

Submission to the Economics and Industry Standing Committee
Inquiry into Western Australia's Economic Relationship with India
Legislative Assembly, Parliament of Western Australia

Prepared by Hugo Seymour, Research Analyst, Perth USAsia Centre, October 2019

31 October 2019

Dear Ms. J.J. Shaw MLA
Chair
Economics and Industry Standing Committee
laeisc@parliament.wa.gov.au
Sent Via: Ms Suzanne Valetta, Principal Research Officer

The Perth USAsia Centre welcomes the opportunity to make a written submission to this important Inquiry into Western Australia's Economic Relationship with India.

Since its establishment in 2013 as a Perth-based foreign and strategic policy think tank, the Perth USAsia Centre has devoted significant energy and resources into enhancing its relationship with India, and commensurately the State's relationship with India.

In recent years, the Centre has developed considerable relationships with senior Indian policymakers and policy institutions, published consistently on the Australia-India (and WA-India) relationship, convened high-level programs in Perth and India highlighting the strategic and economic importance of the Australia-India (and WA-India) relationship, and brought senior Indian policy and defence leaders to WA.

The Centre's programs with senior Indian policy leaders have actively involved WA's Ministers, business and industry leaders, Parliamentary members, scientific and academic heads, and emerging WA students.

The Centre's recent engagement with India includes:

- Visits to New Delhi and Mumbai in September 2019 (Distinguished Fellow Peter Varghese AO, Board Director Hon Stephen Smith, Head of Programs Ms Erin Watson-Lynn and myself); New Delhi in January 2019 (Board Director Hon Stephen Smith and Research Analyst Hugo Seymour); New Delhi in August 2018 (Board Director Stephen Smith and myself);
- Three programs in 2019 with Ambassador Anil Wadhwa (May 2019, September 2019, October 2019), author of the upcoming *Australia Economic Strategy*, including on Australia-India critical minerals partnerships at the Centre's flagship *In the Zone* Conference (October 2019);
- Recent public and private programs in Perth and India with: Director-General of India's Institute for Defence and Analyses Ambassador Sujan R. Chinoy (October 2019); Former Chief of Naval Staff Admiral Robin Dhowan (Ret.) (August 2019); India's former Foreign Secretary and National Security Adviser Ambassador Shivshankar Menon (October 2018);
- Development of institutional relationships with leading Indian think tanks, including: Brookings India, Carnegie India, CUTS International, Gateway House, Institute for Defence and Analyses, Observer

Research Foundation and Vivekananda International Foundation (e.g. Joint programs with Carnegie India, Gateway House and Observer Research Foundation, New Delhi and Mumbai, September 2019);

- India-focused publications launched in 2019 in Perth and India: *India in APEC: Views from the Indo-Pacific* (Seymour, Perth, May 2019); and *RCEP: An Economic Architecture for the Indo-Pacific?* (Wilson, Seymour, New Delhi, January 2019).

The Centre's considerable engagement with India is designed to inform and enhance the State and the nation's economic and strategic relationship with India.

I trust the Centre's submission to this Inquiry will assist the Committee in further understanding the State's economic relationship with India, and in developing policies to strengthen the bilateral trade and investment relationship.

Yours Sincerely,

A handwritten signature in blue ink, appearing to read 'L. Gordon Flake', with a long horizontal flourish extending to the right.

L. Gordon Flake,
Chief Executive Officer, Perth USAsia Centre

Executive Summary

- Over the last decade, as India's economy has more than doubled in size, the value of Western Australia's (WA's) trade with India has more than halved. This is not due to a lack of economic complementary or trading opportunity;
- The structurally-driven growth of the Indian economy, which in a decade's time will match the size of China's today, provides WA with a premier opportunity to advance its market and sector economic diversification priorities;
- The increasing opportunities for WA-India economic engagement are arising as a result of India's considerable growth in consumer and industry demand, as well as Indian Central and State Government policies to improve both the business climate and their delivery of essential services;
- WA has the private and public sector capacity to further participate in India's economic rise, and a strengthened relationship will help ensure the State remains connected into the corridors of regional and global growth. And while an economic partnership between WA and India will have to be of a different kind to WA's trading relationships with Northeast Asia, its development is both possible and necessary;
- A continued trend of divergence between India's growth, its contribution to the global economy and its rising share of global outbound investment - and WA's trade and investment levels with India - will likely further expose the WA economy to international risk over coming decades;
- The endorsement by the Commonwealth Government of the commissioned *India Economic Strategy*, which highlights the urgency of increased whole-of-nation engagement with India, outlines the criticality of intensified Australian State Government engagement. The Strategy asserts that India's trajectory of liberalisation, trade openness and ease of doing business will continue to arc in favour of engagement – and the onus is on Australia to take advantage of the opportunities.

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Introduction

The 21st century re-emergence of India as one of the global economy's predominant powers will have defining consequences for the State of Western Australia (WA). The extent to which WA's economy is able to further participate in India's rise will be a critical element in the State's economic diversification equation, and pursuit of economic and employment security.

India is already the world's third largest economy, and is predicted to be the fastest growing large economy in the world over coming years.¹ By 2030, India will be larger than the United States and the European Union are today, and will be roughly on par with the China of today.² The structural drivers of India's growth have reputable economists forecasting that by the middle of this century, India will be the second largest economy in the world.³ WA's ongoing economic prosperity requires the State being connected into the corridors of global growth, and the rise of India bears no exception.

WA's economy over the last half-century has successfully further integrated into global trade, investment and commodity markets.⁴ This has been driven by the State's reliable and efficient supply of mineral and energy resources to Northeast Asia,⁵ enabled by foreign direct investment from the United States, Western Europe, Japan and more recently China.⁶ In partnership with industry and the Commonwealth Government, WA Governments have long executed active international engagement strategies to help drive these economic relationships.⁷

While WA's merchandise export-led economy benefits the State immensely,⁸ the dynamics of this international orientation do create challenges and expose risks.⁹ It is well accepted that WA will not be able to rely alone on the export of iron ore and liquefied natural gas (LNG) to Northeast Asia for sustained economic growth over coming decades.¹⁰ More specifically, the structural transition of the Chinese economy from investment to consumption-led growth, and the foreshadowed plateau of its steel production, means WA will not be able to depend on iron ore exports, nor China's growth, for revenues and receipts to the same extent as the previous decade.¹¹ At the same time, the services sectors, which employ the majority of Western Australians, risk long term underperformance in their export orientation.¹²

Appropriately articulated by the current WA Government, the principal economic challenge for the State remains the diversification of WA's economic and industrial base.¹³ The challenge remains because by some measures the WA economy is now more concentrated in a select few commodity exports to a select few markets than at any other time in the last 25 years.¹⁴

Given WA's reliance on trade and foreign direct investment,¹⁵ the State cannot diversify its economy without diversifying its international economic relationships. For a trading State, the need for WA to prioritise market as well as sector diversification is only enhanced in a changing and increasingly uncertain global economic environment.¹⁶

The scale of India's rising demand, particularly in growth sectors complementary to WA's capacity, provides a principal opportunity for WA to succeed in its economic diversification and growth task.

Two major pillars of opportunity exist for WA to strengthen its economic relationship with India: firstly, WA producers, industries and institutions can further service India's growing consumer and industrial sectors, as India's economy continues to develop, incomes rise and specific sector demand grows. Secondly, WA's technical and institutional expertise, at both the public and private level, can support India's delivery of essential services to its growing population, and help India sustainably confront its considerable social and economic challenges.

At present, WA does not have an advanced economic relationship with India. In the last ten years, as India's economy has more than doubled in size, the value of WA's trading relationship with India has more than halved.¹⁷ This is not due to a lack of opportunity, but is in part due to WA's focus on and trading success with other major economies, the complexities of the Indian market, and the fact that a major bulk commodity export to underpin trade and investment is yet to emerge.

This history must not characterise the future of the relationship. While economic success with India will be unable to be a structural reproduction of WA's achievements with Northeast Asia, it would not be the first time WA industries have successfully driven a new economic relationship with a major emerging market.¹⁸ There is a clear role for the WA Government to help drive such an enhanced economic relationship with India. Further to articulating to both WA and India the opportunities for increased bilateral trade and investment, forward leaning Indian engagement by WA's Departments and Agencies, trade officers, trading enterprises and Ministers can tangibly support WA's businesses, facilitating trade and investment growth and economic returns for the State.

At the national level, the commissioning and endorsement of the landmark *India Economic Strategy*¹⁹ by the Commonwealth Government (and the subsequent development of an *Australia Economic Strategy* by the Indian Government²⁰) has highlighted the urgency of enhanced whole-of-nation engagement with India. Given the sheer size, complexity and federal structure of the Indian economy, complementary sub-national engagement by Australian State Governments is essential.²¹ Importantly, the current WA Government has recently framed its economic diversification and international engagement priorities, with India identified as a key market (and with sector opportunities aligned with the *India Economic Strategy*).²²

This submission articulates both the increasing opportunities for a strengthened WA-India trade and investment relationship, and recommends a number of WA Government policy actions that could complement current initiatives at the State, Commonwealth and bilateral level.

1. Economic developments in India over the last decade and their implications for the bilateral trading relationship

India's Scale of Structural Growth

India's liberalising reforms began in 1991, and since then India's services and consumption-driven economy has grown dramatically.²³ Principally driven by demographics, urbanisation and incremental economic formalisation,²⁴ India's Gross Domestic Product (GDP) expansion has continued unabated over the last decade, and India has more than doubled in size between 2009 and 2019.²⁵

Within the next decade, India's youth-dominated society will become the most populous in the world and will generate the world's largest workforce.²⁶ Each year, more than ten million Indians move from rural to urban areas, driving the urbanisation of the world's largest rural population.²⁷ India's urban development demands significant public and private investment,²⁸ and contributes to the productivity-enhancing transition of employment from agricultural to services and manufacturing industries.²⁹

India's Central and State Government policies are principally geared to deliver the necessary infrastructure for economic growth and provide essential services to the nation's 1.3-plus billion population.³⁰ The scale of India's policy ambition reflects the nation's enormous demands, and are a response to the structural reforms required of India to grow in a sustainable way. There is still huge unmet demand for essential services in India, particularly the provision of reliable energy, water and sanitation, as well as quality education and healthcare.³¹ At the same time, increasing domestic wealth is creating a large, aspirational consumer class, driving changing dietary habits and increased discretionary spending.³² And while major commercial and financial reforms often proceed slowly and unconventionally, they are on a trajectory of structurally organising the economy and improving the business environment for both domestic and international firms.³³

India is the world's largest democracy, and the nature of its federal structure, reinforced by its economic, political and social diversity, means the nation essentially operates as a series of distinct economies.³⁴ The Central Government has direct control over national trade, finance, foreign affairs and investment policies, while the States have principal responsibility for the provision of education, healthcare, other essential services and many business policies.³⁵ With "competitive federalism" among States institutionalised as a mechanism to improve economic performance,³⁶ the investment attraction and reform agendas of India's State Governments are increasingly having a greater effect on India's economy than the Central Government.³⁷

India will be unable to realise its economic potential and generate prosperity for its people without further openness to international trade, investment and supply.³⁸ Since liberalisation began, India has slowly opened up its markets, particularly to international investment.³⁹ Remarkably, India's applied trade tariff is today one-tenth of 1990 levels, imports roughly equal exports, and the nation's trade as a proportion of GDP is the same as Australia's.⁴⁰ While the market is complex and can be considerably challenging, India is making consistent improvements in global indicators of economic performance, international accessibility and ease of doing business.⁴¹

The Implications of India's Rise for WA

It is the inexorable economic rise of India, along with Indonesia and the broader ASEAN Economic Community, which is driving the convergence of global economic weight in Australia's part of the world - the Indo-Pacific region.⁴² The shift in the global economic centre of gravity, south and west from Northeast Asia closer to WA, has been recognised by the current WA Government as affording tremendous economic opportunities for the State.⁴³

The structural drivers of India's growth have economists, and indeed the *India Economic Strategy*, predicting India will grow at an annual rate of at least 6% over coming decades.⁴⁴ Such a growth rate would see India double in size again by 2035, and substantially increase its share of the global economy from 7% to 13%.⁴⁵

The *India Economic Strategy* articulates "There is no market over the next 20 years which offers more growth opportunities for Australian business than India."⁴⁶ By virtue of WA's complementary economic capabilities, diversification priorities and proximity to market, there is no reason why this analysis doesn't hold true for WA and WA business.

