DIGITAL GAMES
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TALENTED AND EXPERIENCED VIDEO GAME PROFESSIONALS
The Australian game development industry has a long history of performing at a high level within a competitive global industry. Australian-made games have topped sales charts, received major industry awards and enjoyed wide coverage in the international media.

The video game sector is bolstered by strong capability in other complementary industries, including animation and visual effects, film and television production, design and engineering, advertising and marketing and new media. Availability of top-quality education and training both in game-focused courses and in complementary fields ensures that the pool of talent in Australia grows every year, feeding the needs of an expanding industry.

This report provides an overview of the Australian video game industry’s key capabilities. It includes a selection of local success stories and details some of the agencies and associations helping to foster local development.

Talk to your local Austrade representative for tailored information and advice to help your organisation connect and partner with the best that the Australian video game development industry has to offer.
With the emergence of new gaming platforms such as mobile and virtual reality (VR), the Australian games industry has entered a period of renewed growth and energy. Approximately 60 per cent of Australia’s share in the over US$80 billion games marketplace is earned from mobile and web games, though traditional platforms such as consoles and PCs still make up a substantial part of the local industry’s output.

This recent growth has been accompanied by a major shift in how local businesses operate. In the 1990s, the local industry was dominated by ‘work for hire’ contract projects for international clients, often on licensed intellectual properties. Today, Australia has shifted its focus toward original properties. Of the 225 companies actively creating games in Australia, over 75 per cent identify themselves as independent studios working primarily on their own properties.

Growth in the industry has paralleled growth in the use of video games across a wide range of applications. Nearly 70 per cent of Australians play video games for entertainment, but games are also used extensively in education, medicine, disability services, mental health care and more.

Games in Australia are backed by numerous government agencies and non-government organisations, such as Film Victoria, Screen Queensland and Creative Victoria. The industry has an excellent track record of making efficient use of grants, providing substantial returns on government investment and attracting significant private sector investment.

A range of economic indicators suggest that the international games industry will continue to grow at a rapid pace, with industry self-reporting showing that 78 per cent of local studios expect to grow in the next 12 months.

With the global games market expected to top US$100 million in annual sales by 2020, Australia is well positioned to be a key player.
Video games are unique in that their creation incorporates both art and technology, a combination of extremely diverse fields of expertise. Commercial success demands top-level management, marketing, PR, distribution and information infrastructure.

Australia is ideally placed at this intersection of skill sets. Games have been made in Australia for almost 40 years, boosted by a thriving arts scene, world-class tertiary education institutions, highly competitive business community and a commitment to science and technology.

A COLLABORATIVE COMMUNITY

Australia is home to not just a games industry but a true games community. Developing games in Australia is an intergenerational pursuit that encourages and rewards collaboration and mentorship. Veterans and newcomers share skills and experience resulting in a robust skillbase across the industry. Many organisations and events also encourage this cooperative atmosphere.

The Arcade, a shared workspace for game developers in Melbourne, is a thriving example of the Australian games industry’s collaborative culture. It was founded in 2013 through a partnership between the Game Developers Association of Australia (GDAA) and the Victorian government and is now the permanent home of over 20 studios, publishers and other organisations, as well as providing temporary facilities and hot-desks for a dozen more. The Arcade has grown so rapidly that it recently moved from its original building to a newly renovated site with triple the space.

Local developers work closely with a host of not-for-profit industry bodies and professional associations, all of which foster cooperation and skill sharing. Some examples of organisations working to promote and advocate for Australian game developers are:

- the GDAA, which, in addition to co-founding The Arcade, advocates on behalf of the industry in numerous ways
- the Interactive Games and Entertainment Association (IGEA) is deeply involved in supporting the business side of games development
- the International Game Developers Association (IGDA) is very active in Australia and has founded chapters in several cities.

The collaborative nature of the local games industry is also reflected in the numerous events and festivals every year where the Australian community comes together. The longest-running is Freeplay, a combined conference and festival celebrating independent game development. Game Connect Asia Pacific (GCAP) has the additional aim of connecting Australian businesses with their contemporaries in the Asia-Pacific region. With state government support, GCAP and several other events around the same time grew into a week-long games festival, now known as Melbourne International Games Week (MIGW).

