

TRADE & INVESTMENT QUEENSLAND SUBMISSION  
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## Indonesia – Queensland Trade and Investment Overview

### Queensland's existing trade and investment relationships with Indonesia

- Indonesia is a priority trade market for Queensland. Key statistics based on 2015-2016 figures include:
  - Indonesia is Queensland's 12<sup>th</sup> largest goods trading partner by value<sup>1</sup>
  - Two way relationship valued at A\$1,557 million
  - Queensland had a small goods trade surplus with Indonesia of A\$27.7 million, with merchandise exports valued at A\$792.7 million, representing 15.9%<sup>1</sup> of the national total
  - Merchandise imports were worth A\$765.0 million, or 13.5% of the national total.<sup>2</sup>
- Queensland's largest merchandise exports to Indonesia in 2015-16 included:
  - live animals (A\$128 million)
  - coal (A\$116 million)
  - non-ferrous metals (A\$105 million)
  - meat products (A\$104 million)<sup>3</sup>
  - sugar, molasses and honey.<sup>a 4 5</sup>
- The value of Queensland exports to Indonesia has grown steadily, although certain commodity industries are especially vulnerable to external shocks. The rapid rise in live cattle exports in the period 2007-09, to a peak of A\$110 million, followed by a sharp decline to A\$1.2 million in 2012 induced by the 2011 Federal ban on live cattle exports and a subsequent Indonesian reduction of import targets,<sup>6</sup> highlights the volatility of Queensland's largest Indonesian export.<sup>7</sup>
- Trade and Investment Queensland (TIQ) re-established its Representative Office in Jakarta in 2014 to promote and facilitate Queensland trade with Indonesia.
- Major Queensland companies exporting to Indonesia include Aurecon, Thiess, GroundProbe, Austrex, Capilano Honey, Charlton Brown, TAFE Queensland, Queensland University of Technology (QUT), Griffith University, and The University of Queensland (UQ).

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<sup>a</sup> Sugar statistics are confidential at the state level. Approximately 95% of Australian sugar is produced in QLD;<sup>4</sup> Indonesian sugar imports from Australia were valued at A\$469M in 2015.<sup>5</sup>

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**Barriers and impediments to trade and investment with Indonesia for Queensland businesses**

- Consultation with key clients and stakeholders has highlighted that complex certification processes, and inspections and high distribution costs, including supermarket listing fees, are considered significant obstacles for Queensland food exporters. Exporters of processed foods have particularly highlighted the National Drug and Food Control Agency (BPOM) certification process as long, confusing, onerous, expensive and prone to lack of transparency.
- Complex permit and regulatory requirements significantly impede merchandise and service exporters. Limits on foreign asset ownership, financing mandated establishment of local corporations, mandated domestic firm partnerships, and difficulties in obtaining short-term working visas (KITAS) for skilled staff are considered major barriers by Queensland infrastructure and services firms.<sup>8</sup>

The Indonesian Government's Negative Investment List, detailing industries where investment is barred or subject to conditions, is extensive, restrictive and frequently revised.<sup>9 10</sup>

Potential Queensland investors in Indonesia and stakeholders have responded favourably to the offer of greater one-stop support and advisory services from Indonesian authorities, especially the Sydney Office of the Indonesian Investment Promotion Centre (IIPC – the international arm of Indonesian Investment Coordinating Board or BKPM).

- Despite ongoing commitments to trade liberalisation, protectionist policies in sensitive industries may adversely impact Queensland food exports, including quotas and tariffs on meat, livestock, fruit and vegetable products<sup>11</sup>. Changes to beef import quotas and permit procedures are expected to depress Queensland exports in 2017.<sup>12</sup>
- Import exclusions on citrus products aimed at protecting Indonesian businesses, imposed by the Indonesian Government in the April to September growing season, have severely curtailed Australian exports.<sup>13 14 15</sup> Inconsistent and unpredictable determination of quota sizes and opaque implementation systems exacerbate the difficulties faced by exporters.<sup>16</sup> This is of particular concern to Queensland mandarin growers, for whom trade with Indonesia comprises up to 25% of exports,<sup>17</sup> with the industry expressing concern over restrictive policies, increasing uncertainty, and rising costs over the past decade.
- Queensland's higher education and vocational education and training (VET) providers have indicated the need for extensive and targeted market information on Indonesia before entering into partnerships with smaller or less high profile local private providers. Concerns have also been raised over the limited recognition of Australian qualifications by Indonesian firms and institutions.
- Members of the Queensland branch of the Indonesia Australia Business Council (IABC) note it is difficult for working holiday visa holders to study in Australia due to stringent English language requirements. The current requirement of a 5.5 English proficiency score seems excessive for some courses, such as a 3-6 month educational program for a Certificate 4 in Aged Care, as the student will be returning to work in the very short-term to work in a uniquely Indonesian language environment.<sup>18</sup> This requirement significantly limits the number of students able to participate in Queensland-based education programs.

