

**National Interest Analysis [2015] ATNIA 7
with attachments**

**Free Trade Agreement between the Government of Australia and the Government of the
People's Republic of China**

(Canberra, 15 June 2015)

[2015] ATNIF 15

Attachments:

Attachment I	Consultation
Attachment II	Regulation Impact Statement
Attachment III	ChAFTA Fact Sheet: Key Outcomes

NATIONAL INTEREST ANALYSIS: CATEGORY 1 TREATY

SUMMARY PAGE

Free Trade Agreement between the Government of Australia and the Government of the People's Republic of China

(Canberra, 15 June 2015)

[2015] ATNIA 7

[2015] ATNIF 15

Nature and timing of proposed treaty action

1. The proposed treaty action is to bring into force the *Free Trade Agreement between the Government of Australia and the Government of the People's Republic of China* ('ChAFTA/the Agreement'), which was signed by both Governments on 15 June 2015.
2. This proposed treaty action has been tabled and referred to the Joint Standing Committee on Treaties ('JSCOT') at the earliest available opportunity following signature of the Agreement.
3. **Article 17.2** provides that ChAFTA will enter into force 30 days after the date the Parties exchange diplomatic notes certifying that they have completed their respective internal requirements, or on such other date as the Parties may agree. It is proposed that Australia provide such notification as soon as practicable following consideration by JSCOT, the passing of legislative amendments and the enactment of necessary regulations. The Governments of Australia and the People's Republic of China are working towards entry into force of ChAFTA in late 2015, in order to maximise the economic advantages for both Parties.

Overview and national interest summary

4. ChAFTA will significantly boost Australia's economic relationship with China, our largest trading partner, and elevate the standing of the bilateral relationship overall. ChAFTA will give Australian exporters significantly improved market access in goods and services. It will eliminate or significantly reduce tariffs on a wide range of Australian goods exports including beef, dairy, sheepmeat, wine, horticulture and energy and resource products. It also delivers China's best ever services commitments, including the provision of new or significantly improved market access not included in any of China's previous Free Trade Agreements ('FTAs') (other than its Agreements with Hong Kong and Macau).
5. Beneficiaries of the Agreement will include Australian service suppliers across a range of sectors including: banking and financial; insurance; legal; education; health and aged care; construction; manufacturing; and telecommunications. Australian businesses and consumers will enjoy cheaper Chinese imports, notably household and electronic goods. Expanded liberalisation of trade is likely to stimulate economic activity in Australia, leading to job creation.

6. ChAFTA will protect Australia's competitive position in the Chinese market against other countries to which China has already afforded preferential treatment¹, as well as in relation to countries to whom China may offer preferential treatment in the future². ChAFTA will also facilitate the expansion of the economic relationship with China, including through a built-in review agenda for further liberalisation of bilateral trade and investment.

7. ChAFTA will deliver market access gains and cuts to tariffs in priority areas for Australia more quickly than any current multilateral and plurilateral negotiations underway, such as the World Trade Organization ('WTO') Doha Round and the Regional Comprehensive Economic Partnership ('RCEP').

Reasons for Australia to take the proposed treaty action

8. ChAFTA is a broad economic partnership Agreement with China that will further enhance the bilateral relationship, promoting closer economic integration and highlighting its strategic importance. ChAFTA will enhance an already significant and complementary bilateral economic relationship.

9. In 2013-14, two-way trade in goods and services with China reached **\$159.7 billion**, making China Australia's largest trading partner. China is both Australia's largest export market (**\$107.6 billion** or 33 per cent of total exports) and largest source of imports (**\$52.1 billion** or 15 per cent of total imports). ChAFTA will create immediate market access opportunities for many sectors of the Australian economy. On entry into force, more than 85 per cent (85%) of Australia's trade to China will have tariffs set at zero and on the full implementation of ChAFTA, 95 per cent (95%) of trade will enter duty-free. The key outcomes are set out in further detail in **Attachment II** (Regulation Impact Statement and **Attachment III** fact sheet) to this National Interest Analysis ('NIA') and are summarised below.

10. China is Australia's eighth-largest source of foreign investment and the twelfth-largest destination for Australian investment. Australian total investment in China was worth **\$29.6 billion** at the end of 2013, with direct investment accounting for **\$6.4 billion**. China's total investment in Australia was worth **\$31.9 billion** at the end of 2013, with direct investment accounting for **\$20.8 billion**. While bilateral investment figures with China are modest compared to Australia's other trade and investment relationships, investment in non-sensitive sectors in both directions is growing rapidly. ChAFTA will facilitate private Chinese investment by raising the Foreign Investment Review Board ('FIRB') screening threshold for those investors, affirming Australia's attractiveness as an investment destination. It will also commit China to providing Australian investors with the most favourable treatment it gives to any other investment partner in the future.

10.1 Agriculture and processed food: China is Australia's largest agriculture and fisheries market, with an estimated total value of **\$9 billion** in 2013-14. Its demand for high-quality agriculture and food products is growing rapidly. Nevertheless, China's current tariff barriers are high on certain agricultural products. Under ChAFTA,

¹ China has Free Trade Agreements with New Zealand, Chile, ASEAN, Iceland, Costa Rica, Peru, Singapore, Pakistan and Switzerland.

² China has recently concluded trade negotiations with the Republic of Korea and is negotiating with the Gulf Cooperation Council and participating in the Regional Comprehensive Economic Partnership negotiations, and is considering trade negotiations with India, the European Union and Canada.

agricultural tariffs of up to 30 per cent (30%) will be eliminated or significantly reduced on many Australian agricultural exports, including:

- (a) *Beef*: Australia is already China's dominant supplier with 57 per cent (57%) of the import market. Tariffs on beef imports, currently ranging from 12 to 25 per cent (12 – 25%), will be eliminated over nine years. Tariffs of 12 per cent (12%) on beef offal will be eliminated within four to (4 – 7) seven years.
- (b) *Live animal exports*: China is Australia's second-largest market and continues to grow. ChAFTA will remove tariffs of 10 per cent (10%) within four (4) years.
- (c) *Dairy*: China is Australia's largest market for dairy exports. Australia's main competitor is New Zealand, which currently receives a considerable tariff advantage under its bilateral FTA with China. Under ChAFTA tariffs of up to 20 per cent (20%) on certain dairy products will be removed over four to eleven (11) years.
- (d) *Pork*: tariffs of up to 20 per cent (20%) on pork will be eliminated within four (4) years.
- (e) *Sheep meat*: tariffs ranging between 12 and 23 per cent (12 – 23%) will be eliminated within eight (8) years.
- (f) *Seafood*: removal of tariffs, including of 14 and 15 per cent (14 – 15%) respectively on abalone and rock lobster, within four (4) years.
- (g) *Wine*: removal of tariffs of 14 to 20 per cent (14 – 20%) over four (4) years.
- (h) *Horticulture*: removal of tariffs of up to 30 per cent (30%) on all horticulture products, most within four years.
- (i) *Hides, skins and leather*: removal of tariffs of five to 14 per cent (5 – 14%) over two to seven years.
- (j) *Wool*: ChAFTA will provide Australian wool exporters with, in addition to China's existing World Trade Organisation ('WTO') quota, an exclusive country specific quota of 30,000 tonnes of clean wool, which will grow by five per cent (5%) each year to almost 45,000 tonnes of clean wool by 2024.

ChAFTA will not effect any change to Australia's risk-based quarantine measures.