A VIBRANT WORKFORCE

Any industry can only ever be as good as its workforce and Australia’s is among the best in the world in the demanding and competitive business of creating video games. Australian workers are among the most educated, multicultural and multilingual in the world, with over 40 per cent of Australian adults holding a tertiary qualification.

Australia is also home to several specialised video game tertiary education and training institutions. Private colleges such as the Academy of Interactive Entertainment (AIE), SAE Institute’s Qantm programme, JMC Academy and CG Spectrum teach programming, digital art, 3D modelling, animation, audio engineering and other skills vital to creating games. Many non-specialist universities and TAFE colleges also now offer video game courses ranging from diplomas and certificates through to bachelor degrees and postgraduate studies.
Video game development is an economy of ideas and a diverse workforce is inherently capable of producing a broader spectrum of creative and technical inspiration. The Australian population is one of the most diverse and multicultural in the world and the local games industry actively works to increase its diversity via a number of initiatives. For example, lower rates of participation of women in games is being challenged through Film Victoria’s Women in Games Fellowship and Girl Geek Academy’s Girls Make Games workshops.

The Australian games industry is well connected to the international industry, which enables a free flow of talent and expertise. Many Australian developers have spent years working in other countries’ games industries, especially the US and the UK. With the rapid growth of independent development many have returned home, bringing world-class skills and knowledge with them. One notable example is Ken Wong, the acclaimed designer of the hit game Monument Valley, who has returned to Australia to found his new studio, Mountains.
A CREATIVE ENVIRONMENT

Game development in Australia exists within a broader cultural context. This country is home to numerous talented filmmakers, artists, musicians, designers, animators and writers, meaning that game studios have access to a wealth of talent. This proximity to a vibrant arts community helps to make Australian games more appealing, original and artistically and culturally significant.

Inspiration and knowledge can be shared both ways when game studios and artists combine their talents. Melbourne-made digital board game Armello first attracted attention with a Film Victoria-funded animated short film produced by animation studio 12 Field. Conversely, game technology can also enrich the arts, such as the experimental VR film The Turning Forest. This unique project, created by Australian artist Oscar Raby, uses video game technology to engage its audience in a way that a two-dimensional screen cannot.

Professional bodies and cultural institutions not traditionally associated with games are recognising the significance and cultural impact of this new medium. The Australian Writers Guild (AWG) is a prominent example. While it was formed to oversee the wellbeing of writers for performance media such as television and stage, AWG now welcomes video game writers into its ranks. It is just one of many organisations forging ties with the development community, recognising their common creative goals.

Market-leading AAA video games are becoming more like films every year, incorporating large studio spaces, casts of actors having their voices and movements captured and digitised and highly complex sound and music editing. Several Australian cities are home to major film and television production facilities, including Fox Studios Australia in Sydney, Village Roadshow Studios on the Gold Coast and Melbourne’s Docklands Studios. These production centres and the supporting businesses that have formed around them provide capacity for Australian game companies to expand the scale of their projects in coming years.

In addition to film production facilities, Australia’s thriving performing arts community is a rich source of talent for video game production. Modern games may require recorded voiceovers, three-dimensional motion capture, performance capture for facial animation and more. Perhaps the most prominent example is Australian actress Claudia Black, who has become one of the world’s most recognised video game voice artists.

A BUSINESS POWERHOUSE

Australia’s political stability, transparent regulatory system and sound governance frameworks underpin its economic resilience, providing foreign companies with a safe, secure operating environment and making Australia a great place to do business.

With its consistently growing economy, healthy private sector, high levels of business and finance expertise and booming productivity, Australia is one of the best countries in the world for investment. Video games-related initiatives can attract high levels of investment, such as the funds raised by VR game company Zero Latency through its pre-IPO funding round.

The Australian games industry enjoys broad support from the federal and state governments, including direct funding through a diverse suite of cash grants and in-kind payment schemes, business support programmes to aid with overseas travel and attracting investment and a range of government-sponsored conferences, festivals and conventions to aid with recognition, skill sharing and business networking.

