

FUTURE INFRASTRUCTURE:
PRIVATE INVESTMENT -

**A STATEMENT OF
OPPORTUNITY**



DISCUSSION PAPER

Department of State Development, Infrastructure, Local Government and Planning



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A MESSAGE FROM THE MINISTER

The release of our *State Infrastructure Strategy* in 2022 set a plan for the future in identifying the infrastructure needs for Queensland for the next two decades.

Investment in infrastructure unlocks, catalyses and supercharges growth in industries and in the liveability of our communities for generations to come.

Planning and delivering new and enhanced infrastructure is not the sole responsibility of government. Collective and collaborative investment in priority infrastructure areas is the key to Queensland's continued success in developing our industries and providing for our communities.

While the Queensland Government will continue to invest in and own critical public infrastructure, the private sector also has an opportunity to help shape the future of Queensland. The *Future Infrastructure: Private Investment discussion paper* sets out our contemporary views on priorities and opportunities for private investment in infrastructure.

We will engage with industry on the initial investment themes and opportunities set out in this discussion paper and, as importantly, any barriers to realising the investment potential we all see for Queensland.

The Queensland Government looks forward to continuing to work with private sector partners and industry to foster a positive future for investment in infrastructure.

The Honourable Steven Miles MP

Deputy Premier and Minister for State Development, Infrastructure, Local Government and Planning
and

Minister Assisting the Premier on Olympic and Paralympic Games Infrastructure

ABOUT THE STATEMENT OF OPPORTUNITY

The Queensland Government has a clear ambition to capitalise on new, innovative and more collaborative approaches to address the state's infrastructure needs and opportunities while continuing to support established and priority sectors.

We've articulated our priority interests through a range of strategies and plans, and are committed to working with the private sector and industry to advance these opportunities to facilitate better infrastructure investment outcomes across Queensland. We recognise the strength of existing partnerships for established sectors and seek to replicate this success in developing emerging opportunities for Queensland.

In June 2022, the Department of State Development, Infrastructure and Local Planning (DSDILGP) released the State Infrastructure Strategy (SIS), which includes an action for DSDILGP to set priority infrastructure investment opportunities.

As an overarching investment guide for the private sector, the *Future Infrastructure: Private Investment – A Statement of Opportunity* brings together opportunities for private sector investment to highlight Queensland Government priorities, and current infrastructure strategies.

While many infrastructure classes or industries present merit cases for private infrastructure investment, this Statement highlights priorities where government is looking to broadly promote and encourage the private sector to invest in exploring and developing infrastructure options and solutions. It focusses on matching industry and investor interest with targeted opportunities for private sector investment in infrastructure to support, catalyse, stimulate and lead long-term industry growth.

This Statement does not set out to promote every private infrastructure investment opportunity. Not highlighting industries, sectors or infrastructure classes in this Statement does not take away from the importance of those sectors and the value of more targeted or already well-established opportunities for private investment.

STATEMENT OF OPPORTUNITY DISCUSSION PAPER

You will notice question boxes such as these throughout the discussion paper.



How often should the *Statement of Opportunity* be updated

Government levers
(e.g. land, Economic Development Queensland (EDQ), Exclusive Transactions)

This discussion paper identifies:

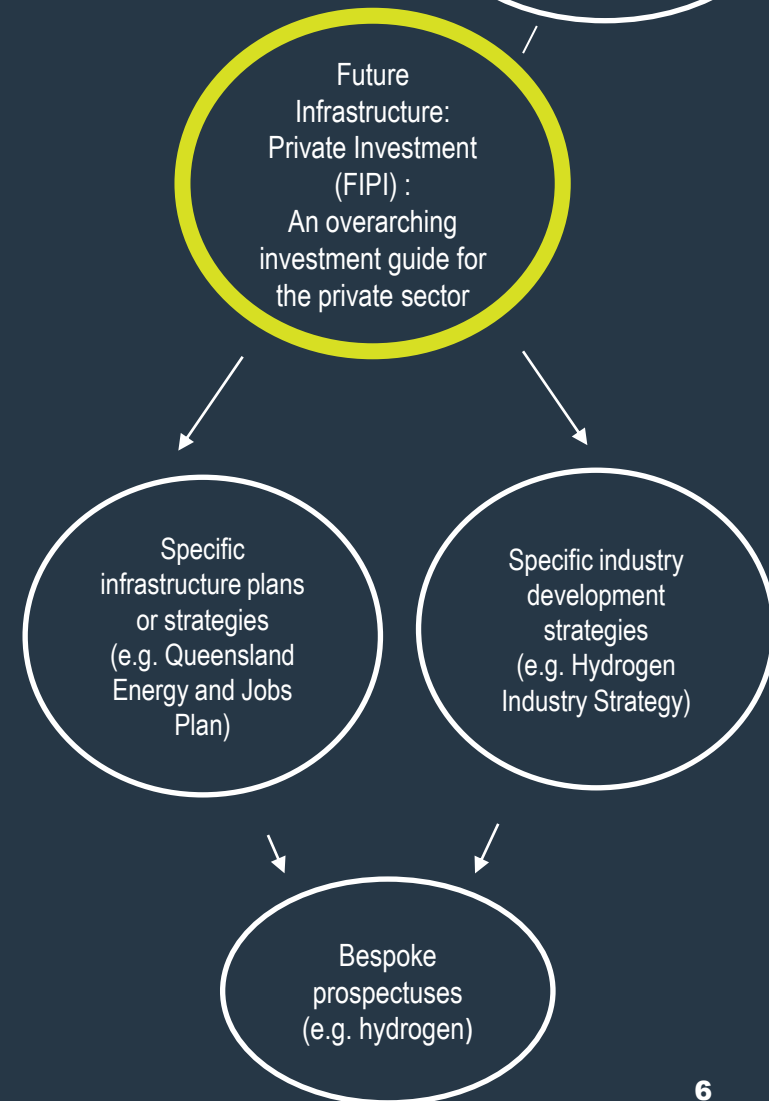
- Specific infrastructure investment opportunities which:
 - have strong potential and private sector investment interest, and
 - support key Queensland Government priorities (e.g. growing our future economy),
- Government levers and support mechanisms available to facilitate private sector investment in infrastructure.

