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OPTIMISING AUSTRADE'S INTERNATIONAL NETWORK

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INTRODUCTION

The digital, economic, demographic and social landscape Austrade operates in is changing. The world's population continues to increase bringing with it demand for renewable energy sources, increased global food demand and supply challenges. Exponential growth in technology is shaping the way industries operate and the products and services they deliver. Shifts include greater reliance on digital services, automation, and the rise of knowledge driven economies. With emerging economies transitioning from centres of labour and production to consumption-oriented economies, trade and investment flows increasingly reflect the shift from production centres to exporters of capital, talent and innovation. Investors, for so long driven by low labour costs and market opportunities, are increasingly seeking intellectual property (IP) protection, open data policies and stable trading environments.

In addition, the shift in the geopolitical climate towards nationalism is driving protectionist trade policies and more aggressive tactics by global trade and investment promotion agencies. Governments, at the national and sub-national level, are investing heavily to gain marketing advantages for their exporters and to win foreign direct investment (FDI).

In this environment there are growing opportunities as well as challenges for Australia and our business community. Austrade fulfils an important role as the Australian Government agency working across governments and with businesses to identify and assess appropriate markets, overcome market access or operational challenges, and develop, sustain, diversify and grow the Australian economy. The ability to work at the sectoral and individual business level in Australia, and with clients¹ around the world, also strengthens the commercial intelligence Austrade can bring to all levels of Australian governments.

Austrade's international network is a core strength. It enables the facilitation of commercial outcomes for Australian exporters and attraction of productive FDI, as well as the development of the authoritative commercial insights Austrade delivers to business and government. Austrade maintains the widest possible network within a constrained budget, operating in 84 overseas locations across 49 markets as at 30 June 2018. **With the rise of protectionism it is critical now more than ever for Austrade to use its international presence and commercial influence to serve Australia's national and economic interest by advocating for expansion and diversification of market access, and opportunities for the Australian businesses.** This presents opportunities for Austrade to transform its practices to ensure its operating model is flexible and responsive to client needs, current and future opportunities and rapid changes in a competitive and digital-driven global environment, while also delivering efficiencies.

Review of Austrade international network

From July – October 2017 Austrade undertook an Organisational Capability Assessment (OCA) to evaluate Austrade's ability to meet future objectives and challenges, including how the agency's processes, practices, systems and people could support the achievement of the desired outcomes.

The **OCA highlighted that Austrade's overseas network** is the most significant asset and area of expenditure, accounting for 49 per cent of Austrade's operating budget, and **must be optimised to ensure locations deliver value.** While the OCA did not propose immediate changes to the overseas network, it recommended a review be undertaken.

From June to September 2018, **Austrade undertook analysis and review of the International Network to identify opportunities to position Austrade for the future and support the broader transformation work currently being completed across the agency.** The review considered Austrade's footprint, resource distribution and operating practices and how the network could be optimised. This was supplemented by discussions with Austrade's senior leadership, and targeted consultation with key stakeholders.

¹ In this document reference to clients includes exporters, investors and customers.

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The analysis and review focused on the current operating model to address the following key elements:

- where to play: analysis of Austrade's limited resources² and where they could be best deployed to optimise return on investment, deliver value to clients, and fulfil government priorities
- what to play: a sharpening of focus and services with a long-term strategic view
- how to play: a review of Austrade's processes, capabilities and partnerships to strengthen its operations.

The findings, recommendations and actions summarised in this document are based around these three elements.

This work builds on the 2006-2007 Journey to Export and International Business research and the 2010-2011 Maximising Our Value review:

- Journey to Export focused on realigning services to tailor support for the Australian business community according to the stage of export maturity.
- Maximising Our Value focused on allocating resources where Austrade as a government agency could add greatest value, as well as sharpening Austrade's focus across established, growth and emerging markets.

Austrade is embarking on a significant change agenda as it transforms to an agile, fast moving organisation to confront the challenges of the next ten years and shifts its approach to service delivery to ensure Australia can compete in a complex global environment. The analysis and review provides Austrade with **independent** insight to build a solid foundation to capitalise on the opportunities and challenges presented by global trends. **Austrade will build on the outcomes of this work to grow and transform our network operations in response to the longer-term transformational changes to our service delivery. Implementation of the changes proposed will be critical to optimise our current operating model and positioning Austrade to increase our impact and reach.** The outcomes of this work are not about identifying savings or reducing Austrade operations.

Methodology

The review included significant exploratory analysis of global economic trends, return on investment, client flows, and current and future trade and investment patterns. It considered a number of inputs and data, including the Government's Foreign Policy White Paper 2017, India Economic Strategy to 2035, Australian International Business Survey (AIBS) results 2017/2018, Deloitte Access Economics (DAE) analysis of Austrade's network to determine Austrade's future market opportunities for trade (including education), as well as Australian Bureau of Statistics (ABS), World Bank, Euromonitor, IMF, ASIC and other internal data sources.

Desktop research was supplemented by internal engagement across Austrade and **extensive stakeholder engagement with federal, state and territory governments; as well as industry, clients and counterpart trade promotion agencies.**

Noting data collection and analysis methods have limitations, the analysis and review also considered evidence from consultations together with a wide range of data and commentary from different sources.

Global Economic Context

Australia's total trade in goods and services rose 11 per cent year-on-year from 2016 to 2017, with the value of goods and services exports rising 14.8 per cent. **China remained Australia's largest export destination for the 8th consecutive year, followed by Japan, the Republic of Korea, and the United States (US). Japan also remained Australia's second largest direct country investor after the US,** with total FDI stock levels of A\$93 billion in 2017, rising by two per cent and accounting for 11 per cent of total FDI stock in Australia.

² In this document reference to resources includes people, property and other financial expenses.

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Australia's International Business Survey (AIBS) 2018 found respondents continue to target Australia's biggest export destinations: **the US, China and the United Kingdom (UK). ASEAN (particularly Indonesia and Vietnam), India and Latin America were identified by Australian businesses as markets of strong interest and desire for enhanced engagement with the region.** The survey further highlighted while China and Hong Kong will remain profitable markets for Australian exporters³, as the region (specifically China) matures, the economy is expected to slow to 5.5 per cent per annum by 2027. Japan and Korea were ranked 7th and 9th top markets respectively for international revenue, indicating a strong and continued interest from Australian businesses. New Zealand continued to be the dominant market in the Pacific region ranking as Australia's 7th top export market and 16th largest source of inward FDI⁴.

