

**National Interest Analysis [2014] ATNIA 8  
with attachments**

**Free Trade Agreement between the Government of Australia and the  
Government of the Republic of Korea**

**(Seoul, 8 April 2014)**

**[2014] ATNIF 4**

**Attachments:**

Attachment I	Consultation
Attachment II	Regulation Impact Statement
Attachment III	KAFTA: An Introduction to the Text of the Agreement (Chapter summaries)
Attachment IV	KAFTA Fact Sheets on Trade in Goods; Trade in Services; Investment; Investor-State Dispute Settlement; Intellectual Property, Electronic Commerce and Competition Policy; Government Procurement; and Temporary Movement of Natural Persons

# NATIONAL INTEREST ANALYSIS: CATEGORY 1 TREATY

## SUMMARY PAGE

### **Free Trade Agreement between the Government of Australia and the Government of the Republic of Korea (Seoul, 8 April 2014) [2014] ATNIF 4**

#### **Nature and timing of proposed treaty action**

1. The proposed treaty action is to bring into force the *Free Trade Agreement between the Government of Australia and the Government of the Republic of Korea* (KAFTA), which was signed by the Governments of Australia and the Republic of Korea on 8 April 2014.
2. Article 23.2 provides that KAFTA will enter into force 30 days after the date the Parties exchange written notifications certifying that they have completed their respective applicable legal requirements and procedures, or on such other date as the Parties may agree. It is proposed that Australia provide such notification as soon as practicable following consideration by the Joint Standing Committee on Treaties and passage of legislative amendments. The Governments of Australia and Korea are working towards entry into force of KAFTA prior to 31 December 2014, in order to maximise the business gains for both Parties. This would require an exchange of notes by the end of November 2014.

#### **Overview and national interest summary**

3. KAFTA substantially liberalises Australia's trade with the Republic of Korea (ROK), Australia's third-largest export market and fourth-largest overall trading partner. KAFTA gives Australian exporters significantly improved market access in goods and services, eliminating tariffs on a wide range of Australian goods exports, including beef, wheat, sugar, dairy, wine, horticulture and seafood, and creating new market openings comparable to those the ROK provided the United States and European Union in key areas of commercial interest to Australian services providers, including legal, accounting, financial, education and other professional services.
4. KAFTA also protects Australia's competitive position in the ROK market, where major competitors such as the US, European Union, Chile and ASEAN countries are already receiving preferential access through their respective free trade agreements, and against New Zealand and Canada, both of whom are close to concluding free trade agreement (FTA) negotiations with the ROK.
5. Economic modelling indicates that KAFTA will provide a significant boost to Australia's economy (nearly \$5 billion in additional income between 2015 and 2030), increasing Australia's exports to ROK and creating more jobs and higher economic growth. KAFTA will deliver market gains and deeper cuts to tariffs more rapidly than current multilateral and plurilateral initiatives underway such as the World Trade Organization (WTO) Doha Round, the Regional Comprehensive Economic

Partnership (RCEP) and the Trans-Pacific Partnership Agreement (TPP) (which currently does not include the ROK).

### **Reasons for Australia to take the proposed treaty action**

6. A comprehensive free trade agreement with the ROK will further strengthen the broader bilateral relationship. KAFTA will support an already significant, complementary and growing economic relationship with the ROK, Australia's third-largest export market and fourth-largest overall trading partner. KAFTA will benefit Australian exporters, importers and consumers by opening markets and freeing trade and investment between Australia and the ROK. With one in five Australian jobs linked to trade, KAFTA will provide an important boost to the Australian economy.