There are clear distinctions between India's services-led development model and that of Northeast Asia's industrialisation model.⁴⁷ Further to India's own natural resource endowments, this means an advanced WA-India economic partnership will have to be of a different kind to what the State has recently grown accustomed to.⁴⁸ However, success with India is by no means "too hard" – it is essential.

Given WA's reliance on trade and investment, the State must remain connected into the global economy. As the global flow of goods, services and investment reorient and increasingly involve India, WA's economy will be further risk-exposed if the trend of divergence between India's growth and WA's India trade continues.⁴⁹

Further, as contributions to global growth and outbound investment by WA's traditional economic partners likely plateau,⁵⁰ WA's economy will likely suffer if a commensurate proportion of India's increasing share of capital outflows and international business investment does not head in the State's direction.

2. Current status of India's trading relationship with Western Australia

The contemporary WA-India economic relationship is principally a story of Indian domestic demand being serviced by external WA supply. While not structurally dissimilar to WA's economic relationships with Northeast Asia, the modern relationship rests on a comparatively much smaller (and more volatile) volume of minerals-dominated goods trade.⁵¹

Beginning with agricultural exchanges, trade between WA and India started in the 1830s when WA sourced sugar, flour, rice and tea from India, while WA exported jarrah, forestry and livestock products.⁵² WA gold was exported to India as soon as it was discovered, and has until recent times been the bedrock minerals commodity of the relationship.⁵³

Beginning the 21st century outside of WA's top twenty trading partners,⁵⁴ India rose to be an average top five WA-export market between 2003 and 2013.⁵⁵ Driven almost exclusively by gold exports,⁵⁶ in 2005 India was WA's fourth largest trading partner and accounted for half of national exports.⁵⁷ Becoming WA's third largest export market in 2007,⁵⁸ the relationship peaked in value in 2009-10 with WA exports totalling \$8.6 billion.⁵⁹

In 2018, albeit with a more diversified commodity range including LNG, alumina, bauxite and some iron ore,⁶⁰ WA's exports of mineral and petroleum products made up a concentrated 80% of the \$3.4 billion WA merchandise export trade.⁶¹ Agricultural commodity exports from WA to India accounted for only 1% of the State's food exports.⁶² Diamonds from WA, which are almost entirely sent to India for polishing, do not enter bilateral trading statistics as they transit through third markets.⁶³ WA imports from India are in smaller quantities (\$400 million in 2018), and consist mostly of refined petroleum and motor vehicle components.⁶⁴

While WA's services exports to India have trended upwards over the course of this century, principally in international education and tourism,⁶⁵ growth has not been of the same scale as the Australian east coast markets.⁶⁶ In recent times, due to coal and also services exports, national trade with India has grown at a consistently faster rate than WA-India trade.⁶⁷

In value terms, the size of WA's export relationship with India has more than halved since 2009-10 highs,⁶⁸ and a five-year trajectory of negative trade growth is currently evidenced.⁶⁹ While India was WA's 6th largest export market over the course of 2018, the rapidly growing country has fallen out of WA's top ten when 2018-19 figures are calculated.⁷⁰

While WA has traditionally received a significant share of Indian investment into Australia, particularly through major project investments (with various degrees of success),⁷¹ nationally the investment relationship with India is underdeveloped.⁷²

India doesn't need WA's iron ore to the extent the State is accustomed to providing to Northeast Asia, and hasn't yet demanded WA's LNG to the extent the State is accustomed to supplying to Northeast Asia. As such, it has long been recognised that there is not an obvious "stable base" to underpin the trade and investment relationship.⁷³

3. Existing barriers or impediments to trade

The fact that WA's trade relationship with India has deteriorated to be less than half of what it was a decade ago, over the same period that India's economy has more than doubled in size, clearly evidences there are existing barriers and impediments to WA-India trade.

The rapid growth in WA's export relationship with India at various times this century, particularly in gold trade and (from a low base) international students and tourists, shows that both goods and services trade growth is possible despite existing barriers and impediments.

The most prominent impediments from a WA industry perspective are the significant complexities in navigating and operating in the enormous Indian market, as well as the at-the-border barriers facing WA exporters seeking to supply the Indian market. From an industry operating standpoint, the barriers and impediments facing WA businesses are akin to the industry and trade challenges faced nationally by Australian companies.

At a macroeconomic level, the most distinctive impediment to WA's trade with India is the lack of an obvious bulk commodity export to underpin investments, exports and a wider economic relationship. WA's significant bilateral economic relationships in Northeast Asia began with significant capital investments into WA, by nations looking to externally secure their supply of raw minerals and energy resources (supported by international investors and companies). The lack of a bilateral free trade deal or the existence of tariffs at the import market did not prevent the development of these export-oriented industries.⁷⁴

While India does not need WA's iron ore and hasn't yet demanded WA's LNG to the extent the State is accustomed to supplying to Northeast Asia, this does not mean there are not significant opportunities for WA-India trade. However, this does create a distinctive challenge for both WA industry and the WA Government in having to approach the Indian market with an international engagement strategy that is novel to the kind executed over the last half-century.⁷⁵

Complexities of the Indian Market

The complexities of the Indian market and the subsequent constraints on Australian industry engagement with India are well documented, particularly at a sector-by-sector level in the *India Economic Strategy*. The challenges facing WA businesses seeking to engage the Indian market have also been closely examined by the current WA Government, and are well-evidenced in industry surveys and reports.⁷⁶

These ease of doing business constraints are both behind-the-border and at-the-border, and include: uncertainty in Central and State Government business policy direction, application and responsibility; challenges in understanding the business culture and regulatory climate; the existence (and inconsistency in application) of tariffs and non-tariff protectionist measures; infrastructure gaps and logistics costs; uncertainty regarding the efficiency and reliability of contractual and legal enforcement avenues; and the potential for or risk of corruption.⁷⁷ Given the distinctiveness of the Indian federal system and the political sensitivity of certain sectors, the ease of doing business varies across certain sectors and certain States.⁷⁸

Consistently articulated in the *India Economic Strategy* is that India is on a reform path of increased openness to international trade, a more certain investment environment and a more formalised economy for business operation. India's ranked improvement to 63 out of 190 in the World Bank's official *Ease of Doing Business* Report – down 67 places over the last three years - bears this out.⁷⁹ So too does India's participation with Australia in negotiations for an Indo-Pacific-wide free trade agreement, the *Regional Comprehensive Economic Partnership* (RCEP).⁸⁰

This analysis of an incrementally improving business environment is articulated not only in globally measured indicators, but in WA and Australia-focused industry trade surveys.⁸¹ Among Australian companies who are currently trading with India, surveys show that while the market is challenging, a majority feel business conditions are improving.⁸² Further, a clear precedent exists that with an established strategy for market engagement, market literacy and market compliance, revenue streams and optimism about future growth can result.⁸³

While WA is well renowned as an open, stable and secure place for international investment, notable stories of Indian business investment into WA have not always been profitable enterprises (including in the resources sector).⁸⁴ While the individual challenges that faced particular investments can be examined on a case-by-case basis, the *India Economic Strategy* is clear that Indian perceptions of Australia's investment climate and ease of doing business are influenced by notable cases (successes or failures).⁸⁵

4. Opportunities to strengthen the trading relationship

The opportunities for an across-the-board increase in WA's trade and investment relationship with India lie in areas where Indian industry, government and consumer demand is rising, and where WA has the skills, volume and/or scalable product to service India. This rising Indian demand is due to the nation's rapid industrial and consumer growth, and the resource commitments of Indian Central and State Governments to improve essential services infrastructure and delivery.

To achieve growth in the relationship, sustained industry investment supported by whole-of-Government effort is necessary. Reports by and to previous WA Governments have identified the need for increased economic engagement with India, and WA Government support has been articulated as necessary to help industry participate in the Indian market.⁸⁶

WA Government Policy

The History of Indian Engagement

Consecutive WA Governments have identified the increasing economic significance of India and the immense opportunities for WA to develop an advanced bilateral economic relationship.⁸⁷ The architecture of WA's modern Government-led engagement lies in the Asia and Indian Ocean-focused trade strategies of the early and mid-1990s, beginning with the Carmen Lawrence Government's 1992 *Into Asia* Strategy.⁸⁸ Following the Richard Court Government's *Indian Ocean Trade Strategy* of 1995, WA was the first State to establish a trade office in India.⁸⁹

While the predominant focus and direction of WA's Asian engagement over the last thirty years has been Northeast Asia, there have been periods of intensity in Indian engagement by WA Governments.⁹⁰ This has included in-country activity by various Departments and Agencies, in partnership with industry.⁹¹ A challenge for WA Governments has always been sustaining the consistency of engagement required to help drive the economic relationship.⁹²

The importance of senior visits by WA Government Ministers to nurture and advance the India economic relationship has been recognised by Government and industry in both countries.⁹³ At the highest level, three WA Premiers have formally visited India. The first was Geoff Gallop in 2005, shortly after two-way senior Ministerial delegations.⁹⁴ Two years later, Alan Carpenter as Premier visited.⁹⁵ In 2015, Premier Colin Barnett made his visit to the subcontinent.⁹⁶ Current WA Premier Mark McGowan is making an inaugural visit to India in November 2019.⁹⁷

Over the course of this century, there have also been a number of visits and delegations led by Deputy Premiers, senior economic development and service-sector ministers.⁹⁸ The principal destinations of the visits have been the national capital New Delhi and the major commercial hub Mumbai, as well as the capital cities of growth hub States Tamil Nadu, Karnataka and Telangana.⁹⁹ [See Table A]. The frequency of WA Ministerial visits this century has fluctuated, and the Indian market has not been as prioritised as other established or emerging trade partners.¹⁰⁰

Since the establishment of WA's Mumbai trade office in 1996, the State's permanent presence in India has remained. The WA trade office has enabled tailored on-the-ground support to be provided to WA businesses looking to operate or expand in India, as well as to Indian businesses looking to invest and trade with WA.¹⁰¹ However, rather than expanding in scale as India's market has grown, WA's on-the-ground presence in India has diminished over time. WA trade offices in Chennai and Kolkata, which operated as satellite offices to serve the south and east of the country respectively, were opened in the 1990s and by the turn of this decade had both been closed.¹⁰²

In 2016, WA entered into its Sister State relationship with the newly-bifurcated State of Andhra Pradesh¹⁰³ [See 4 a)].

Table A: Timeline of WA Ministerial Visits to India – 2000 to 2019¹⁰⁴

Timeline	Minister	Location(s)	Principal Purpose(s)
February 2000	Deputy Premier; Commerce and Trade	Mumbai (Maharashtra State); Chennai (Tamil Nadu); New Delhi	Trade and Investment
November 2002	State Development; Tourism; Small Business	Chennai; Bangalore (Karnataka); New Delhi	Trade and Investment; Energy and Minerals; Agribusiness
April 2004	Sport and Recreation; Tourism	New Delhi	Sports; Tourism
October 2005	Premier	New Delhi; Bangalore; Mumbai; Chennai	Trade and Investment; Energy and Minerals; Direct Flights
February 2007	Premier; Trade	Mumbai; Coimbatore (Tamil Nadu); Chennai; Hyderabad (Telangana); New Delhi	Trade and Investment; International Education; Energy and Minerals
July 2007	Deputy Premier; Treasurer; State Development	Hyderabad; Chennai; Mumbai; New Delhi	Trade and Investment; Energy and Minerals;
November 2007	Small Business	New Delhi; Mumbai	Skilled Migration
September 2009	Regional Development	New Delhi; Agra (Uttar Pradesh)	Trade and Investment; Energy and Minerals
April 2015	Premer; State Development	Mumbai; New Delhi	Trade and Investment; Energy and Minerals
December 2016	Treasurer	New Delhi	Sister State
August 2017	Deputy Premier; Health	New Delhi; Hyderabad; Vijawada (Andhra Pradesh);	Bilateral Dialogue; Health; Sister State

August 2018	Tourism	New Delhi; Mumbai	Direct Flights; Tourism
October 2018	Tourism	Mumbai; New Delhi	Direct Flights; Tourism
January 2019	Education and Training	Mumbai; New Delhi; Ahmedabad (Gujarat)	International Education
March 2019	Tourism	New Delhi; Mumbai	Direct Flights; Tourism
August 2019	Tourism	New Delhi	Direct Flights
November 2019	Premier; State Development, Jobs and Trade	Mumbai; New Delhi	Tourism; International Education; Energy and Minerals

The Architecture of State Engagement

WA Government Levers

The argument for active WA Government engagement to help strengthen an international economic relationship cannot be clearer than in the case of India.