China has identified a limited number of products as significantly sensitive staple foods, namely rice, wheat, cotton, maize, sugar, rapeseed and vegetable oils. It has not liberalised trade in these products in any of its FTAs, including ChAFTA. Australian exporters have access to China's WTO quotas for these products (open to all WTO Members). However, China has agreed to a review three (3) years after ChAFTA enters into force to consider deepening liberalisation and further expansion of market access.

10.2 Resources, Energy and Manufacturing: Australia's exports of resources, energy and manufacturing products to China were worth over **\$90 billion** in 2013

(approximately 40 per cent (40%) of Australia's total exports), making China Australia's biggest export market in these sectors. On entry into force, 92.9 per cent (92.9%) of China's imports of these products from Australia (by value in 2013) will enter duty free. On full implementation of the Agreement, 99.9 per cent (99.9%) of Australia's current exports of these products will enter duty free. China will also provide greater certainty to traders by binding tariffs at zero for major resources and energy products, including iron ore, gold, crude petroleum oils and liquefied natural gas.

10.3 Services: China is Australia's largest services market, with exports worth **\$7.5 billion** in 2013-14 (13 per cent (13%) of Australia's services exports). ChAFTA provides China's best ever services commitments (other than its agreements with Hong Kong and Macau). China's existing WTO commitments to Australia relating to services are limited. Under ChAFTA, China will bind its regulatory regime in a wider range of service sectors, providing greater certainty of treatment for Australian service providers. In some areas, ChAFTA will provide new access for Australian service providers. Australian banks, insurers, securities and futures companies, education providers, law firms, health and aged care services, mining and extractive industries, telecommunications providers, tourism and travel services will all benefit by being able to do business more easily in China. Australia and China have agreed to a review two (2) years after ChAFTA's entry into force to consider the progressive liberalisation of measures affecting trade in services.

10.4 Investment: Chinese investment in Australia has grown strongly in recent years and ChAFTA will provide further opportunities for investors in both countries. China has undertaken to extend the most favourable treatment it gives to any other investment party in a subsequent agreement with Australian investors. The stimulatory effect of Chinese investment on the Australian economy can help create jobs across the country and create further opportunities to generate export income. Chinese private investors in non-sensitive sectors will be subject to a foreign investment screening threshold equivalent to that currently provided to investors from New Zealand, the United States, Japan, the Republic of Korea and Chile, thereby facilitating an increase in the flow of Chinese investment into Australia. ChAFTA includes an investor-state dispute settlement mechanism with appropriate protections for government regulation in areas such as public welfare, health, culture, environment and foreign investment screening. This mechanism will promote investor confidence. Australia and China have agreed to a review within three (3) years after ChAFTA's entry into force to consider further investment protections and increased market access.

10.5 Other: ChAFTA also includes the Parties' commitments on:

- (a) *movement of natural persons:* China and Australia will provide guaranteed access to individuals of the other Party for certain categories of business visitors and skilled service providers, thereby reducing barriers to labour mobility and enabling increased trade and investment;
- (b) *intellectual property:* ChAFTA includes a Chapter on intellectual property that reaffirms the Parties' existing international obligations and includes provisions on various issues including national treatment,

enforcement, border measures, geographical indications and cooperation;

(c) *competition policy*: ChAFTA promotes cooperation between Australian and Chinese competition authorities through the exchange of information and consultation;

(d) *government procurement*: ChAFTA contains a commitment to negotiate a reciprocal agreement on government procurement after the completion of China's negotiations to join the WTO Government Procurement Agreement; and

(e) *electronic commerce*: ChAFTA contains provisions that prevent the imposition of customs duties on electronic transmissions, safeguard electronic commerce and facilitate cooperation in respect of consumer protection.

Key Australian commitments

11. Consistent with Australia's other bilateral trade agreements, under ChAFTA, Australia will remove its remaining tariffs on Chinese goods. Tariffs on 81.6 (81.6%) per cent of Australia's merchandise imports from China (by value in 2013) will be eliminated on entry into force of ChAFTA, with the remaining tariffs on Australia's sensitive products³ phased out within four (4) years. As these outcomes will make Chinese goods more competitive than goods from countries that do not have FTA's with Australia, it can reasonably be expected that Chinese exports to Australia will increase. Australian businesses and consumers will enjoy cheaper Chinese imports, notably household and electronic goods.

12. Under ChAFTA, Australia will treat Chinese services suppliers equally with those of Australia's other key FTA partners, including by providing market access outcomes broadly equivalent to Australia's FTAs with Japan and Korea. This is consistent with Australia's already open and transparent services market.

13. Australia will increase Foreign Investment Review Board ('FIRB') screening thresholds for private Chinese investors from **\$252 million** to **\$1,094 million** for investments in non-sensitive sectors. Australia has retained the ability to screen investments in sensitive sectors, including media, telecommunications and defence-related industries at lower levels and reserved policy space to screen proposals for foreign investment in urban land, agricultural land (at **\$15 million** or above) and in agribusinesses (at **\$53 million** or above).

14. Alongside the conclusion of ChAFTA, Australia and China have negotiated two Memoranda of Understanding. The first of these is a Work and Holiday Arrangement, under which Australia will grant visas for up to 5,000 Chinese work and holiday makers annually. This will increase demand for tourism services and support the development of Australia's tourism sector. The second Memorandum of Understanding will allow for Investor Facilitation Arrangements ('IFAs'). Chinese-owned companies registered in Australia undertaking large infrastructure development projects will be able to negotiate, similarly to Australian businesses, increased flexibilities for workers engaged on specific projects. IFAs

³ This includes products in the following sectors: automotive, steel, aluminium, copper, plastics, paper, chemicals, processed food (canned fruits and peanuts), carpets, textiles, clothing and footwear.

will operate within the framework of Australia's existing 457 visa system and will not allow Australian employment laws or wages and conditions to be undermined.

Obligations

15. The text of ChAFTA comprises seventeen (17) Chapters, four Annexes (including Schedules of Commitments for Australia and China) and five (5) side letters. There are two (2) Memoranda of Understanding as detailed in **Paragraph 14** above and an additional side letter which do not form part of the Agreement. A Chapter-by-Chapter summary of key obligations contained in the Agreement is provided at Attachment **III** to this NIA (ChAFTA Summary of Chapter Outcomes).

16. ChAFTA is a broad Agreement that will liberalise and facilitate trade and investment between Australia and China. Upon entry into force, or over time, each Party will eliminate or reduce specified tariffs on imports of goods from the other Party (**Chapter 2**) that meet the agreed Rules of origin⁴ criteria (**Chapter 3**). The Parties' Schedules of tariff commitments are set out at **Annex I** to the Agreement, with a country specific tariff rate quota⁵ ('TRQ') for Australian wool exports to China (**Chapter 2**). A review clause of the Agreement (**Chapter 16**) stipulates a requirement for the Parties to consider the deepening liberalisation and further expansion of market access three (3) years after ChAFTA's entry into force.

17. Under the Trade in Services and Investment Chapters of the Agreement (**Chapters 8** and **9** respectively), each Party will grant market access and non-discriminatory treatment (known as national treatment⁶ and most favoured nation ('MFN') treatment⁷) to services and investments from the other Party. In China's case, national and MFN treatment will apply to specific sectors listed in its Schedule of Specific Commitments (**Annex III**). In Australia's case, national and MFN treatment will apply except where specific measures or individual sectors are specifically reserved in the non-conforming measures annexures to ChAFTA (**Annex III**). The Parties also commit to additional sector-specific disciplines affecting financial service providers and investors from each Party (**Annex 8-B**), in addition to those above in the Trade in Services and Investment Chapters of the Agreement.