Deloitte Access Economics (DAE) analysis of total trade flows and Austrade priority exports⁵ over the forward forecast period of the next 10 years highlighted **China will remain the largest Australian export region, with ASEAN, South Asia and Latin America expected to have the fastest growth rates** compared with the Pacific, Europe, Middle East and Africa, North East Asia and North America.

Inward FDI grew by seven per cent in 2017 compared to previous years and more than 50 per cent above 2011. Australia's economic resilience and increased global trade and investment ties are strengthening our position as an attractive investment destination within the region. Developed markets with high income, notably **North America, Europe and Japan, provide the largest source of inward FDI** to Australia. Rising incomes in Greater China resulting in **China also becoming one of the most significant sources of FDI, closely followed by ASEAN.**

The ASEAN region continues to provide strong growth opportunities for Australia. Australian exports to ASEAN have experienced strong growth of 4.6 per cent, double the growth of exports to the USA in 2017⁶. **Looking ahead it is expected that Australia's value of goods and services exports to the region will double in the next 10 years⁷.**

Across ASEAN, Indonesia is the largest market in ASEAN, and in 2017 became largest ASEAN market for Australian exports. This will only be further enhanced by the Indonesia Australia Comprehensive Economic Partnership Agreement (IA-CEPA). **Indonesia is expected to become the world's fifth largest economy by 2030 with the largest forecast growth in imports (8.3 per cent), seeing it overtake Thailand and Malaysia** to become the region's second largest importer in the next 10 years. Indonesia has been identified by Austrade clients as one of the key markets businesses are looking to explore, however it remains a complex market where business to government links are critical and requires support from Austrade.

While Singapore remains the second largest market for priority exports in ASEAN-5, **Singapore has a moderate growth outlook over the next ten years compared to the rest of the ASEAN, growing annually at an average rate of 1.3 per cent.** As a developed country, demand for Australian priority exports is growing at a slower pace compared with its neighbours. In addition, clients and stakeholders view the Singaporean market as mature, open and well understood and there are low barriers to doing business, resulting in lower requirements for trade development support from Austrade. **Singapore is, however, recognised as a key investment decision hub across ASEAN.** This is characterised by the level of investment activity in-market and the rapid growth of inward FDI to Australia by 12 per cent in the last year. Singapore accounts for almost two thirds of FDI from across the ASEAN region, making it Australia's seventh largest source of FDI stock.

³ Australia's International Business Survey (AIBS) 2017 showed that China was the top market for revenue generation, while Hong Kong was ranked sixth alongside Indonesia, India and Japan.

⁴ Department of Foreign Affairs and Trade, Composition of Trade.

⁵ This refers to Austrade's eight Trade and Investment sectors, refined through the consideration of the following factors in relation to sub-sectors: i) mapping to Standard International Trade Classification (SITC) categories aligned with the ABS Balance of Payments data; ii) consultation with Austrade sector team leaders on most relevant sub-sectors given 2018-19 business planning process; iii) alignment of sub-sector with 8 priority sectors; and iv) size of sub-sector and potential distortion of results e.g. coal, iron ore, gas. This ensured the analysis remains focused on where Austrade can add the greatest value.

⁶ DFAT 2017 Composition of Trade, Australia.

⁷ Deloitte Access Economics analysis of future global economic trends.

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India is critical to driving the South Asian region's economic growth. **India was Australia's fifth largest export market in 2017 growing merchandise trade in the 2017-18 financial year by an impressive 38% on the previous year.** India is an increasingly important economic and strategic partner for Australia as outlined in detail in the recently released "An India Economic strategy to 2035-Navigating from Potential to Delivery".

Economic growth across the Middle East region is expected to decline with a low compound annual growth rate over the next ten years of 1.5 per cent.⁸ Current geopolitical challenges are expected to impact on trade and investment flows. Despite these challenges, there continue to be opportunities across the region.

While the economic growth outlook for Africa remains fairly low, **Africa has the fastest growing population and the growing urban middle class is expected to create demand for goods and services.** This presents opportunities for the Australian business community – particularly across the international education, health and infrastructure sectors. South Africa remains Australia's largest export market in the region, representing 35 per cent of total exports to Africa in 2017.

Australian businesses continue to identify European countries as key destinations for exporting, with the United Kingdom identified as the third top market for international revenue earned by Australian exporters.⁹ However, low barriers to doing business and a well understood market have resulted in a strong Austrade investment focus in the region: the European Union (EU) as a bloc continues to be one of the most significant sources of inward FDI for Australia. **While the United Kingdom remains Australia's leading trade and investment partner in Europe, there are significant opportunities across Europe more broadly driven by increased disbursements of EU funds, private consumption supported by a stronger labour market, and improving business confidence.** The analysis completed particularly highlighted opportunities in the markets of Poland, Czech and Slovak Republics, which are all expected to grow at 2 to 3 per cent per annum for the next three years. Further to this, **current progress towards FTA negotiations with the EU, as well as the commitment to commencing FTA negotiations following the UK exit from the EU, has the potential to create significant additional opportunities for Australia across EU and UK.**

The US continues to be one of the largest export destinations for Australian exporters and in particular for trade in services. **The US remains Australia's largest two-way investment partner** and largest investor in Australia by far. In addition, the signing of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP/TPP-11) in March 2018 is expected to increase trade and investment opportunities for Australia with a range of other countries in the Americas region, and across a broad range of commercial sectors.

Australia's annual average exports of goods and services to Latin America are expected to almost double over the next decade. However, Latin America is expected to be one of the smaller regions for Australian priority exports maintaining a two per cent share in the next 10 years¹⁰. The Latin American region remains an important market, requiring Austrade assistance to address barriers to doing business. Reasonable growth prospects for the region are expected over the next ten years.

A stable Asia Pacific region is key to Australia's future economic prosperity. Consistent with the 2017 Foreign Policy White Paper the review highlights the close linkages between security and economic interests, with a focus on maximising trade and openness.

Austrade's presence in Port Moresby and Suva continues to support Australia's engagement in the Pacific and long-term investment in the region's growth, stability and security. The Pacific Agreement on Closer Economic Relations (PACER) Plus was concluded in 2017 and lays the groundwork for "stronger trade and investment and increased business confidence through transparent and enforceable rules."¹¹

⁸ Deloitte Access Economics analysis of future global economic trends.