Firstly, there is a need for articulation in WA that while a strengthened relationship with India is an imperative,¹⁰⁵ it is unlikely to be able to be built off the back of bulk commodity exports alone. Further, as growth in the relationship will unlikely be first enabled by high volumes of foreign direct investment from India into WA, leadership is essential in articulating the considerable economic opportunities that can be realised if a different engagement approach is formulated and executed.

Secondly, a strengthened economic relationship between WA and India, and particularly one that supports employment growth in WA, can only succeed through business engagement.¹⁰⁶ Therefore, the existing challenges of the Indian market only heighten the need for WA Government support to assist industry trading with and operating in India. Of WA respondents in the 2018 Australia's International Business Survey (AIBS), India is a top four target market.¹⁰⁷ The WA Government has an important role providing direction to these companies as to where economic opportunities lie, providing support services to businesses looking to establish a market presence, and utilising the 'badge of Government' to help facilitate operations.

In acknowledging the importance of consecutive WA Governments in helping drive economic relationships in Northeast Asia, the role of the WA Government in supporting industry in the Indian market will need to be even greater.¹⁰⁸ And while relative time zone and geographic proximity provides WA some advantages in realising economic opportunities,¹⁰⁹ these assets alone are not determinants of an advanced economic relationship.¹¹⁰

Thirdly, the nature of India's federal structure provides unique opportunities for the WA Government as a sub-national jurisdiction to engage with Indian State Governments, including through publicly led programs and public-private partnerships.¹¹¹ Many of India's significant challenges and areas of rising demand, particularly in the provision of essential services, are Indian State responsibilities and fields of WA Government core

competency. There are growing areas where the State can sustainably partner with India, including in the provision of technical and consulting services.

The WA Government has a limited, yet distinctive international engagement toolkit to support the State's international economic relationships. This includes senior Ministerial visits, the work of WA's trade offices,¹¹² and activity pursuant to Sister State Memorandums of Understanding (MoUs) and the international agreements of WA Departments and Agencies.¹¹³ When coordinated with industry and/or executed in partnership with the Commonwealth Government, this can support industry engagement and trade growth. For example, independent analysis of the Victorian Government's trade mission program found that industry participants were able to increase total export sales to high-growth markets (including India) by 219% within 12 months, and 345% within 24 months.¹¹⁴

The *India Economic Strategy* reinforces a clear role for Australian State Government engagement in India,¹¹⁵ and argues the pattern of engagement needs to have a clear and sustained focus, including through:

1. Frequent senior ministerial visits;
2. Raising domestic awareness of the economic opportunities in India;
3. Supporting business engagement, including through State Government-hosted trade missions;
4. The investment of resources;
5. An on-the-ground presence;
6. State Parliamentary delegations; and
7. Giving effect to MoUs through specific project plans.

Importantly, international engagement strategies of the current WA Government are determined to execute such a "whole-of-Government" approach.¹¹⁶ Further, the sectors identified by the State where WA has both capacity and international competitiveness - energy; tourism, events and creative industries; international education; mining and METS; technology and advanced manufacturing; and primary industries¹¹⁷ - articulate India as holding significant growth prospects for WA.¹¹⁸ These sectors are aligned with the *India Economic Strategy*.

Sectors and States for Strategic Engagement

The *India Economic Strategy* outlines a comprehensive vision for Australia to triple its exports to India and to increase tenfold the level of outbound Australian investment to India by 2035 - making India Australia's third largest export partner and third largest destination for Australian outbound investment in Asia.¹¹⁹

As well as providing a roadmap for Commonwealth and State Government engagement, the *India Economic Strategy* provides a detailed "Sectors and States" matrix for Australian business to undertake or enhance their Indian engagement. The 10 sectors and 10 states are also determined as where returns on strategic investment by Australian Commonwealth and State Governments will be the greatest in supporting industry.¹²⁰

10 Sectors:

1. Education;
2. Agribusiness;
3. Resources;
4. Tourism;
5. Energy;
6. Health;
7. Science and Innovation;
8. Infrastructure;
9. Sport; and
10. Financial services.

*Defence and security is not among the priority sectors of the *India Economic Strategy*, but a chapter is included on defence industry opportunities given Commonwealth Government priorities and the enhancing Australia-India defence and security relationship.

10 States:

1. Andhra Pradesh;
2. Gujarat;
3. Karnataka;
4. Maharashtra;
5. National Capital Region of New Delhi;
6. Punjab;
7. Tamil Nadu;
8. Telangana;
9. Uttar Pradesh;
10. West Bengal;

Unlike other Australian States and Territories, WA does not yet have a formal strategy focusing its engagement with India.¹²¹ Notwithstanding, WA's trade office presence in Maharashtra State (Capital Mumbai),¹²² Sister State partnership with Andhra Pradesh,¹²³ principal Ministerial visit destination New Delhi,¹²⁴ and historical inroads in West Bengal (Kolkata)¹²⁵ and Tamil Nadu (Chennai),¹²⁶ are all priority States in the *India Economic Strategy*.

[State-by-State trade and investment opportunities for WA are further examined in Section 4 d].

An Integrated State and Commonwealth Approach

The Commonwealth Government is committed to strengthening economic ties with India,¹²⁷ and has endorsed the *India Economic Strategy* which calls for an integrated approach between Commonwealth and State

Governments.¹²⁸ For example, a new forum will be held between Commonwealth and State Governments on international education strategies in India.¹²⁹

As both the Commonwealth and State Governments look to develop the Indian relationship, it is important WA remains cognisant of both Commonwealth and Indian policy developments and initiatives. In partnership with the Commonwealth Government, WA can look to be a first-mover State in the execution of *India Economic Strategy* recommendations.

For example, since its formal response to the *India Economic Strategy*, the Commonwealth Government has delivered on a number of key recommendations. The establishment of the new Consulate General in Kolkata,¹³⁰ the key minerals province and a State with a historical WA presence, could provide a foundation for further WA engagement in West Bengal.

Further, applicable *India Economic Strategy* recommendations include: the Commonwealth Government working with States beyond Victoria and New South Wales on Indian student recruitment,¹³¹ exploring (with States) capacity building programs with India in mine safety and environmental standards,¹³² and increased Tourism Australia support for State tourism marketing in India.¹³³ These could all be leveraged by the WA Government in the execution of its respective international education, mining partnership and tourism programs.

Existing activities by the Commonwealth Government support WA industry's engagement in India, including the Australian Trade and Investment Commission's (Austrade) export grants scheme and in-market service offerings.¹³⁴ At the same time, many Commonwealth Government activities could also be further executed in WA. For example, the Australia-India Council, a public grants body for enhancing the bilateral relationship, has only awarded two grants for WA projects in the last six years.¹³⁵ Other States and their Agencies have recently utilised the Australia-India Council to pursue Sister State and offshore TAFE projects.¹³⁶

Upon the scheduled late-2019 release of the *Australia Economic Strategy*, commissioned by the Indian Government in response to the *India Economic Strategy*,¹³⁷ the WA Government can ensure it is a first-mover State with the Commonwealth Government in reviewing the Strategy and exploring possible areas of joint implementation.

Policy Recommendations

- 1. Ministerial Visits:** Increase the frequency and impact of senior WA economic development and services-sector Ministerial visits to India. At the same time, further encourage senior Indian Ministerial counterparts to visit WA.
- 2. Trade Office Strategy and Activity:** Following completion of the review into WA's trade offices, ensure WA's office and officer presence in India is strategically located, sector-oriented and resourced to support WA-India trade and investment growth.

3. **Two-Way Industry Delegations:** Explore what further support can be provided to WA's business chambers, industry institutions and companies to visit India, and to encourage senior Indian business chambers, industry institutions and companies to visit WA.

4. **The Australia Economic Strategy:** Upon the release of the Indian Government's *Australia Economic Strategy*, the Department of Jobs, Tourism, Science and Innovation should examine its findings and explore how WA can be a first-mover State with the Commonwealth Government and Indian Governments in relevant areas of implementation.

a) The Sister State Relationship between the State Government of Western Australia and the State Government of Andhra Pradesh

WA and Sister State Relationships

Sister State relationships between the WA Government and overseas provincial Governments are established through Memorandums of Understanding (MoUs). The MoUs establishing the Sister State outline a framework for cooperation across trade, investment and cultural fields, often coordinated by a working group.¹³⁸

Prior to the signing of the Andhra Pradesh Sister State MoU in 2016, WA already had Sister State relationships across Asia with Hyogo Prefecture in Japan (established 1981),¹³⁹ Zhejiang in China (1987)¹⁴⁰ and East Java in Indonesia (1990).¹⁴¹ As an example of activity, in the first four years of the WA-East Java Sister State relationship more than 200 business, technical and cultural exchanges took place.¹⁴²

Analysis of WA's Sister State relationships shows that sustained State-led activity and engagement pursuant to agreements - when configured to match commercial opportunities - can help drive international relationships and WA trade. For example, the rationale behind initial engagement with Zhejiang Province was that its port of Beilun was the first port of call for WA iron ore, and an enhanced bilateral provincial Government relationship would advance the yet-developed WA-China iron ore trade.¹⁴³

Andhra Pradesh

Located on the southeast coast of India, Andhra Pradesh like WA has abundant natural resources and is a strong mining and agriculture State. Further, it is India's number one in ease of doing business and has recently grown at rates above 10%.¹⁴⁴ Given its economic development, reform commitments, openness to international partnerships and rate of growth,¹⁴⁵ Andhra Pradesh is a priority state in the *India Economic Strategy*.

WA's Sister State MoU with Andhra Pradesh outlines a specific framework for economic and governance cooperation, including in mining and mining services, energy production, agriculture and fisheries processes, and education and training.¹⁴⁶ Importantly, the MoU has an Appendix of specific opportunities and action items,¹⁴⁷ and has bipartisan support in WA.¹⁴⁸

Since 2016, further cooperative activity organised by respective Sister State Governments has included two-way Departmental delegations,¹⁴⁹ and a visit to Vijawada by the WA Deputy Premier in late 2017 yielded further public and private sector agreements. This included in research and education, geological mapping, dryland agriculture management, traffic safety and public sector exchanges.¹⁵⁰ While there have been visits to India by WA's Tourism and Education Ministers in the last two years, there is yet to be a follow-up WA Ministerial visit to Andhra Pradesh.¹⁵¹ In mid-2019 a new Chief Minister of Andhra Pradesh was elected,¹⁵² which provides new opportunities for engagement.

Under "competitive federalism", India's States are increasingly emphasising Sister State relations as a vehicle to build international economic partnerships.¹⁵³ Given the rising importance of States in India's economic

development and business policies, and the overlap in economic and service-delivery responsibilities between Australian and Indian States, the WA-Andhra Pradesh Sister State relationship provides a sound platform for strategic WA engagement. WA should continue to engage Andhra Pradesh pursuant to the Sister State MoU, and seek to drive both State to State and private sector partnerships.

Public and Private Engagement

The *India Economic Strategy* highlights State to State engagement on water resource management as a successful model for public-led technical partnerships and service delivery.¹⁵⁴ The water partnerships between some Australian States and Indian counterparts have been developed pursuant to Sister State MoUs, and are now developing research and economic links.¹⁵⁵

India has an entrenched business culture of engaging through chambers of commerce and economic institutions, including at the State level.¹⁵⁶ For example, the Andhra Pradesh Chambers of Commerce and Industry Federation operates out of Vijawada, servicing the State's industry along with its affiliate district-level chambers and business associations.¹⁵⁷ WA's senior industry bodies, including the Chamber of Commerce and Industry and Chamber of Minerals and Energy, have historically led delegations to India, as well as developed "Sister Chamber" relationships with Indian counterparts.¹⁵⁸ The WA Government could explore further partnerships with these industry bodies in encouraging WA's private sector engagement in Andhra Pradesh.