7. KAFTA will create immediate market access opportunities for many sectors of the Australian economy. The ROK's tariffs will be set at zero on 84.0 per cent of its imports (by value) from Australia immediately on entry into force with most other tariffs phased out quickly. After 10 years, a zero tariff would apply to 95.7 per cent of imports from Australia (by value) and on full implementation of KAFTA, 99.8 per cent of Australia's current goods trade would enter the ROK duty free. The key outcomes are set out in further detail in Attachment IV (refer fact sheets) and include:

Agriculture: Despite the ROK being Australia's fifth-largest agriculture market, Australian exporters face high barriers with the ROK imposing an average tariff of 53.6 per cent on agricultural imports and prohibitive tariffs on some products of up to 550 per cent. Under KAFTA, the ROK has agreed to eliminate beef tariffs over 15 years; eliminate tariffs immediately for raw sugar, wheat, wine and some horticulture; and eliminate most dairy tariffs over 3-20 years with immediate duty-free Australia-specific quotas for cheese, butter and infant formula. A small number of agricultural products (comprising 0.2 per cent of Australia's exports to ROK) were deemed too sensitive by ROK to include in KAFTA, including rice, milk powder, honey, abalone, ginger, apples, pears and walnuts.

Energy, Minerals and Manufacturing: Energy and minerals products accounted for approximately 80.0 per cent of the value of Australia's merchandise exports to the ROK in 2012-13. While many Australian mineral and energy exports to the ROK enter duty free, it applies tariffs of up to 8.0 per cent on a range of priority resource products, and tariffs of up to 13.0 per cent on manufactured products. On entry into force of KAFTA, 88.0 per cent of Australia's manufactures, resources and energy exports will enter ROK duty free, with all remaining tariffs eliminated within 10 years.

Services: KAFTA will provide new market openings for Australian service suppliers in education, telecommunications, financial, accounting, taxation and legal services, which currently face a range of restrictions including with respect to commercial presence, cross-border supply and licensing requirements. Under KAFTA, the ROK will permit new Australian access in these sectors, providing outcomes equivalent to those in its free trade agreements with the United States and the European Union. For example, Australian law firms will be allowed access to the ROK's legal consulting services market upon entry into force of the KAFTA, with the establishment of joint

venture law firms permitted within five years. Australian financial services providers will be able to supply specified financial services on a “cross-border basis” (for example, via electronic means) as well as a range of insurance and insurance-related services. Telecommunications providers will, within two years, be able to own up to 100 per cent of the voting shares of a facilities-based telecommunications service supplier in ROK. Education, engineering and other professional services will benefit from ROK’s commitments to guarantee existing market access for Australian companies and work towards improving mutual recognition of qualifications.

Investment: KAFTA provides improved access and protection for Australian investors and investments in the ROK as well as for ROK investors in Australia, promoting investor confidence and certainty in both countries. The ROK has agreed to further open several sectors to Australian investment, including the telecommunications sector and legal, accounting and taxation services, through the progressive reduction of market access barriers. ROK investors will be afforded a foreign investment screening threshold equivalent to that currently afforded to investors from New Zealand and the United States. The stimulatory effect of ROK investment on the Australian economy can help create jobs across the country, including in regional Australia, and create further opportunities to generate export income. KAFTA includes an investor-state dispute settlement mechanism with appropriate protections in areas such as public welfare, health, culture, environment and foreign investment screening.

Other: KAFTA also includes commitments on:

- *intellectual property:* KAFTA will ensure that Australian innovators and Australian creative industries enjoy high levels of protection in the ROK broadly equivalent to protections provided in Australia;
- *government procurement:* for Australia, this will provide, subject to agreed exceptions, national treatment for Australian goods, services and suppliers in the ROK market for government procurements above agreed value thresholds; and
- *electronic commerce:* KAFTA contains provisions that safeguard electronic commerce, prevent the imposition of customs duties on electronic transmissions and maintain best practice regulation in this field.