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**Emerging and possible future trends**

- Queensland is well placed to be a key partner in Australia's trade relationship with Indonesia. TIQ regards education, infrastructure, food products and mining as the areas of engagement that have the greatest potential.
- The number of Indonesian students studying abroad is expected to rise based on increasing incomes and an elevated demand for tertiary and vocational education. Queensland's higher education providers have expertise relevant to tropical regions and to Indonesian industries, offer affordable tuition compared to major competitors, and are located in areas with lower costs of living than other Australian states. The VET sector is the fastest growing education sector in Indonesia and Queensland VET providers are well placed to operate in that market due to similar tropical climate and industry compositions (especially agriculture and coal mining).
- Indonesia plans to spend \$500 billion on infrastructure development to 2019 and this presents significant opportunities for Queensland engineering firms. Interest in Queensland firms' expertise with Public Private Partnership (PPP) projects is high, facilitated by high-level communication and education, visits and cooperation. The demand is likely to rise for services related to infrastructure, including engineering, technical expertise, supervision, and maritime services.<sup>19</sup>
- The demand for Queensland food products, particularly meat, is increasing based growing consumer demand for higher quality goods and on urbanisation.<sup>20</sup> Queensland agribusiness expertise is in demand to improve Indonesian industry practices and output, and opportunities exist to build on previous public and private research and education programs.
- Indonesia's demand for coal is likely to remain high as Indonesia focuses on infrastructure and industry development. Indonesia's domestic coal production is generally of lower quality thermal coal for power generation, whereas Queensland exports largely consist of bituminous coking coal suitable for steel production and infrastructure projects.<sup>21 22</sup>
- The demand for Queensland mining equipment, technology and services (METS) industries will probably grow to service Indonesia's growing mining industry. Significant opportunities exist for technology transfer and joint ventures in the METS sector.<sup>23</sup>

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**Opportunities for deepening existing commercial and cultural links, and developing new ones, with Indonesia**

- According to the Australia-Indonesia Centre's research report on the perceptions of Indonesians and Australians, Australians hold less positive views on Indonesia (43% favourable) than Indonesian opinions on Australia (87% favourable).<sup>24</sup>

While Indonesia may be perceived as strongly religious, underdeveloped, and/or an unsatisfactory neighbour, it is also recognised as an important trading partner with whom Australia should strengthen ties.<sup>25</sup> The disparity in perception can be attributed to knowledge deficiencies, as Australians report a limited understanding of Indonesia along with a desire to learn more.<sup>26</sup> These figures explain some of the relatively low level of engagement and interest in Indonesian business and investment opportunities. Queensland government and industry bodies have opportunities to overcome these issues and deepen Indonesian ties by improving the understanding of Indonesian market and culture.

- TIQ has a partnership with Asialink Business to support Queensland businesses to build their Asia capabilities and unlock new opportunities. As part of the partnership, Asialink Business has appointed a full-time Partnerships and Development Manager, co-located with TIQ in Brisbane to serve as a strategic resource for Queensland businesses to benefit from training, research, and information essential to building their knowledge and capability to engage with the diverse Asian markets including Indonesia.
- The Indonesian higher education (HE) sector is generally underfunded and, in some areas, is unable to meet domestic demand.<sup>27</sup> Major opportunities to engage directly with Indonesian education reform and expansion, particularly in workplace-ready training, are likely in the near to mid-term.<sup>28</sup> Indonesians have positive perceptions of Australia's education system and citizens of both countries recognise education as key to deepening relations.<sup>29</sup> With several high quality VET and HE institutions, Queensland is well placed to capitalise on these trends.
- The number of Indonesian students studying in Queensland mirrors national trends and has recently begun to trend slightly upwards.<sup>b</sup> Raising the profiles of Queensland HE and VET providers is essential to increasing student numbers and establishing new regional economic and cultural ties. Focusing on partnerships with local providers outside of "elite" institutions to avoid direct competition with better known international universities in the European Union, United States, and Australian G8 universities, is recommended. Shifting emphasis from scholarships, which benefit a limited group, to flexible program design and delivery options, may entice larger numbers of students.
- Indonesia has significant infrastructure requirements and insufficient state investment.<sup>30 31</sup> Engagement in PPP projects offers opportunities for Queensland firms specialising in maritime, construction, transport, and infrastructure related services.
- Increasing Indonesian demand for processed food, driven by growing consumer demand for higher quality goods and urban expansion, presents opportunities for Queensland exporters.