[Sector-by-sector engagement opportunities for WA and Andhra Pradesh are further examined in Section 4 d).]

Policy Recommendations

5. ***Enhancing the Sister State:*** Review the breadth of activity conducted between Andhra Pradesh and WA pursuant to the Sister State MoU (and subsequent agreements), and explore enhancing current and pursuing new initiatives to support WA-India trade and investment growth.
6. ***Two-Way Parliamentary Delegations:*** Increase the frequency of WA Parliamentary delegations to India, including to Andhra Pradesh, and encourage Indian State Parliamentary delegations to visit WA. A focus of the delegations should be examining WA-India trade and investment growth opportunities.

b) The role of the Indian diaspora business and entrepreneur community

Australia and WA's Indian Diaspora

The rapid 21st century increase in WA's Indian diaspora is reflective of the national trend – Australia's Indian population is the fastest growing diaspora in the nation.¹⁵⁹ A result of significant skilled migration, and heavily accelerated during the mining construction boom, India is also Australia's largest source of skilled migrants.¹⁶⁰

There are now 75,000 Western Australians with Indian ancestry in the State, and 65,000 live in Perth.¹⁶¹ This figure is up from 15,000 in 2001,¹⁶² and the 3-4% of Perth's population who are Indian-born puts WA's capital city in the upper scale of Australia's cities with Indian populations.¹⁶³ Nationally, the current 700,000 Indian-born Australians are expected to double in number by the early 2030s, and surpass the number of Chinese-born Australians.¹⁶⁴

Australia's India diaspora is talented, and the vast majority of Australia's Indian-born migrants travelled to Australia on professional skills, student or business migration visas.¹⁶⁵ Australia's Indian-born population is three times as likely to have a higher-education degree, on average have higher incomes, and are the second-highest tax paying diaspora after United States-born Australians.¹⁶⁶

While Australia's Indian population makes a considerable contribution to the national economy, the diaspora is yet to have a significant impact on national bilateral trade figures.¹⁶⁷ There is little evidence to distinguish WA's India diaspora and WA-India trade from this national analysis. However, with an increasing prominence of WA-India business organisations, and an increasing number of WA's Indian diaspora in positions of business and political leadership, this is more likely to change in coming years.¹⁶⁸

Increasing Diaspora Business and Trade Links

WA Government policy should continue to support diaspora-focused programs that are oriented to business and trade development, including the leveraging of WA's considerable Indian diaspora to strengthen the State's trade and investment links with India.

Enhanced by WA's growing Indian diaspora, many local communities in Perth have significant Indian links.¹⁶⁹ As with Sister States, international "Sister City" relationships are increasingly being emphasised by India's municipal governments as a mechanism to drive two-way commerce.¹⁷⁰ Perth's existing Sister City relationships work to increase people-people and business links, and can facilitate delegations and investments.¹⁷¹ Many WA Local Governments have Sister City relationships in Northeast Asia, in Europe and America, but none yet in India.¹⁷² The WA Government could further work with WA's Local Government counterparts to explore their Indian linkages, and assist in the development of formal relationships.

Fundamental to the State's industry capacity and trade success are the skills, experiences and ambition of the WA business community – and with that the growing network of WA-India business institutions.¹⁷³ The WA Government should continue to support WA-India business councils and India-focused dialogues, as well as

encourage Indian business chambers and industry institutions that do not have a presence in WA to establish a Perth office.¹⁷⁴

Policy Recommendations

- 7. *Formal Community Links:*** The Department of Local Government, Sport and Cultural Industries should explore what support can be provided to WA Local Governments (with large Indian diasporas) to assist in the development of Sister City relationships and/or other formal links with Indian cities.

- 8. *India Dialogues in Perth:*** Pursue hosting the Australia India Leadership Dialogue and the Australia India Youth Dialogue in Perth.

c) Strategies to attract inbound investment into Western Australia

A Long Term Strategy

WA has traditionally received a considerable share of India's investment into Australia, particularly in the resources sector.¹⁷⁵ Nationally however, the investment relationship between Australia and India is underdeveloped.¹⁷⁶

Whilst on vastly different scales, WA and India are both capital-importing markets, and India's domestic infrastructure and business investment requirements consume the vast majority of India's available capital. In the near-term, it is unlikely WA will be able to rely on the WA-India economic and trading relationship being driven by large-scale Indian business investment into WA. Further, an investment relationship between WA and India is unlikely to succeed if WA seeks only inbound investment from India.

The *India Economic Strategy* assesses that there is the potential for large-scale Indian investment into Australia, particularly in sectors of WA capacity (such as energy and mining).¹⁷⁷ However, it is also made clear that Indian investment into Australia will flow more readily if Australia's presence in the Indian market grows.¹⁷⁸ This includes the presence of Australian Commonwealth and State Government Agencies and trade offices.

On the investment side, the WA Government should continue to support the in-market presence of WA businesses seeking initial or greater access to the market. This includes via the activities of WA's trade officers, trade delegations and senior Ministerial visits. At the same time, the WA Government should continue to promote Indian inbound investment, particularly in sectors where Indian Governments and companies are looking to strategically diversify their portfolios and/or secure supply.

Business and Investment Visas

The WA Government does have a particular investment facilitation lever through the State-Sponsorship of investment visas.¹⁷⁹ The WA Business Migration Program, within the Small Business Development Corporation, manages WA's formal nomination for eligible applications for business and investment visas (both provisional and permanent).¹⁸⁰ In 2017-18, nearly \$400 million was injected into the State through confirmed investments from Permanent Residency Business Visa holders, and over 250 direct employment positions in WA were created.¹⁸¹

While WA has successfully promoted skilled migration in India during periods of labour shortage,¹⁸² there may be further opportunities to prospectively market WA-sponsored business and investment visas in India.¹⁸³ This can include by partnering with the WA-India diaspora and business organisations.¹⁸⁴ More broadly, analysis of State-by-State nomination figures reveals WA likely has capacity to increase its marketing of this investment program.¹⁸⁵ Given the growing bridge of skilled people-to-people links between WA and India, at the same time as India's middle class and number of high-net worth individuals is rising, the WA Government should explore further integrating its Indian investment facilitation programs with the Business Migration Program.

Policy Recommendations

9. ***An Indian Investment Prospectus:*** The Department of Jobs, Tourism, Science and Innovation should develop and promote a tailored Investment Prospectus for Indian investment into WA – focusing on the priority sectors of Indian outbound investment where WA provides investment opportunities.
10. ***Business and Investment Visas:*** Explore opportunities to further integrate WA's Business Migration Program with the State's broader Indian economic engagement and investment facilitation programs.

d) Developing existing and new export markets in India in target sectors

Introduction

While a strengthened WA-India trading relationship will remain a model of WA supply servicing Indian demand, and there are indeed opportunities for considerable merchandise commodity exports, it is in the technical and services sectors where there is the most opportunity for genuinely diversified WA-India relationship growth.¹⁸⁶

WA has this century relatively underperformed in services sector exports, yet India's consumption of WA's education and tourism services has markedly grown and continues to grow above trend. Further, the scale of India's domestic education demand presents considerable in-market opportunities for WA's providers [*See 4 c) i) International education*]. As Indian incomes rise and the nation's outbound visitor and spend-per-visitor numbers increase, India is a priority market for WA tourism [*See 4 c) ii) Tourism*].

India does not need WA's iron ore to the extent the State is accustomed to providing, and hasn't yet wanted WA's LNG to the extent the State is accustomed to supplying. Notwithstanding, there are growing opportunities for WA to export both energy and minerals products to India, as well as WA's resources sector services and technical expertise [*See 4 c) iii. Minerals and energy*]. There are also specific WA-India opportunities in the provision of high-quality goods and services in WA's second primary industry, agribusiness [*See 4 c) v) Agribusiness*].

WA's capabilities in the defence industry [*See 4 c) iv) Advanced manufacturing*] are increasingly aligning with Indian demands due to national convergences in the defence relationship, and WA's public sector capacity in healthcare, industry management and essential services delivery creates further opportunities for engagement [*See 4 c) vi) Further Opportunities in a Whole-Of-Government Approach*].

The current WA Government's identified priority sectors for economic diversification are aligned with the Inquiry's Terms of Reference target sectors, and with priority sectors in the *India Economic Strategy*. Importantly, the current WA Government has identified India as holding significant growth prospects across these priority sectors.

i. International Education

The greatest opportunity to strengthen WA's international education relationship with India lies with a policymaking purpose to develop the relationship beyond the recruitment of Indian students to study in WA's onshore universities, TAFEs and private training organisations.¹⁸⁷ Growing WA's international education relationship with India requires ongoing recognition that the enormity of Indian education demand transcends overseas learning for employment outcomes (in which Perth is one destination of choice), and involves the wholesale domestic development of an Indian schooling, higher education, vocational training and research system to teach and skill the largest workforce in the world.¹⁸⁸

India's development of its domestic education system requires substantial improvements in education infrastructure, learning and delivery models, teacher quality and quantity, curriculum development and research - all of which require international partnerships¹⁸⁹ where WA has both public and private sector capacity. There are clear opportunities for an expanded WA-India international education partnership to be supported by WA Government policy - the institutional, governance and model arrangements, as well as the delivery of education services, is core business for State Governments in both WA and India.

WA's increased participation in India's domestic education system can not only be sustainable and profitable for private and public WA institutions, it can also enhance international student recruitment capacity and grow Indian international student numbers in WA. This export sector is of vital importance for institutional revenue and employment in WA.¹⁹⁰ Further, an international education partnership will also weave through all other facets of WA-India engagement, and will enable WA's increased participation in other sectors of growing Indian demand.¹⁹¹

For WA policymaking, strategic investment by the WA Government should focus on driving offshore partnerships, particularly in vocational education and training (VET), in encouraging increased WA-India research engagement, and having attractive student recruitment policy settings.

The Current Relationship

While the WA Government assesses the State as currently receiving a low national share of Indian international students,¹⁹² the Indian education export market for WA has performed better than other markets in the context of WA's 21st century share decline - and in the last five years WA's national share of Indian students has generally increased.¹⁹³ Underpinned by the large global increase in Indian students studying overseas, the growth in the last decade of Indian students in WA has been above broader rates of WA education export growth.¹⁹⁴

India has also markedly increased its share of WA education exports, and since 2017 has been WA's biggest source of international students.¹⁹⁵ Nearly half of Indian onshore enrolments are in VET, and above 40% are in higher education.¹⁹⁶ While the publicly-run WA TAFEs have previously provided revenue-returning VET training in India,¹⁹⁷ there is not currently extensive in-market activity. Some WA-based private training operators are active in India.¹⁹⁸

WA's universities have a range of well-established and new relationships with Indian universities and institutions, encompassing both research collaborations and partnership agreements in the delivery of education services. For example, The University of Western Australia (UWA) has since the mid-1990s been a partner in the global International Crops Research Institute for Semi-Arid Tropics (ICRISAT), which contributes significant agricultural research.¹⁹⁹ Curtin University has an established joint doctoral program with the Indian School of Mines,²⁰⁰ and recently agreed to establish a Research Centre for teacher training with India's National Council of Education Research and Training (NCERT), and to create and implement online training modules.²⁰¹ During recent WA ministerial visits to India, further articulation agreements and other MoUs have been signed between WA and Indian institutions.²⁰²

The Opportunities

India's education policy landscape outlines the sheer scale of in-market demand, and thus the opportunities for increased WA engagement. In VET, the Modi Administration's *Skill India* program plans to train a further 400 million Indians.²⁰³ In higher education, India aims to almost double its enrolment rate to 50% by 2030.²⁰⁴ In teacher training and delivery, NCERT is aiming to train 3.2 million of India's estimated 8 million teachers.²⁰⁵

For international providers, India's regulatory climate requires a strategic focus. While the university sector is highly regulated, both with regards to international provider engagement and degree recognition,²⁰⁶ the VET sector is much more open.²⁰⁷ And while India's draft new education policy contemplates new access arrangements for foreign higher education institutions,²⁰⁸ for State Government engagement a focus on VET services and in-market delivery is strategically sound.