8. The Department of Foreign Affairs and Trade (DFAT) commissioned a study, conducted by the Centre for International Economics (CIE), which examined the projected impact of KAFTA on Australia as well as the opportunity cost of not proceeding with KAFTA in light of the ROK’s free trade agreements with the United States and the European Union. Their modelling, based solely on merchandise trade liberalisation, reveals KAFTA will be worth nearly \$5 billion in additional income to Australia between 2015 and 2030 and will result in an annual boost to the economy of around \$650 million after 15 years of operation. In its first year, increased exports under KAFTA would create over 1,700 jobs and increase real consumption per household by \$77. After 15 years of operation – by 2030 – Australia’s exports to the ROK would be 25.0 per cent higher (or \$3.5 billion) than they otherwise would have been as a result of lower ROK tariffs. By 2030, exports of agricultural goods to the ROK will be 73.1 per cent higher than otherwise, mining exports 17.1 per cent higher and manufacturing exports 52.8 per cent higher. Additionally, services and investment liberalisation under KAFTA is likely to increase GDP and household incomes further.

9. CIE's modelling indicates that the cost to Australia of not proceeding with KAFTA is a 4.7 per cent decrease in annual exports by 2030, by which time ROK will have completed tariff reductions under its FTAs with the US and EU. This reduction in exports would reflect ROK importers' choice to source beef, sugar and dairy products from Australia's competitors who are already enjoying preferential access. Failure to proceed with KAFTA would result in ROK imports of Australian agricultural goods declining by 29.0 per cent, with mining and manufacturing exports also declining by 0.9 and 7.5 per cent respectively.

## **Obligations**

10. KAFTA consists of 23 chapters, with associated annexes and schedules, and four side letters. A detailed chapter-by-chapter summary of key obligations is provided at Attachment III (*KAFTA: An Introduction to the Text of the Agreement*).

11. KAFTA is a broad agreement that will liberalise and facilitate trade and investment between Australia and the ROK. Upon entry into force, or over time, each Party will eliminate specified tariffs on imports of goods from the other Party (Chapter 2) that meet the agreed rules of origin<sup>1</sup> criteria (Chapter 3). The Parties' schedules of tariff commitments are set out at Annex 2-A. Tariff rate quotas<sup>2</sup> (TRQs) for certain Australian agricultural exports to Korea are set out at Appendix 2-A-1. Most TRQs will be progressively phased out over 10-20 years, depending on the product.

12. Each Party will grant market access and non-discriminatory treatment (known as national treatment<sup>3</sup> and most-favoured-nation treatment<sup>4</sup>) to services and investments from the other Party under the Cross-Border Trade in Services, Financial Services and Investment chapters (Chapters 7, 8 and 11 respectively), except where specific measures or individual sectors are specifically reserved in the non-conforming measures annexures to KAFTA (Annexes I-III).

13. KAFTA also contains commitments and disciplines on customs procedures (Chapter 4), sanitary and phytosanitary (SPS) measures<sup>5</sup> (Chapter 5), telecommunications (Chapter 9), the temporary entry of skilled persons (Chapter 10), government procurement (Chapter 12), intellectual property rights (Chapter 13), competition policy (Chapter 14), electronic commerce (Chapter 15), labour (Chapter 17) and the environment (Chapter 18). There is a binding State-to-State dispute

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<sup>1</sup> "Rules of origin" (ROO) establish the criteria for determining whether goods will qualify for preferential tariff treatment under KAFTA (that is, whether a good 'originates' in Australia or the ROK).

<sup>2</sup> Under KAFTA, a "tariff rate quota" (TRQ) represents the maximum quantity of a product permitted to enter duty-free in a particular year.

<sup>3</sup> "National treatment" means Australia must treat Korean investors and service providers no less favourably than it treats Australian investors and service providers in like circumstances, and vice versa.

<sup>4</sup> "Most-favoured-nation" (MFN) treatment means Australia must treat Korean investors and service providers no less favourably than it treats investors and service providers of third countries in like circumstances, and vice versa.

<sup>5</sup> "Sanitary and phytosanitary" (SPS) measures are measures, such as quarantine, to protect human, animal or plant life or health from pests and diseases.

settlement mechanism modelled on previous free trade agreements and the WTO system (Chapter 20). Most substantive obligations in KAFTA will be subject to this mechanism, except those found in the Technical Barriers to Trade, SPS Measures, Competition Policy, Labour, Environment and some aspects of the Movement of Natural Persons chapters. An Investor-State Dispute Settlement (ISDS) mechanism is included in the Investment Chapter (Chapter 11).