We'd like to work with industry to refine these infrastructure investment opportunities and, where appropriate, the levers government could use to support investment through its existing services, programs and initiatives.

Targeted industry engagement on this discussion paper aims to:

- test and refine infrastructure investment themes and opportunities,
- understand private sector investment appetite across specific infrastructure priorities,
- uncover insights into the barriers to private infrastructure investment in Queensland, and
- understand how government can support greater investment.

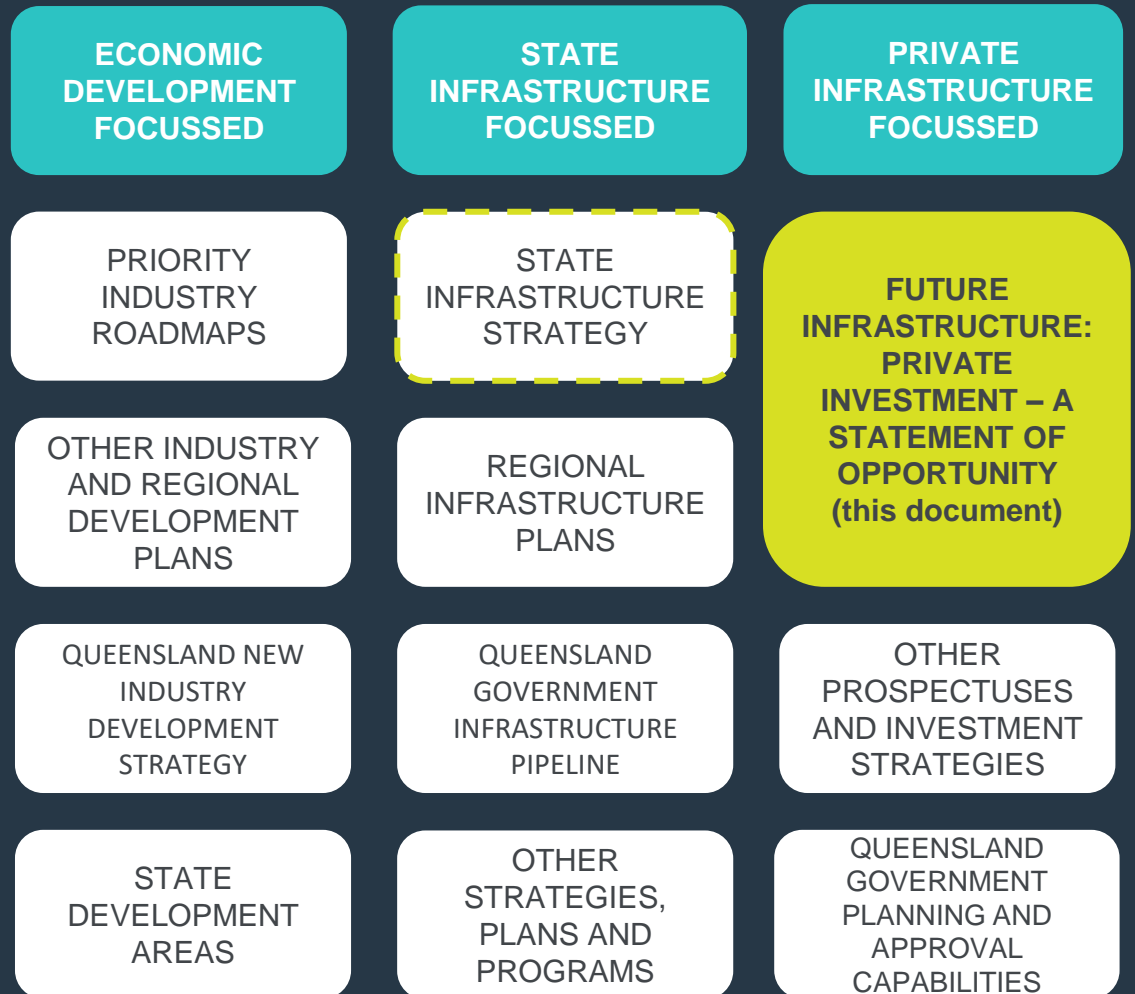
Targeted industry feedback on this discussion paper will be used to inform the development of a public infrastructure investment *Statement of Opportunity*.



