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NSW Trade with South Korea: Outcomes for exporters from the KAFTA

by Andrew Haylen

1. Introduction

The Republic of Korea (*South Korea*) is one of the most significant trading partners for Australia, and specifically New South Wales, ranking 3rd as an export and 7th as an import destination nationally and at the State level.

Given this, there are likely to be significant economic gains for both countries once the Korea-Australia Free Trade Agreement (KAFTA) is formalised. According to the Department of Foreign Affairs and Trade, the agreement will result in a \$653 million a year boost to the Australian economy.¹

There will be a number of significant tariff and non-tariff economic gains from this agreement for both South Korea and Australia. The envisaged boost to Australian exporters comes as the KAFTA will see import tariffs in South Korea removed on the majority of exports. South Korean exporters will experience similar benefits once Australian import tariffs are removed. In the non-tariff area, Australian telecommunication companies will be able to have much greater control over South Korean service suppliers and Australian financial service suppliers will be able to open in South Korea. It will also be easier for South Korean companies to invest in Australia, with the foreign investment review threshold to be increased from \$248 million to \$1.078 billion.²

The NSW Department of Trade and Investment, which identified South Korea as one of the State's top ten priority markets in the NSW International Engagement Strategy, welcomed the announcement that Australia had concluded the KAFTA negotiations.³

This paper will specifically estimate the value from tariff reductions as they relate to merchandise exports. Its main finding is that, over the period of implementation, there is likely to be significant value for Australia (and New South Wales) from this FTA, particularly for agricultural exporters. As a preliminary to that analysis, this paper examines the current extent and

nature of trade between South Korea and Australia and, more specifically, between South Korea and New South Wales.

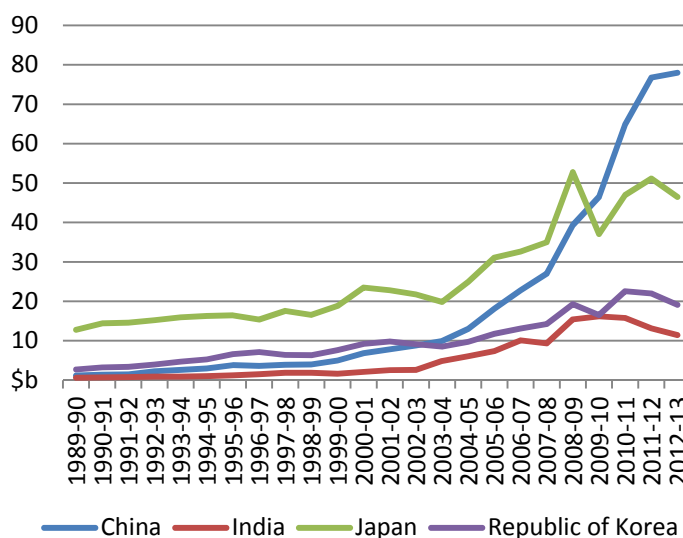
It should be noted that this paper relates only to tariff reductions under Chapter 2 of the KAFTA. Economic gains related to other components of the KAFTA (e.g. from easing of foreign investment regulation and reductions to barriers in other non-merchandise trade) are not estimated. While there are significant potential benefits for Australian exporters from the KAFTA, it may impact negatively on domestic business in terms of increased competition resulting from cheaper South Korean merchandise imports. This aspect of the KAFTA is not assessed in this paper.

2. Australia’s trade with South Korea

2.1 Merchandise exports

In 2012-13, Australia exported \$19.1 billion worth of merchandise to South Korea, making it the 3rd largest export destination behind China (\$77.97 billion) and Japan (\$46.5 billion). Merchandise exports from Australia to South Korea have risen significantly over the last two decades; increasing by 480 per cent at an average annual rate of 8.1 per cent between 1992-93 and 2012-13 (Figure 1).

Figure 1: Australia’s merchandise exports, by country⁴

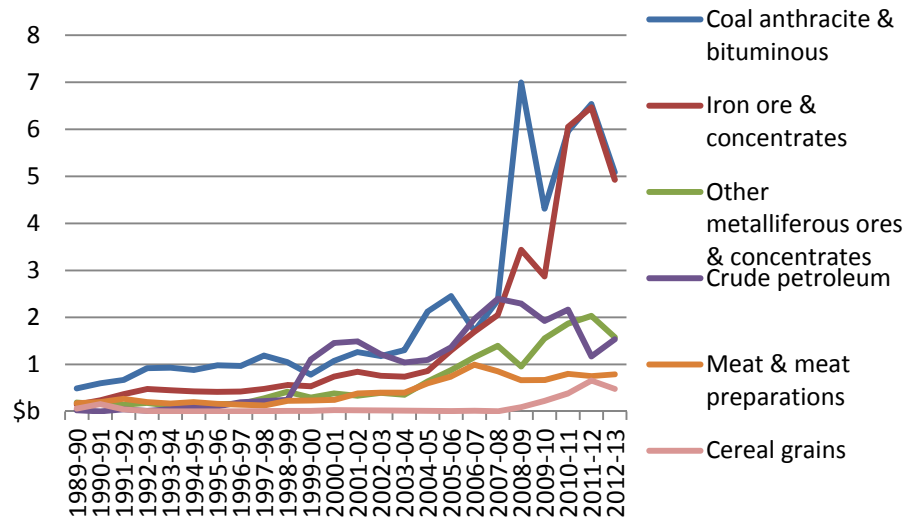


Natural resources have accounted for a large share of Australia’s merchandise exports to South Korea in recent years. In 2012-13, processed and unprocessed minerals accounted for 35.4 per cent of such exports to South Korea. With the expansion of the mining and resources industry, particularly in Western Australia, this share has increased over time from around 9 per cent in 1997 to reach an historical high of 40.3 per cent in 2011-12. In 2012-13, coal (\$5.1 billion), iron ore (\$4.9 billion) and crude petroleum (\$1.5 billion) accounted for just over 60 per cent of Australia’s merchandise exports to South Korea.

Agricultural products also represent a relatively large share of Australia’s merchandise exports to South Korea. In 2012-13, processed and

unprocessed food and animal products accounted for 11.5 per cent of such exports to South Korea. In 2012-13, \$806 million worth of meat and meat preparations were exported to South Korea, making it Australia's most valuable agricultural export and 6th most valuable merchandise export once mineral and fuels are considered. In 2012-13, cereal grain exports were valued at \$480 million (Figure 2).