In addition to tertiary education for game developers, Australian educational institutions also offer world-class courses in business management, finance,
marketing and public relations, business law and other skill sets that aid the business side of game development. This wealth of expertise ensures that Australians not only make great games, but can also create sustainable and profitable businesses.

The worldwide games industry is the largest entertainment business in the world, generating more income than either film or music. Even a single hit video game is capable of generating massive international sales. Australian-produced global hits including **Fruit Ninja**, **Ski Safari**, **Jetpack Joyride** and **Crossy Road** have collectively earned revenue in the hundreds of millions of dollars.9–12

Video games themselves offer many options for businesses, with multiple business models proving to be potentially lucrative. ‘Buy once’ or ‘premium’ games offer all of their content for a single fixed price. Popular Australian-made premium titles include **Framed**, **Hacknet**, **Train Conductor** and **Hollow Knight**. Other games offer a complete experience either at low or no cost, with ongoing revenue from ‘in-app purchases’ — small in-game purchases including cosmetic upgrades, in-game currency and additional game content. Successful Australian-made examples of this business model include **Ski Safari**, **Gems of War**, **Real Racing 3** and many others.

During the peak of Australia’s ‘big studio’ game development era in the 1990s and early 2000s, the most profitable work frequently was not original properties, but licensed properties made for third parties. While this style of doing business is now less common, it is the core activity for several of Australia’s oldest game studios. Tantalus Media was founded in 1994 and has produced licensed games for Nintendo, Dreamworks, Disney and Nickelodeon. Other successful studios operating in this space include Big Ant Studios and Wicked Witch Software.
Australia is technology-rich, with local developers creating not only games, but also advances in the technology that underlies them. Australian companies are on the leading edge of new developments in software engineering, electronic hardware and emerging applications such as virtual reality (VR) and augmented reality (AR).

The hardware and software developed for entertainment games has been successfully adapted to create games and other experiences intended for serious purposes, such as public safety, charitable fundraising and raising awareness of social issues. ‘Serious games’ has grown into a respected field, spawning multiple annual conferences and other events. A prominent example of the medium is the Virtual Dementia Experience, developed by Opaque Media Group for Alzheimer’s Australia Vic, which uses game technology to simulate the challenges of living with Alzheimer’s disease.

Games technology is now being adapted for industrial and scientific applications, with many Australian companies at the forefront of this development. The University of Melbourne incorporates VR surgery into its medical curriculum, allowing medical students to perform virtual surgery on highly realistic digital patients. Games technology can also be used to visualise architectural plans before the foundations have even been poured, allowing buyers to ‘walk through’ their future homes.

While many companies focus on making games directly, other studios also find great success developing ‘middleware’ – software licensed by other developers to create their games. These can be large-scale products like entire 3D engines, such as the Australian-made BigWorld Engine, used by the international hit game World of Tanks. Smaller products can also be licensed to other studios, such as Opaque Media’s interface for importing motion-control data into the Unreal Engine, or Sydney-based Epiphany Games’ proprietary enhancements for the Gamebryo Engine.

Even within the field of games for entertainment, Australian companies are pioneering new technologies and approaches. Melbourne’s Zero Latency has used VR hardware and motion tracking to create a dedicated-site entertainment product: groups come to the Zero Latency game space where they engage in a single play session. Similarly, ‘escape rooms’ are a growing entertainment phenomenon, challenging players to escape elaborate rooms by solving puzzles together. Many of these incorporate video game elements, such as Pop Up Playground’s Room Service experience.
League of Geeks: an Australian studio bringing together global talent

Case study

The studio behind the hit digital board game Armello is one that could not have existed a decade ago. While their core team is based in Melbourne, League of Geeks was founded as a distributed studio that uses cutting-edge collaboration tools to work with the best people anywhere in the world.

The contributors are paid through a proportional profit-share arrangement; the better the game performs, the greater the reward for everyone involved. This approach also allows the company to maintain a variable workforce according to available funding and project needs.

Armello first attracted public interest with an eye-catching animated short film that was produced with help from Screen Australia. This was the first step in an extended transmedia promotional campaign that incorporated web content, media engagement, conference appearances, a successful crowdfunding campaign on Kickstarter.com and even the creation of a plush toy.

