to support WA university and school programs. Facilitating partnership with Gulf Universities to deliver specific WA programs. 	
Promote WA METS and PETS capabilities	Connect WA capabilities in upstream and downstream mining and energy sector services across the Middle East.	<ul style="list-style-type: none"> Work with Chamber of Minerals and Energy (WA), market regional opportunities to WA METS and PETS industry. Offer Middle East market intelligence, in-market support, business matching, and attendance at industry-focused trade events and trade missions. Expand Mining and Oil and Gas sector and related networks across government and private sectors in the Middle East. 	
Establish links between Perth and Dubai through Smart cities, science, and innovation	Leverage synergies between Dubai and Perth to establish ongoing linkages between cities.	<ul style="list-style-type: none"> Promote joint activities to develop smart cities and related industries, knowledge, and infrastructure and profile Perth as the most livable city and gateway to Australia. 	
Identify opportunities for ag-exporters to increase WA commodity exports, with focus on grains, fresh produce, and red meat	Position WA to meet key food security requirements of the Gulf countries.	<ul style="list-style-type: none"> Work with CBH to promote wheat, barley, and animal feed. Improve export readiness and market advice on Gulf region by promoting inward missions. Identify options to expand the red meat and livestock supply chain in Perth through the Saudi SWF. Explore other regional markets in the Middle East as potential WA agriculture commodity export market, to increase WA's meat market share in the GCC. 	

Singapore, Malaysia, and Vietnam – Singapore Office

Initiative	Objective	Related activities	Sector
Advocate for WA expertise in micro-grids and renewable technologies	Support interest in WA renewables and battery technologies.	<ul style="list-style-type: none"> • Manage ongoing enquires from SMEs in the renewable sector via Enterprise Singapore and provide market advice. • Host briefings for government and industry. 	
Support WA's international education presence through appointment of Vietnam-based EBDM	Promote WA as a destination for students and as a partner in ASEAN countries to deliver schooling, skills and higher education.	<ul style="list-style-type: none"> • Provide practical and strategic management to the EBDM in Vietnam, including identification of suitable partners in the VET and university sector for WA. • Continue to explore partnerships between WA universities and specific faculties in Singapore and Malaysia (notably in the health sector). • Assist Schools Curriculum and Standards Authority (SCSA) to expand its WACE schools in Vietnam and to respond to new expressions of interest. 	
Promote WA's health and aged care skills, services and products	Convert increased interest in WA to market health and aged care skills and services into the ASEAN market.	<ul style="list-style-type: none"> • Commission an independent analysis of aged care in WA for investment attraction and export. • Convene industry roundtables on aged care twice annually to assist the International Office to service the sector. • Work with WA aged care service providers and educational institutions to expand links into ASEAN. 	
Support individual start-ups and researchers with guidance on Singapore financing and joint venture opportunities	Facilitate linkages across innovation, science, and technology.	<ul style="list-style-type: none"> • Respond to individual requests for assistance with Singapore networking for start-ups. • Work with WA universities, CSIRO, and relevant ASEAN institutions to boost awareness of WA science and innovation. • Develop programs to introduce WA companies entering Singapore as part of the Austrade Landing Pad to relevant Singapore businesses. • Consult Curtin Singapore about the possible introduction of their Ignition program to Singapore. • Liaise with CSIRO in Singapore about program of science and innovation events. • Provide regulatory advice to companies seeking to market products in the complementary medicine sector in Singapore. 	
Collaborate with Defence West to develop a WA Defence Industry Directory for the ASEAN market	Promote depth and expertise of WA defence and allied industries.	<ul style="list-style-type: none"> • Work with Defence West to advise on preferred engagement format between WA and Singapore on defence industries. • Support ongoing services to WA small to medium enterprises seeking ASEAN clients or partners. • Develop WA Defence Industry Directory of WA companies across defence, shipbuilding, marine services and engineering industries. 	
Support WA food exports to domestic Singapore market and expand across ASEAN region	Address market demand for quality food items from a clean environment, including premium foods and wines.	<ul style="list-style-type: none"> • Facilitate and maintain B2B service between WA producers and exporters and ASEAN importers, chefs, distributors, food service operators. • Attend trade fairs in ASEAN. • Maintain dialogue with other Australian States and Territory ASEAN representatives, Austrade, Singapore Government (Enterprise Singapore, AVA, MND). 	

United Kingdom, Europe, and Israel – London Office

Initiative	Objective	Related activities	Sector
Improve UK/EU understanding of WA resource availability including WA mineral processing capability	Encourage offtake agreements and investments between WA battery minerals miners and European car and battery manufacturers, and build government-to-government links to support the sector.	<ul style="list-style-type: none"> Retain membership and participation in groups including: <ul style="list-style-type: none"> International Energy Agency Critical Raw Materials for Electric Vehicles (IEA CRM4EV) Taskforce European Battery Alliance Connect WA companies to potential off takers and investors. Support Ministerial engagement of European manufacturers and investors. Support missions/delegations from Europe to WA to explore opportunities for investment, offtake agreements, and value-added processing. 	
Promote and grow WA's renewable hydrogen initiatives	Facilitate industry and government links in emerging sector to secure investment and technology from UK and Europe and build policy expertise.	<ul style="list-style-type: none"> Engage UK/EU users and investors and connect them with WA project proponents. Attend Hannover Messe and other related conferences, including for speaking opportunities. Build links with UK/EU government agencies, industry, and NGOs to inform WA policy development. 	
Promote Perth as a regional hub for LNG support industries	Grow LNG industry support in accordance with objectives of LNG Jobs Taskforce.	<ul style="list-style-type: none"> Support trade delegation to Australian Oil and Gas (AOG) Expo. Build UK/EU network that can provide valuable input into LNG Jobs Taskforce objectives. Facilitate market visits and information exchange for companies to invest in WA oil and gas sector. 	
Establish University Liaison Officer	Improve connectivity between WA universities and in-market institutions.	<ul style="list-style-type: none"> Recruit a London-based University Liaison Officer to develop networks and opportunities. 	
Promote WA's innovative companies and enterprises across technology, defence and space	Secure investment, partnerships, and expertise for WA based companies.	<ul style="list-style-type: none"> Organise and execute London Tech Week trade delegation. Organise and execute Israel Trade delegation for start-ups in fields of space, agtech and smart cities. Identify smart cities initiatives and models in the UK and Europe which have easy applicability to WA cities and towns. Promote WA defence industry capabilities to companies in supply chain for Hunter class frigates, OPVs and Attack class submarines. Organise space sector delegations to WA. Increase UK Space Agency, European Space Agency, Swedish Space Corporation and related entities' connection with WA. 	
Promote WA wines	Increase market share for WA sourced wines in UK and Europe.	<ul style="list-style-type: none"> Organise and host London wine tasting for trade and consumers. 	