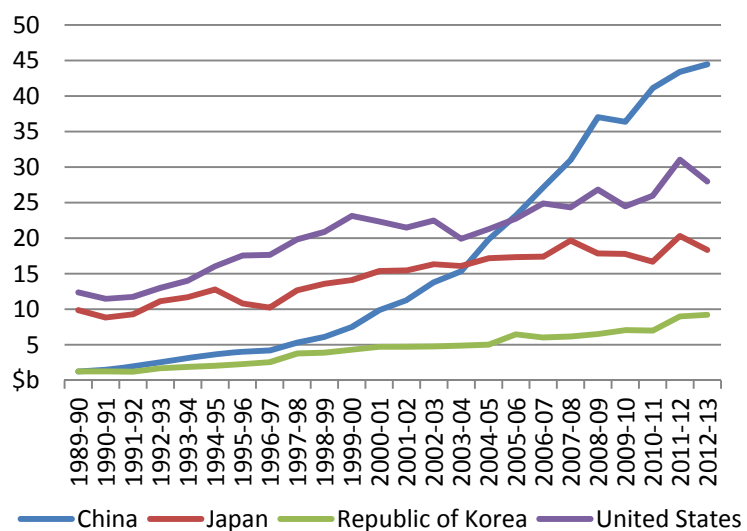
Figure 2: Merchandise exports to South Korea, by commodity group⁵



2.2 Merchandise imports

During 2012-13, Australia imported \$9.2 billion worth of merchandise products from South Korea, making it the 7th largest import destination; with China (\$44.5 billion) and the United States (\$27.9 billion) the two largest import destinations (Figure 3).

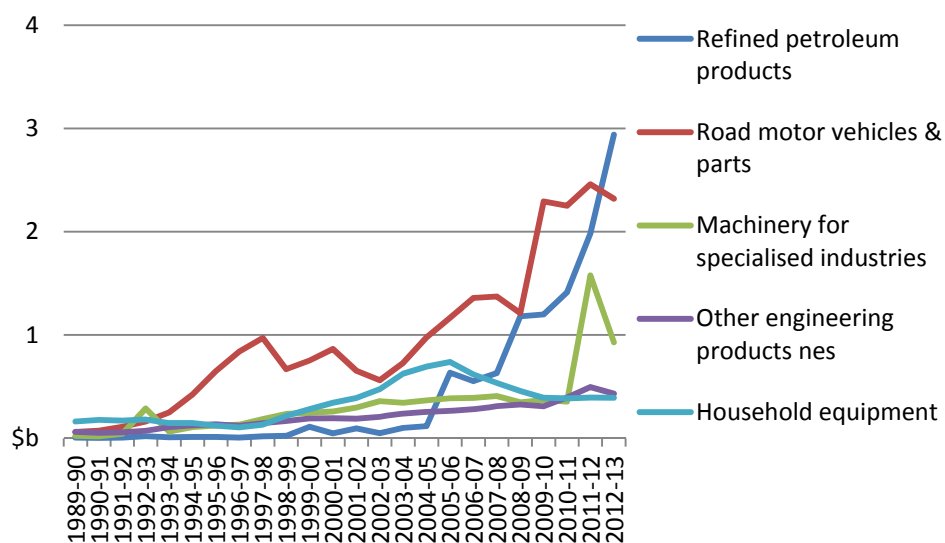
Figure 3: Australia's merchandise imports, by country⁶



Merchandise imports from South Korea have risen significantly over the last two decades; increasing by 543 per cent at an average annual rate of 8.8 per cent between 1992-93 and 2012-13.

Processed fuels and **elaborately transformed manufactured goods** accounted for a large share of Australia's imports from South Korea. In 2012-13, refined petroleum product imports were valued at \$2.9 billion; while road motor vehicle (and associated parts) imports were valued at \$2.3 billion. Until last year, motor vehicles and parts had been the most imported product from South Korea. Refined petroleum products have superseded it as the most imported product from South Korea following significant growth (532 per cent) after 2004-05 (Figure 4).