Initially created for PC, League of Geeks later partnered with Sony to bring Armello to PlayStation 4. This experience was invaluable when the team helped Push Me Pull You, another Australian-made game, to be published on that platform.

Since then they have continued to build on Armello’s success, releasing an Xbox One version and ongoing expansion packs of additional content for all platforms.

leagueofgeeks.com
Hipster Whale and Mighty Games: the dynamic duo of accessible mobile games

Case study
One of the Australian games industry’s biggest success stories happened over a remarkably short period. After meeting at a conference, two friends founded a studio together and created an instant mobile game classic. Under their new name of Hipster Whale, the pair took just 12 weeks to create Crossy Road, an international hit that has been downloaded over 150 million times.

Crossy Road established the design philosophy that would shape all of their future projects. The three pillars of Hipster Whale design are to attract the player with fun and colourful visuals, engage them with easy-to-grasp gameplay and then monetise the experience through a non-intrusive free-to-play model.

Based on these principles, Hipster Whale joined with other veteran game creators to found Mighty Games Group. The two companies are now a development and publishing powerhouse. While Mighty Games releases original games like Shooty Skies, Charming Keep and Charming Runes, Hipster Whale has partnered with global brands Disney and Bandai Namco to create Disney Crossy Road and Pac-Man 256. The instant accessibility of Crossy Road even allowed it to be adapted into an arcade machine.

Hipster Whale are now seeking other independent game producers who need a publishing partner, while they and Mighty Games continue to work on their own original and licensed projects.

hipsterwhale.com
mightygamesgroup.com
Zero Latency: out of the computer and into the world

Case study

Virtual reality (VR) is an exciting new technology and Melbourne’s Zero Latency has emerged as a world leader in VR innovation.

A typical VR experience ties players to one spot, but Zero Latency has partnered with global technology leaders to develop a revolutionary new VR platform that sets players free. This proprietary solution allows wireless, free-roaming multiplayers for a truly social experience.

Within a specially converted warehouse space, each player wears a lightweight backpack incorporating a powerful computer and a VR headset. High-tech cameras track the players through the game area, allowing them to interact both with each other and a shared digital world.

Groups of friends work together to fend off hordes of bloodthirsty zombies, explore futuristic outer space environments, or solve puzzles in a surreal dreamscape. Even more diverse experiences are in the planning stages.

After achieving great success at home in Melbourne, Zero Latency is now expanding globally. Sites have been launched in the US, Japan and Spain and this home-grown company is accelerating their expansion into an international network of company-owned as well as licensed sites.

A remarkably successful pre-investment campaign raised $7 million ahead of a upcoming IPO, so Zero Latency is on its way to becoming a worldwide entertainment phenomenon.

zerolatencyvr.com

Image courtesy of Zero Latency
Nnooo: the little studio that grew into a publisher

Case study

When an independent studio is successful enough, it can sometimes grow into a game publisher, repurposing its expertise to help other small developers reach a bigger audience. Few companies exemplify this transformation better than Nnooo.

Located in Sydney, the small team began work on the fast-paced Pop for Wii, Apple devices and Nintendo DSi. Nnooo continued to work on the handheld DSi platform, designing a series of popular lifestyle apps for note-taking and calendar management.

Next came their biggest success to date, the frenetic, neon-bright action game escapeVektor, which began life on the Wii but later came to both Nintendo and Sony portable gaming devices. All three versions were critical triumphs, picking up several industry awards.

Having spent years amassing extensive knowledge and experience in delivering polished games to consoles, Nnooo began to lend this considerable expertise to smaller studios. While they still make their own games – most recently Blast ‘Em Bunnies – they published Cubemen 2 on Wii U resulting in the first Nintendo indie game to offer both a cross-platform multiplayer experience and cross-platform user-generated content.

Nnooo’s most recent published game was The Legend of Kusakari on Nintendo 3DS. The team are currently working on bringing Rogue Singularity, Anodyne and Majestic Nights to a range of consoles.