<sup>b</sup> See charts on page 10.

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**The role of government in identifying new opportunities and assisting Queensland companies to access existing and potential opportunities in Indonesia**

- TIQ's role is to provide information to Queensland's companies, institutions and Government on market opportunities in Indonesia.
- TIQ can also assist with managing cultural and language gaps between Indonesia and Australia, helping to dispel misperceptions about Indonesia as a market or source of investment. Indonesian and Australian business cultures are significantly different, and as relatively few Indonesians speak proficient business English, compared to other ASEAN nations, many Queensland companies are discouraged by communication barriers.
- TIQ is working to improve Indonesian perceptions of Queensland and its businesses. Queensland is less known there than is New South Wales or Victoria. A lack of direct flights also impacts visibility, access and visits to the state. Overcoming these misconceptions, changing the business community's perceptions, and promoting what is unique to Queensland will open the door to future opportunities.
- Cooperation between Queensland and Indonesian government bodies to recognise each other's certifications of education, food, fruit and vegetables, and livestock will significantly increase access to Indonesian markets.
- The Queensland Government, through TIQ, has committed \$25.3 million over five years to grow Queensland's international education and training (IET) industry, through the *International Education and Training Strategy to Advance Queensland 2016 – 2026*.<sup>32</sup> This highlights the state's strong commitment to improving trade and investment partnerships, particularly in the Asia Pacific region, where Indonesia is a priority. Key elements of the strategy include:<sup>33</sup>
  - An annual International Education and Training Partnership Fund of \$1.2 million available to consortia to deliver initiatives and encourage matching funds to leverage greater investment in international education and training.
  - Working with Queensland providers, across all sectors, to expand and capitalise on offshore program delivery, executive leadership programs, and global partnerships.
  - Promoting the value of two-way international education and working with providers to encourage more Queensland students to engage in international education, particularly in the Asia Pacific region.
  - Expanding Queensland's global offshore network to place education and training specialists in priority countries, including Indonesia, with a focus on building Queensland brand awareness and responding to market opportunities in international education.
  - Investing in alumni engagement activities that recognise the value of international alumni as advocates for the Queensland experience.
  - Working with Tourism and Events Queensland (TEQ), education partners, and local tourism providers to foster and promote opportunities for edu-tourism.
  - Working with Australian Government counterparts to ensure a leveraged approach to branding, student experience, and data collection in line with national and state goals.

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**The contributions of diaspora communities to Queensland's relationships with Indonesia**