India is emerging as a global hub for research and development, and is ranked the top innovation destination centre in Asia.²⁰⁹ While there is currently no Indian university in the global top 100 rankings, India has elite Institutes of Technology (IITs) and is making significant public investments in research projects.²¹⁰ WA's universities are increasingly cognisant of their geostrategic location in the Indian Ocean Rim, and are adopting forward leaning strategies to further engage with Indian institutions.²¹¹

The *India Economic Strategy* identifies increased research partnerships between Australia and India, particularly increasing two-way PhD studies, as critical to an advanced education partnership.²¹² While there are limits in the capacity of Australian State governments to fund joint research (even with Commonwealth funding Australian universities still need to source significant inputs) there is a role the State can play in facilitating PhD exchanges,²¹³ and in connecting WA's institutions with funding opportunities in India.

In the *India Economic Strategy*, the increasing power of States in Indian education governance, delivery and funding is highlighted, and the States of Maharashtra, the New Delhi Capital Region, Tamil Nadu and West Bengal are priority States for education (including for student recruitment).²¹⁴ Given WA's existing education commitments with Andhra Pradesh, particularly in agricultural research, and mining and healthcare VET partnerships, these States and Andhra Pradesh should be a focus for WA.

Offshore VET

The *India Economic Strategy* articulates that a fully realised VET partnership will only succeed if scalable provisions of offshore VET are delivered in India.²¹⁵ In Australia VET services are now majority-delivered by private registered training organisations (RTOs), yet State Governments still regulate the industry and deliver public education via TAFEs.²¹⁶ Importantly, the WA Government has a history of successfully providing offshore services (including in India) as a key component of its training revenue profile, and currently provides some offshore services.²¹⁷

In 2009, then-Central TAFE, WA's leading public provider of offshore VET, undertook initiatives to develop a new market in India - in education delivery, model development and 'train the trainer' activity.²¹⁸ By the turn of the decade, the execution of a business plan and the establishment of more than a dozen partnerships resulted in Central TAFE's first revenue stream in India.²¹⁹ India was considered a priority market by the re-constituted Central Institute of Technology, and WA had the most offshore student enrolments for any Australian State in India.²²⁰

Challengingly, efforts to develop an established offshore VET presence in India have largely dissipated over the last decade. Notwithstanding, the quality of VET is still held in high regard in India,²²¹ and there are increasing opportunities for WA's TAFEs to re-engage. For example, 125 million Indian employees are working in automatable areas, and South Metro TAFE is now delivering in partnership with industry Australia's first qualifications in automation.²²² While VET partnerships in India must emphasise low cost, high volume and high quality, and will take time to succeed,²²³ WA TAFEs and the Department of Training and Workforce Development should explore re-engagement. Further, in-market engagement by WA institutions can also be leveraged to support further WA-based RTOs enter and operate in the market.

The visit to India by WA's Education and Training Minister in 2019, the first such ministerial visit, identified the need to further explore how WA's TAFE system can provide services in India.²²⁴ The *Indian Economic Strategy* identifies opportunities to develop partnerships both with Indian State Governments and directly with large companies.²²⁵ WA already has a basis for renewed engagement, and the WA-Andhra Pradesh Sister State agreement identifies in-market delivery opportunities in mining and health courses.

Student Recruitment

WA has a long history in international student recruitment as one of the first Australian States to enter the market.²²⁶ After Australia's international education market began, WA's newly created offices in Asia were primarily "student recruitment offices".²²⁷

In the *India Economic Strategy*, it is estimated Australian education exports to India alone could exceed \$12 billion by 2034, and the capacity for more Indian students to study outside east coast institutions is noted.²²⁸ This inbound growth aspiration is in line with the current WA Government's *International Education Strategy*, with India the destination of recruitment campaigns as part of a goal to double onshore international student numbers by 2025.²²⁹

Recent funding increases to StudyPerth, WA's international student recruitment Agency, have provided the Agency with increased capacity to undertake recruitment marketing and to execute on alumni engagement and student experience commitments.²³⁰ It is important a secure funding supply for Indian marketing remains, particularly as Perth has suffered when there has been a lack of marketing in comparison to other States.²³¹ A coordinated Departmental and Agency focus to promote WA as a study destination is required, particularly given StudyPerth has discontinued overseas travelling for recruitment, as well as its management of WA's overseas education officers.²³²

It is well known prospective international students make decisions influenced by graduate employment and migration opportunities,²³³ and the *India Economic Strategy* argues Australia should continue to welcome Indian students who seek an Australian education primarily for such an outcome.²³⁴ Since Commonwealth migration reforms created State-sponsorship arrangements for certain visas, States in Australia have had levers which have an effect on student recruitment outcomes.²³⁵

StudyPerth has articulated that previous changes in State-sponsorship migration arrangements have had a deleterious impact on WA's international student recruitment and contributed to recent declines in student numbers - including from India.²³⁶ Even while most Indian students in WA study VET courses, the new special category of State-sponsorship opportunities for international masters and PhD students has been promoted in India, and has gone some way to reverse the downturn.²³⁷ Perth's re-classification as a 'region', which will come into effect in November 2019 and make Perth's international students eligible for an additional year in Australia on a post-study work visa, is also expected to support international student growth.²³⁸ Future migration-related reforms should work in favour of student recruitment and international education growth.

Particularly given Perth is not a widely known destination,²³⁹ and over half of India's international students use an education agent,²⁴⁰ it is important both effective incentive settings to study in WA are utilised and that WA institutions engage credible agents in India.²⁴¹ The recent initiation of an Australia India Business Council-led mentoring program for Indian students in WA²⁴² is in alignment with the *India Economic Strategy* recommendations²⁴³ and should be continually supported and promoted.

Policy Recommendations

- 11. Offshore VET:** Explore re-engagement by WA TAFEs and the Department of Training and Workforce Development in the offshore delivery of education, training and VET consultancy services in India.
- 12. Student Recruitment:** Ensure WA's architecture of international student recruitment incentives, including employment schemes and State-sponsored visa settings, work in favour of recruitment growth and are strategically promoted in India.

ii. Tourism

A strengthened WA-India tourism relationship will, similar to international education, develop from as well as drive growth in bilateral economic activity across other sectors. With the rapid 21st century increase in Indian migration to Australia, along with India's consumer class growth and marked increase in international education demand, WA has experienced sizeable growth in the Indian tourist market.²⁴⁴ Given these structural drivers of people flows, the WA-India tourism relationship has grown without – until very recently - any dedicated tourism marketing or investment by WA Governments and Agencies.²⁴⁵

State Governments have considerable influence on the performance of the tourism industry, particularly the international tourism market. States directly market overseas, and also invest in the domestic infrastructure and sector capability required to service the market. The importance of marketing WA as a destination in India has been recognised by Governments and industry in both countries.²⁴⁶

The recent prioritisation of the Indian tourism market by the WA Government, along with inaugural investments in direct tourism marketing and trade office assets, is expected to support growth in the relationship. Further, sustained effort by the current WA Government to restart a direct flight route between India and Perth is particularly noteworthy.

To continue to grow the WA-India tourism relationship, the WA Government should continue to prioritise and invest in Indian tourism marketing, targeting business and high-value travellers as well as Indians visiting friends and relatives (VFR). Further, this prioritisation should continue with or without the securing of direct flights in the near-term, as sustained investment will continue to support the tourism relationship and encourage bilateral trade growth.

The Current Relationship

The WA-India tourism relationship has recently grown at a faster rate than WA's recent rise in international tourism numbers.²⁴⁷ Underwritten by the rapid increase in the number of Indians travelling overseas, India is now embedded in WA's top ten international tourism markets.²⁴⁸ Importantly for the sector, of all Indian travel to WA there is now a sizeable proportion who are travelling to WA for a holiday.²⁴⁹

WA's performance in the Indian tourism market has improved considerably this century off a low base.²⁵⁰ However, while WA is competing in a global market and not just against other Australian States, it is clear WA is not yet receiving a nationally-reflective share of Indian visitors travelling to WA for business or a holiday, as compared to the lower-spending VFR share.²⁵¹ This is likely due to relative underdevelopment in the broader economic relationship, as well as a historical lack of marketing in India. Further, the interrelationship between international education and tourism,²⁵² particularly given this lower share of business and holiday travellers, shows how challenges in international student recruitment can impact the extent of WA's tourism market growth.²⁵³

Led by repeat Tourism Minister visits, and the WA Premier's upcoming November 2019 visit, focus on the Indian tourism market by WA Governments is currently at its high-water mark.²⁵⁴ Until recently, India had not been considered a "priority market" by the WA Government and subsequently Tourism WA. While previous tourism strategies showed India's potential for growth was considerable, India remained a "monitor" market until 2018 Tourism WA policy updates.²⁵⁵ Subsequently actioned have been inaugural allocations of resources to promote WA in India, including the addition of a dedicated tourism representative in-market and the pursuit of corporate partners.²⁵⁶ There are indications these investments are showing returns.²⁵⁷

The Opportunities

The *India Economic Strategy* forecasts national tourism from India to Australia can increase four-fold on 2017 levels and be worth \$9 billion to the economy by 2035.²⁵⁸ This will occur as India's consumer class continues to grow, airfare opportunities and packages become more affordable, and India's diaspora and international student base in Australia increases.²⁵⁹ The most prospective sub-sections in the Indian tourism market in growth and spend terms, and one which is vital for WA to increase, are the business traveller and high-value holiday market.²⁶⁰

India's top ten wealthiest States deliver the vast majority of inbound Indian tourists to Australia, and include Maharashtra, New Delhi Capital Region, Andhra Pradesh, West Bengal and Tamil Nadu.²⁶¹ Strategic investment by the WA Government in these States, targeting business travellers and high-value holidaymakers, is likely to generate the greatest return. Tourism in WA is significant for the State's economy, and for State employment.²⁶² Increasing the number of Indian visitors to WA, and the rate of spend-per-visitor, will help close the gap in WA's tourism jobs growth as compared to the rest of the country.²⁶³

A Priority Market

WA's current *Tourism Two Year Action Plan* focuses particularly on the Indian VFR market, and on the importance of partnering with the international education sector.²⁶⁴ It is important that in the development of the *Long Term Tourism Strategy*,²⁶⁵ emphasis is also placed on the business traveller and high-value holiday market.

Important analysis on Indian leisure market dynamics has been done by Tourism WA and Tourism Australia, including on WA and Australia's market strengths and weaknesses.²⁶⁶ Investment and marketing decisions should be appropriately applied, and the precedent set by market capability training for other priority international tourism markets (such as Japan) shows what can be applied for the Indian market.²⁶⁷ This will help ensure quality experiences and maintain a valuable return-visit rate.

Direct Flights

India is the fastest growing aviation market in the world,²⁶⁸ and the importance of developing direct flights between Perth and a major Indian city (for example, New Delhi, Mumbai or Chennai) to strengthen the tourism and broader trade relationship cannot be understated.²⁶⁹ This includes the pursuit of increasing the number of business travellers and high-value holidaymakers to WA. The importance of direct flights is recognised by

the WA Government, as is the contribution the WA Government can make towards achieving this enhanced connectivity.²⁷⁰

The 2018 visit by the Tourism Minister to restart discussions was the first visit to India by a WA Tourism Minister in over fifteen years.²⁷¹ Further, the current intensity of engagement by WA Government and industry in this pursuit is unprecedented.²⁷² However, achieving near-term direct flights with India should not be the condition precedent to increased WA engagement - in tourism promotion and across other priority sectors. In lieu of near-term direct flights, sustained pursuit of this increased connectivity should continue, whilst alternative tourism strategies are executed - including targeting Indian travellers with the airlines of regional hub countries.²⁷³ Continued investment in the Indian market will only enhance the critical mass of exchange, and improve the commercial viability of direct flights.

Policy Recommendations

- 13. *In-Market Tourism Promotion:*** Ensure Tourism WA's in-market tourism investments in India increasingly promote Perth as a leisure destination to the high-value holidaymaker and business traveller market, as well as marketing to the visiting friends and relatives market.