Recognising Nnooo’s proficiency on PlayStation 4, Sony selected them as a partner for PlayStation First, a unique program giving game development students a head start through experience developing games for PlayStation platforms.

nnooo.com
Halfbrick Studios: creators of Australia’s first billion-download app

Case study

The creators of the most downloaded Australian-made game in history had humble beginnings. Halfbrick began in 2001 with five friends in a Brisbane basement. As was common for Australian developers at the time, the fledgling studio established itself creating licensed properties for large international publishers.

In 2009 they started making their own games for the emerging mobile phone market, leading to the 2010 release of the game that would launch them internationally – Fruit Ninja.

This revolutionary title was perfect for touch-screen gaming and its immediate accessibility, bite-sized fun factor and low price turned it into an instant hit. Three months after its release it reached a million downloads, but more were to come. Around its fifth birthday, Fruit Ninja reached a billion downloads across mobile, home console and other platforms. At its peak, it was installed on one third of all iPhones in the USA.

Next came Jetpack Joyride, another runaway hit downloaded tens of millions of times across platforms including mobiles, home consoles and handheld gaming devices.

Over a dozen games have followed on many platforms and Halfbrick has become an international studio. While still headquartered in Brisbane, it employs more than 100 staff in six offices across four countries. They have forged strong international partnerships, bringing Fruit Ninja to the Xbox Kinect with the help of Microsoft and achieved huge sales in China through deals with local publishers.

halfbrick.com
Opaque Media Group: using game technology to change the world

Case study
Melbourne’s Opaque Media is a digital solutions company that illuminates real-world issues using virtual reality (VR), augmented reality (AR), motion detection, surround sound and other video game elements. Their portfolio of clients and collaborators includes medical research institutes, spaceflight agencies, local government, universities and charities.

One of their most audacious projects was created with Alzheimer’s Australia. The Virtual Dementia Experience uses wall-sized screens, motion capture and immersive audio to simulate the challenges faced by people living with dementia. The Virtual Dementia Experience has won multiple local and international awards for its impact on the aged care industry.

Recently the company has attracted major press interest with Earthlight, an immersive VR game that puts players into the role of trainee astronauts. The painstakingly-researched experience takes the player through authentic astronaut training, culminating in a trip into orbit.

Earthlight is the result of a close partnership with NASA; the team had the chance to visit a training facility and use the equipment. Actual space program trainees had the chance to play Earthlight in a simulated microgravity environment.

Earthlight is being taken to market by Opaque Space, an Opaque Media Group company currently going through HTC’s highly competitive Vive X global VR accelerator. Opaque Space sister company, Hollywood VR solution provider Opaque Studios, is another successful Vive X entrant. Opaque Media Group is unique in having two spin-offs go through the Vive X program.

In addition to these games and experiences, Opaque Media Group also make licensed software that others can use for their own projects, including the Kinect 4 Unreal software for accessible, high performance, interactive motion capture.

www.opaque.media
The following are some of the organisations involved in the Australian games industry. Contact your local Austrade representative about connecting and partnering with this industry.

**Australian Writers Guild (AWG)** has been the peak body for writers for stage, screen and radio in Australia for more than 50 years. Its vision is to see performance writing and writers thrive as a dynamic and integral part of Australian storytelling, representing the Australian cultural voice in all its diversity. AWG has founded a dedicated advisory committee to foster and promote writers who work in digital and interactive media, including games. awg.com.au

**Creative Victoria** is the state government body dedicated to championing, growing and supporting Victoria’s creative industries by investing in the ideas, talent, organisations, events and projects that make Victoria a creative state. It encompasses disciplines as diverse as games development, graphic design, fashion and film-making, from commercially-driven products to community-based projects. creative.vic.gov.au

**Film Victoria** is the State Government agency that provides strategic leadership and assistance to the film, television and digital media sectors of Victoria. It aims to be a responsive advocate for the local screen industry through funding content, arranging industry placements, administering financial assistance and more. It has several ongoing grants and assistance programmes to support the games industry and supported 19 projects that went into production in 2015/16. film.vic.gov.au

**Games Developers Association of Australia (GDAA)** is a non-profit, non-government membership organisation that aims to raise the profile of the Australian game development industry domestically and internationally. It encourages participation and engagement from members to ensure it is aware of industry needs, is able to meaningfully support the sector and can continue to foster the Australian game development community. gdaa.com.au