18. ChAFTA also contains the Parties' commitments and disciplines on:

- (a) customs procedures (**Chapter 4**);
- (b) sanitary and phytosanitary ('SPS') measures⁸ (**Chapter 5**);
- (c) technical barriers to trade (**Chapter 6**);
- (d) the movement of natural persons (**Chapter 10**);

⁴ "Rules of origin" ('ROO') establish the criteria for determining whether goods will qualify for preferential tariff treatment under ChAFTA (that is, whether a good 'originates in Australia or China).

⁵ Under ChAFTA, a "tariff rate quota" ('TRQ') represents the maximum quantity of a product permitted to enter China on a preferential basis in a particular year. For wool, there is a duty free country specific quota of 30,000 tonnes of clean wool increasing by 5 per cent each year to almost 45,000 tonnes of clean wool.

⁶ "National treatment" means Australia must treat Chinese investors and [goods and] service providers no less favourably than it treats Australian investors and [goods and] service providers in like circumstances, and vice versa.

⁷ "Most-favoured-nation" ('MFN') treatment means Australia must treat Chinese investors and service providers no less favourably than it treats investors and service providers of third countries in like circumstances, and vice versa.

⁸ "Sanitary and phytosanitary" (SPS) measures are measures, such as quarantine, to protect human, animal or plant life or health from pests and diseases.

- (e) electronic commerce (**Chapter 12**); and
- (f) Intellectual Property rights (**Chapter 11**).

19. **Chapter 15** (Dispute Settlement) of ChAFTA contains a binding State-to-State dispute settlement mechanism modelled on previous free trade agreements and the WTO system. Most substantive obligations in ChAFTA will be subject to this mechanism, except those found in the Chapters on Technical Barriers to Trade, Sanitary and Phytosanitary Measures, Electronic Commerce and the Movement of Natural Persons (aside from disputes meeting certain criteria). As noted above, there is also an Investor-State Dispute Settlement mechanism in the Investment Chapter (**Chapter 9**).

20. **Chapter 13** (Transparency) requires the Parties to publish and administer their laws, regulations, procedures and administrative rulings of general application in respect of matters covered by ChAFTA consistently and fairly. **Chapter 14** (Institutional Provisions) establishes a Joint Commission to oversee ChAFTA's implementation.

21. **Chapter 16** (General Provisions and Exceptions) of ChAFTA sets out several WTO-style general and security exceptions which apply to a number of chapters of ChAFTA. Such exceptions ensure FTA obligations do not unreasonably restrict government action in key policy areas, including action to protect essential security interests, the environment and health. **Chapter 16** also carves out application of a Party's taxation measures from the scope of the Agreement, and provides for the protection of confidential information.

22. ChAFTA is consistent with Australia's obligations at international law, including those under the *Marrakesh Agreement Establishing the World Trade Organization*.

Implementation

23. Following JSCOT consideration and prior to entry into force of the Agreement, in order to implement the obligations in ChAFTA in Australia, a *Migration Act 1958* (Cth) Determination is required in relation to labour market testing. Amendments will also need to be made to the *Customs Act 1901* (Cth), the *Customs Tariff Act 1995* (Cth) and relevant customs regulations as follows:

- (a) the *Customs Regulations 2015*;
- (b) the *Life Insurance Regulations 1995* - in order to implement the agreement reached by the Parties to ChAFTA in respect of life insurance;
- (c) The *Foreign Acquisitions and Takeovers Regulations 1989* requires amendment to incorporate the new threshold for screening investment proposals by Chinese private investors at **\$1,094 million** (subject to lower thresholds for sensitive sectors), whereby Chinese life insurers will be able to operate in Australia through branches rather than subsidiaries.

24. In addition, new customs regulations will need to be enacted for the product specific rules of origin set out in **Annex II** of ChAFTA.

25. The remainder of Australia's obligations under ChAFTA do not require any legislative or regulatory amendment.

26. The impact of ChAFTA on States and Territories is outlined at **Attachment I** to this NIA (Consultation).

20. Under Article 17.2 (Entry into Force), the Agreement will enter into force thirty (30) days after the date the Parties exchange written notifications certifying that they have completed their respective internal requirements, or on such other date as they may agree.

Costs

22. The estimated loss of tariff revenue for Australia resulting from ChAFTA is approximately **\$610 million** in 2015-16 and **\$4,150 million** over the forward estimates period. This estimate assumes that ChAFTA will enter into force in late 2015. This estimated costing does not include any flow-on impacts arising from increased bilateral trade with China once the Agreement enters into force. Accordingly, the estimates do not take into account additional lost tariff revenue if imports from China displace imports from other countries. On the other hand, the costs estimates for entry into the Agreement do not take into account the potential domestic economic growth that ChAFTA is expected to generate and any additional taxation revenue resulting from such growth. Overall, given the scale of the bilateral trade and investment relationship between Australia and China, China's current high tariffs on Australia's main agricultural exports to China and the strong support for ChAFTA from the business community, the Government considers that entry into ChAFTA represents a net gain for the Australian economy.

Regulation Impact Statement

23. A Regulation Impact Statement as required by the Office of Best Practice Regulation is attached to this NIA (**Attachment II**).

Future treaty action

24. **Article 17.3** (Amendments) of the Agreement provides that the Parties may agree in writing to amend ChAFTA. Any future amendment of ChAFTA will be subject to Australia's domestic treaty process and would enter into force thirty (30) days after the date the Parties exchange written notifications certifying that they have completed their respective internal requirements, or on such other date as they may agree.

25. The review provision of the Agreement (**Article 16.5** (Review of Agreement),) stipulates a requirement for the Parties to undertake a general review of the Agreement with a view to furthering its objectives (ie. to consider the deepening liberalisation and further expansion of market access) within three (3) years after ChAFTA's entry into force. Such negotiations may give rise to further treaty action under ChAFTA.

Withdrawal or denunciation

26. The Agreement contains no specific withdrawal or denunciation provisions. Under **Article 17.4** (Termination) of the Agreement, either Party may terminate ChAFTA by giving the other Party 180 days advance notice in writing. Any future termination of ChAFTA will be subject to Australia's domestic legal requirements for treaty action.

Contact details

Free Trade Agreement Division
Department of Foreign Affairs and Trade

ATTACHMENT I - CONSULTATION

Free Trade Agreement between the Government of Australia and the Government of the People's Republic of China

(Canberra, 15 June 2015)

[2015] ATNIF 15

CONSULTATION

State and Territory consultations

27. The proposed treaty action will have an impact on the States and Territories. The obligations in **Chapter 8** (Trade in Services) and **Chapter 9** (Investment) apply to State and Territory measures. Where States and Territories wish to maintain measures that are inconsistent with these obligations, they must list them in the annexes of non-conforming measures to these Chapters. Australia has included several non-conforming measures relating to regional government in its annexes. **Chapter 10** (Movement of Natural Persons) will also affect State and Territory governments.

28. Prior to the launch of negotiations, in 2004, the then Minister for Trade wrote to State and Territory Premiers and Chief Ministers seeking comments on the feasibility of a bilateral FTA with China. Thereafter State and Territory governments were consulted through the regular Senior State and Territory Trade Officials' Group ('STOG') and Commonwealth-State-Territory Standing Committee on Treaties ('SCOT') meetings. DFAT officials provided regular updates to State and Territory representatives of premiers and industry departments prior to or following key events such as negotiating rounds and broad industry consultations.