⁹ Australia's International Business Survey (AIBS) 2017

¹⁰ Deloitte Access Economics analysis of future global economic trends.

¹¹ Department of Foreign Affairs and Trade, 2017 Foreign Policy White Paper.

The 2017 Foreign Policy White Paper confirms Australia's commitment to improving two-way trade and investment flows with international counterparts. Reducing regulatory burdens for Australian exporters ensures trade makes exporting easier for Australian business. Austrade is regularly involved and facilitates engagement with local governments and builds strong relationships to help create an environment conducive to Australian companies doing business in overseas markets. Austrade has an important role in providing authoritative commercial insights to contribute to policy development and to help clients navigate and access government support.

Maximising the economic benefit from international agreements which reduce barriers to trade and investment continue to be central to enabling increased trade and investment flows and opportunities for the Australian business community. Raising awareness of the benefits from these agreements to Australian businesses needs to be matched with similar awareness at the firm level in international markets. Australian and international businesses require a connecting function to ensure businesses benefit from agreements, and Austrade will play a continued role in this space.

While opportunities exist across a number of regions and markets, Austrade has finite resources and must ensure the international network is optimised with resources directed to where Austrade can add the greatest value and achieve significant outcomes for clients and the Australian economy.

FINDINGS AND AGREED ACTIONS

The international network is critical to Austrade's success, and contributes to the delivery of significant outcomes for Austrade clients and the Australian economy. To continue down a path of success in a changing global environment, the analysis and review found there are opportunities for change Austrade should consider. **Decisions surrounding where resources are deployed across Austrade's international network are not only critical to Austrade, but more broadly impact the focus and direction of key players in trade and investment.**

Austrade Executive have considered the findings of the analysis and the review. To provide a strong platform on which Austrade can build to capitalise on opportunities and challenges presented by global trends, and to increase our impact and reach, the Austrade Executive have agreed a set of actions discussed below.

1. International footprint and resource allocation

1.1 Principles for resource allocation

Establishing protocols for resource allocation across the network will help guide Austrade resource allocation now and into the future, ensuring resources are allocated to where they can deliver the greatest impact in achieving Austrade strategic objectives. In doing so Austrade should **consider protocols applied by Austrade competitors, markets in which clients are engaging**, where there are long-term opportunities, and **supporting the delivery of whole of government activities**. This should be coupled with considerations of **reputational risk** and the leadership role Austrade plays in influencing the direction for Australia's international trade and investment agenda.

Austrade should consider the return on investment across locations, risk exposure and administrative impost when managing small-scale sub-posts, including the outcomes and potential impact that can be achieved by small-scale sub-posts. An analysis completed as part of the review highlighted low level of significant qualitative outcomes from sub-offices compared to other offices, resulting in these offices not delivering a significant return on Austrade's investment. Sub-offices are fragmented and small-scale, which means they lack sufficient critical mass and specialised subject matter expertise required to be fully effective apart from the handling of routine matters. In addition, sub-office oversight places a material administrative impost on A-based capacity and is a low productivity use of an expensive and finite resource.

1.1 Agreed actions

- a) **A set of protocols** will be developed and applied to the decisions **in relation to Austrade international footprint and resource allocation** now and into the future. The protocols will include considerations around impact (qualitative outcomes) and return on investment, alignment to strategic direction, current and future opportunities, operational risk exposure and administrative impost, as well as the leadership role of Austrade and management of reputational risk.
- b) Austrade's default position will be to **limit the number of small-scale sub-posts** across the network, and apply a high standard to making decisions in relation to current and future small-scale sub-posts.
- c) **All decisions** in relation to footprint and resource allocation will be **evidence based** leveraging a combination of internal and external data and qualitative information sources.
- d) Austrade will continue to explore and pilot opportunities to enable **flexible models for resources allocation and service delivery**, be it through partnerships, use of technology, establishment of pop-up posts and the use of short term appointments.
- e) Consistent with these protocols Austrade will also **maintain flexibility and give consideration to the complexity of the market, geopolitical environment and medium to longer term opportunities** when making **decisions in relation to the location of the General Manager International (GMI) roles** across the regions. The assessment will take place at the end of each posting period.

1.2 Austrade international footprint

The analysis of how Austrade resource allocation could be optimised considered a combination of factors, including maturity of the market, geopolitical landscape, opportunities created by international agreements that reduce barriers, trade and investment flows, and opportunities for economic diversification.

The findings highlighted **opportunities for changes to Austrade's current footprint and resource allocation**, in particular reweighting of resources from across the network to strengthen and sharpen resourcing levels across North East Asia, China, ASEAN, South Asia, MEA, North America, Latin America and the Pacific.

North East Asia

From an Austrade commercial perspective, **Tokyo, Seoul and Osaka posts are highly ranked in terms of return on investment and act as strategic hubs for Australian businesses**. However, **investment and trade outcomes from Fukuoka and Sapporo are very limited relative to other posts in the region**, with very low growth prospects. In order to strengthen service delivery to Australian businesses in the North East (NE) Asia region Austrade should, where appropriate, consolidate its resourcing in the key hubs of Tokyo, Seoul and Osaka.

In 2017-18 NE Asia (Japan and Korea) delivered a very high number of quality investment outcomes, presenting an **opportunity to raise investment capability through the repositioning of existing resources across the region to focus on investment**.

Although commercial opportunities and growth prospects are very limited in Kyushu and Hokkaido regions of Japan, the **delivery of consular and other Whole-of-Government functions in Sapporo and Fukuoka remain a critical function of the Australian Government's broader presence in Japan**. Austrade needs to explore our role and models for the delivery of consular services with DFAT for both posts. Sapporo in particular has an important consular function to play in the northern winter months as a result of the large numbers of Australian tourists visiting Hokkaido.

China

Austrade's resource allocation across the Greater China needs to align to the strategic value of this economic region to Australia. Stronger investment focus across the region is required with China being the fifth largest source of FDI stock into Australia.

Austrade's footprint in China consists of four hub posts in Beijing, Shanghai, Guangzhou and Chengdu; supported by six sub-posts in Shenyang, Qingdao, Wuhan, Nanjing, Kunming and Shenzhen. Each sub-post is staffed by two BDMs. The level of client servicing and outcomes delivered is varied across the China network. Consistent with findings about the small-scale sub-posts, the analysis highlighted lower activity levels and outcomes across sub-posts compared to the hub posts, with sub-posts in China ranking in the bottom 8 per cent for the overall ranking of Austrade service delivery¹².