**Interactive Games and Entertainment Association (IGEA)** is an independent industry association representing the business and public policy interests of Australian and New Zealand companies in the computer and video game industry. Its members publish, market, develop and distribute games and related hardware and it is administered by a board of directors comprising senior executives from interactive games and entertainment companies. igea.net

**International Game Developers Association (IGDA)** is a non-profit professional association built from a global network of collaborative projects and communities from all fields of game development, from programmers and producers to writers, artists, QA and localisation. It brings together developers at key industry conferences and in special interest groups to improve their lives and their craft. IGDA has local chapters in several Australian cities. igda.org

**Screen Queensland**’s purpose is to grow the screen industry and to be a significant contributor to the economic and cultural wellbeing of Queensland. Aiming to foster creativity, courage and discipline within the diverse screen-based industries, it promotes a supportive culture, progressive ideas, innovation, collaboration within the industry and strong professional leadership. screenqueensland.com.au
Global Game Jam (GGJ) – January
GGJ is listed by Guinness as the world’s largest game jam. In just 48 hours, tens of thousands of creative individuals in almost 100 countries design, make and deliver thousands of playable games based on a common theme. Australia hosts some of the largest sites and Australians are deeply involved in making this huge event happen every year. Australian jam sites have even spawned several projects that became commercially released games. globalgamejam.org

RTX Sydney – February
RTX is the fan convention for Rooster Teeth, which began its life making short, funny YouTube videos, including the popular video game comedy Red Vs Blue. They leveraged the popularity of their videos into the creation of an international media empire and are now one of the leaders in digital entertainment. RTX was founded in the United States and now has a sibling event held every year in Sydney. This consumer expo covers many fields of interest, with independent video games a major component. rtxsydney.com

EB Games Expo – October
Australia’s largest video game event is both an industry conference where publishers can preview their upcoming games and a huge fan convention. It is an international event, attracting some of the biggest games companies from around the world as exhibitors. Organised by retail chain EB Games, the expo moved to Sydney for several years before returning to where it was founded on the Gold Coast. ebexpo.com.au

PAX Australia – October
Penny Arcade Expo (PAX) is a multi-city event across the United States, with its Seattle and Boston shows claiming the title of the two biggest gaming events in North America. PAX Australia was founded in Melbourne in 2013, the first time PAX had expanded outside the United States and has been a similarly huge success, bringing together tens of thousands of game fans and hundreds of exhibitors every year. aus.paxsite.com

Unite Melbourne – October
Unite Melbourne allows developers to connect with engineers behind the extremely popular Unity Engine, providing an opportunity to learn how to get the most out of this engine and network with other professionals. This Australian branch of a global series of conferences across Asia, Europe and the United States brings developers from around the globe to learn, network and party in a creative and energetic environment. unite.unity.com

Melbourne International Games Week (MIGW) – October/November
Melbourne is home to almost half of Australia’s game studios, making it the ideal setting for an entire week of events to promote the local industry and foster professional connections. Curated by Creative Victoria, MIGW incorporates a wide range of events for game developers, game publishers, educational institutions, other industries with an interest in games and the general game-playing public. gamesweek.melbourne

Game Connect Asia-Pacific (GCAP) – November
GCAP is Australia’s premier game development conference, focusing specifically on skills development, addressing industry trends and forging connections between international businesses. GCAP delivers thought-provoking, creative and innovative sessions, covering programming, art, design, management and more, from leaders in the local and international game development industry. gcap.com.au

Freeplay – multiple events
Based in Melbourne, Freeplay is Australia’s longest-running and largest independent games festival, bringing Australia’s independent game community together through its conference, public events program, playable games arcade and awards. The festival unites players, makers, critics, artists, academics and students for a critical celebration of the artistry of games and digital culture. freeplay.net.au
ABOUT AUSTRADE

The Australian Trade and Investment Commission – Austrade – contributes to Australia’s economic prosperity by helping Australian businesses, education institutions, tourism operators, governments and citizens as they:

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REFERENCES


8. Ibid.