29. During ChAFTA negotiations, DFAT worked closely with State and Territory governments to finalise the Agreement's Schedules of non-conforming measures in relation to services and investment commitments at the regional level. In September 2014, the Trade Minister wrote to Premiers and Chief Ministers seeking the cooperation of States and Territories to ensure that the said Schedules accurately reflected their requirements. Consultations with States and Territories continued up until conclusion of the FTA.

Public consultations

30. DFAT commenced stakeholder consultations in 2004, with a call for public submissions as part of a feasibility study into the costs and benefits of an FTA between Australia and China. Following the launch of negotiations in 2005 and throughout, DFAT received over 260 submissions⁹ from individuals, NGOs, companies and peak industry groups on issues relevant to the FTA negotiations. The list of public submissions received is set out below.

⁹ Some individuals/entities requested their submission be kept confidential and some individuals/entities provided multiple submissions.

31. In addition to seeking submissions from interested parties, DFAT, in conjunction with relevant Commonwealth agencies, has conducted an extensive program of direct consultations and discussions with stakeholders in Canberra, around Australia and in China since 2004, to ensure that their views informed development of the Government's negotiating strategy for the Agreement. DFAT officials have had ongoing consultations with NGOs and industry, including through a large number of one-to-one, small group meetings and industry round tables. There were also a number of large round table meetings held with peak organisations representing industry, professional bodies and other interested groups. These consultations helped identify commercially significant impediments to increasing Australia's exports to, and investment in, China. Following each negotiating round, DFAT contacted stakeholders to update them on the progress of the FTA negotiations with China and sought their further views ahead of the next round. A full list of consultations is provided below. In general, the consultations that occurred in Australia and among Australian businesses in China were broadly positive with feedback supportive of an FTA with China.

32. Consultations across a broad range of Australian agriculture and services industries were broadly supportive of an FTA with China, provided that China's market was opened to Australia's key exports. Following the announcement of ChAFTA's conclusion in November 2014, a broad cross-section of industry, professional and sectoral stakeholders expressed supportive comments regarding the reduction and/or elimination of tariff and other trade barriers and resulting increased competitiveness of Australian exporters as well as increased opportunities for Australian service providers.

33. The exclusion of certain products from ChAFTA (rice, wheat, cotton, maize, sugar, rape seed and vegetable oils) has raised some concerns among stakeholders in those sectors. Currently, Australian exports of these products enter China under its existing WTO arrangements (open to all WTO Members), whereby it applies quotas on these imports with tariffs ranging up to 15 (15%) per cent (for sugar). China has not further liberalised any of these products for competitors in its FTAs to date and accordingly, has not done so in this instance. China has, however, agreed to ChAFTA containing a built-in review process three years after the Agreement into force which will, inter alia, consider further liberalisation and expansion of market access.

34. A limited number of stakeholder groups consulted by DFAT identified defensive interests. Prior to the announcement by Toyota, Ford and Holden to end motor vehicle manufacturing in Australia, automotive companies were concerned that ChAFTA not undermine the ongoing viability of the Australian passenger motor vehicle industry. Other manufacturers expressed concern about increased competition from China. Such concerns have been met in the Agreement through staged elimination of Australia's tariffs on certain motor vehicles and automotive parts over two to four years. The Agreement also contains a tariff phase-out period to allow other sensitive industries (steel, aluminium, plastics, canned fruit, carpets, clothing and footwear) time to adjust.

35. Some stakeholders expressed concern with the inclusion in the Agreement of an Investor-State Dispute Settlement ('ISDS') mechanism. The Government has previously said it will consider the inclusion of ISDS mechanisms in trade agreements on a case-by-case basis. ChAFTA includes a modern, balanced ISDS mechanism with the inclusion of appropriate carve-outs and safeguards in important areas such as public welfare, health and the environment. These modern safeguards have been developed in response to concerns raised by ISDS provisions in earlier agreements.

36. Other stakeholders raised concerns about the impact of ChAFTA on Australian jobs. Under the *Memorandum of Understanding* allowing for Investment Facilitation Arrangements ('IFA'), Chinese-owned companies registered in Australia undertaking large infrastructure development projects above **\$150 million** will be able to negotiate increased labour flexibilities for specific projects. These IFAs will operate within the framework of Australia's existing 457 visa system and will not allow Australian employment laws or wages or conditions to be undermined.

Commonwealth consultations

37. Commonwealth Government departments were extensively consulted throughout the ChAFTA negotiations via regular inter-departmental committee meetings and participation of relevant agencies in Australia's negotiating teams.

38. Further detail concerning consultations and outreach is included in the Regulation Impact Statement attached to this NIA (**Attachment II**). The following is a list of submissions received and stakeholders consulted during the course of ChAFTA negotiations:

LIST OF PUBLIC SUBMISSIONS RECEIVED

1. Abalone Association of Australasia Incorporated
2. Abalone Council of Australia Ltd
3. Australian Chamber of Commerce (Beijing)
4. Australian Chamber of Commerce and Industry
5. Adsteam Marine Ltd
6. Albright & Wilson
7. Alcoa
8. Alex Malik
9. ALPHAPHARM
10. Altium Ltd
11. ANZ Banking Group Ltd
12. Apple and Pear Australia
13. Aspect Melbourne Pty Ltd
14. Association of Consulting Engineers Australia
15. Australian Vice-Chancellors' Committee
16. Australasian Performing Rights Association Ltd (APRA) / Australasian Mechanical Copyright Owners Society (AMCOS)
17. Australia China Business Council (Victoria)
18. Australia Tibet Council
19. Australian Automotive Aftermarket Association
20. Australian Chamber of Commerce (Beijing)
21. Australian Chicken Meat Federation Inc
22. Australian Conservation Foundation
23. Australian Cotton Industry Council Ltd
24. Australian Cotton Shippers Association
25. Australian Dairy Industry Council Inc
26. Australian Electrical & Electronic Manufacturers' Association
27. Australian Fair Trade & Investment Network (AFTINET)
28. Australian Federation Against Copyright Theft

29. Australian Film Commission
30. Australian Food and Grocery Council
31. Australian Horticultural Exporters Association
32. Australian Industry Group
33. Australian Institute of Architects
34. Australian Labor Party – Geelong West Branch
35. Australian Manufacturing Workers' Union
36. Australian Nurses Federation
37. Australian Nursing and Midwifery Council
38. Australian Oilseeds Federation
39. Australian Plantation Products & Paper Industry Council
40. Australian Pork Limited
41. Australian Prawn Farmer's Association
42. Australian Steel Institute
43. Australian Stock Exchange
44. Australian Tyre Manufacturers' Association
45. Australian Wine and Brandy Corporation
46. Australian Wool Innovation Ltd
47. Australian Wool Processors Council Inc
48. Avcare Ltd
49. AWB Ltd
50. Basell Australia Pty Ltd
51. Bass Capital
52. Beat Knoblauch & Associates
53. Ben Coyne
54. Benedict Coyne
55. BHP Billiton
56. BlueScope Steel
57. BRADSAL – National Coating Company Pty Ltd
58. Bryan Chapman
59. Building Products Innovation Council (BPIC)
60. Business Council of Australia
61. Business Development Services Australia
62. Carindale Wines
63. Carpet Institute of Australia Ltd
64. Caterpillar Elphinstone
65. CBH Group
66. Cement Industry Federation
67. Central Queensland University
68. Chevron Texaco
69. China Business Focus Group
70. Clayton Utz
71. Commonwealth Bank of Australia
72. Conference of Leaders of Religious Institutes in NSW
73. Copyright Agency Ltd
74. Coral Sea Studios
75. Cox Architects
76. CPA Australia
77. CPA Australia Hong Kong Division
78. Crone Partners