Figure 4: Merchandise imports from South Korea, by commodity group⁷

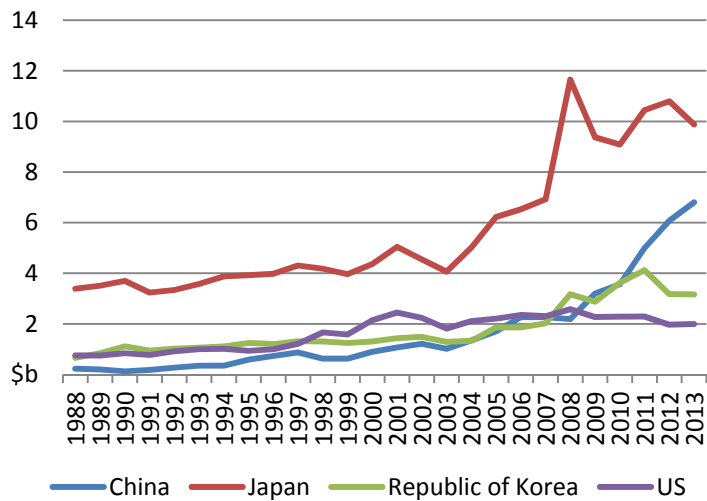


3. NSW trade with South Korea

3.1 Merchandise exports

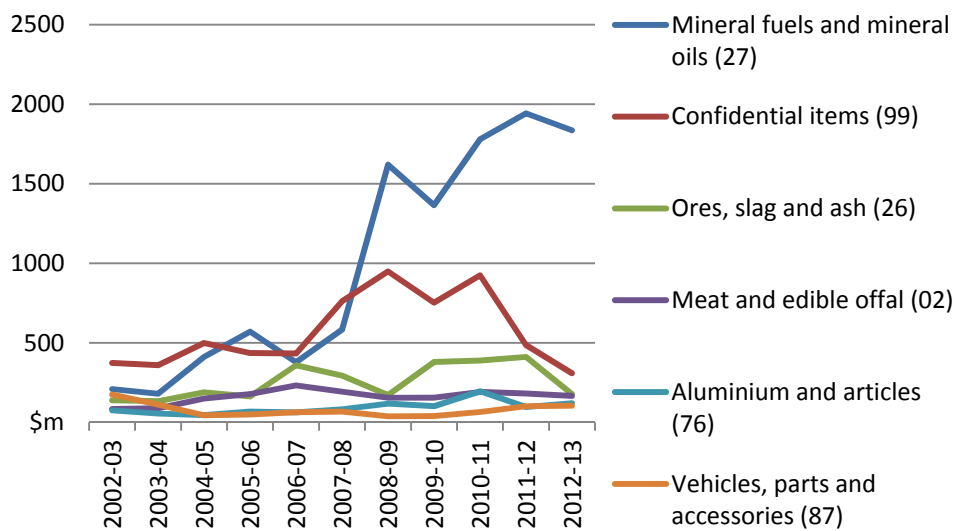
In terms of merchandise exports, South Korea (\$3.2 billion) was New South Wales' third largest trading partner in 2013 behind Japan (\$9.9 billion) and China (\$6.8 billion). NSW merchandise exports to South Korea have more than doubled over the last decade or so, increasing at an average annual rate of 7 per cent since 2002. This compares with annual export growth rates of 17 and 7 per cent for China and Japan respectively (Figure 5).

Figure 5: NSW merchandise exports, by country, FOB⁸



Mineral fuels and oils (exported under HS 27⁹) are the most exported commodities from NSW to South Korea. This has been the case for a number of years following substantial growth (485 per cent since 2006-07) in the late 2000s. **Ores** (HS 26 and including copper) and **meat and edible offal** (HS 02) have historically been the next most valuable exports to South Korea from NSW (Figure 6).

Figure 6: NSW merchandise exports to South Korea, by two digit HS classification¹⁰



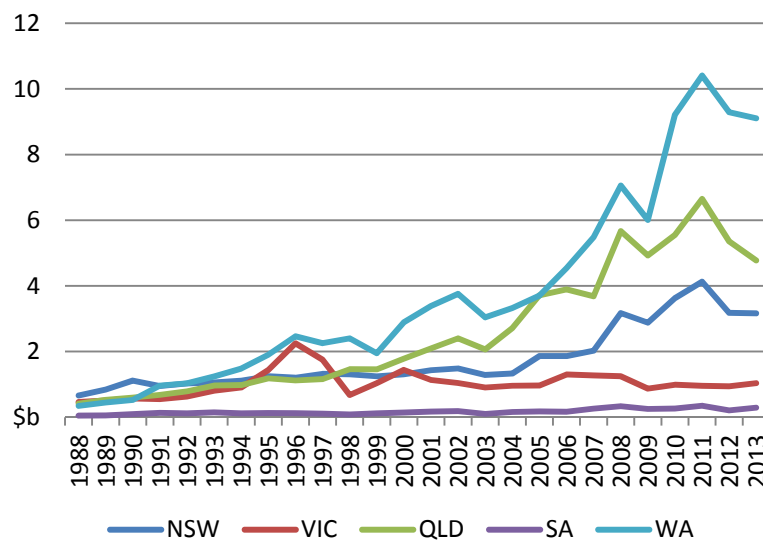
Of the mineral fuels and oils, coal is by far NSW's most exported commodity to South Korea, and in 2012-13, accounted for 60 per cent all merchandise exports; as well as 36 per cent of all Australia's coal exports to South Korea. Beef (5 per cent) and copper ore (4 per cent) were the next most valuable exports for NSW to South Korea in 2012-13 at \$150 million and \$128 million respectively (Table 1).

Table 1: NSW merchandise exports to South Korea by commodity group, 2012-13¹¹

Commodity	\$m	YOY % change	% of Aust.
Coal	1824	-6.1	35.8
Beef, f.c.f.	150	-5.7	21.3
Copper ores & concentrates	128	-65.8	29.1
Vehicle parts & accessories	104	3	92.1
Aluminium	97	29.3	14.2
Total merchandise exports	3042	-16.5	15.9

When compared with the other States, in 2013, NSW was the third largest merchandise exporter to South Korea behind Western Australia and Queensland (Figure 7). In 2013, Western Australian merchandise exports to South Korea were valued at \$9.1 billion, with a large share of this value accounted for by iron ore and crude petroleum exports. In 2013, Queensland merchandise exports to South Korea were valued at \$4.8 billion, with coal accounting for nearly half of this total.

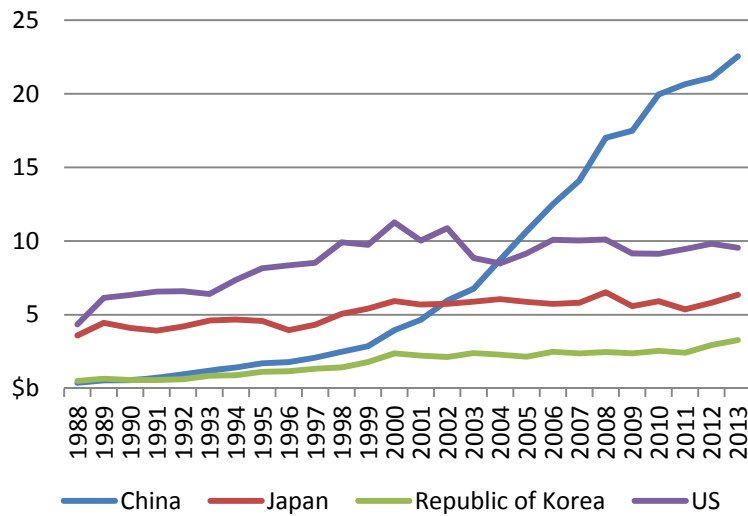
Figure 7: Merchandise exports to South Korea, by state, FOB¹²