- 14. *India Capability in the WA Tourism Industry:*** Evaluate the 'India capability' of the WA tourism industry, and through Tourism WA explore what further support can be provided to enhance WA's catering of the Indian high-value holidaymaker and business traveller market.

iii. Minerals and energy

Energy

While current resources trade between WA and India is mostly in mineral commodities, there are likely greater growth opportunities in the energy sector than the minerals relationship. Distinctive to mineral resources, WA has considerable energy endowments in the structurally sustainable areas of growing bulk Indian demand - particularly in LNG, which is one of WA's most technically advanced export industries.

An advanced energy partnership between WA and India will likely only succeed if the relationship goes beyond commodity export transactions, and over time WA embeds itself as a provider of technical skills, services and advanced capabilities to and in India. This is particularly the case regarding India's energy system development, its integration of new technologies, and in renewable energy - where WA has public and private capacity. Advancing this technical relationship will support WA energy companies becoming trusted partners in India's large, complex and developing energy system.

The Current Relationship

The principal WA-India energy relationship includes WA's supply of LNG to India, which has significant unrealised potential, and WA's importation of refined Indian petroleum.

While WA has proximity advantages compared to other Australian States in the supply of LNG to India, India's oil and gas purchases have predominantly been from the Gulf and the US, with Qatar's supply generally more cost-competitive than the US and Australia.²⁷⁴ Notwithstanding, the first spot consignment of WA LNG to India was in 2005, with a Shell Australia shipment from the North West Shelf supplied to Shell India in Gujarat.²⁷⁵

WA's successful long-term supply contract model with Northeast Asia has not been readily replicated with India, who makes considerable price-sensitive purchases on the spot market. Notwithstanding, Australia's first long-term LNG supply contract with India occurred in 2009, between India's Petronet LNG and ExxonMobil from the Gorgon LNG project.²⁷⁶

Woodside, Australia's largest independent oil and gas company and WA-based, has long sought long-term supply contracts and co-investments with India, and is still working with Indian Governments and companies in this pursuit.²⁷⁷ Further, the WA Government has advocated for increased LNG trade between WA and India, and this mission has been a focus of previous Premier visits.²⁷⁸ The recent commissioning of India's first east coast LNG receiver terminal, the Ennore LNG terminal north of Chennai, will reduce shipment costs and increase WA's market competitiveness.²⁷⁹

Domestically, the WA Government has supported Indian energy investment in WA, including with its own resourcing commitments to support projects.²⁸⁰ The traditional challenges facing WA and India in the energy sector, such as India's investment in WA's limited thermal coal reserves, can be highlighted through case studies of unprofitable enterprises.²⁸¹ In renewable energy and energy technology, there are private-sector agreements emerging that deal in microgrid systems.²⁸²

The Opportunities

India is set to overtake China in the 2020s as the primary source of global energy demand, and remain the largest contributor to global demand growth over coming decades.²⁸³ Driven by urbanisation, increased industrial activity and rising incomes, all four major energy consuming sectors - industry, household, transport and agriculture - will drive significant increases in Indian demand.²⁸⁴ By 2035, India's gas demand is forecast to triple from today's 50 billion cubic metres (BCM) to more than 160 BCM – with potential LNG import requirements over 80 BCM.²⁸⁵

India's energy infrastructure and systems face significant challenges, most principally the need to have a more productive, efficient and reliable generation and distribution architecture.²⁸⁶ Still, some 300 million Indians lack access to electricity.²⁸⁷ In a complex federated policy landscape, India is desiring greater energy self-sufficiency, at the same time it is seeking to reform its generation and transport industry to meet Paris Agreement commitments.²⁸⁸ However, India simply cannot meet its energy needs without international imports and technical support.²⁸⁹

LNG

Nationally, the prospects for energy commodity exports are not as strong as for mineral resources (particularly metallurgical coal).²⁹⁰ However, given WA's proximity to market and lack of metallurgical coal, in WA an LNG-driven energy partnership should continue to be strategically pursued as the most promising bulk commodity export opportunity.

WA's opportunities to supply LNG include through a mix of long term contracts and spot market trading.²⁹¹ The current WA Government recognises shipping distances to India to transport LNG are increasingly internationally competitive,²⁹² and should explore intensified efforts to support this trade. This should include exploring whether successful LNG technology and capacity building programs developed with other countries (as part of long-term supply deals) can be executed with India's principal energy States.²⁹³ For example, Andhra Pradesh has India's largest offshore gas field,²⁹⁴ and Tamil Nadu is the home of India's new east-coast LNG receiver terminal.²⁹⁵

Domestically, WA's energy sector requires significant foreign capital and technology to be developed, and Indian investment can play a role.²⁹⁶ Through domestic forums and institutions focusing on building WA's LNG and LNG technical and equipment services (PETS) industries,²⁹⁷ further studies should be done as to how WA can enhance its energy investment and technical relationship with India. In the long term, the provision of resources and services to India should encourage increased strategic Indian investment into WA.²⁹⁸ Further, given WA's energy reliability and competitive domestic gas prices, there are opportunities to pursue broad-based Indian industrial investment in WA.

Technical Skills, Services and Advanced Capabilities

Indian States and companies are seeking international energy services and technologies to address generation, storage, distribution and management requirements - including across the engineering, consultancy and training spectrum.²⁹⁹ This includes in traditionally centralised grid and emerging off-grid systems³⁰⁰ - both domains where WA has expertise. For example, Andhra Pradesh and Tamil Nadu have high levels of installed solar capacity, and have a strong State focus on new energy technology utilisation.³⁰¹

WA is a market leader at the private and Government Trading Enterprise (GTE) level in the development of standalone power systems and microgrids, especially systems integrating solar and renewables.³⁰² Opportunities to commercially sell to Asia (including India) have been identified,³⁰³ and WA Government engagement with other jurisdictions on energy systems and technologies³⁰⁴ should be explored with India. Through sustained engagement and support for private sector engagement, greater opportunities for Indian investment into WA renewable energy and technology assets should also be realised.³⁰⁵

Policy Recommendations

- 15. LNG Trade:** Explore what further support can be provided to WA's LNG sector to increase exports to India, including through senior Ministerial visits and the development of Department of Jobs, Tourism, Science and Innovation-led LNG technology and industry capacity building programs.
- 16. GTE Expertise:** Explore offshore engagement by WA's energy utilities in India, including Horizon Power and other WA GTEs, with a view to providing consultancy, technical and commercial services in new energy systems and technologies.

Minerals

WA has a considerable history of successfully utilising its mineral endowments for economic gain and employment creation. The post-World War II industrialisation of Northeast Asia - starting with the reconstruction of Japan, followed by the modernisation of South Korea, and more recently led by the re-emergence of urbanising China - has in part been enabled by WA's reliable and secure external supply of raw minerals. Particularly given the scale of the iron ore industry, the export orientation of WA's mining sector has both been significantly beneficial for WA, and served as the backbone of many of Australia's major bilateral economic relationships.

Challengingly for WA, the State has neither the raw minerals desired by India in the volume that WA is accustomed to supplying, nor as a consequence the minerals investment opportunities that could be made by India to generate near-term large scale business investment in WA. Of the three major mineral commodities identified in the *India Economic Strategy* as providing bulk export opportunities - metallurgical coal, copper and gold,³⁰⁶ - WA is a major producer of gold only.³⁰⁷ India is well endowed with iron ore and has a well-established industry,³⁰⁸ and WA doesn't produce metallurgical coal or large quantities of copper.³⁰⁹ Therefore, WA will be unable to rely upon this sector alone to drive an advanced WA-India relationship. Notwithstanding,

there are still considerable opportunities for WA to develop a minerals resources relationship with India, both in the provision of raw (and processed) minerals, and mining system technical expertise and services.

The Current Relationship

The mining relationship forms the basis of contemporary WA-India trade, with WA gold, alumina, bauxite and iron ore exports comprising the majority of 2017-2018 figures.³¹⁰ Gold has a longstanding history of dominating the WA-India trade relationship, but has declined in both volume, value and its share of WA exports over the last decade.³¹¹

One of the most successful stories of WA-India trade is in the jewellery sector, where the vast majority of WA diamonds from Rio Tinto's Argyle diamond mine enter India via third markets.³¹² And while there have been high-profile mineral investments into WA by India, as well as efforts by both major and mid-tier WA mining companies to develop an in-market India presence, notable stories have not always been success stories.³¹³

In critical minerals, early signs of a new partnership are positive. The first Australia-India lithium agreement was recently signed, between WA-based Neometals and Indian company Manikaran Power, to explore the supply of WA spodumene concentrate to refine lithium in India.³¹⁴

At present, the METS relationship substantially exists as a story of opportunity, rather than a present reality. The METS market in India is challenging for Australian companies to enter, and a lack of major in-market investments by producers has contributed to a low number of METS companies operating in India.³¹⁵ Notwithstanding, the WA university sector has partnered with Indian counterparts on a number of minerals-related scientific research and education projects.³¹⁶

The WA Government has a history engaging India to develop the mining relationship, including in capacity building and the sharing of mining sector expertise.³¹⁷ Whilst there have been expressions of interest on both sides to deepen cooperative engagement,³¹⁸ partnerships are yet to materialise to the same extent as with other jurisdictions.³¹⁹ Importantly, the WA-Andhra Pradesh Sister State MoU outlines significant opportunities for mining and METS partnerships to occur in the minerals-rich Indian province. The most recent WA ministerial visit to Andhra Pradesh in 2017 yielded further mining-focused agreements.³²⁰

The Opportunities

India's mineral demands will be driven by the nation's considerable urbanisation and expanding industrial base, which will most prominently lift India's per-capita steel intensity well above its current one-third of the global average.³²¹ And while India has few reserves of metallurgical coal, India has significant endowments of iron ore and thermal coal.³²² Therefore, while the national mineral resources relationship will continue to be led overwhelmingly by the supply of metallurgical coal to India from the Australian east coast,³²³ this will not be a WA story.

The opportunities for WA to strengthen this minerals relationship include India's procurement of WA mineral resources (both 'traditional' and 'critical' minerals), the use of WA technology and services (METS) in India's

domestic production, and increased Indian investment into WA to secure resources.³²⁴ WA's public and private expertise can also provide assistance in the development of India's mining industry - to enhance regulatory and governance models and to improve mining sector efficiency and productivity.³²⁵

India is increasingly a major producer and end-user of the technologies, transport and energy systems that are driving global demand for critical minerals (including lithium, cobalt and rare earths) - critical minerals that WA mines, processes and is seeking international partnerships in.³²⁶ In the raw minerals WA is traditionally used to supplying, whilst opportunities are not of the same scale as in Northeast Asia, exports of gold, copper iron ore and other minerals should continue.

While the relationship will continue to be led by WA exports to the Indian market, WA should still seek further Indian investment into WA mineral resource assets, as well as support its METS companies operating in the market.³²⁷ Lead Indian mining and METS States such as Andhra Pradesh and West Bengal exhibit the most promise.³²⁸

Critical Minerals

The secure supply of battery quality critical minerals and rare earths is increasingly important for India, who is actively looking to source materials for its growing electric vehicle market, manufacturing industry and emerging technological production processes.³²⁹ Importantly, WA has significant reserves of the vast majority of critical materials India is import-dependent in and has identified it needs secure supply to.³³⁰

The establishment of a State-owned joint venture to acquire critical minerals (including lithium and cobalt),³³¹ as well as public visits to WA concerning critical minerals by the commissioned author of the *Australia Economic Strategy*,³³² shows India's focus on this task and its increasing interest in WA.

Since the release of the *Future Battery Industry Strategy* by the WA Government, a market-specific investment attraction strategy for India has been developed.³³³ WA should continue to work with industry and Governments in both countries to develop WA-linked supply chains in the relationship.

METS and Mining Sector Expertise

Indian demand for METS and mining sector expertise will grow mostly where the nation is looking to expand domestic output.³³⁴ This includes the iron ore sector, and across-the-board mining industry practices where WA has considerable private and public expertise. While India's METS demands are significant, Australian industry does face market access challenges, and METS engagement is unlikely to be able to follow large Australian in-market minerals production investments (such as in Africa).³³⁵ Notwithstanding this, the WA Government should continue to strategically support WA METS exports and METS activity in-market.