79. Dairy Australia
80. David Smith
81. DCM Architects
82. Deloitte Touche Tohmatsu (Deloitte)
83. Department of Education and Training, Western Australia
84. DibbsBarker (formerly Dibbs Abbott Stillman)
85. Dr Peter Thorn
86. Dr Thomas Faunce, Australian National University
87. Dr Turlough F. Guerin
88. Ecka Granules
89. Edith Irma
90. Edith Knight
91. Education QLD International
92. EGR
93. EL Consult (Human Resources)
94. Elders Australia Ltd
95. Engineers Australia
96. English Australia
97. Falun Gong Human Rights Working Group
98. FCM Travel
99. Federal Chamber of Automotive Industries
100. Federation of Automotive Products Manufacturers
101. Fisher Adams Kelly
102. Flight Centre Ltd
103. Ford Motor Company
104. Forestry Tasmania
105. Freight Logistics Council
106. Furnishing Industry Association of Australia
107. GENENG Pty Ltd
108. Gift and Homewares Australia
109. Global Foundation Secretariat
110. Goodman Fielder Ltd
111. Growcom
112. Hassell
113. Holden
114. Horticultural Market Access Committee (HMAC)
115. Horticulture Australia Ltd
116. Hunt & Hunt
117. Hydro Tasmania
118. Ian Quin
119. Institute for International Business, Economics and Law, University of Adelaide
120. Institute of Patent and Trade Mark Attorneys
121. Insurance Australia Group
122. Jak Fruits
123. Jeff Gunningham
124. Jewellers' Association of Australia
125. Julie D'Alcorn
126. JML Australia
127. John Cole and Ruth Hill

128. Kangaroo Industries Association of Australia
129. Kann Finch
130. Kembla Products / Metal Manufacturers Ltd
131. Kevin Garland
132. Kindy Roo
133. Law Council of Australia
134. Law Institute of Victoria
135. Lawyers for Animals
136. LiveCorp
137. Macquarie Telecom
138. Mahinder Lall
139. Marg Chu
140. MasterFoods ANZ (Mars)
141. Mayne Group Ltd
142. Meat & Livestock Australia
143. Media Entertainment & Arts Alliance
144. Medical Devices Industry Action Agenda
145. Minerals Council
146. Murray Valley Citrus Marketing Board
147. National Association of Forestry Industries (NAFI)
148. National Farmers Federation
149. Northern Territory – Minister for Asian Relations and Trade
150. One Steel
151. Penrice Soda Products
152. Plastics and Chemicals Industries Association
153. Q Concepts
154. Qantas Airways Ltd
155. Qenos
156. Quantum Energy Technologies
157. Queensland Law Society
158. Queensland Nurses' Union
159. Ricegrowers' Association of Australia Inc
160. Richardson Business Consultants Pty Ltd
161. RJ Quirk Consulting
162. Royal Australian Institute of Architects
163. Sam Chen-Helen Wong Tours
164. Science Industry Action Agenda
165. Screen Producers of Australia
166. South Australian Aquaculture Council Inc
167. South Australian Government
168. South Edge Seeds Pty Ltd
169. Stephen Thornton
170. Supply Line (Australia) Pty Ltd
171. Symex Holdings Ltd
172. Tanda International Pty Ltd
173. Teachall Language Training Centers
174. Telstra Corporation
175. Textile & Fashion Industries of Australia
176. Textiles, Clothing and Footwear Union of Australia
177. Thomas Winch Company (Qld) Pty Ltd

178. Toyota
179. Trade Mark Investigation Services
180. Tredex
181. Uniting Care NSW/ACT
182. University of Adelaide Institute for International Business, Economics and Law
183. Universities Australia
184. Victoria – Minister for Manufacturing
185. Victorian Government (Department of Innovation, Industry and Regional Development)
186. Viscopy Ltd
187. WA Chamber of Commerce & Industry
188. WA Farmers Federation
189. WA Fishing Council
190. Warren Cauliflower Group Inc
191. Western Australia – Department of State Development
192. Western Australia Farmers Federation (Inc)
193. Windsor Farm
194. Winemakers Federation of Australia
195. World Organisation to Investigate the Persecution of Falun Gong

LIST OF STAKEHOLDERS CONSULTED

1. AAPT
2. AAV Ltd
3. Abalone Association of Australasia Incorporated
4. Abalone Industry Association of SA Inc
5. ABB Grain
6. Academies Australasia Pty Ltd
7. ACL Bearing Company
8. ACOSS
9. ACT Nursing and Midwifery Board
10. Adsteam Marine Ltd
11. Advantage Williams
12. Advertising Federation of Australia
13. AFG Investment Management (Aust) Pty Ltd
14. AgForce
15. Agrow Viticulture Pty Ltd
16. AIMS Financial Group
17. Air International Group Ltd
18. Air International Thermal Systems
19. ALCOA
20. Alex Malik
21. Allens Linklaters (previously Allen Consulting Group Pty Ltd)
22. Alliance
23. Alternative Technology Association
24. Alternative Wind Energy Association
25. Altium Ltd
26. ALSPEC

27. Alumina Ltd
28. AMP Capital Investors
29. ANCA
30. Angus Society of Australia
31. Anti-Dumping Industry Task Force
32. ANZ (China) (Beijing and Shanghai)
33. ANZ Banking Group Ltd (Melbourne)
34. Apple and Pear Australia Ltd
35. Architects Accreditation Council of Australia (Canberra)
36. Arnotts Biscuits
37. Ashmark Institute
38. Ashurst
39. Asia Pacific Australia Strategic Consulting
40. Aspect Monitoring Services Pty Ltd
41. Association of Australian Leather Industries
42. Association of Consulting Engineers Australia
43. Association of Mining and Exploration Companies
44. Ausenco Services Pty Ltd
45. Ausfilm
46. Ausino Drilling Services
47. Austal Ships Pty Ltd
48. Austcham Hong Kong
49. Austcham Shanghai
50. Austral Fisheries Pty Ltd
51. Australasian Institute of Banking and Finance
52. Australasian Performing Rights Association / Australasian Mechanical Copyright Owners Society
53. Australia China Alliance
54. Australia China Business Council
55. Australia China Development Centre
56. Australia China Friendship Society NSW
57. Australia Post
58. Australian Abalone Growers' Association
59. Australian Airports Association
60. Australian Aluminium Council
61. Australian Association of Leather Industries
62. Australian Association of Ports and Marine Authorities
63. Australian Bankers Association Inc.
64. Australian Biofuels Association
65. Australian Business Council for Sustainable Energy
66. Australian Business Ltd
67. Australian Cane Farmers Association Ltd
68. Australian Centre for Intellectual Property in Agriculture
69. Australian Chamber of Commerce (Beijing)
70. Australian Chamber of Commerce & Industry
71. Australian Chicken Growers Council Ltd
72. Australian Chicken Meat Federation
73. Australian Citrus Growers Inc
74. Australian Coal Association
75. Australian College of Natural Medicine

