

INVEST IN BRISBANE, AUSTRALIA FOR ENERGY AND RESOURCES

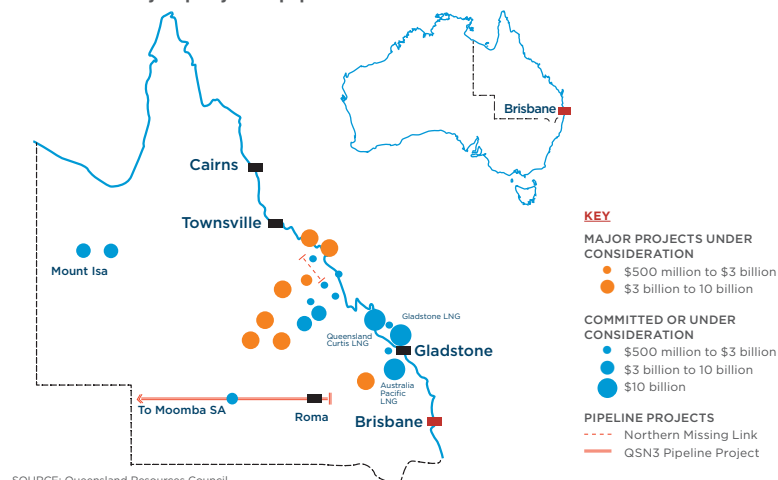
Brisbane's established and world-leading resource hub underpins the demands of Australia and many parts of the world.

Investment in Australia's energy and resource sector accounts for the vast majority of business investment occurring across the country. Australia's earnings from resources and energy commodities are projected to increase at an average rate of 7 per cent a year from 2013-14 to total \$274 billion in 2018-19. Earnings will be driven by the substantial growth in volumes of a number of commodities despite near-term softness.¹

Queensland is world renowned for its vast resource endowments, including coal, base metals, coal seam gas (CSG) and petroleum, with the state currently accounting for over 35 per cent of all private capital investment in mining and exploration in Australia.²

Brisbane, as Queensland's business centre, is home to 177 energy and resource companies, with the majority choosing Brisbane for their headquarters.³ The city's strategic location across three international time zones, close proximity to many of Australia's largest resource and mineral deposits, highly skilled workforce and access to world-leading innovation and technology are just some of the competitive advantages that make Brisbane a premier choice for energy and resources companies doing business in Australia and across the globe.

Queensland major projects pipeline



SOURCE: Queensland Resources Council

Brisbane's Competitive Advantages

Global advantages

Increasing global demand for coal and LNG provides ongoing opportunities for expansion and investment. The state's first LNG exports are anticipated to begin later this year, supported by sales agreements with customers in Chile, China, Japan and Singapore. Brisbane is the closest major Australian eastern seaboard capital city to Asia and home to one of Australia's fastest growing capital city ports, making the city well placed to cater to the growing energy and resource demands of the Asia Pacific market.

Infrastructure and construction

Record investment in energy and resources projects requires ongoing investment in key economic infrastructure across

the transport, energy, water and telecommunications sectors. Queensland's continued ability to service the growth in demand for its resources from both China and India is supported by world-class rail and port infrastructure.

Talent innovation and education

Brisbane's population is young, skilled, well-educated and culturally diverse. Home to three world-class universities, a rich research environment and innovation-focused government, Brisbane is internationally recognised as a centre of excellence in the field of mining technology and services. A large number of world-renowned industry research and education facilities are well established in Brisbane including the Queensland Minerals and Energy Academy, UQ Sustainable Minerals Institute and Cooperative Research Centres (CRCs) such as CRC Mining.

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Proximity to Australia's largest resource and mineral reserves

Brisbane, as a world-leading commercial hub for energy and resources, benefits from its proximity to Australia's largest coal and unconventional gas deposits. Two of the state's major basins, the Bowen Basin and Surat Basin, account for 92 per cent of Australia's CSG reserves as well as the majority of the state's 34 billion tonnes of world-class coking coal and thermal coal deposits.⁴

"Brisbane has some great universities that provide some fantastic people that can work for a mining technology company such as ours."

Andrew Jesset, Chief Executive Officer, Mineware

Opportunities

Supply chain partnerships

There is currently in excess of **\$71 billion** in resource investments under construction and **\$61 billion** committed or under consideration in Queensland.⁵ As these projects continue to proceed through the planning stages to commencement, opportunities will emerge for companies with the capacity to integrate their offerings into project supply chains and/or contracts with local companies.

Coal

Queensland has a rich endowment of high-quality coal resources, with more than **34 billion tonnes** (raw coal in-situ) identified by drilling operations. Coal exploration expenditure in Queensland in 2012-13 was a staggering **\$454 million**.⁶ Queensland is the world's largest seaborne metallurgical coal exporter, sending **152 million tonnes** abroad in 2013-14 and a further **52 million tonnes** of thermal coal, accounting for approximately 40 per cent of all internationally traded coking coal and 8 per cent of internationally traded thermal coal.⁷

CSG to LNG

Australia is currently the **world's third-largest liquefied natural gas (LNG) exporter**, but with more LNG plants under construction than any other country, it is positioned to become the largest by 2020.⁸ Queensland in particular is well placed to benefit from this growth, with the state's exports expected to grow by 23 per cent in 2015-16 due to LNG exports coming online.⁹

Shale gas

In 2011, a report commissioned by the U.S. Energy Information Agency estimated that shale gas resources exceed CSG reserves in Australia. Of the four basins assessed with the most potential, the Cooper and Maryborough Basins are both based in Queensland.¹⁰

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Companies in the Brisbane market include;

- ABB
- Alstom
- Arrow Energy
- Bechtel
- BHP Billiton
- Cameron International
- Clough Seam Gas
- Fluor
- General Electric
- Halliburton
- Laing O'Rourke
- Origin Energy
- QGC (BG Group)
- Rio Tinto Alcan
- Rio Tinto Coal
- Santos
- Schneider
- Sun Engineering
- Thiess
- Weatherford International
- WorleyParsons

¹Australian Government Bureau of resources and energy economics, Resources and Energy Quarterly, September Quarter 2014

²Queensland Government Mining Journal, Autumn Edition 2014

³Deloitte Queensland Index, August 2014

⁴Australian Government, Bureau of resources and energy economics, Gas Market Report, October 2013

⁵Deloitte Access Economics, Investment Monitor, June 2014

⁶Queensland Government, Department of Natural Resources and Mines, Queensland coal statistics report for year ended June 2013

⁷Queensland Government, Department of Natural Resources and Mines, Queensland coal statistics interim report for year ended June 2014.

⁸International Energy Agency, Mid-Term Gas Market Report 2013

⁹Queensland Government, State Budget at a Glance 2013-14

¹⁰Alex Cull, 2011