3.2 Merchandise imports

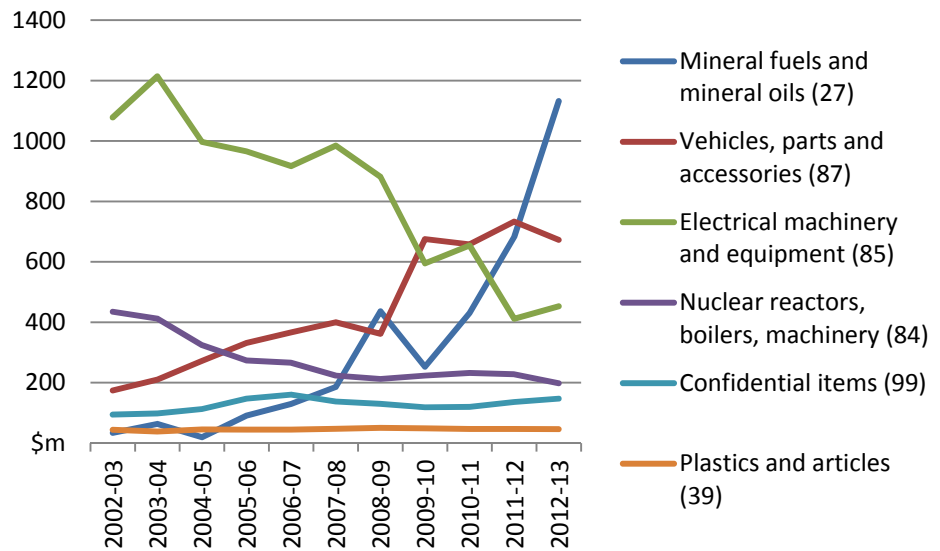
In terms of merchandise imports, South Korea (\$3.3 billion) was New South Wales' 7th largest trading partner in 2013, behind China (\$22.5 billion) and the United States (\$9.5 billion) who were ranked 1st and 2nd respectively. Growth in NSW merchandise imports from South Korea has been moderate over the last decade or so, increasing by around 36 per cent since 2002. This compares with the significant growth from China over this period, in which imports have more than tripled since 2003 (Figure 8).

Figure 8: NSW merchandise imports, by country, customs value¹³



Mineral fuels and oils (HS 27) are currently the most imported commodities from South Korea to NSW following substantial growth in refined petroleum imports since 2009-10. Prior to 2011-12, **motor vehicles** (HS 87) and **electrical machinery** (HS 85) had been the most imported products into NSW from South Korea. In 2003-04, electrical machinery accounted for \$1.2 billion of all NSW imports from South Korea. Since then, NSW imports of electrical machinery have steadily declined (Figure 9).

Figure 9: NSW merchandise imports from South Korea, by two digit HS classification¹⁴



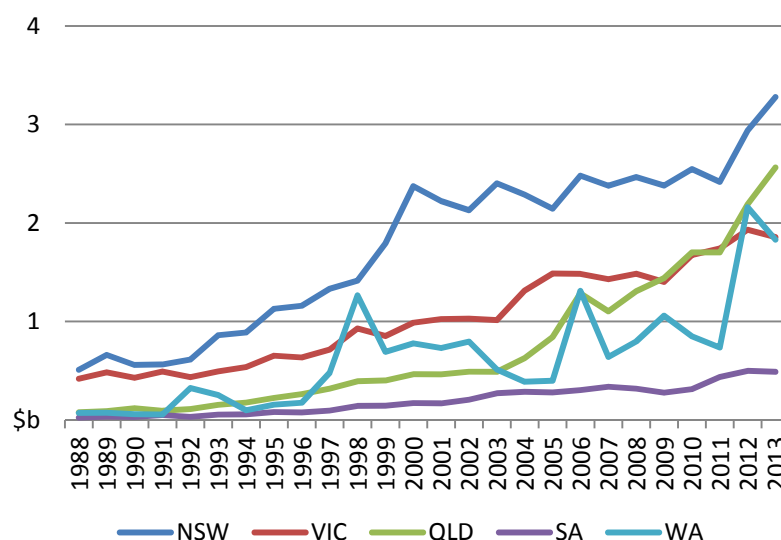
In 2012-13, refined petroleum product imports were valued at nearly \$1.1 billion or 36 per cent of all NSW merchandise imports from South Korea; while passenger motor vehicles were valued at \$611 million (or 20 per cent). NSW merchandise imports from South Korea increased by 17 per cent in 2012-13 when compared with the previous fiscal year (Table 2).

Table 2: NSW merchandise imports from South Korea by commodity group, 2012-13¹⁵

Commodity	\$m	YOY % change	% of Aust.
Refined petroleum	1,096	61.2	37.3
Passenger motor vehicles	611	-5.7	30.0
Telecom equipment & parts	226	20.2	91.9
Monitors, projectors & TVs	116	14.9	52.9
Household-type equipment, nes	51	-1.9	46.7
Total merchandise imports	3,039	17	33.0

When compared with the other States, NSW was the largest importer from South Korea in 2013 (accounting for 32 per cent of Australia's merchandise imports from South Korea) followed by Queensland and Victoria. In 2013, Queensland's merchandise imports from South Korea were valued at \$2.6 billion, with a large share of this value also accounted for by refined petroleum and motor vehicles; while Victoria's were valued at \$1.9 billion (Figure 10).

Figure 10: Merchandise imports from South Korea, by state, customs value¹⁶



4. Summary of key tariff outcomes of the KAFTA

According to the Department of Foreign and Affairs and Trade (2014):

The KAFTA gives Australian exporters significantly improved market access in goods and services and substantially improves investment protections. On entry into force of KAFTA, 84 per cent of Australia's exports (by value) to Korea will enter duty free, rising to 99.8 per cent on full implementation of the Agreement. As part of our commitments, Australia will remove its remaining tariffs on Korean goods on entry into force or over several years.¹⁷

Specific tariff outcomes for Australia from the KAFTA are summarised below:

- South Korea will eliminate tariffs immediately on entry into force for raw sugar, wheat, wine, and some horticultural products.
- South Korea will eliminate its 40 per cent tariff on beef progressively over 15 years
- 88 per cent of Australia's manufactures, resources and energy exports will enter South Korea duty free on entry into force of KAFTA, with all remaining tariffs phased out within ten years.

5. Value to Australian exporters from tariff reductions

There will be economic gains from tariff reductions for Australia from the KAFTA in terms of additional revenue for exporters. This revenue will be obtained as the tariff duties on most of Australia's export products to South Korea will, in the future, either be eliminated or reduced substantially.

The tariff reductions negotiated in the KAFTA will be implemented by South Korea over a 20-year period once the agreement comes into force. The timeline and extent of the tariff reductions vary by individual commodity (classified at the HS 10 digit level). For example, some commodities are categorised such that tariffs are removed in the first year of the implementation period; while others may be removed incrementally, or in rare instances, not at all.