76. Australian Communications Industry Forum
77. Australian Computer Society
78. Australian Conservation Foundation
79. Australian Construction Industry Forum
80. Australian Constructors Association
81. Australian Copyright Council
82. Australian Cotton Industry Council
83. Australian Council for Infrastructure Development
84. Australian Council for Private Education & Training
85. Australian Council of Trade Unions
86. Australian Council of Wool Exporters
87. Australian Dairy Industry Council
88. Australian Digital Alliance
89. Australian Egg Corporation Ltd
90. Australian Electrical & Electronic Manufacturers Association
91. Australian Energy Alliance
92. Australian Fair Trade & Investment Network (AFTINET)
93. Australian Federation Against Copyright Theft
94. Australian Federation of Intellectual Property Attorneys
95. Australian Federation of International Forwarders
96. Australian Federation of Travel Agents
97. Australian Film Commission
98. Australian Financial Review
99. Australian Flower Export Council
100. Australian Food and Grocery Council
101. Australian Franchisees Alliance
102. Australian Gemstone Industry Council
103. Australian Hide Skin and Leather Exporters' Association
104. Australian Horse Industry Council
105. Australian Industry Greenhouse Network
106. Australian Industry Group
107. Australian Information Industry Association
108. Australian Institute of Energy
109. Australian Institute of Export
110. Australian Institute of Petroleum
111. Australian Interactive Media Industry Association
112. Australian Libraries and Information Association
113. Australian Logistics Council
114. Australian Lot Feeders' Association
115. Australian Macadamia Society
116. Australian Malt Exporters Committee
117. Australian Manufacturers' Patents, Industrial Designs, Copyright and Trade Mark Association
118. Australian Manufacturing Workers' Union
119. Australian Medical Association
120. Australian Mushroom Growers' Association
121. Australian National University (Research School of Pacific and Asian Studies)
122. Australian Nursing Federation (ACT)
123. Australian Nursing and Midwifery Council
124. Australian Nut Industry Council

125. Australian Oilseeds Federation
126. Australian Paper Industry Council
127. Australian Peak Shippers Association
128. Australian Performing Rights Association (APRA)
129. Australian Pharmaceutical Manufacturers Association
130. Australian Plantation Products & Paper Industry Council
131. Australian Pork Ltd
132. Australian Prawn Farmers' Association
133. Australian Record Industry Association
134. Australian Retailers Association
135. Australian Seafood Industry Council
136. Australian Services Roundtable
137. Australian Shipowners Association
138. Australian Ship Builders Association Ltd
139. Australian Society of Forwarders
140. Australian Steel Institute
141. Australian Stock Exchange Ltd
142. Australian Subscription TV & Radio Association
143. Australian Sugar Industry Alliance
144. Australian Sugar Millers
145. Australian Tablegrape Growers' Association
146. Australian Telecommunications User Group
147. Australian Tourism Export Council
148. Australian Tourist Commission
149. Australian Tyre Manufacturers' Association
150. Australian Vinyls Corp Ltd
151. Australian Weaving Mills
152. Australian Wind Energy Association
153. Australian Wine and Brandy Corporation
154. Australian Wine Export Council
155. Australian Wool Innovation
156. Australian Wool International
157. Australian Wool Testing Authority
158. Australian Writers' Guild
159. AUSVEG
160. Autech Research Software
161. Autoliv
162. Avcare Ltd
163. AWB
164. Axiom College
165. B2B Lawyers
166. Babcock & Brown
167. Baker & McKenzie
168. Ballarat University
169. Barley Australia
170. Bayer
171. Beat Knoblauch & Associates
172. Bentleys MRI
173. BHP Billiton
174. Bioenergy Australia

175. Blake Dawson Waldron (Sydney, Melbourne & Shanghai)
176. Blueberry Growers' Association
177. BlueScope Steel
178. Blundstone Pty Ltd
179. Botanical Resources Pty Ltd
180. Bovis Lend Lease
181. Box Hill Institute
182. BP
183. Bradmill Pty Ltd
184. BRADSAL – National Coating Company Pty Ltd
185. Brambles
186. Briar Maritime Pty Ltd
187. Bridgestone Australia Ltd
188. Brisbane City Enterprises Pty Ltd
189. Brooks Grains Pty Ltd
190. Bruck Textiles
191. Building Products Innovation Council
192. Bundaberg Sugar
193. Burswood Ltd
194. Bush's Pet Food
195. Business Council of Australia
196. Business Development Services Australia
197. Business SA
198. Canegrowers Council of Australia
199. Cape Mentelle
200. Capel Farms
201. Capral Aluminium
202. Cardno Acil Pty Ltd
203. Carpet Institute of Australia
204. Carroll & O'Dea Lawyers
205. Carrick Institute
206. Cattle Council of Australia
207. Cement Industry Federation
208. Central Queensland University
209. Century 21
210. Challenge Dairy
211. Chambers & Company
212. Charles Sturt University
213. Charlton Brown Group
214. Chevron Texaco Australia
215. China Business Group
216. China Institute
217. Chisholm TAFE
218. Clayton Utz
219. Clipsal
220. Clough Ltd
221. CMI Operations Pty Ltd
222. Cochlear Ltd
223. Collex Pty Ltd
224. Cologne Pacific

225. Colonial First State
226. Comalco
227. Commonwealth Bank of Australia
228. Commerce Queensland
229. Compact Design
230. Confectionery Manufacturers of Australia
231. Connell Wagner
232. Copyright Agency Ltd
233. Coral Sea Studios
234. Corrs Chambers Westgarth
235. Cotton Australia
236. Council for International Trade and Commerce Sa Inc
237. Council of Small Business Organisations of Australia
238. Council of Textile and Fashion Industries
239. Cox Richardson
240. CPA Australia
241. Cripps Nubake Pty Ltd
242. Crown
243. Crown Hill Pty Ltd
244. CSA Global
245. CSR Sugar Ltd
246. Cullen Wines
247. Curtin University of Technology
248. Customs Brokers and Forwarders Council of Australia
249. Dairy Australia
250. Dairy Industry Association of Australia
251. Dana Australia Pty Ltd
252. Deacons (Sydney & Melbourne)
253. Deakin University
254. Deer Industry Association of Australia
255. Department of Education and Training, Western Australia
256. DENSO International Australia Pty Ltd
257. Denton Corker Marshall
258. DibbsBarker (formerly Dibbs Abbott Stillman)
259. Dow Chemical (Australia) Ltd
260. Dragon Mountain Gold
261. Drivetrain Systems International Pty Ltd
262. E-fill Pty Ltd
263. Ecologic Pty Ltd
264. Education Adelaide
265. Education Queensland International
266. Ekebol Engineering Pty Ltd
267. Elders Australia Ltd
268. Energy Council of Australia
269. Energy Development Association of Australia Inc
270. Energy Networks Association
271. Energy Resources of Australia Ltd
272. Energy Supply Association of Australia
273. Energy Users Association of Australia
274. Engineers Australia

- 275. English Australia
- 276. Environment Business Australia
- 277. Environmental Hazard Management
- 278. Ernst & Young
- 279. Evans and Tate
- 280. Excellent Plating Works
- 281. Exide Technologies
- 282. Export Solutions
- 283. Falun Dafa Association of NSW Inc
- 284. Federal Chamber of Automotive Industries
- 285. Federation of Automotive Products Manufacturers
- 286. Financial Services Council
- 287. Financial Services Institute of Australasia
- 288. Fisher Adams Kelly Patent Attorneys
- 289. Flight Centre Ltd
- 290. Flight Training Australia
- 291. Flinders University
- 292. Flour Millers Council of Australia
- 293. FMP Group (Australia) Pty Ltd
- 294. Food Standards Australia/New Zealand
- 295. Footwear Manufacturers' Association of Australia
- 296. Fonterra
- 297. Ford Motor Company Australia
- 298. Free TV Australia
- 299. Freshwater Productions
- 300. Frostyboy Australia
- 301. Fruit Growers Tasmania
- 302. Furnishing Industry Association of Australia
- 303. Futuris Automotive Interiors
- 304. Futuris Corporation Ltd
- 305. Gadac Plastics
- 306. Gavin Anderson Consulting
- 307. GENENG PTY LTD
- 308. GHD Engineers
- 309. Gilbert & Tobin
- 310. Global Foundation Secretariat
- 311. Global Vision
- 312. Gloria Jeans
- 313. GM Holden
- 314. Gold Coast TAFE
- 315. Golden Tiger Mining
- 316. Goodyear
- 317. Gordon Institute of TAFE
- 318. GORGON Joint Venture
- 319. Grains Council of Australia
- 320. Grain Growers' Association
- 321. Grain Industry Market Access Forum
- 322. Grain Pool Pty Ltd
- 323. Gray & Perkins Lawyers
- 324. GRD Minproc Ltd