It is reasonable and timely that Austrade review and optimise its resource allocation across Greater China region, including the return it receives on its investment in its network of sub-posts. Consideration should be given to servicing a market cluster of urban centres exhibiting economic scale, growth and geographic proximity complemented by infrastructure connectivity.

ASEAN

The ASEAN region is a critical for Australia's future economic development. **Resourcing across the region should be strengthened to achieve more robust focus and impact.** Indonesia is becoming one of the most prominent international markets for Australia, and requires stronger strategic focus and leadership in the market.

There are opportunities to sharpen focus in Indonesia by **establishing two strategic commercial hubs in Jakarta and Surabaya.** Current activity and expected rapid growth in **Kuala Lumpur and Vietnam** over the next 10 years suggest these two markets **could achieve stronger trade and investment outcomes with a slight increase in the current level of resourcing.**

On the other hand the analysis highlighted a small education-focused market like Brunei, which has seen a decrease in numbers of international students to Australia since 2004. Austrade should review its presence and approach to servicing the Brunei market.

Singapore has the potential to be a significant investment hub targeting opportunities across ASEAN markets and beyond. This supports the need for a strong Austrade Investment lead in Singapore and the reweighting of resources from trade development to attracting foreign direct investment.

South Asia

India is Australia's fifth largest export market and an important economic partner. **The complexities of the market demand a strategically concentrated and focused approach to Austrade's work in India.** Austrade currently has a dispersed network of offices located in 11 cities across India with a number of small-scale sub-posts.

Consistent with findings about the small-scale sub-posts, the analysis highlighted lower activity levels and outcomes over the last three financial years across small-scale sub-posts compared to the six key strategic hubs in the market. While opportunities exist across this dispersed market **stronger impact and outcomes for the Australian business community can be achieved by sharpening the focus and servicing more clients in Austrade priority sectors across the market.**

For a big growth market, South Asia is relatively **underweight in A-based resources in comparison to other Austrade regions**¹³.

¹² Austrade service level analysis – weighted ranking of tailored services, general services, trade and education outcomes, investor requests and investor outcomes against trade and investment resource allocations.

¹³ South Asia has the lowest A-based per office ratio of 0.3, and lowest A-based to locally engaged staff (LES) ratio of almost 1:11 compared to other Austrade posts.

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In addition, **servicing Pakistan from the Austrade India post is challenging** due to discordant political relationships between India and Pakistan, the absence of regional economic cooperation and restricted movement of people and goods across the border can present a challenge for A-based staff to conduct business from India. The majority of India's informal exports to Pakistan are understood to be routed via third countries, most frequently Dubai. **Given the Dubai to Pakistan trade route is well-established and thriving, it is sensible for Austrade to service the Pakistan market from the Middle East region.**

Middle East

In comparison with other regions, **the projected average growth and size of Australian priority exports to the Middle East region is expected to slow over the next ten years.** This is also reflected in the service-level activity across a number of Middle East posts which is lower in comparison to other Austrade regions. There are opportunities for Austrade to review its resource allocation across the region, to optimise return on investment, while leveraging existing and future opportunities across the region.

Dubai post is an outlier across the Austrade international network where Austrade is responsible for the delivery of consular services, as well as the management of a large post and provision of services to staff of four Australian government agencies. This places significant additional pressures on Austrade staff and post operations both in terms of capacity and capability. Austrade's role in this should be further explored with DFAT.

Africa

The Africa region presents a number of opportunities, particularly focused around infrastructure and international education. The African region is important not only from a future commercial perspective but even more so from a security and geopolitical perspective. While the level of resourcing is consistent with opportunities available to Australian businesses in the African region, **there are opportunities to reposition resources across Africa to better support current and future business activity.**

Europe

Europe overall remains a strong performer and key market with a number of opportunities for Australian businesses. The market is well understood and there are low barriers to doing business, requiring less support from Austrade and resulting in **Austrade's strong investment focus in the region. Trade work remains important where Austrade can make an impact either through addressing market failure or to capitalise on significant opportunities for Australian businesses.** Frankfurt remains the central hub for businesses in the European region.

There are limited opportunities for Australian exporters in Russia over the short to medium term. The level of activity and outcomes from Moscow and Vladivostok are relatively low when compared to the rest of the Austrade network. **Austrade should review its resource allocation in Russia given the low-return on investment and projected limited opportunities set to remain in the medium to long-term.** Requirement for Austrade's presence in Vladivostok should be further explored with DFAT.

North America

The Australian trade and investment relationship with the US is well-established. While the US remains one of Australia's largest export destinations, limited support is required from Austrade to navigate the market. **The US market presents significant trade and investment opportunities for high growth technology companies,** and Austrade should focus some of its resources on proactively exploring these opportunities. Given the US is one of the world's leading innovation hubs, this could be achieved through the piloting of new and alternative models for resource allocation and service delivery.

Based on the analysis of investment activity across the region, **the majority of work in North America should focus on investment attraction. Trade work will still continue and will be important where Austrade can make an impact either through addressing market failure or to capitalise on significant opportunities for Australian businesses.** In order to capitalise on these opportunities, it was highlighted that challenges in attracting and retaining high calibre investment staff would need to be overcome.

New York remains the central hub for businesses in the North America region.

Latin America

Australian trade activity to Latin America is growing from a small base. **There are opportunities across the region which are important to supporting Australia's economic diversification, particularly driven by the education sector.** Austrade assistance is required across the region to address barriers to doing business such as language and market access issues, consideration should be given to resource allocation to weigh up opportunities and return on investment analysis compared with other neighbouring regions.

Pacific

While New Zealand is the primary recipient of exports to the Pacific region, it is widely recognised that the New Zealand market is well understood by the Australian exporters and there are low barriers to doing business. The market is relatively straightforward to navigate, requiring less support from Austrade, and is currently over serviced. The economic indicators for the Pacific are very small in relative terms compared with other regions, however **the region is important from the geopolitical perspective.** This presents opportunities to review resource allocation across the region to achieve stronger impact and bigger return on investment, including helping businesses capitalise on opportunities presented by aid work.