The following section of the paper estimates the additional revenue obtained by Australian exporters from tariff reductions implemented by South Korea under [Chapter 2](#) of the KAFTA. For the purpose of this analysis, estimates have been undertaken using UN comtrade data (which means estimated values are expressed in 2012 US dollars) and under the assumption that import prices (or unit values) and quantities remain constant at actual 2012 levels over the 20-year implementation period.¹⁸ In reality, quantities and prices for most commodities are almost certain to fluctuate in response to changes in supply and demand. Such changes, which are difficult to quantify, may be realised in the early years of the tariff schedule as exporters increase supply in response to price incentives offered by the tariff reductions.

Based on these estimates, Australian exporters will obtain an additional \$603 million in annual revenue from tariff reductions by the end of the 20-year implementation period (Table 3).

Table 3: Annual value to Australia from tariff reductions, by two digit HS classification (2012 US\$m)¹⁹

Commodity (HS Code)	Year 1	Year 5	Year 10	Year 20
Meat and Edible Offal (02)	19.53	97.65	195.26	290.03
Mineral fuels and oils (27)	38.63	91.31	91.31	91.31
Cereals (10)	4.01	20.03	40.05	72.09
Oil seeds and oleaginous fruits (12)	2.64	13.21	25.87	51.19
Nuclear reactors, boilers and machinery (84)	10.13	11.13	11.35	11.35
Milling products (12)	1.08	5.14	10.14	10.26
Other	49.53	64.30	74.42	76.98
Total	125.5	302.7	448.42	603.21

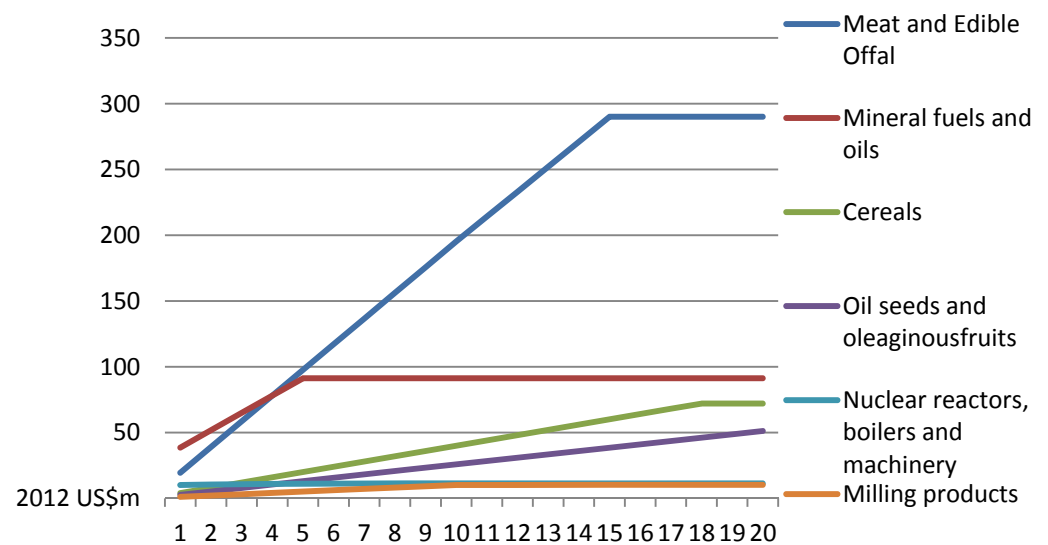
A large share of this export revenue will be received by **meat and edible offal** exporters (under HS 02), obtaining an additional \$290 million by the final year of the tariff reduction period.

Most of the meat and edible offal products are categorised such that reductions will be implemented incrementally over a 15-year period. Because of this, additional export revenue from these products will increase incrementally before stabilising in the 15th year of the tariff reduction period (Figure 11).

At the end of the implementation period, exporters of **mineral fuels, mineral oils and products of their distillation** (under HS 27) will collectively receive around \$91 million in additional annual export revenue. The full extent of these gains will be realised by the 5th year of the tariff reduction period.

At the end of the implementation period, exporters of **cereal products** (under HS 10) will collectively receive around \$72 million in additional annual export revenue. The full extent of these gains will, however, only be realised by the 18th year of the tariff reduction period (Figure 11).

Figure 11: Annual value to Australia from tariff reductions, by two digit HS classification²⁰



6. Value to South Korean exporters from tariff reductions

The following section of the paper estimates the additional revenue obtained by South Korean exporters from tariff reductions implemented by Australia over a 10 year implementation period. These estimates have also been completed using the same methodology and data sources in Section 5 of the paper.

Based on these estimates, South Korean exporters will obtain around \$292 million in additional annual revenue from tariff reductions by the end of the implementation period (Table 4). A large share of this export revenue will be obtained by **motor vehicle** exporters (HS 87) which will obtain an additional \$115 million by the final year of the tariff reduction period.

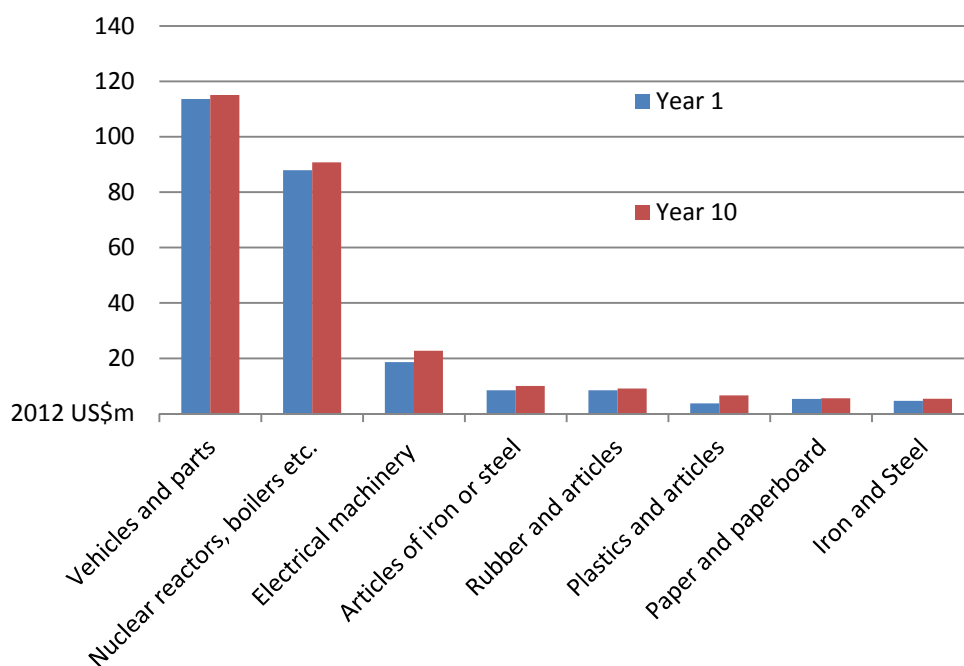
Table 4: Annual value to South Korean exporters from tariff reductions, by two digit HS classification (2012 US\$m)²¹