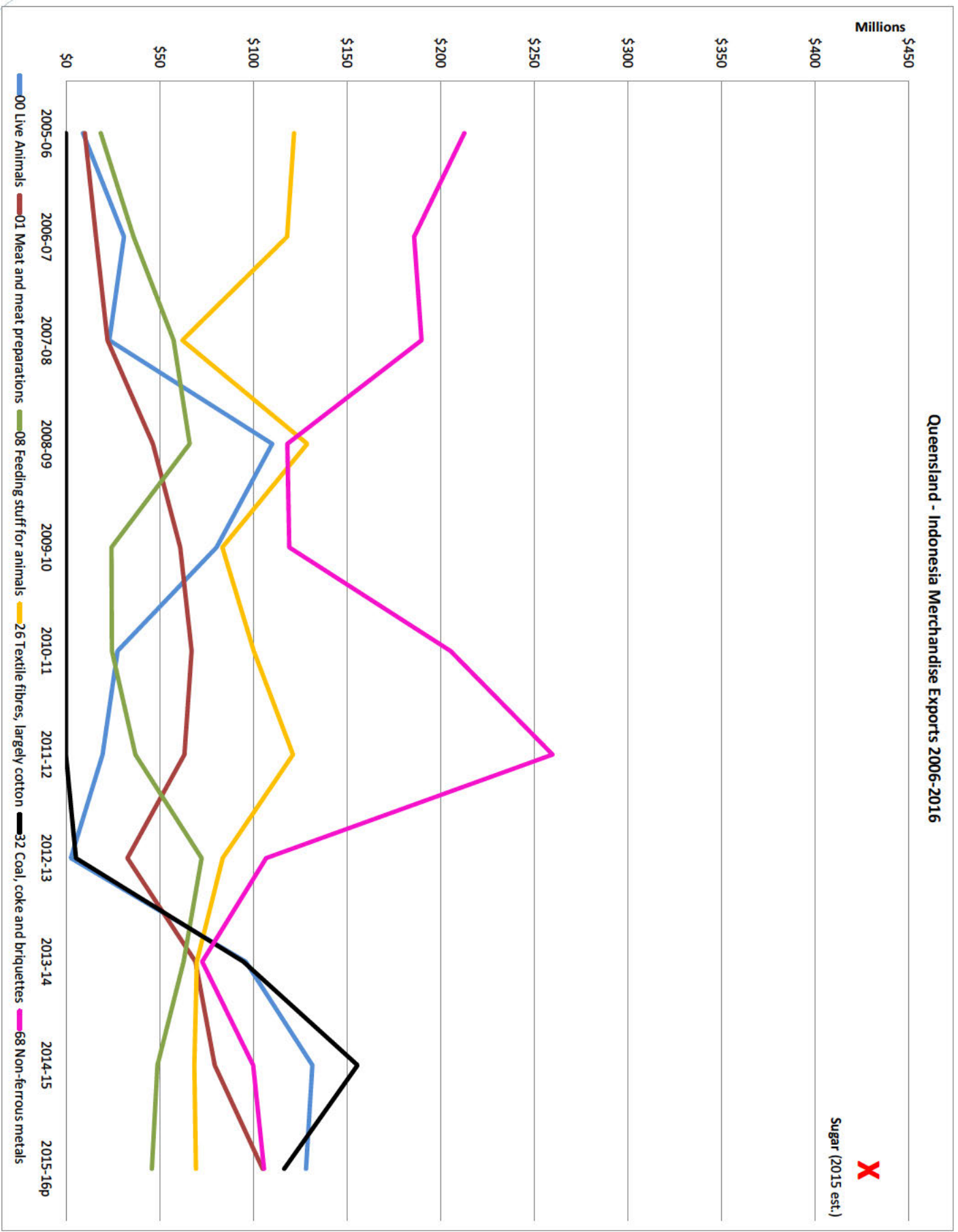
- The Indonesian-born population in Queensland in the year 2011 was 6,562. This is 10.4% of the national total and a smaller proportion than in New South Wales, Victoria or Western Australia.<sup>34</sup>
- Indonesian student and community groups are active in promoting Indonesian culture and community, mostly in Brisbane.<sup>35 36</sup> Few Queenslanders live in Indonesia, possibly due to Indonesia's reputation in terms of difficult spousal visa and/or permanent residency approval processes.<sup>37</sup>
- Queensland's Indonesian community can contribute significantly to Australia's relationship with Indonesia by expanding local awareness and understanding of Indonesian culture, identifying and promoting shared interests and increasing exchanges.

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**Queensland Government Engagement with Indonesia**