Like Japan, **the delivery of consular functions remains critical in New Zealand, and Austrade needs to further explore its role and models for the delivery of consular services with DFAT.** Given the limited connectivity or intra-trade flows between the Pacific and ASEAN, Austrade needs to consider separating the Pacific from the ASEAN regional grouping to allow for a sharper focus on both the Pacific and ASEAN regions – both critical markets for Australia.

1.2 Agreed actions

To ensure the allocation of Austrade's finite resources is optimised, Austrade Executive will explore opportunities for changes to resource allocation across the international network with the Minister, DFAT and other key stakeholders. **Any changes will take into consideration DFAT's long-term strategic plans, ensuring that Austrade's and Australian reputation in the region is retained and will be implemented in consultation with staff.** The changes will include:

- a) Where appropriate, repositioning and rebalancing resourcing between Sapporo, Fukuoka, Tokyo, Osaka and Seoul in the North East Asia region, with the objective of **strengthening the resourcing levels in Tokyo, Osaka and Seoul.** Re-weighting Japan's trade focused resources to investment with the **objective of strengthening Japan's role as one of Austrade's five big investment hubs.**
- b) Maintaining the current level of resourcing across the **Greater China region** and exploring opportunities for **rationalising and optimising resource allocation.**
- c) Repositioning and rebalancing resourcing between Makassar, Surabaya, Brunei, Kuala Lumpur, Singapore and Vietnam in the ASEAN region through initially **bolstering resources in Kuala Lumpur and Vietnam, and establishing Jakarta and Surabaya as two major hubs in Indonesia.** Re-weighting Singapore's trade focused resources to investment with the objective of **strengthening Singapore's role as one of Austrade's five big investment hubs.**
- d) Given the complexities of the ASEAN market, significant opportunities and strong importance of Indonesia, **show vision and leadership by appointing the General Manager ASEAN position in Jakarta and appointing a strong senior investment specialist as the head of the Singapore post.**
- e) Exploring opportunities to reshape, **optimise and bolster resource allocation across India, through a detailed design and analysis of opportunities demand and return on investment.**
- f) **Moving Pakistan to report into Middle East and Africa region.**
- g) Reviewing resource allocation across the Middle East region to identify and **reposition a resource from the region to South Asia.** As well as more broadly **repositioning and rebalancing resourcing within the Middle East region to ensure alignment with return on investment, current and future opportunities.**
- h) **Repositioning resourcing across Africa to better support current and future business activity.**

- i) **Streamlining resource allocation in Russia to identify and reposition resources across Europe and South Asia**, ensuring alignment and supporting the delivery of identified opportunities and Austrade strategic objectives across these two regions. This will include considering and consulting with DFAT on the future of the Vladivostok post.
- j) **Repositioning and rebalancing resourcing between Houston and other posts within North America, as well as more broadly between North and Latin America**, ensuring alignment with return on investment, current and future opportunities. The identified efficiencies will be either used to bolster resources across the region to focus on new and emerging opportunities, or addressing challenges in attracting and retaining high calibre investment staff.
- k) **Repositioning and rebalancing resourcing between New Zealand and the rest of the Pacific, as well as ASEAN region**, with the objective of **bolstering service delivery in the Pacific Islands**.
- l) **Moving Pacific reporting lines out of ASEAN region** and exploring alternative reporting options for this market.
- m) **Exploring Austrade's role and alternate models for the delivery of consular services with DFAT, particularly as it applies to Austrade presence in Sapporo and Fukuoka, New Zealand, Vladivostok and Dubai**. Any changes should take into consideration delivery of whole-of-government responsibilities, market complexities and significant global events.

2. International network focus and service delivery

In addition to providing financial support to exporters through the Export Market Development Grants (EMDG) program, Austrade continues to play a **strong role in export market development through identifying and connecting clients to opportunities**. However a disjointed approach to service delivery and a need for more coordinated, regional-focused offerings have been highlighted by clients and stakeholders. **Access and use of reliable data for prioritisation of market, sector, trade and investment opportunities is also required to ensure sharper focus and more impactful outcomes for clients and the Australian economy**.

The scope and type of Austrade clients are changing, which presents opportunities to undertake further client segmentation to **focus strategic and targeted service offerings where high growth clients have capability and capacity to exploit international markets going forward**.

While clients and stakeholders would welcome more targeted service offerings to deliver stronger impact and outcomes, volume-based transactions continue to dominate the suite of services across the Austrade international network. Changes in the global operating environment and client needs represent opportunities for **Austrade to review and sharpen our focus and service delivery across different markets**. Significant bodies of work are already underway to develop more focused and impactful service delivery offerings. Landing Pad program should also be considered as part of this work.

In addition there are opportunities to improve consistency in the application of fee for service revenue (FSR) when delivering services to Austrade clients. **FSR should not be seen as a performance measure or driver of service delivery**. Consistent with Austrade philosophy of putting clients at the centre, FSR should only be applied where client requests tailored services. **Austrade should focus on offering value to clients irrespective of whether FSR is charged**.

There continue to be **five major investment hubs across the international network – North America, Europe, North Asia, Greater China and Singapore** (operating as a regional investment hub for ASEAN). To further support sharper focus and enhanced outcomes, work across these major investment hubs needs to consider a deeper focus on Australia's supply chain gaps in attracting relevant skills, technology and talent.

Another area highlighted by the review was the importance clients place on the management of non-tariff barriers (NTBs) and the need for Austrade to play a greater and more consistent role. **Austrade plays an important role in direct engagement with the Australian business community and working closely with subnational government to capture insights which contribute to productive economic development of Australia**. Austrade also facilitates engagement with local governments in market, building strong relationships to help create an environment conducive to Australian companies succeeding in business overseas. **There is scope for Austrade to be more proactive and demonstrate stronger leadership in providing authoritative commercial insights to contribute to policy development to support economic development of Australia, and to help clients navigate and access government support**.

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More broadly better coordination and connectivity between government agencies, industry and state and territory partners is required to ensure stronger outcomes for clients. **There are a number opportunities for agencies to work together, co-design and sharpen market and sector focus**, including obtaining clarity around roles and responsibilities and sharing global plans to leverage each other's in-market activities in a more strategically aligned and coordinated manner.