14. Chapter 22 sets out exceptions which apply to a number of chapters of KAFTA. Such exceptions ensure FTA obligations do not unreasonably restrict government action in key policy areas, including action to protect essential security interests, the environment and health. Chapter 22 also carves out application of KAFTA to a Party's taxation measures except in certain circumstances, and provides for the protection of confidential information.

15. Four legally binding "side letters" set out the Parties' agreed interpretation of particular KAFTA provisions in relation to services and investment, telecommunications, gambling and betting services and transparency in investor-state arbitration proceedings. The side letters form an integral part of KAFTA.

16. KAFTA is consistent with Australia's international obligations, including those under the *Marrakesh Agreement Establishing the World Trade Organization*.

## **Implementation**

17. To implement KAFTA in Australia, amendments need to be made to the *Customs Act 1901*, the *Customs Tariff Act 1995* and relevant customs regulations such as the *Customs Regulations 1926*. New customs regulations need to be enacted for the product specific rules of origin set out in Annex 3-A of KAFTA. The *Foreign Acquisition and Takeovers Regulations 1989* will also require amendment to incorporate the new threshold for screening investment proposals by ROK investors at \$1,078 million (subject to lower thresholds for sensitive sectors). The *Life Insurance Regulations 1995* will require amendment in order to implement the agreement reached in respect of life insurance, whereby ROK life insurers will be able to operate in Australia through branches rather than subsidiaries. Consistent with Australia's existing obligations in the Australia-US and Australia-Singapore FTAs, and to fully implement its obligations under KAFTA, the *Copyright Act 1968* will require amendment in due course to provide a legal incentive for online service providers to cooperate with copyright owners in preventing infringement due to the High Court's decision in *Roadshow Films Pty Ltd v iiNet Ltd*<sup>6</sup>, which found that ISPs are not liable for authorising the infringements of subscribers.

18. The remainder of Australia's obligations under KAFTA do not require any legislative or regulatory amendments. The impact of KAFTA on States and Territories is outlined at Attachment 1 (*Consultation*).

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<sup>6</sup> [2012] HCA 16 (20 April 2012).

## **Costs**

19. Treasury modelling has estimated that the loss of tariff revenue to the Australian Government resulting from KAFTA, based on current levels of trade, will be approximately \$100 million in 2014-15 and \$635.9 million over the forward estimates period. This estimate assumes that KAFTA will enter into force in the second half of 2014. The costing does not include any second-round impacts arising from increased bilateral trade. Accordingly, the estimates do not take into account additional lost tariff revenue if imports from the ROK displace imports from other countries. On the other hand, the estimates do not take into account the potential domestic economic growth that KAFTA could generate (see paragraph 8, above) and any additional taxation revenue resulting from this growth. Overall, noting the economic modelling, it is assessed that KAFTA represents a net gain to the Australian economy.

## **Regulation Impact Statement**

20. A Regulation Impact Statement is attached (Attachment II).

## **Future treaty action**

21. Article 23.3 provides that the Parties may agree in writing to amend KAFTA. Article 21.3 establishes a 'Joint Committee' that will meet annually and, among other things, consider and decide any amendments to KAFTA subject to ratification by both Parties. Any amendment would enter into force after the Parties exchange written notifications certifying that they have completed their respective applicable legal requirements and procedures, or on such other date as the Parties may agree.

## **Withdrawal or denunciation**

22. Under Article 23.4, either Party may terminate KAFTA by giving the other Party 180 days advance notice in writing. Termination of KAFTA would be subject to Australia's treaty process.