- Queensland Ministers have actively increased awareness and engagement with Indonesia via recent trade missions to Indonesia, including:
  - In September 2016, the then Minister for Agriculture and Fisheries visited Jakarta, as part of a week-long trade mission to Asia. Queensland beef exports and opportunities were the focus of discussions with high ranking Indonesian officials, including the Governor of Jakarta, Australian and Indonesian industry bodies and Asian supermarket chains.
  - In May 2016, the Hon Jackie Trad MP, Deputy Premier and Minister for Trade and Investment led a mission of 18 delegates representing Queensland's higher education and VET sectors to visit Semarang as part of a *Study in Queensland Week* trade mission to Indonesia. The Governor of Central Java hosted official luncheon for Deputy Premier Trad to commemorate the 25<sup>th</sup> anniversary of Sister State relations between Queensland and Central Java.
  - Deputy Premier Trad led another trade mission to Jakarta from 17-19 November 2015, as part of the Federal Government's Indonesia-Australia Business Week (IABW) initiative. Over 70 Queensland delegates participated in IABW promoting Queensland education and training, urban infrastructure expertise, and foreign direct investment.<sup>38</sup>
  - The then Minister for Agriculture and Fisheries led a trade mission to Jakarta on 9-13 August 2015, in partnership with the Northern Territory Minister for Industry and Fisheries. The mission was organised as part of an ongoing Northern Australia engagement strategy to foster stronger relationships with Indonesia, further promote trade and investment opportunities for Northern Australian beef and agricultural industries, and to identify opportunities for potential future collaborations.<sup>39</sup> This mission was a success, helping to significantly increase Queensland live cattle exports in 2016.<sup>40 41</sup>
  - In December 2014, the then Minister for Trade led a delegation of Food and Agribusiness, Education and Training participants to Indonesia, including Jakarta and Semarang. On this visit, the Minister opened the TIQ Office in Jakarta and capitalised upon connections established during the 2014 G20 Summit in Brisbane, meeting with senior government officials including the Minister for Trade.<sup>42 43</sup>
- In 2016, TAFE Queensland signed a Memorandum of Understanding (MOU) with the Indonesian Ministry of Home Affairs, witnessed by the Deputy Premier in Jakarta. The MOU builds upon existing relationships and is seen as an important step in developing Queensland's international education export market.<sup>44</sup> There is significant potential to increase institutional and education sector linkages via more efforts along these lines.
- Queensland has maintained a Sister-State MOU with Central Java since 1991 covering trade and investment, education, health, and government relations.<sup>45</sup> The MOU has focused largely on education including an annual exchange of high school teachers, intensive language courses and cultural activities.
- The TIQ representative office in Jakarta was established in 2014, and there are plans to increase its capacity to identify potential trade opportunities, and encourage trade and investment relationships between Indonesia and Queensland.
- The Queensland Government will continue its efforts to identify trade impediments and will work cooperatively with both the Australian and Indonesian Governments to remedy this where possible.

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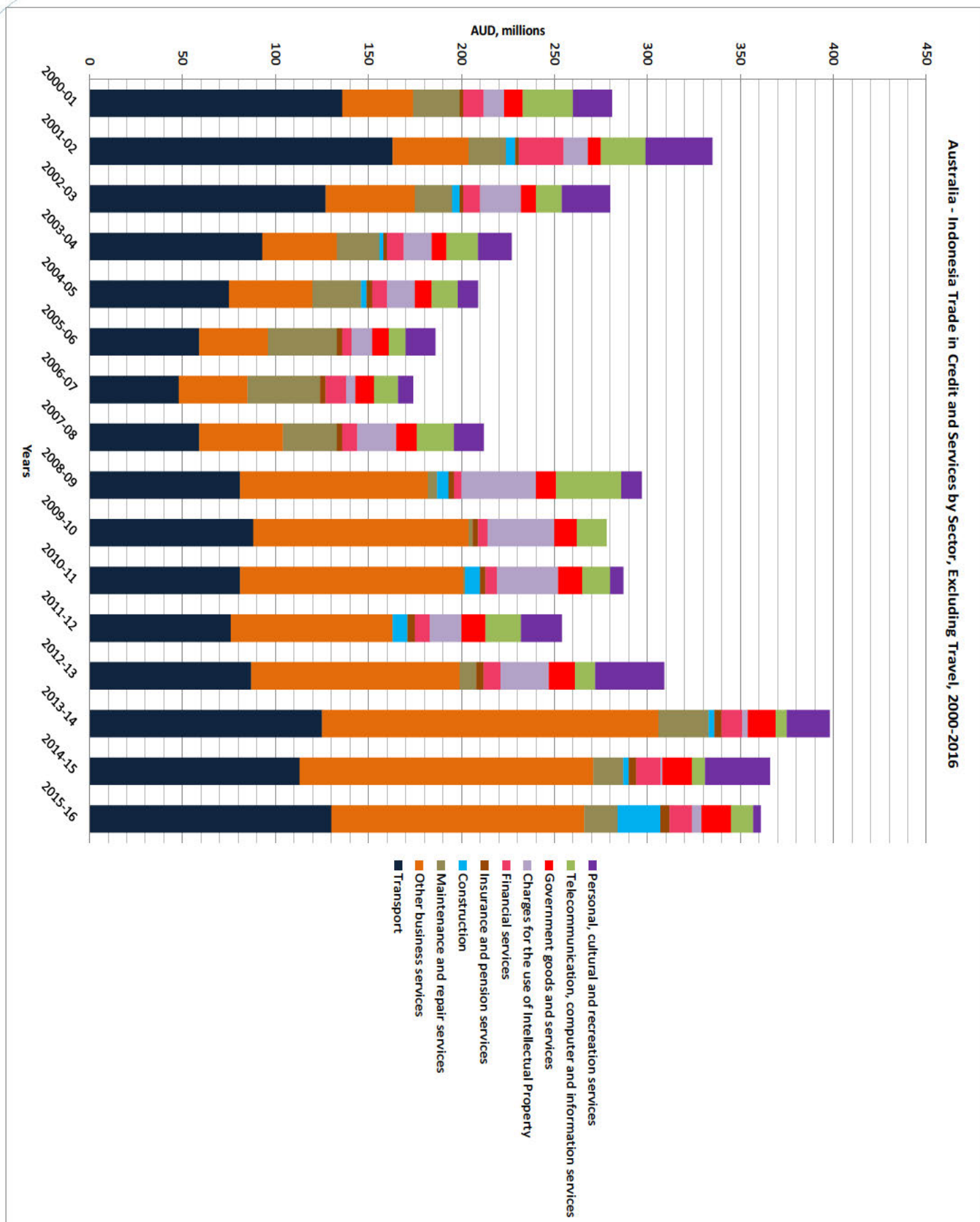