India's mining industry lacks development in significant areas. For example, India has only explored about 10% of its mineral resources,³³⁶ and WA has leading geological survey institutions and regimes that could be utilised to explore technical partnerships.³³⁷ Partnership opportunities also extend to capacity building in mining

health and safety, land management and conservation, exploration, tenement and royalty regimes, and in research conducted by India's mining-focused institutions.³³⁸

As India's mining industry is government-dominated as well as regulated, and large public companies are often owned by State governments, there are opportunities for the WA Government to further leverage its mining sector capacity in India - through technology, capacity building and governance partnerships of the kind executed with other mining jurisdictions. Activity pursuant to existing WA-India agreements should continue to be advanced, and new engagement opportunities should be explored – with a view to strategically supporting further WA mining and METS sector trade.

'Traditional' mineral commodities

While due to industrial shortcomings India has been a net importer of iron ore since 2012 (including increasingly from WA),³³⁹ India has about 30 billion tonnes of reserves and is largely self-sufficient.³⁴⁰ While forecasts of potential imports vary and ultimately depend on India's future production efficiency,³⁴¹ iron ore will not be the foundation mineral resource for WA-India trade. Further, while Rio Tinto's diamond trade has been very successful, the Argyle diamond mine is scheduled to close in 2020.³⁴² Notwithstanding these limitations, along with China India is the top gold market in the world, and demand is predicted to increase.³⁴³ While cognisant that traditional mineral resources trade with India has its relative limits, the WA Government should continue to encourage WA exports, outbound WA investment, and increased Indian investment in WA.

Policy Recommendations

- 17. Critical Minerals:** Upon the release of the Indian Government's *Australia Economic Strategy*, examine its findings concerning critical minerals and explore through the Department of Jobs, Tourism, Science and Innovation how WA can intensify support for WA-India partnerships in the critical minerals value chain.

- 18. Mining Sector Capacity Building:** Advance existing and explore new WA-India mining sector technology and capacity building programs, led by the Department of Mines, Industry Regulation and Safety with a view to supporting WA mining and METS companies engage the Indian market.

iv. Advanced manufacturing

The Defence Industry

While foreign affairs, defence and strategic relationships are a matter for the Commonwealth Government, and the Australian defence industry is heavily led by sovereign government decision making and prime procurements, enhanced defence engagement between Australia and India is creating defence industry opportunities for WA's local industry.

WA's geostrategic location as Australia's only Indian Ocean facing state, as well as the considerable Indian Ocean-facing defence assets in WA,³⁴⁴ place the State at a strategic sweet-spot given the increased defence expenditure of the two countries.³⁴⁵ Enhanced bilateral defence ties are also increasing the number of joint bilateral activities between Australia and India, often focused in the Indian Ocean and utilising WA's HMAS Stirling.³⁴⁶ This provides WA industry with the opportunity to further leverage its advanced manufacturing capacities.

The Opportunities

While India has a desire for greater self-sufficiency in defence equipment procurement and wants to reduce its import reliance, India is currently the world's largest defence equipment importer (and the fifth largest defence spender in the world).³⁴⁷ While India is a challenging market to operate in, private firms have been able to bid for Indian defence contracts since the beginning of this century, and Indian companies are able to work with foreign original equipment managers.³⁴⁸

Opportunities for WA's defence industry in advanced manufacturing exist principally in specialist equipment provision, including via SMEs and WA's larger firms tapping into the Indian defence procurement market.³⁴⁹ By leveraging WA's marine capacity at the common-user Australian Marine Complex, shipbuilding and marine services partnerships are possible, as is commercialising for defence applications WA's resource industry-led subsea and remote systems capabilities. Across the defence industry spectrum, opportunities also extend to joint research and development, cyber security, and in education and training.³⁵⁰

The majority of Australian contractors are often subsidiaries of global manufacturers, who sell to India through other markets.³⁵¹ Further, the principal focus of WA SMEs will continue to be subcontracting within Australian sovereign investments.³⁵² Notwithstanding, with the increasing rate of Australia-India joint exercises, increased naval visits and Indian Ocean-focused maritime dialogues, WA is uniquely placed to continue to showcase its capabilities to India.³⁵³

Developing the Relationship

The increasing strategic convergence between Australia and India in the Indian Ocean and the broader Indo-Pacific region has been recognised by the current WA Government.³⁵⁴ At the same time, the current WA Government is seeking to double the size of WA's defence industry - by growing industry capability, building research partnerships and developing strategic infrastructure.³⁵⁵ Pursuant to the *WA Defence and Defence*

Industries Strategic Plan, the Office of Defence West has been expanded to provide further support services to the industry.³⁵⁶

To develop the WA-India defence industry relationship, India should also be designated as a country whose Indian Ocean activities inform WA's investment decisions, and WA defence industry trade delegations should also travel to India.³⁵⁷ WA's Sister State partner Andhra Pradesh has its own shipbuilding industry, and is home to India's Eastern Naval Command at Visakhapatnam.³⁵⁸ Further, New Delhi is India's defence industry capital, and is the first destination of most WA ministerial visits. Highlighting WA's domestic technical skills and advanced manufacturing capabilities in India, as well as during Indian visits to WA, is in line with the State's strategy and the Commonwealth Government's *Defence Export Strategy*.³⁵⁹

Policy Recommendation

- 19. India and the WA Defence Industry:** Explore through the Office of Defence West what further support can be provided to WA's defence industry engaging the Indian market.

v. Agribusiness

While WA's agricultural industry has receded in industrial and trade prominence as a share of the WA economy over the last half-century, agriculture is still WA's second major export industry.³⁶⁰ Consisting of internationally-renowned high-quality products and supply chains, employing considerable numbers of Western Australians and housing private and public sector expertise, WA agribusiness relies on thriving export markets to succeed.³⁶¹

While there are significant challenges facing international companies securely and reliably accessing the Indian market, WA cannot ignore the food sector of a major agricultural market and the soon-to-be most populous nation in the world.³⁶²

Agricultural and forestry product trade in the 19th century formed the earliest foundations of the WA-India trading relationship.³⁶³ Today, while India is not a major consumer of WA produce or agricultural services, there are opportunities to develop the relationship. This extends from the supply of raw products, and includes leveraging WA's production, technical and supply chain expertise in the Indian market.³⁶⁴

Strategic investment by the WA government to support complementary product exports to India, as well as advancing technical and capacity building partnerships in India, will encourage growth in the WA-India agricultural relationship.

The Current Relationship

Of the nearly \$8.5 billion agricultural trade between Australia and India, WA% is responsible for 4%.³⁶⁵ As a considerable agricultural exporter to Asia, only 1% of WA's agricultural exports land in India.³⁶⁶ Given WA's principal agricultural exports are in price-sensitive commodities purchased on global markets, there are limits in the capacity of WA Governments to influence export orientation. Notwithstanding, the WA Government since 2016 has funded an in-market Agriculture and Food development officer to support WA exporters access the Indian market, and continues to provide Asia-focused grants for prospective agricultural exporters.³⁶⁷

The principal agribusiness Department of the WA Government (now the Department of Primary Industries and Regional Development) has consistently kept abreast of the product opportunities and market challenges concerning India.³⁶⁸ Consistent analysis is that WA's opportunity to develop an agricultural relationship with India lies in a technical and services partnership, as well as in the provision of certain counter-seasonal and value-added products.³⁶⁹ While some of WA's key industry players have previously unsuccessfully sought to enter the Indian market, some WA-based research institutions (such as the UWA Institute of Agriculture) have meaningful agricultural-focused partnerships in India.³⁷⁰

In line with WA's lead agricultural markets, the principal focus of engagement by relevant Ministers and Department officials has been Northeast Asia, the Gulf and Southeast Asia.³⁷¹ Notwithstanding, the WA-Andhra Pradesh Sister State agreement outlines a determination to partner in specific areas of agricultural management, including in agricultural research, and the most recent WA ministerial visit to Andhra Pradesh yielded further agreements.³⁷²

The Opportunities

While India is a major agricultural producer, the *India Economic Strategy* forecasts that the divergence between what India can produce and what it needs to consume will continue to grow.³⁷³ Indian food demand is predicted to increase by 400 million tonnes by 2025, as changing consumption patterns and a growing population increase both per capita and gross demand.³⁷⁴ Further, considerable productivity improvement requirements will increasingly demand international technical skills and services to support India's agricultural supply chain development.³⁷⁵

While Indian Central Government agricultural policy is deeply protectionist, heavily domestically subsidised, favours self-sufficiency and exhibits anti-import instincts, this has not prevented India's food imports more than doubling in recent years.³⁷⁶ For considerable periods this century, Indian imports have risen at a faster rate than China and Indonesia.³⁷⁷

The *India Economic Strategy* articulates that Australia should seek to increase its exports of raw commodities, focus on developing value-added product exports, further integrate into India's technical supply chains, and partner with India in areas where Australia has considerable governance and scientific expertise (particularly in dryland farming and agricultural water management).³⁷⁸

For WA, initiatives to support identified complementary product exports, as well as efforts to leverage expertise in agricultural water management and dryland farming are recommended. India's States of Andhra Pradesh (whose agricultural sector grew by 26% in 2015-16), Maharashtra, Tamil Nadu and West Bengal are major grains, pulses and fisheries markets, and India's self-sufficiency goals will be likely unable to be achieved in these major markets.³⁷⁹

Agricultural Product Exports

WA's combined counter-seasonality and relative geographical proximity to India, on top of its reputation for quality produce and robust safety standards,³⁸⁰ can support state developments in specific products in the Indian market over other major global producers.³⁸¹

In 2016, the then-Department of Agriculture and Food received a commissioned report comprehensively examining WA's food export opportunities in Asia.³⁸² India was examined as part of two-dozen target markets, and from 650 products across all food consumption platforms 20 high-growth and high-value products were identified to be "...at the intersection of what Asian consumers want and what [WA] can produce."³⁸³

Analysis of the report shows two WA products that have significant potential for increased Indian export are rolled oats and apples. WA drives the majority Australia's world-leading unprocessed and milled oat exports, and India's annual import growth at the time of the report was a compounded 24%.³⁸⁴ The WA apple industry, which has a history of exports to India following in-market Departmental technical service programs,³⁸⁵ could look at over 20% compound import growth.³⁸⁶ Further to previous analysis identifying WA's capacity to export

higher-protein products to India, closer WA analysis of such export opportunities should be further coupled with intensified market-development activities.³⁸⁷

Agribusiness Technology and Services

WA has significant supply chain expertise in dryland farming, including in on-farm irrigation methods, biosecurity systems and harvesting technologies, and in post-farm storage and transport logistics.³⁸⁸ Particularly in irrigation and agricultural water management, which is one of India's most significant economic challenges,³⁸⁹ there are opportunities for WA's technologies and services to selectively meet Indian demand.

The *India Economic Strategy* stresses that the provision of technical skills and agricultural services on a commercial basis in India is possible.³⁹⁰ For WA, previous WA Government reports have highlighted the opportunities to provide training and capacity building in agricultural water management, including in rainwater harvesting, water storage and irrigation techniques.³⁹¹

There is strong precedent that WA's provision of capacity building and technical programs can facilitate enhanced agricultural exports in new markets, including in India.³⁹² Notwithstanding the previous challenges facing WA industry in the Indian market, existing arrangements should be advanced and new efforts complementary to existing research projects and Australian Government initiatives should be explored.