325. Greenpeace
326. Griffith University
327. Group of Eight
328. Grow Choice, Organic Insect Control
329. Growcom
330. Gulliver Media
331. Gunnadah Industries
332. Hamburg Sud
333. Hammersley Iron
334. Harvest Moon
335. Harvey Norman
336. Heathgate Resources Pty Ltd
337. Heinz
338. Hella Australia Pty Ltd
339. Herbert Smith Freehills
340. Heritage Seed Pty Ltd
341. Holmesglen Institute
342. Holstein Australia
343. Hook Plastics
344. Hooker Cockram
345. Horticultural Market Access Committee
346. Horticultural Skills Australia
347. Horticulture Australia Council
348. Horticulture Australia Ltd
349. Housing Industry Association
350. HRL Pty Ltd
351. Hunt & Hunt
352. Hydro Tasmania
353. IBM
354. ICN Queensland
355. IDP Education Australia
356. Importers' Association of Australia
357. Incat
358. Independent Schools Council of Australia (ISCA)
359. Insearch Ltd
360. Institute of Actuaries of Australia
361. Institute of Arbitrators and Mediators Australia
362. Institute of Certified Accountants
363. Institute of Chartered Accountants in Australia
364. Institute of Internal Auditors
365. Institute of Patent & Trade Mark Attorneys
366. Institute of Surveyors
367. Insurance Australia Group Ltd
368. Insurance Council of Australia
369. International Air Traffic Control Academy
370. International Australian Business Ltd
371. International and Enterprise Development
372. International Banks and Securities Association of Australia
373. International Fibre Centre
374. International Legal Services Advisory Council Roundtable

375. Internet Industry Association
376. Invest Victoria
377. Invest Australia
378. Investment and Financial Services Association Limited
379. ITS Global Asia-Pacific
380. ITS Global Consulting
381. Jeanswest
382. Jerrard & Stuk Lawyers
383. JML Australia
384. John Cole and Ruth Hill
385. Jones King Lawyers
386. Jones Lang LaSalle
387. Kagan Bros Consolidated (Logistics)
388. Kaplan Business School
389. Karmer Pty Ltd
390. Kelloggs Australia Pty Ltd
391. Kemin
392. King & Wood Mallesons (previously Mallesons Stephen Jaques)
393. KPMG
394. Kreglinger Wines
395. LAB Architecture
396. La Trobe University
397. Launceston Chamber of Commerce
398. Laureate International
399. Law Council of Australia
400. Law Institute of Victoria
401. Law Society of NSW
402. Lawyers for Animals
403. Leighton Holdings
404. Lenah Game Meats
405. Lightning Protection International
406. Linfox
407. LiveCorp
408. Louis Gross & Associates Solicitors
409. Macdonnells Solicitors
410. Macquarie Group Ltd
411. Macquarie Real Estate Asia Limited
412. Macquarie Telecom
413. Macquarie Textiles
414. Macquarie University
415. Macrossan Lawyers
416. Marand Precision Engineering Pty Ltd
417. Margaret River Wine Industry Association
418. Mark IV Automotive
419. Martinez Quadrio Lawyers
420. Master Builders Association of Australia
421. Master Fish Merchants Association of Australia
422. Masterfoods ANZ
423. Mayne Group Ltd
424. McDowell & Associates

- 425. Meat and Livestock Australia
- 426. Media Entertainment & Arts Alliance
- 427. Medicines Australia
- 428. Metal Manufactures Ltd
- 429. MG Kailis Pty Ltd
- 430. Micromine
- 431. Midland Brick
- 432. Mine Site Technologies
- 433. Minerals Council of Australia
- 434. Mineral Securities Ltd
- 435. Mining Equipment and Services Council of Australia
- 436. Ministerial Council on Employment, Education, Training and Youth Affairs
- 437. Minter Ellison (Canberra)
- 438. Mitsubishi
- 439. Mitsui Australia
- 440. Moet Hennessy
- 441. Monash University
- 442. Monroe Australia Pty Ltd
- 443. Moonraker Australia
- 444. Morgan Stanley
- 445. Morris Goding Accessibility Consulting
- 446. Moulis Legal
- 447. MTM Pty Ltd
- 448. Mullins Wheels Pty Ltd
- 449. Murdoch University
- 450. Murray Valley Citrus Board
- 451. National Association of Forest Industries
- 452. National Australia Bank
- 453. National Electricity Market Company
- 454. National Farmers Federation
- 455. National Food Industry Strategy Ltd
- 456. National Generators Forum
- 457. National Institute of Accountants
- 458. National Pipeline Advisory Committee
- 459. National Tertiary Education Union
- 460. Neoteck
- 461. Nestle Purina PetCare
- 462. News Limited
- 463. Nissan Casting Pty Ltd
- 464. North Coast TAFE
- 465. North Melbourne Institute of TAFE (NMIT)
- 466. North Sydney TAFE
- 467. North West Shelf Australia LNG
- 468. Northern Territory Chamber of Commerce
- 469. Northern Territory Minerals Council
- 470. Novaris Technologies
- 471. Novatas/MIBT
- 472. NSK Australia Pty Ltd
- 473. NSW Adult Migrant English Service
- 474. NSW Business Council

- 475. NSW District Court
- 476. Nurses Board of South Australia
- 477. Nurses Board of Western Australia
- 478. Nursing Board of Tasmania
- 479. Nursing and Midwifery Board of the Northern Territory
- 480. Office of Horticulture Market Access
- 481. OneSteel
- 482. Open Learning Institute of TAFE
- 483. Optus
- 484. Orica Australia
- 485. Orica Explosives
- 486. Oxiana Limited
- 487. OZ Minerals Ltd
- 488. PacBrands
- 489. Paccar Australia Pty Ltd
- 490. Pan Pacific Gold
- 491. Parish Engineering
- 492. Paritech Ltd
- 493. Pastoralists and Graziers' Association of WA
- 494. PBR International Ltd
- 495. Peanut Company of Australia
- 496. Penrice Soda Products
- 497. Pet Food Industry Association of Australia
- 498. Petuna Seafoods
- 499. PGA International Golf Institute
- 500. Phillip Morris Ltd
- 501. Pilkington Automotive
- 502. Planning Institute of Australia
- 503. Plantation Timber Association of Australia
- 504. Plastics and Chemicals Industries Association
- 505. Post Harvest Committee
- 506. Potato Growers' Association of WA
- 507. Port Kembla Port Corporation
- 508. Ports Australia
- 509. Precision Engineering
- 510. Premium Fresh Tasmania
- 511. Premium Grain Handlers (WA)
- 512. Price Waterhouse Coopers
- 513. Priceless Pets
- 514. Printing Industries Association of Australia
- 515. Professions Australia
- 516. Public Interest Advocacy Centre
- 517. Q Concepts
- 518. Qantas Airways Ltd
- 519. QANTM College
- 520. Qantic International
- 521. QBE Insurance (International) Limited
- 522. Qenos
- 523. Queen Fine Foods Pty Ltd
- 524. Queensland Government VET Export Office