Commodity (HS Code)	Year 1	Year 5	Year 10
Vehicles and parts (87)	113.67	115.09	115.09
Nuclear reactors, boilers and machinery (87)	87.96	90.79	90.79
Electrical machinery and equipment (85)	18.64	22.77	22.77
Articles of iron or steel (74)	8.44	10.05	10.05
Rubber and articles (41)	8.45	9.09	9.09
Plastics and articles (40)	3.71	6.62	6.62
Paper and paperboard (49)	5.34	5.57	5.57
Iron and Steel (73)	4.67	5.38	5.38
Other	24.16	26.14	26.20
Total	275.05	291.51	291.56

South Korean exporters of **nuclear reactors, boilers, machinery and mechanical appliances** (HS 84) will realise around \$91 million in additional revenue by the end of the implementation period.

As evident in Figure 12, most of the gains (94 per cent) from the tariff reductions will be realised in the first year of the 10-year implementation period.

Figure 12: Annual value to South Korea from tariff reductions, by two digit HS classification²²

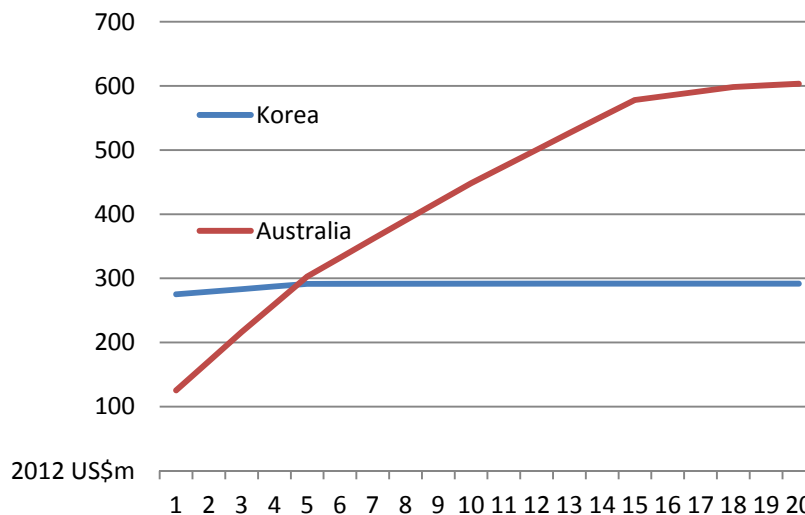


7. Comparison of benefits between South Korea and Australia from tariff reductions

Using the previous estimates it is possible to compare which country is likely to gain the most from the tariff reductions specified under Chapter 2 of the KAFTA. Figure 13 illustrates that up to year 5 of the implementation period, South Korean exporters are likely to have higher annual export

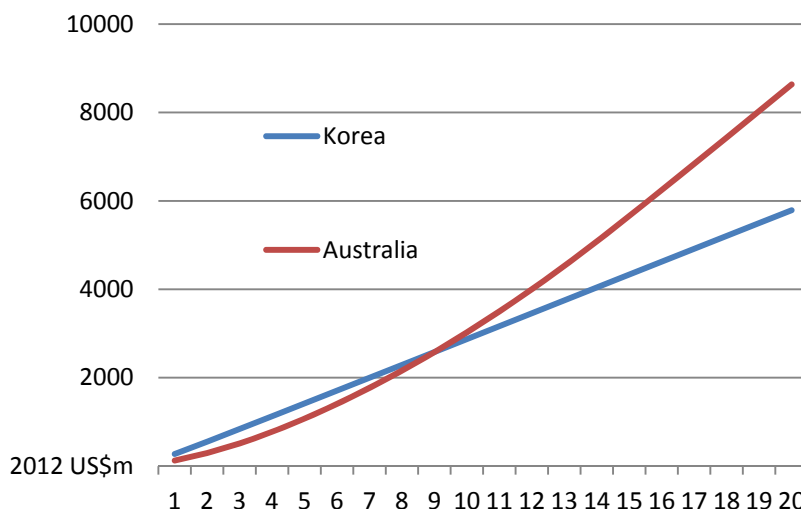
revenue gains than Australian exporters. However, as gains are realised later in the implementation period from tariff reductions to agricultural commodities, such as meats and cereals, Australia's annual export revenue gains will increase beyond that of South Korea's. By year 20 of the implementation period, Australia's annual export revenue from the tariff reductions will be around \$312 million more than that of South Korea's.

Figure 13: Annual value to exporters from tariff reductions (2012 US\$m)²³



By year 20 of the implementation period, Australia will have accumulated an additional \$2.8 billion of export revenue than South Korea. This gap begins to widen from year 10 onward, and will widen as annual revenue gains from the FTA stabilise toward the end of the implementation period (Figure 14).

Figure 14: Cumulative value to exporters from tariff reductions (2012 US\$m)²⁴



8. Implications for NSW from the tariff reductions

Using New South Wales' export share of each commodity (at the HS two digit level), it is possible to obtain estimates of the value NSW exporters are likely to obtain over the tariff reduction period. For the purposes of this analysis, these estimates are provided assuming that State shares and quantities of exports to South Korea, along with prices, remain constant over the implementation period.