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**Source:** ABS Foreign Trade, unpublished data

2015 sugar export value of approximately A\$445 million achieved through division of total Australian sugar exports to Indonesia (A\$469M)<sup>5</sup> by proportion of Australian sugar produced in Queensland (95%).<sup>4</sup>

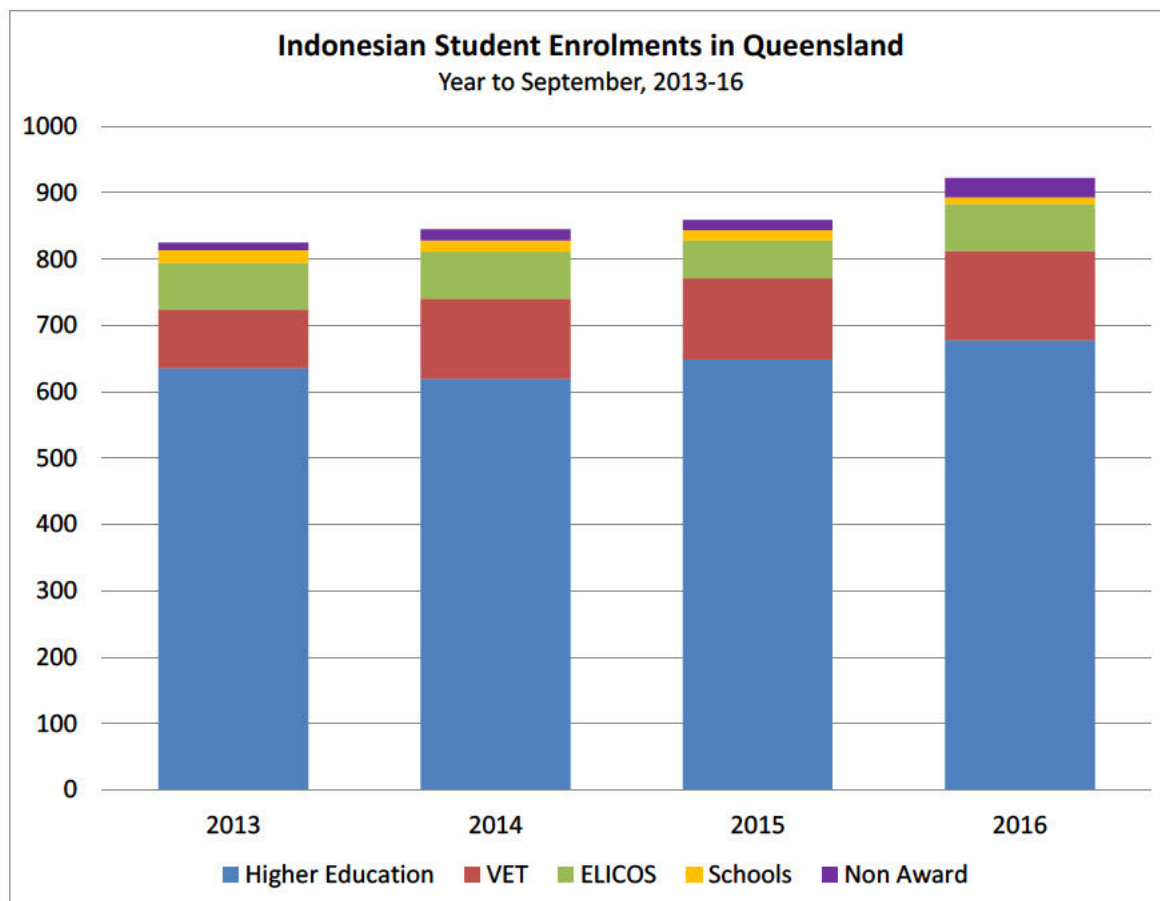
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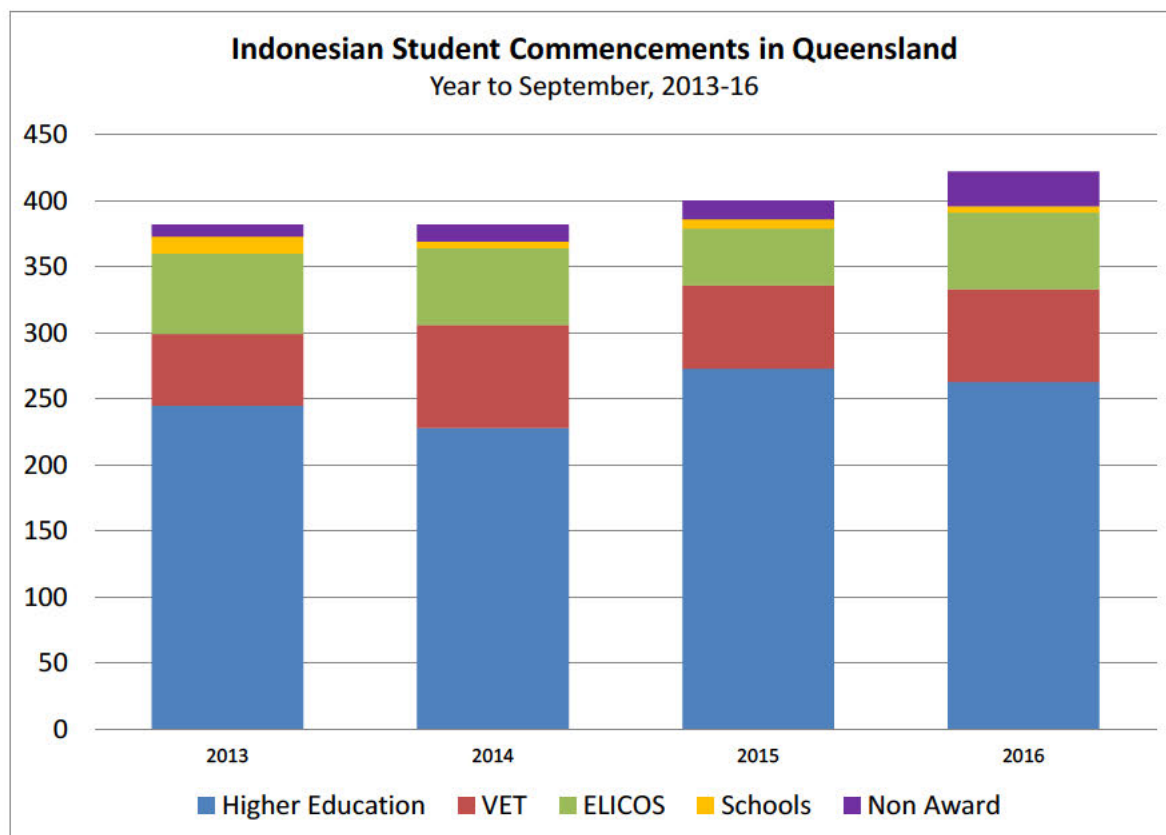
**Source:** ABS International Trade

Travel credit and services were excluded from this chart for ease of reading. This sector was valued at A\$928 million in 2015-16, from an initial value of A\$781 million in 200-01 and a minimum of A\$603 million in 2005-06.



*Note: Student enrolled in multiple programs may be counted multiple times.*

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Source: Commonwealth Provider Registration and International Student Management System (PRISMS) database

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Source: International Visitor Survey, Tourism Research Australia

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