Policy Recommendations

- 20. *Agricultural Product Exports:*** Explore what further strategic support can be provided to WA agricultural producers by the Department of Primary Industries and Regional Development to develop new and strengthen existing targeted agricultural export markets in India.
- 21. *Agribusiness Technology and Services:*** Enhance existing and explore new technical and capacity building agricultural programs in India, focused on WA's expertise in dryland farming and agricultural water management. The Department of Primary Industries and Regional Development can lead engagement with a view to creating export opportunities for WA's agricultural industry.

vi. Further Opportunities in a Whole-Of-Government Approach

Healthcare

The Relationship

The visit to India by the Deputy Premier (and Health Minister) in late 2017 coincided as the first visit to India by a WA Health Minister.³⁹³ The current WA-India health relationship exists principally in the training sector, through international education services in WA and via some WA-based private RTO's providing health-related services offshore.³⁹⁴ Further, now disbanded sub-Agencies devoted to the export of WA healthcare services previously had clients in India.³⁹⁵

The Opportunities

WA's healthcare system is among the best in the world, and has public and private sector capacity that is complementary to many areas of Indian health demand and policy aspiration.³⁹⁶ WA's opportunities to export its health expertise, including to India, has been historically identified – as have WA's domestic administrative and regulatory impediments to thoroughly exploring that trade.³⁹⁷ Recommendations have been made to and accepted by WA Governments to explore such non-subsidised commercial opportunities.³⁹⁸

India's rapidly growing healthcare sector, which includes ambitious policy objectives and significant increases in healthcare budgets, will continue to experience healthcare demand overwhelming domestic supply.³⁹⁹ The *India Economic Strategy* assesses that Australia can be a niche healthcare provider into India, principally in health services delivery such as in rural and remote care, and in telehealth.⁴⁰⁰

For WA, who leads the nation in the delivery of rural, remote care and telehealth services, the WA Government should explore technical expertise, consultancy and service delivery partnerships in progressive healthcare States - including Andhra Pradesh, Tamil Nadu and Maharashtra.⁴⁰¹ Opportunities in healthcare training and services are also identified in the WA-Andhra Pradesh Sister State Agreement.

To strengthen the health relationship, and develop one that could further extend in training and into other services,⁴⁰² State-level ministerial engagement is prioritised in the *India Economic Strategy*.⁴⁰³ WA has a history of providing medical services overseas in partnership with education institutions, and there are opportunities for Australian States to engage India pursuant to recently articulated national Health partnerships.⁴⁰⁴

Rural, Remote Care and Telehealth

The final report of WA's most recent sector-wide health system review, the *Sustainable Health Review (SHR)*, recommends WA "enhance its reputation as a world leader in specific healthcare areas" and "develop WA's presence as a leader in Asia with a focus on commercial potential".⁴⁰⁵ With this recommendation accepted by the current WA Government, a key area of opportunity to activate this ambition with India is in leveraging WA's world-class rural and remote care and telehealth capabilities.⁴⁰⁶

The Indian public healthcare system provides the majority of primary care in rural areas, and like WA is operated by States.⁴⁰⁷ A shortage of care provision in rural areas has contributed to the National Rural Health Mission allowing foreign entities to enter the market.⁴⁰⁸

Covering WA's vast geography, the WA Country Health Service is the largest rural health system in Australia.⁴⁰⁹ Its remote care practices are world-class, and a core component of its service delivery is in increasingly sophisticated telehealth.⁴¹⁰ The opportunities for WA to explore technical expertise, consultancy and services delivery partnerships overseas, including to India, have been identified to previous WA Governments.⁴¹¹ Acknowledging the existing regulatory impediments to advancing such a partnership,⁴¹² the current WA Government should explore engagement of this kind in India.

Urban Water Management

The Opportunities

There is a precedent of Australian States developing successful urban water management partnerships with Indian States and institutions, including pursuant to Sister State relationships.⁴¹³ The *India Economic Strategy* identifies water partnerships as holding significant potential for sustained engagement, particularly for State Governments and Agencies.⁴¹⁴

Currently, no Indian city receives piped water every hour of the week, and by 2030 around half of India's water demand is projected to be unfilled.⁴¹⁵ Indian Central and State Governments are well aware of the nation's significant water challenges, and in the 2019 national general election the now re-elected Narendra Modi Government campaigned on delivering safe, piped drinking water to every Indian home by 2024.⁴¹⁶

The reliable supply of clean water to WA households is core business of the WA Government, and in a challenging geological climate the State has secured its metropolitan water supply through technological advancements (such as the use of Australia's first desalination plant) and sound management regimes.⁴¹⁷

In the WA-Andhra Pradesh Sister State MoU, water management is identified as an area of future potential partnership, and the States share a similar geology, geography and climate. Andhra Pradesh has expressed interest in working with Australia in water management,⁴¹⁸ and the new Jagan Reddy Government is looking to build water management capacity in its Agencies and diversify its water portfolio (including through the development of desalination capacity).⁴¹⁹

Further, committed funding by the Commonwealth Government to fund Australian Cooperative Research Centre for Water Sensitive Cities (WSC CRC) activity in Andhra Pradesh could be leveraged by the WA Government, especially given WA's established WSC CRC activity.⁴²⁰ As a Sister State partner, WA should explore through the Department of Water and Environmental Regulation and Water Corporation the provision of urban water technical services and capacity building programs with Andhra Pradesh.

Transport and Trade Infrastructure

The Opportunities

India has considerable transport infrastructure needs – particularly to improve the productivity of its agricultural industry and its trading capacity.⁴²¹ While WA is not in a position to finance infrastructure development, many areas of transport and trade infrastructure management demand are in alignment with WA Government responsibility and private sector capacity. This includes in road safety, port logistics and road and rail freight management.⁴²²

WA, along with Australia, has world-class transport infrastructure and logistics networks, and has the nation's largest network of ports.⁴²³ The *India Economic Strategy* identifies these maintenance models and regulatory processes as possibly being commercialised in the support of India's transport development and trade infrastructure management - and there is precedent of Australian State Government engagement.⁴²⁴ Further to recent private-sector agreements signed in Andhra Pradesh, and identified opportunities in the WA-Andhra Pradesh Sister State MoU, the WA Government should explore further advancing these opportunities.⁴²⁵

Sustainable Fisheries

The Opportunities

WA is a world-leader in sustainable fisheries management, and WA Governments have a history of successfully supporting the development of sustainable fisheries management regimes and practices with Indian Ocean Rim countries.⁴²⁶ Importantly, fisheries management is an agreed item for cooperation under the Andhra Pradesh Sister State agreement, and Andhra Pradesh is a significant fisheries State.⁴²⁷

The fisheries component of the Sister State could be further activated, with a view to facilitating private-sector activity and developing commercial partnerships. In the development of WA's *Primary Industries Strategy*,⁴²⁸ international partnership opportunities in WA's fields of fisheries governance and sustainability expertise should be identified and subsequently explored, including with India.

Policy Recommendations

- 22. Rural, Remote Care and Telehealth:** Explore engagement in India by the Department of Health in leveraging WA's expertise in the delivery of rural, remote care and telehealth services - with a view to developing technical expertise, consultancy and delivery partnerships.
- 23. Public-Sector Partnerships:** Explore the further development of WA-India public partnerships in areas of WA expertise with complementary Indian demand – including in urban water, fisheries sustainability and transport management - with a view to providing technical, capacity building and consulting services and supporting private sector engagement.

Summary of Recommendations

- 1. Ministerial Visits:** Increase the frequency and impact of senior WA economic development and services-sector Ministerial visits to India. At the same time, further encourage senior Indian Ministerial counterparts to visit WA.
- 2. Trade Office Strategy and Activity:** Following completion of the review into WA's trade offices, ensure WA's office and officer presence in India is strategically located, sector-oriented and resourced to support WA-India trade and investment growth.
- 3. Two-Way Industry Delegations:** Explore what further support can be provided to WA's business chambers, industry institutions and companies to visit India, and to encourage senior Indian business chambers, industry institutions and companies to visit WA.
- 4. The Australia Economic Strategy:** Upon the release of the Indian Government's *Australia Economic Strategy*, the Department of Jobs, Tourism, Science and Innovation should examine its findings and explore how WA can be a first-mover State with the Commonwealth Government and Indian Governments in relevant areas of implementation.
- 5. Enhancing the Sister State:** Review the breadth of activity conducted between Andhra Pradesh and WA pursuant to the Sister State MoU (and subsequent agreements), and explore enhancing current and pursuing new initiatives to support WA-India trade and investment growth.
- 6. Two-Way Parliamentary Delegations:** Increase the frequency of WA Parliamentary delegations to India, including to Andhra Pradesh, and encourage Indian State Parliamentary delegations to visit WA. A focus of the delegations should be examining WA-India trade and investment growth opportunities.
- 7. Formal Community Links:** The Department of Local Government, Sport and Cultural Industries should explore what support can be provided to WA Local Governments (with large Indian diasporas) to assist in the development of Sister City relationships and/or other formal links with Indian cities.
- 8. India Dialogues in Perth:** Pursue hosting the Australia India Leadership Dialogue and the Australia India Youth Dialogue in Perth.
- 9. An Indian Investment Prospectus:** The Department of Jobs, Tourism, Science and Innovation should develop and promote a tailored Investment Prospectus for Indian investment into WA – focusing on the priority sectors of Indian outbound investment where WA provides investment opportunities.
- 10. Business and Investment Visas:** Explore opportunities to further integrate WA's Business Migration Program with the State's broader Indian economic engagement and investment facilitation programs.
- 11. Offshore VET:** Explore re-engagement by WA TAFEs and the Department of Training and Workforce Development in the offshore delivery of education, training and VET consultancy services in India.

- 12. Student Recruitment:** Ensure WA's architecture of international student recruitment incentives, including employment schemes and State-sponsored visa settings, work in favour of recruitment growth and are strategically promoted in India.
- 13. In-Market Tourism Promotion:** Ensure Tourism WA's in-market tourism investments in India increasingly promote Perth as a leisure destination to the high-value holidaymaker and business traveller market, as well as marketing to the visiting friends and relatives market.
- 14. India Capability in the WA Tourism Industry:** Evaluate the 'India capability' of the WA tourism industry, and through Tourism WA explore what further support can be provided to enhance WA's catering of the Indian high-value holidaymaker and business traveller market.
- 15. LNG Trade:** Explore what further support can be provided to WA's LNG sector to increase exports to India, including through senior Ministerial visits and the development of Department of Jobs, Tourism, Science and Innovation-led LNG technology and industry capacity building programs.
- 16. GTE Expertise:** Explore offshore engagement by WA's energy utilities in India, including Horizon Power and other WA GTEs, with a view to providing consultancy, technical and commercial services in new energy systems and technologies.
- 17. Critical Minerals:** Upon the release of the Indian Government's *Australia Economic Strategy*, examine its findings concerning critical minerals and explore through the Department of Jobs, Tourism, Science and Innovation how WA can intensify support for WA-India partnerships in the critical minerals value chain.
- 18. Mining Sector Capacity Building:** Advance existing and explore new WA-India mining sector technology and capacity building programs, led by the Department of Mines, Industry Regulation and Safety with a view to supporting WA mining and METS companies engage the Indian market.
- 19. India and the WA Defence Industry:** Explore through the Office of Defence West what further support can be provided to WA's defence industry engaging the Indian market.
- 20. Agricultural Product Exports:** Explore what further strategic support can be provided to WA agricultural producers by the Department of Primary Industries and Regional Development to develop new and strengthen existing targeted agricultural export markets in India.
- 21. Agribusiness Technology and Services:** Enhance existing and explore new technical and capacity building agricultural programs in India, focused on WA's expertise in dryland farming and agricultural water management. The Department of Primary Industries and Regional Development can lead engagement with a view to creating export opportunities for WA's agricultural industry.

- 22. Rural, Remote Care and Telehealth:** Explore engagement in India by the Department of Health in leveraging WA's expertise in the delivery of rural, remote care and telehealth services - with a view to developing technical expertise, consultancy and delivery partnerships.
- 23. Public-Sector Partnerships:** Explore the further development of WA-India public partnerships in areas of WA expertise with complementary Indian demand – including in urban water, fisheries sustainability and transport management - with a view to providing technical, capacity building and consulting services and supporting private sector engagement.

About the Perth USAsia Centre

The Perth USAsia Centre located at The University of Western Australia is a non-partisan, not-for-profit institution strengthening relationships and strategic thinking between Australia, the Indo-Pacific and the USA. The Centre is a leading think tank focusing on geopolitical issues, policy development and building a strategic affairs community across government, business and academia. Since the Centre's inception in 2013, the Centre has collaborated with over forty partners to convene more than four hundred programs across sixteen cities in eight countries, engaging a world-class community of over 10,000 strategic thinkers and policy leaders.

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Endnotes

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203 and Queensland's 40. Between the period 1 July 2015 to 30 June 2016 WA sponsored under 5 EOI nominations within the SIV program, compared with Victoria's 192, New South Wales' 103 and Queensland's 8. See: Commonwealth of Australia Department of Home Affairs, *Significant investor visa statistics* <<https://www.homeaffairs.gov.au/research-and-statistics/statistics/visa-statistics/work/significant-investor-visa>>.

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