8.1. Value for NSW exporters to South Korea

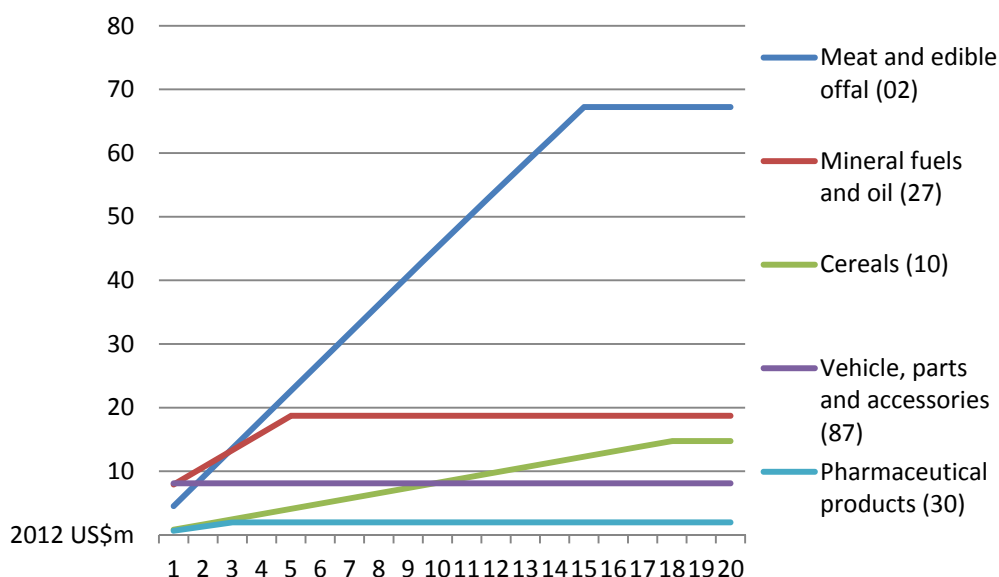
Based on these estimates, NSW exporters will obtain around \$122 million in additional annual revenue from tariff reductions by the end of the implementation period (Table 5). A large share of this export revenue will be realised by **meat and edible offal** exporters (HS 02) which will obtain an additional \$67.2 million in annual revenue by the final year of the tariff reduction period. NSW exporters of **mineral fuels and oil** (\$18.7 million) and **cereals** (\$14.7 million) will also obtain significant value from the KAFTA by the end of the implementation period.

Table 5: Annual value to NSW exporters from tariff reductions, by two digit HS classification (2012 US\$m)²⁵

Commodity (HS Code)	Year 1	Year 5	Year 10	Year 15	Year 20
Meat and edible offal (02)	4.53	22.63	45.25	67.21	67.21
Mineral fuels and oil (27)	7.91	18.70	18.70	18.70	18.70
Cereals (10)	0.82	4.09	8.18	12.28	14.73
Vehicle, parts and accessories (87)	8.10	8.10	8.10	8.10	8.10
Pharmaceutical products (30)	0.66	1.96	1.96	1.96	1.96
Other	6.31	8.67	10.22	10.61	10.85
Total	28.32	64.16	92.42	118.86	121.55

As mentioned previously, tariff reductions on meat and edible offal products are implemented incrementally over a 15-year period. Because of this, additional export revenue for these products will increase incrementally before stabilising in the 15th year of the tariff reduction period. Cereal products will increase and then stabilise by the 18th year of the implementation period. Revenue gains on the other major products such as mineral fuels and oil will be realised earlier in the implementation period (Figure 15).

Figure 15: Annual value to NSW exporters from tariff reductions, by two digit HS classification ²⁶



8.2. Value for South Korean exporters to NSW

South Korean exporters to NSW will obtain around \$70 million in additional annual revenue from tariff reductions by the end of the implementation period (Table 6). A large share of this export revenue will be obtained by **motor vehicle** exporters (HS 87) which will obtain an additional \$34 million in annual revenue by the final year of the tariff reduction period.

As at the national level, almost all of the value will be obtained by South Korean exporters in the first year of implementation.

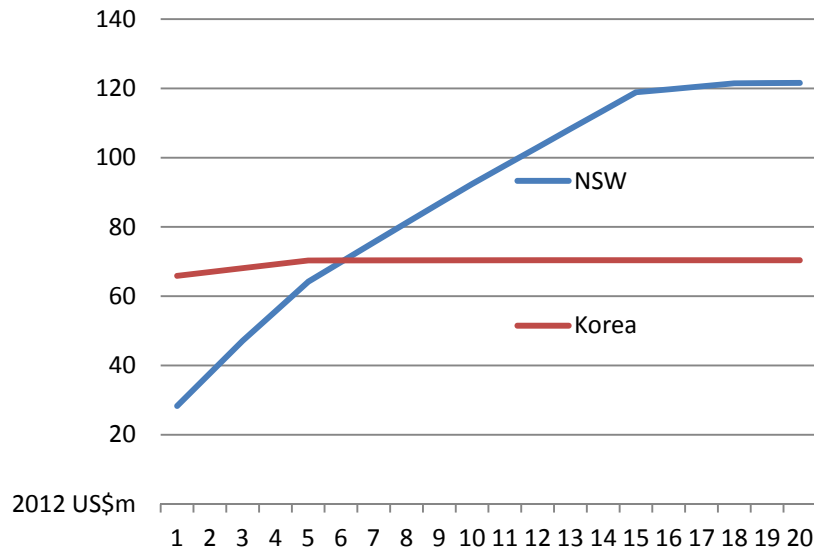
Table 6: Annual value for South Korean exporters (to NSW) from tariff reductions, by two digit HS classification (2012 US\$m) ²⁷

Commodity (HS Code)	Year 1	Year 5	Year 10
Vehicles, part and accessories (87)	33.62	34.04	34.04
Nuclear reactors, boilers and machinery (87)	10.22	10.55	10.55
Electrical machinery and equipment (85)	8.62	10.53	10.53
Rubber and Articles (40)	2.30	2.48	2.48
Plastics and articles (39)	0.91	1.62	1.62
Iron and Steel (72)	1.05	1.21	1.21
Others	9.15	9.91	9.91
Total	65.88	70.34	70.35