## **Contact details**

Free Trade Agreement Division  
Department of Foreign Affairs and Trade

## ATTACHMENT I - CONSULTATION

### **Free Trade Agreement between the Government of Australia and the Government of the Republic of Korea (Seoul, 8 April 2014)**

#### **CONSULTATION**

23. The proposed treaty action will have an impact on the States and Territories. The obligations in Chapter 7 (Cross-Border Trade in Services), Chapter 8 (Financial Services) and Chapter 11 (Investment) apply to State and Territory measures. Where States and Territories wish to maintain measures that are inconsistent with these obligations, they must list them in the annexes of non-conforming measures to these chapters. Australia has included several non-conforming measures relating to regional government in its annexes. Chapter 10 (Movement of Natural Persons) and Chapter 12 (Government Procurement) will also affect State and Territory governments.

24. State and Territory governments were consulted through regular Senior State and Territory Trade Officials Group (STOG) and Commonwealth-State-Territory Standing Committee on Treaties (SCOT) meetings. State and Territory departments were contacted and invited to make public submissions at the outset of negotiations. In September 2009 the then Minister for Trade wrote to State and Territory leaders seeking endorsement of Australia's initial services and investment offer, reflecting the responsibilities State and Territory Governments have for regulation of services and investment activities, prior to exchanging offers with the ROK. State and Territory Governments subsequently advised that they supported the initial offer subject to continuing consultations on KAFTA.

25. Stakeholder views have been actively encouraged and considered throughout the negotiations, including through an initial call for public submissions in December 2008 to seek views on the expected economic, regional, social, cultural, regulatory and environmental impacts of a free trade agreement with the ROK. This was sent by email to over 600 addressees and by letter to over 50 key stakeholders, as well as advertised in media and on DFAT's website. As part of this process DFAT received more than 60 submissions, predominantly from individual companies and peak industry groups. Most submissions supported an FTA with the ROK; a common concern raised was that the ROK's FTAs with competitors (ASEAN, Chile, United States, European Union) risked reducing the competitiveness of certain Australian food and agricultural products in the ROK market. Other industries identified some sensitivities towards imports from ROK, most particularly in the manufacturing sector.

26. DFAT has undertaken numerous consultations, in Seoul, Canberra and State/Territory capitals, with both industry and civil society in relation to the FTA negotiations and taken a wide range of views into account. DFAT has held six-monthly stakeholders meetings involving peak associations, conducted sectoral roundtables, frequent ad hoc consultations with industry groups and individual

producers/exporters, regularly briefed the Australia-Korea Business Council and provided input for community cabinet meetings. Public forums, open to individuals and groups, were held in capital cities with invitations sent to key stakeholders. DFAT has also provided regular updates on the progress of the negotiations on its website.

27. Throughout the negotiation of KAFTA, written updates were provided to key stakeholders following each round of negotiations.

28. Commonwealth Government departments were extensively consulted throughout the negotiations and representatives from relevant departments attended the negotiations in Canberra and Seoul.

29. The following is a list of submissions received and stakeholders consulted:

### **LIST OF SUBMISSIONS RECEIVED**

1. ANZ Bank
2. Australian Bankers' Association Inc
3. Australian Chamber of Commerce and Industry
4. Australian Council of Trade Unions
5. Australian Council of Wool Exporters & Processors Inc
6. Australian Dairy Industry Council
7. Australian Electrical and Electronic Manufacturers' Association
8. Australian Fair Trade and Investment Network
9. Australian Food and Grocery Council
10. Australian Horticultural Exporters Association
11. Australian Industry Group
12. Australia-Korea Business Council
13. Australian National University
14. Australian Nursing Federation
15. Australian Nursing and Midwifery Council
16. Australian Oilseeds Federation
17. Australian Plantation Products and Paper Industry Council
18. Australian Pork Ltd
19. Australian Recording Industry Association / Music Industry Piracy Investigators
20. Australian Wine and Brandy Corporation
21. BHP Billiton Ltd
22. BlueScope Steel
23. Centre for International Law, University of Sydney
24. Commonwealth and Public Sector Union - State Public Services Federation Group
25. Compassion in World Farming
26. Daeshin Agricultural Co. Ltd
27. Dairy Australia
28. Engineers Australia
29. Ford Australia
30. Frosty Boy Australia
31. Generic Medicines Industry Association Pty Ltd