- 525. Queensland Law Society
- 526. Queensland Nurses' Union
- 527. Queensland Nursing Council
- 528. Queensland Sugar Limited
- 529. Queensland Tooling Network
- 530. Queensland University of Technology
- 531. Raytheon Australia Pty Ltd
- 532. RE Davison Pty Ltd
- 533. Red Meat Advisory Council
- 534. Red Rock Lobster Pty Ltd
- 535. Redox Diamonds
- 536. Regional Express
- 537. Renewable Energy Generators Association
- 538. Research Institute of Sustainable Energy
- 539. Restaurant & Catering Australia
- 540. Ricegrowers' Association of Australia
- 541. Richardson Business Consultants Pty Ltd
- 542. Rigid Cellular Plastic
- 543. Rio Tinto
- 544. Riverina Citrus
- 545. Riverside Apiaries
- 546. RJ Quirk Consulting
- 547. Roaring Forties
- 548. Robert Bosch (Australia) Pty Ltd
- 549. ROC Oil
- 550. Royal Australian Institute of Architects
- 551. Royal Melbourne Institute of Technology (RMIT)
- 552. SA Freight Council
- 553. Samex Australian Meat Company
- 554. SANEC Ltd
- 555. Santos
- 556. Science Industry Action Agenda
- 557. Scott Wilson Nairn Pty Ltd
- 558. Screen Producers Association of Australia
- 559. Seafood Access Forum
- 560. Seafood Services Australia
- 561. Seafood Training
- 562. Search Foundation
- 563. Securrency Pty Ltd
- 564. Securicor International Valuables Transport
- 565. Securities and Derivatives Industry Association
- 566. Seed Industry Association of Australia
- 567. SEMF
- 568. Services Australia
- 569. Settlers Rise Winery
- 570. Shearwater Consulting
- 571. Sheepmeat Council of Australia
- 572. Sheridan Australia
- 573. Shipping Australia Ltd
- 574. Siemens VDO Automotive Pty Ltd

- 575. Simplot
- 576. Sino Gold
- 577. Small Business Coalition
- 578. Smart Exporting Queensland
- 579. Smorgon Steel
- 580. South Australian Aquaculture Council Inc
- 581. South Australian Services Exporters Association
- 582. South East Qld Fish Pty Ltd
- 583. South West TAFE
- 584. Southbank Institute of TAFE
- 585. Southcorp Ltd
- 586. Southern Cross Resources Australia Pty Ltd
- 587. Southern Cross University
- 588. Southern Rock Lobster Ltd
- 589. Spatial Sciences Institute
- 590. SPC Ardmona
- 591. Sport Knowledge Australia
- 592. Springfield Land Corporation
- 593. Stafford Group
- 594. Sugar Australia
- 595. Summit Storage Products Pty Ltd
- 596. Suncorp Metway Ltd
- 597. Sunraysia Citrus Growers
- 598. Sunraysia Mallee Economic Development Board
- 599. Sunrice
- 600. Supercoat
- 601. Sustainable Tourism CRC
- 602. SVP Industries
- 603. Swan Hill Summer Fruit Growers
- 604. Swinburne University of Technology
- 605. Sydney Film School
- 606. Symex Holdings Ltd
- 607. TAFE Directors Australia
- 608. TAFE NSW
- 609. TAFE Queensland
- 610. TAFE WA
- 611. Tanda International Pty Ltd
- 612. Tashimi Fish
- 613. Tasmania Distillery Pty Ltd
- 614. Tasmanian Abalone Council
- 615. Tasmanian Chamber of Commerce and Industry
- 616. Tasmanian Farmers and Graziers' Association
- 617. Tasmanian Feedlot
- 618. Tasmanian Freight Logistics
- 619. Tassie Lobsters
- 620. Technical Textiles and Nonwovens Association
- 621. Telecommunication Society of Australia Ltd
- 622. Telstra Corporation Ltd
- 623. Tenix Defence
- 624. Tesol

- 625. Textile Clothing and Footwear Union
- 626. Thales
- 627. The Age
- 628. The Australian Outback Travel Company Pty Ltd
- 629. The Citrus Board of SA
- 630. The Gribbles Group Ltd
- 631. The Hammond Care Group
- 632. The Institute
- 633. TI Automotive
- 634. Timothy Court & Associates
- 635. Toll Autologistics
- 636. Toll Corporate
- 637. Toll Holdings
- 638. Toll Group
- 639. Tourism and Transport Forum
- 640. Tourism Queensland
- 641. Tourism Task Force
- 642. Tourism Training Australia
- 643. Toyota Motor Corporation Australia
- 644. Tract Consulting
- 645. Trade Institute
- 646. Trade Mark Investigation Services
- 647. Tradestart - CQ
- 648. Travelport
- 649. TressCox Lawyers
- 650. Ultra Clean Coal
- 651. Uniting Care NSW/ACT
- 652. Universities Australia (formerly AVCC)
- 653. University of Adelaide (Institute for International Business)
- 654. University of Canberra
- 655. University of Melbourne
- 656. University of New South Wales
- 657. University of South Australia
- 658. University of Southern Queensland
- 659. University of Sydney (China Studies Centre)
- 660. University of Tasmania
- 661. University of Technology Sydney
- 662. University of Western Australia
- 663. University of Western Sydney (UWS)
- 664. University of Wollongong
- 665. Urbis JHD
- 666. URS Ausino
- 667. Vanguard Investments Australia Ltd
- 668. Vegetables WA
- 669. Venture Asia Pacific Pty Ltd
- 670. Victoria TAFE Association
- 671. Victoria TAFE International
- 672. Victoria University
- 673. Victorian Employers' Chamber of Commerce and Industry (VECCI)
- 674. Victorian Hide and Skin Producers

- 675. Village Roadshow
- 676. Virgin Australia
- 677. Virgin Blue Airlines Ltd
- 678. Virtual Communities Ltd
- 679. Viscopy Ltd
- 680. Viscount Plastics Pty Ltd
- 681. Visy Industries
- 682. Vodafone
- 683. WA Chamber of Commerce & Industry
- 684. WA Farmers Federation
- 685. WA Fishing Council
- 686. WA Fruit Growers' Association
- 687. Wadley Consulting
- 688. Waste Technologies of Australia Pty Ltd
- 689. Watershed Wines
- 690. Websters Ltd
- 691. Wellard Rural Exports
- 692. Western Mining Corporation
- 693. Western Rocklobster Development Association
- 694. Westpac Banking Corporation
- 695. Willard Estate Logistics Service
- 696. William Buck Chartered Accountants
- 697. Windsor Farm Foods
- 698. Wine Industry Association WA
- 699. Winegrape Growers' Association of Australia
- 700. Winemakers Federation of Australia
- 701. Withcott Seedlings
- 702. Wolff Architecture
- 703. Woodhead International
- 704. Woodsbagot
- 705. Woodside Energy Ltd
- 706. Woodside Petroleum Ltd
- 707. Wool Exporters and Processors
- 708. Woolworths
- 709. Xanadu Wines
- 710. Zinifex Hobart Smelter