8.3. Comparison of benefits between South Korea and NSW from tariff reductions

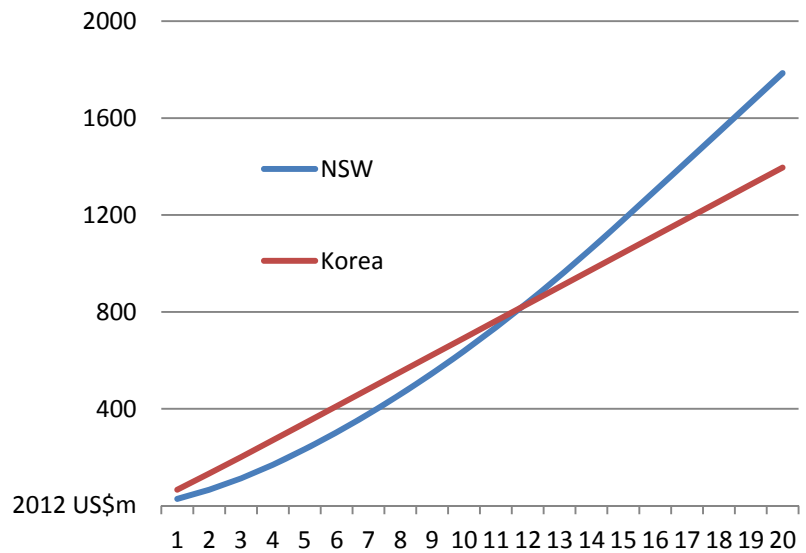
As evident in Figure 16, by the end of the implementation period, NSW exporters will extract a greater annual value from the tariff reductions in the KAFTA than their South Korean counterparts. Because most of Australia’s tariff reductions occur in the first year of the KAFTA schedule, South Korean exporters will obtain greater value than NSW exporters up until year 6.

Figure 16: Annual value to exporters from tariff reductions²⁸



By the end of the implementation period, NSW exporters would have accumulated an additional \$389 million from the tariff reductions than South Korean exporters to NSW. The relative margin is slightly less and also occurs at a later stage in the tariff reduction than at the national level (Figure 17).

Figure 17: Cumulative value to exporters from tariff reductions²⁹



9. Conclusion

South Korea is one of the most significant trading partners for Australia, and specifically New South Wales. Because of this, there are likely to be significant economic gains for both countries once the KAFTA is formalised. The Department of Foreign Affairs and Trade estimates that the agreement will result in a \$653 million a year boost to the Australian economy, which includes both tariff and non-tariff economic gains.

Based on the estimates in this paper, by the end of the 20-year implementation period, Australian exporters will obtain an additional \$603 million in annual revenue from tariff reductions specified in Chapter 2 of the KAFTA. A large share of this revenue will be obtained by meat, cereal and mineral exporters. This compares with the \$292 million in additional annual revenue South Korean exporters will receive.

Based on the same estimates, NSW exporters will obtain an additional \$122 million in annual revenue from tariff reductions by the end of the implementation period.

It should be noted that these tariff reductions represent only one component of the KAFTA. As such, while the estimates suggest that Australian exporters are likely to benefit more from these tariff reductions than their South Korean counterparts, varying economic gains may be realised in other components of the KAFTA (e.g. gains from easing of foreign investment regulation and reductions to barriers in other non-merchandise trade).

¹ Department of Foreign Affairs and Trade, [Korea-Australia Free Trade Agreement: Official Documents](#), 2014

² Department of Foreign Affairs and Trade, [Korea-Australia Free Trade Agreement: Official Documents](#), 2014; SmartCompany, [Korea-Australia Free Trade Agreement: What it means for businesses](#), February 2014

³ NSW Department of Trade and Investment, [Business update: Opportunities for NSW in new Korea-Australia Free Trade Agreement](#), February 2014

⁴ Department of Foreign Affairs and Trade, [Trade statistical pivot tables](#), 2013

⁵ Department of Foreign Affairs and Trade, [Trade statistical pivot tables](#), 2013

⁶ Department of Foreign Affairs and Trade, [Trade statistical pivot tables](#), 2013

⁷ Department of Foreign Affairs and Trade, [Trade statistical pivot tables](#), 2013

⁸ Australian Bureau of Statistics, [International Trade in Goods and Services, Australia](#), December 2013

⁹ The Harmonized Commodity Description and Coding System generally referred to as "Harmonized System" or simply "HS" is a multipurpose international product nomenclature developed by the World Customs Organization. It comprises about 5,000 commodity groups; each identified by a six digit code. The system is used by more than 200 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics. Over 98 % of the merchandise in international trade is classified in terms of the HS. For more information, visit the World Customs Organization [website](#).

¹⁰ DFAT STARS Database, based on ABS Catalogue number 5368.0, December 2013

¹¹ Department of Foreign Affairs and Trade, [Australia's trade by State and Territory](#), 2012-13

¹² Australian Bureau of Statistics, [International Trade in Goods and Services, Australia](#), Catalogue No. 5368.0, December 2013

¹³ Australian Bureau of Statistics, [International Trade in Goods and Services, Australia](#), Catalogue No. 5368.0, December 2013

¹⁴ DFAT STARS Database, based on ABS Catalogue number 5368.0, December 2013

¹⁵ Department of Foreign Affairs and Trade, [Australia's trade by State and Territory](#), 2012-13

¹⁶ Australian Bureau of Statistics, [International Trade in Goods and Services, Australia](#), Catalogue No. 5368.0, December 2013

¹⁷ Department of Foreign Affairs and Trade, [Korea-Australia Free Trade Agreement, Outcomes at a Glance](#), February 2014

¹⁸ Because of data limitations, individual commodity estimates have been conducted at the HS 6 digit level and then aggregated at the HS 2 digit level.

¹⁹ Author estimates using data from: United Nations, [Commodity Trade Statistics Database](#), 2014; Department of Foreign Affairs and Trade, [Korea-Australia Free Trade Agreement: Official Documents](#), 2014, Chapter 2

²⁰ *Ibid.*

²¹ *Ibid.*

²² Ibid.

²³ Ibid.

²⁴ Ibid.

²⁵ Author estimates using data from: United Nations, [Commodity Trade Statistics Database](#), 2014; Department of Foreign Affairs and Trade, [Korea-Australia Free Trade Agreement: Official Documents](#), 2014, Chapter 2; DFAT STARS Database, based on ABS Catalogue number 5368.0, December 2013

²⁶ Ibid.

²⁷ Ibid.

²⁸ Ibid.

²⁹ Ibid.

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