2. Agreed actions

- a) Ensure client service analysis and design work currently underway in Austrade incorporates **segmentation analysis of the Australian exporter community to build a sharper, more detailed understanding of this exporter group and where Austrade's service offering may be best directed**.
- b) As part of the client service design work **explore opportunities for how Austrade can transform and ensure consistent application of the FSR**.
- c) As part of the client service design work **explore opportunities for how Austrade can maximise and transform the Landing Pads program to deliver better value to clients**.
- d) **Review Austrade business planning processes to incorporate strategic forward forecasts of future opportunities**, and enable sharper focus, prioritisation and more globally coordinated approach.
- e) **Take on a more dedicated role and utilise Austrade's unique position in gathering and distilling business intelligence to advocate for business by informing policy development and influencing discussions in relation to non-tariff barriers**. Where appropriate exercise a leadership role and advocate on behalf of business, particularly as it relates to the work on visas and non-tariff barriers.
- f) Continue to **grow investment capability across the five major investment hubs** of North America, Europe, Japan, China and Singapore.
- g) As part of a strategic approach to partnerships within Austrade, **identify opportunities to work more closely with our partners**, including to sharpen market and sector focus, clarify roles and identify shared market and/or regional strategies where services can be co-designed and co-delivered. Ensure that teams across Austrade international network are consulted and engaged in this process.

3. Operating model and practices

The strengthening of Austrade operations through leadership, people, processes, systems and enablers is important to delivering on our strategic priorities.

3.1 Strong leadership

While the regional model is highly regarded by Austrade stakeholders and clients, it needs to be enabled by strong leadership. This means **ensuring the General Managers across regions and in Australia are working together as custodians of the network to build organisational capability, drive change, and to deliver strong outcomes for Austrade**. Austrade needs to maintain a high calibre of General Managers that bring strong commercial and government acumen as well as proven leadership experience in managing highly diverse teams. The General Manager International (GMI) role should be focused on the leadership of the region, and **the post in which the GMI role is attached to should be managed by the TC in that location**, including the day-to-day management of consular operations where applicable.

3.1 Agreed actions

- a) **Set clear expectations for the GMI roles**, build on the role profiles developed as part of the review work completed, ensuring GMIs are expected to demonstrated strong commercial and government acumen as well as proven leadership experience in managing highly diverse teams.

- b) **Develop a leadership capability framework** based on the servant leadership model¹⁴ to ensure leaders across Austrade are working together to build organisational capability, drive change and deliver strong outcomes for Austrade.
- c) **Confirm a Post Manager role in all locations with the GMI**, it is anticipated this can be managed from within the existing resources. Ensure the post in which the GMI role is attached to is managed by the TC in that location, including the day-to-day management of consular operations where applicable.

3.2 Responsibilities and capability requirements

The international network needs to be enabled by a strong cohort of A-based and Overseas Engaged Employees (OEEs). **A strong team of trade and investment practitioners with a consistent and contemporary set of skills and expertise is critical to the success of Austrade.** Austrade needs to build its view of the ideal set of capabilities its trade and investment-focused staff should be practising, and to create structured continuous professional development programs to support this.

In addition, **consistent and appropriate classification levels should be assigned to the A-based roles across the network, ensuring alignment with the whole of government direction and APS classification management practices.** This will ensure consistent contribution at level, appropriate allocation of responsibilities, accountabilities and decision making. There are opportunities for Austrade to review the current assignment of APL5/APL4 (EL2) classification, as well as allocation of APL5/APL4 (EL2) roles across the network. Similarly, there are opportunities for Austrade to introduce more APL3 (EL1) roles across the network to help overcome critical post resourcing challenges, as well as to provide further opportunities for career growth and development within Austrade. This should replace the existing Trade Commissioner Development Program (TCDP).

3.2 Agreed actions

- a) **Finalise the trade and investment capability model** building on the work completed as part of the review of the international network operations.
- b) Identify opportunities to support the development and delivery of trade and investment capability development, including **exploring options to co-design and co-deliver a trade and investment competency framework with other like-minded partners.**
- c) **Retain the business analysis and research function across the five investment hubs,** implement a more consistent approach to the scope of roles and responsibilities.
- d) **Transition APL5 STC roles to an APL4 (EL2)** classification to be consistent with APS classification management rules and the current onshore model. In the instances where Austrade may wish to consider alternate remuneration options, Individual Flexibility Agreements (IFAs) will be used consistent with the guidance identified as part of the review.
- e) Over time **introduce more APL3 roles in markets where there are more than one A-based.**
- f) Mainstream the TCDP by **integrating the APL3 TC roles as part of Austrade structure. Review the current TCDP locations** (and all future APL3 TC locations on a regular basis) to ensure the most effective allocation of resources.

¹⁴ Servant leadership is a leadership philosophy in which the main goal of the leader is to serve. A Servant Leader shares power, puts the needs of the employees first and helps people develop and perform as highly as possible.

3.3 Processes and systems

Clear KPIs and appropriate infrastructure were identified as two key areas required to enable effective operations across the international network. **The application of KPIs across the network is required to provide clarity to staff and help drive the right outcomes and behaviours.** Current application of KPIs across the network was found to be complex, inconsistent and difficult to interpret. While a lot of work has been done on investment KPIs, better protocols and assessment cadence are required for trade.

The Client Relationship Management (CRM) system, while a critical tool, is trying to be too many things to too many people – namely a work flow, people flow and client management system. **A CRM type system is critical to supporting effective service delivery, management of clients and sharing of information not only across Austrade, but also with our partner agencies.** However, as it currently stands the value of output from the system is not reflective of the time spent inputting key client and investor information into it.

3.3 Agreed actions

- a) As part of the current work on the development of corporate performance measures and KPIs, **ensure introduction of consistent, clear and universal key performance indicators, including to provide a client-focused set of measurable indicators to drive behaviour and improved practices across the organisation.**
- b) Undertake discovery work and **progress the design of an efficient and integrated CRM system** which supports the sharing of information not only across Austrade but also with our partner agencies.

3.4 Delivery of corporate support functions

The nature of the business requirements and work performed by the corporate support functions across the international network have changed. The changes are resulting from advancements in technology, improved and streamlined processes, and the complexity of the environment in which Austrade operates. Furthermore, **Austrade should aim to maximise productivity in the delivery of corporate support functions to use the achieved efficiencies to bolster client facing resources across the international network.**

In particular **there is scope for Austrade to maximise the use of the Office Manager and administrative roles, and streamline the delivery of Human Resources (HR) and Finance functions across the network.** The Office Manager role should be reshaped to become Corporate Services Adviser role with the responsibility for supporting the management of post operations, including **administrative and some operational** HR and Finance responsibilities. In addition, there is an opportunity to rebalance the level and allocation of the Office Manager and administrative support resourcing across the regions.