32. GM Holden Ltd
33. Horticultural Market Access Committee (Horticulture Australia Ltd)
34. International Legal Services Advisory Council
35. International Trademark Association
36. Investment and Financial Services Association Ltd
37. Macquarie Bank
38. Mariani Foods
39. Maryborough Sugar
40. Meat and Livestock Australia
41. Media Entertainment and Arts Alliance
42. Monash University
43. Mulwarra Exports
44. Music Council of Australia
45. National Farmers' Federation
46. Mr Jean Ough
47. Mr George Pietrzykowski
48. Queensland Government
49. Queensland Law Society
50. Queensland Sugar Ltd
51. Queensland University of Technology
52. Ricegrowers Association of Australia Inc
53. Seafood Services Australia (on behalf of Seafood Access Forum)
54. South Australian Government, Department of Trade and Economic Development
55. Mr Richard Stone
56. Sugar Australia
57. TAFE Directors Australia
58. Thoroughbred Breeders Australia
59. Toyota Motor Corporation Australia
60. Universities Australia
61. University of Newcastle
62. Victorian Government
63. Western Australian Government, Department of Agriculture and Food
64. Dr Brett Williams
65. Woodside Energy
66. Yum! Restaurants International

## **LIST OF STAKEHOLDERS CONSULTED**

1. AGR Matthey
2. AISIN Australia
3. ANZ Bank
4. Air International
5. AMP Capital
6. Architects Accreditation Council of Australia
7. Asia Business Forum
8. Asialink
9. Asia Society AustralAsia Centre
10. Association of Consulting Engineers in Australia
11. Austcham

12. Australasian and New Zealand Society of Nuclear Medicine
13. Australasian Radiation Protection Society
14. Australasian Veterinary Boards Council
15. Australian Acupuncture and Chinese Medicine Association Ltd
16. Australian Aluminium Council
17. Australian Bankers' Association Inc
18. Australian Canvas and Synthetic Products Association
19. Australian Chamber of Commerce and Industry
20. Australian Council on Healthcare Standards
21. Australian Council of Trade Unions
22. Australian Council of Wool Exporters & Processors Inc
23. Australian Dairy Industry Council
24. Australian Electrical and Electronic Manufacturers' Association
25. Australian Fair Trade and Investment Network
26. Australian Federation of Travel Agents
27. Australian Food and Grocery Council
28. Australian Industry Group
29. Australian Institute of Energy
30. Australian Institute of Radiography
31. Australia-Korea Business Council
32. Australian Logistics Council
33. Australian Lot Feeders' Association
34. Australian Meat Industry Council
35. Australian Manufacturing Workers' Union
36. Australian Medical Acupuncture College
37. Australian Medical Association
38. Australian Medical Council
39. Australian National University
40. Australian Natural Therapists Association
41. Australian Nursing Federation
42. Australian Nursing and Midwifery Accreditation Council
43. Australian Oilseeds Federation
44. Australian Petroleum Production and Exploration Association
45. Australian Plantation Products and Paper Industry Council
46. Australian Pork Ltd
47. Australian Processor Council
48. Australian Prudential Regulation Authority
49. Australian Radiation Protection Society
50. Australian Recording Industry Association / Music Industry Piracy Investigators
51. Australian Services Roundtable
52. Australian Steel Institute
53. Australia Sugar Milling Council
54. Australian Tourism Export Council
55. Australian Traditional Medicine Society
56. Australian Wine and Brandy Corporation
57. Australian Writers Guild
58. Barley Australia
59. BHP Billiton Ltd
60. Blake Dawson Waldron

61. BlueScope Steel
62. Bovis Lend Lease
63. Business Council of Australia
64. Carpet Institute of Australia Ltd
65. Cattle Council of Australia
66. Centre for International Law, University of Sydney
67. Certified Practising Accountants Australia
68. Chinese Health Foundation of Australia
69. Commonwealth Bank of Australia
70. Commonwealth and Public Sector Union - State Public Services Federation Group
71. Compassion in World Farming
72. Continental
73. Corrs Chambers Westgarth
74. Council of Regulating Authorities for Dental Technicians and Dental Prosthetists Australia and New Zealand
75. CSR
76. Daeshin Agricultural Co. Ltd
77. Dairy Australia
78. Dental Board of Australia
79. Dental Hygienists Association of Australia
80. Engineers Australia
81. English Australia
82. Federal Chamber of Automotive Industries
83. Federation of Automotive Products Manufacturers
84. Federation of Chinese Medicine and Acupuncture Societies of Australia Inc
85. Footwear Manufacturers Association of Australia
86. Ford Australia
87. Frosty Boy Australia
88. Futuris
89. General Motors Holden Ltd
90. Generic Medicines Industry Association Pty Ltd
91. Government of Western Australia, Department of Agriculture
92. Government of Western Australia, Department of State Development
93. Griffith University
94. Horticultural Market Access Committee (Horticulture Australia Ltd)
95. Hunt and Hunt Lawyers
96. Institute of Actuaries
97. Institute of Public Accountants
98. Institute of Chartered Accountants in Australia
99. Institution of Arbitrators and Mediators
100. Insurance Australia Group Ltd
101. International Legal Services Advisory Council
102. International Legal Services Committee
103. International Trademark Association
104. Investment and Financial Services Association Ltd
105. ITS Global
106. JETRO Sydney
107. Kia Motors Australia

108. KPMG
109. Law Council of Australia
110. Leightons Holdings
111. Lowy Institute
112. Macquarie Bank / Group
113. Macquarie Telecommunications
114. Mallesons Stephen Jaques
115. Mariani Foods
116. Maryborough Sugar
117. Meat and Livestock Australia
118. Media Entertainment and Arts Alliance
119. Minerals Council of Australia
120. Minter Ellison
121. Monash University
122. Mulwarra Exports
123. Music Council of Australia
124. National Association of Forest Industries Ltd
125. National Australia Bank
126. National Farmers' Federation
127. National Institute of Accountants
128. New South Wales Business Chamber
129. New South Wales Government, Department of Education and Communities
130. New South Wales Government, Department of Trade and Investment, Regional Infrastructure and Services
131. OneSteel
132. Mr Jean Ough
133. Mr George Pietrzykowski
134. Pharmaceutical Society of Australia
135. Pharmacy Guild of Australia
136. Philip Morris Ltd
137. Planning Institute of Australia
138. Plastics and Chemicals Industries Association
139. Professions Australia
140. Qantas Airways Ltd
141. QBE
142. Queensland Government, Department of Primary Industries
143. Queensland Law Society
144. Queensland Sugar Ltd
145. Queensland University of Technology
146. Red Meat Advisory Council
147. Research Institute for Asia and the Pacific
148. Ricegrowers Association of Australia Inc
149. Rio Tinto
150. Robert Bosch Australia
151. Royal Australian Institute of Architects
152. Royal College of Nursing Australia
153. Seafood Services Australia (on behalf of Seafood Access Forum)
154. South Australian Government, Department of Trade and Economic Development

155. Spatial Sciences Institute
156. State and Territory Bar Associations
157. State and Territory Law Councils
158. State and Territory Premiers and Chief Ministers Departments
159. State and Territory Trade Officials
160. Mr Richard Stone
161. Sugar Australia
162. TAFE Directors Australia
163. Tasmanian Government, Department of Economic Development
164. Telstra
165. Technical Textiles and Non-woven Association
166. Textile and Fashion Industries Association of Australia
167. Thoroughbred Breeders Australia
168. Time Taylor Ltd
169. Toyota Motor Corporation Australia
170. Tourism Australia
171. Trade Queensland
172. Universities Australia
173. University of Newcastle
174. Victorian Government, Department of Innovation, Industry and Regional Development
175. Western Australian Tourism Office
176. Westpac Banking Corporation
177. Dr Brett Williams
178. Wilson Parking
179. Winemakers Federation
180. Woodside Energy
181. Yum! Restaurants International