HR and Finance functions will continue to deliver technical and strategic services across the international network. However, **it is recommended that these functions, resources and service delivery are centralised onshore** to deliver efficiencies and enhance operations. Onshore HR and Finance teams will have to be sufficiently resourced to deliver services to the international network. In addition, to help manage this, it is suggested a contract be put in place with a global employment law provider to help manage complex cases and deliver market specific employment conditions advice. Further investment should also be made into technology solutions to reduce risk and streamline the delivery of the operational and administrative activities. It was agreed any performance and conflict management matters relating to people should be dealt with by the STCs/TCs in market with the advice from HR.

In relation to other critical business functions, it is clear that marketing and communications teams play an important role in the delivery of client services (events/content), while generating client pipeline and protecting the reputation of Austrade. **There is an opportunity to review how the onshore and international marketing and communications teams are best aligned to deliver outcomes.**

3.4 Agreed actions

- a) **Redesign the Office Manager and administrative support network** to reflect greater standardisation and consistency in roles, responsibilities and allocation across the international network, including **to provide critical day-to-day real time support for GMI and STCs/TCs in market.**
- b) **Design and implement a centralised model for the delivery of HR and Finance across the network**, ensuring application of the following principles:
 - The model should deliver consistent and robust services across the network
 - The new model should clearly separate the role of HR and the role of a manager in managing people and performance matters
 - A professional services firm should be engaged to provide to provide current, reliable and trusted global HR advice in relation to legal and employment matters
 - This is not a cost saving exercise, but efficiencies should be achieved.(No changes to the current delivery of HR and Finance across the network will be made until this model is finalised).
- c) **Review the alignment of marketing and communications resources across onshore and the international network** to improve client experience and make a meaningful contribution to trade and investment outcomes, while enhancing the reputation of Austrade.

CONCLUSION

Austrade is firmly focused on the future and on ensuring we continue to meet and exceed the expectations of the Government, our clients and partners. The **agreed actions summarised at Appendix A, will help bolster our operating model across the international network to ensure it is positioned to readily identify and respond to opportunities and changes in business and international markets.** Austrade will continue to regularly measure our success and identify ways to improve and adjust with emerging trends.

Austrade acknowledges and thanks the team led by Mr Tim Beresford in his capacity as independent reviewer, for their analysis and insights into our current capability, and their guidance in relation to our future direction.

Dr Stephanie Fahey
Chief Executive Officer, Austrade

SUMMARY OF AGREED ACTIONS

The analysis and review considered the impact of current and future export and investment patterns and Austrade current activity and performance across markets.

The review highlighted the significant work undertaken by Austrade staff across all locations. However, the analysis identified an imbalance in resource allocation across the network and opportunities to refocus and streamline operations to achieve stronger return on investment, deliver value to clients, and fulfil government priorities. Austrade Executive have identified a set of actions which, if implemented, will optimise our current operating model and provide a strong platform on which Austrade can build on to grow and transform our operations in response to the longer-term changes to our service delivery.

1. International footprint and resource allocation

1.1 Principles for resource allocation

- a) **A set of protocols** will be developed and applied to the decisions in relation to **Austrade international footprint and resource allocation** now and into the future. The protocols will include considerations around impact (qualitative outcomes) and return on investment, alignment to strategic direction, current and future opportunities, operational risk exposure and administrative impost, as well as the leadership role of Austrade and management of reputational risk.
- b) Austrade's default position will be to **limit the number of small-scale sub-posts** across the network, and apply a high standard to making decisions in relation to current and future small-scale sub-posts.
- c) **All decisions** in relation to footprint and resource allocation will be **evidence based** leveraging a combination of internal and external data and qualitative information sources.
- d) Austrade will continue to explore and pilot opportunities to enable **flexible models for resources allocation and service delivery**, be it through partnerships, use of technology, establishment of pop-up posts and the use of short term appointments.
- e) Consistent with these protocols Austrade will also **maintain flexibility and give consideration to the complexity of the market, geopolitical environment and medium to longer term opportunities** when making **decisions in relation to the location of the General Manager International (GMI) roles** across the regions. The assessment will take place at the end of each posting period.

1.2 Austrade international footprint

Austrade has finite resources, and we have to make sure that allocation of these resources across our international network is optimised with resources directed to achieve the best outcomes for clients and the Australian economy. To achieve this Austrade Executive will **explore opportunities for changes to resource allocation across the international network with the Minister, DFAT and other key stakeholders**, this will include the following:

- a) Where appropriate, repositioning and rebalancing resourcing between Sapporo, Fukuoka, Tokyo, Osaka and Seoul in the North East Asia region, with the objective of **strengthening the resourcing levels in Tokyo, Osaka and Seoul**. Re-weighting Japan's trade focused resources to investment with the **objective of strengthening Japan's role as one of Austrade's five big investment hubs**.
- b) Maintaining the current level of resourcing across the **Greater China region** and exploring opportunities for **rationalising and optimising resource allocation**. (*This work will be led by the incoming GM China in close consultation with staff and take into consideration DFAT's long-term strategic plans in China, as well as ensuring that Austrade's and Australian reputation in the region is retained*).
- c) Repositioning and rebalancing resourcing between Makassar, Surabaya, Brunei, Kuala Lumpur, Singapore and Vietnam in the ASEAN region through initially **bolstering resources in Kuala Lumpur and Vietnam, and establishing Jakarta and Surabaya as two major hubs in Indonesia**. Re-weighting Singapore's trade focused resources to investment with the **objective of strengthening Singapore's role as one of Austrade's five big investment hubs**.

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- d) Given the complexities of the ASEAN market, significant opportunities and strong importance of Indonesia, **show vision and leadership by appointing the General Manager ASEAN position in Jakarta and appointing a strong senior investment specialist as the head of the Singapore post.**
- e) Exploring opportunities to reshape, **optimise and bolster resource allocation across India, through a detailed design and analysis of opportunities demand and return on investment.** (*The changes will take into consideration DFAT's long-term strategic plans in India, as well as ensuring that Austrade's and Australian reputation in the region is maintained*).
- f) **Moving Pakistan to report into Middle East and Africa region** to address the complexities resulting from the discordant relationship between India and Pakistan, and leverage the well-established trade route between Dubai and Pakistan.
- g) Reviewing resource allocation across the Middle East region to identify and **reposition a resource from the region to South Asia.** As well as more broadly **repositioning and rebalancing resourcing within the Middle East region to ensure alignment with return on investment, current and future opportunities.**
- h) **Repositioning resourcing across Africa to better support current and future business activity.**
- i) **Streamlining resource allocation in Russia to identify and reposition resources across Europe and South Asia,** ensuring alignment and supporting the delivery of identified opportunities and Austrade strategic objectives across these two regions. This will include considering and consulting with DFAT on the future of the Vladivostok post.
- j) **Repositioning and rebalancing resourcing between Houston and other posts within North America, as well as more broadly between North and Latin America,** ensuring alignment with return on investment, current and future opportunities. The identified efficiencies will be either used to bolster resources across the region to focus on new and emerging opportunities, or addressing challenges in attracting and retaining high calibre investment staff.
- k) **Repositioning and rebalancing resourcing between New Zealand and the rest of the Pacific, as well as ASEAN region,** with the objective of **bolstering service delivery in the Pacific.** This will support the development of this important geopolitical region, and enable Austrade to focus and help businesses capitalise on opportunities presented by the aid work.
- l) **Moving Pacific reporting lines out of ASEAN region** and exploring alternative reporting options for this market.
- m) **Exploring Austrade's role and alternate models for the delivery of consular services with DFAT, particularly as it applies to Austrade presence in Sapporo and Fukuoka, New Zealand, Vladivostok and Dubai.** Any changes should take into consideration delivery of whole-of-government responsibilities, market complexities and significant global events.

2. International network focus and service delivery

- a) Ensure client service analysis and design work currently underway in Austrade incorporates **segmentation analysis of the Australian exporter community to build a sharper, more detailed understanding of this exporter group and where Austrade's service offering may be best directed.**
- b) As part of the client service design work **explore opportunities for how Austrade can transform and ensure consistent application of the FSR.**
- c) As part of the client service design work **explore opportunities for how Austrade can maximise and transform the Landing Pads program to deliver better value to clients.**
- d) **Review Austrade business planning processes to incorporate strategic forward forecasts of future opportunities,** and enable sharper focus, prioritisation and more globally coordinated approach.
- e) **Take on a more dedicated role and utilise Austrade's unique position in gathering and distilling business intelligence to advocate for business by informing policy development and influencing discussions in relation to non-tariff barriers.** Where appropriate exercise a leadership role and advocate on behalf of business, particularly as it relates to the work on visas and non-tariff barriers.
- f) Given the rapid growth and importance of inward investment to the Australian economy, continue to **grow investment capability across the five major investment hubs** of North America, Europe, Japan, China and Singapore.
- g) As part of a strategic approach to partnerships within Austrade, identify opportunities to work more closely with our partners, including to sharpen market and sector focus, clarify roles and identify shared market and/or regional strategies where services can be co-designed and co-delivered. Ensure that teams across Austrade international network are consulted and engaged in this process.

3. Operating model and practices

3.1 Strong leadership

- a) **Set clear expectations for the GMI roles**, build on the role profiles developed as part of the review work completed, ensuring GMIs are expected to demonstrate strong commercial and government acumen as well as proven leadership experience in managing highly diverse teams.
- b) **Develop a leadership capability framework** based on the servant leadership model¹⁵ to ensure leaders across Austrade are working together to build organisational capability, drive change and deliver strong outcomes for Austrade.
- c) **Confirm a Post Manager role in all locations with the GMI**, to allow the GMIs a more focused approach on leadership and management of the region. Ensure the post in which the GMI role is attached to is managed by the TC in that location, including the day-to-day management of consular operations where applicable. It is anticipated this can be managed from within the existing resources.

3.2 Responsibilities and capability development

- a) **Finalise the trade and investment capability model** building on the work completed as part of the review of the international network operations.
- b) Progress to identify opportunities to support the development and delivery of trade and investment capability development, including **exploring options to co-design and co-deliver a trade and investment competency framework with other like-minded partners**.
- c) **Retain the business analysis and research function across the five investment hubs**, implement a more consistent approach to the scope of roles and responsibilities.
- d) **Transition APL5 STC roles to an APL4 (EL2)** classification to be consistent with APS classification management rules and the current onshore model. In the instances where Austrade may wish to consider alternate remuneration options, Individual Flexibility Agreements (IFAs) will be used consistent with the guidance identified as part of the review.
- e) Overtime **introduce more APL3 roles in markets where there are more than one A-based**. This will provide more opportunities for staff career growth and development offshore at the APL3 level and opportunities to gain appropriate experience consistent with APL3 leadership roles.
- f) Mainstream the TCDP by **integrating the APL3 TC roles as part of Austrade structure. Review the current TCDP locations** (and all future APL3 TC locations on a regular basis) to ensure the most effective allocation of resources.

3.3 Processes and systems

- a) As part of the current work on the development of corporate performance measures and KPIs, **ensure introduction of consistent, clear and universal key performance indicators, including to provide a client-focused set of measurable indicators to drive behaviour and improved practices across the organisation**.
- b) Undertake discovery work and **progress the design of an efficient and integrated CRM system** which supports the sharing of information not only across Austrade but also with our partner agencies.

¹⁵ Servant leadership is a leadership philosophy in which the main goal of the leader is to serve. A Servant Leader shares power, puts the needs of the employees first and helps people develop and perform as highly as possible.

3.4 Delivery of corporate support functions

- a) **Redesign the Office Manager and administrative support network** to reflect greater standardisation and consistency in roles, responsibilities and allocation across the international network, including to **provide critical day-to-day real time support for GMIs and STCs/TCs in market.**
- b) **Design and implement a centralised model for the delivery of HR and Finance across the network**, ensuring application of the following principles:
 - The model should deliver consistent and robust services across the network
 - The new model should clearly separate the role of HR and the role of a manager in managing people and performance matters
 - A professional services firm should be engaged to provide to provide current, reliable and trusted global HR advice in relation to legal and employment matters
 - This is not a cost saving exercise, but efficiencies should be achieved.(No changes to the current delivery of HR and Finance across the network will be made until this model is finalised).
- c) **Review the allocation and scope of responsibilities of marketing resources across onshore and the international network**, ensuring the use of marketing resources is maximised, roles and responsibilities between onshore and in market are complementary, and to support better positioning and marketing of Austrade services.