STATEMENT OF OPPORTUNITY POLICY CONTEXT

To help support economic development and industry investment, the Queensland Government already publishes economic and infrastructure documents, including a State Infrastructure Strategy. While predominantly focussed on public infrastructure, this Strategy notes that the private sector has a vital role in contributing to the delivery of its vision and objectives.

Having identified this role, we are now seeking to ensure that the private sector has clarity about where the Queensland Government sees opportunities for private sector infrastructure investment through FIPI, along with the roles government may be able to play in supporting this investment.



WHAT WE MEAN BY INFRASTRUCTURE

To maximise infrastructure investment opportunities, we define infrastructure more broadly than the 10 infrastructure classes outlined in the SIS. It can include traditional enabling infrastructure, industry specific common user infrastructure, industrial land and precincts, and other types of facilities, such as those required in the manufacturing sector.

The Statement recognises that in some infrastructure classes under the State Infrastructure Strategy, investment will continue to be led by State Government.

SCOPE OF THE STATEMENT OF OPPORTUNITY



Details the priority infrastructure themes and policy context



Identifies key opportunities for private sector investment in infrastructure



Links to other plans and strategies that provide greater detail on what and where these opportunities are



Details the levers government has to support and facilitate private sector investment in infrastructure and why you should do business in Queensland

» OUR INFRASTRUCTURE LANDSCAPE

Infrastructure trends



State Infrastructure Strategy focus areas



Driving infrastructure performance



Creating livable communities



Renewable energy superpower



Connecting our regions



Building a Brisbane 2032 legacy

National infrastructure trends



Place-based infrastructure approach



Cleaner, greener future



Improving physical and digital connections



Optimising infrastructure assets



better approaches to infrastructure

» OUR INFRASTRUCTURE LANDSCAPE

We face a collective challenge across government and industry – how can we deliver infrastructure for tomorrow in a sustainable and cost-effective way?

As highlighted in the SIS, we have a clear ambition to capitalise on new, innovative and more collaborative approaches to address our State's infrastructure needs. While the Queensland Government is investing \$89 billion in infrastructure investments over the next four years over, more investment is needed to meet the changing needs of Queensland's population, industries and market conditions.

The economic catalyst underpinning our clear ambition of accelerated housing and infrastructure development is population growth. Following our strong response to the COVID-19 pandemic, Queensland had the largest positive 12 month population change of any Australian state or territory to December 2022, welcoming a 2.0% increase accounting for over 104,400 people. And our population will continue to increase - by 2032, the population of Queensland is expected to grow by 16%.

Brisbane 2032 presents Queensland with the opportunity to take advantage of its abundant resources and bring communities together to build a sustainable sports ecosystem, attract investment and trade, and cement our position as a global tourism destination. In preparation for this global event, significant infrastructure investment is required across Queensland as its population is projected to grow to 6.2 million

Queensland has a once-in-a-lifetime opportunity to boost our economy, pave the way in Australia's decarbonisation agenda and become a world leader in renewable energy by utilising infrastructure in a sustainable, cost-effective way.

We understand the key challenge of boosting housing supply and prioritising affordability, to support a growing population. The Palaszczuk Government is committed to ensuring every Queenslanders has a home and is investing \$3.9 billion in social and affordable housing, including a planned investment of \$102.1 million towards 255 new social homes in Far North Queensland by 30 June 2025. The Palaszczuk Government is also working closely with local councils to bring land in the underutilised urban footprint to market sooner. Complementary sectors are pivotal to this strong housing agenda, including working with the Australian Government to provide digital connectivity for Queensland households, and we need to be growing digital industries to ensure every home in Queensland has access to reliable and affordable digital connectivity.

Government recognises the value of the current investment market and is seeking to leverage this to attract and focus investment to deliver upon these key infrastructure investment priorities.

SECTORS AND EMERGING THEMES

THEMES WITH LONG-TERM GROWTH OPPORTUNITIES

ENERGY

RENEWABLE HYDROGEN

CRITICAL MINERALS

BIOFUTURES

RESOURCE RECOVERY

DIGITAL



DECARBONISATION

Efforts to reduce emissions and meet our climate targets, encompassing energy, renewable hydrogen, critical minerals and biofutures industries to position Queensland as a renewable energy powerhouse.

CIRCULAR ECONOMY

Linking materials and resource recovery to enhance the State's circular approach to how we use, recycle, re-manufacture and reuse end of life materials and products.

CONNECTING OUR REGIONS

Building on digital industries to ensure everyone in Queensland can access reliable and affordable digital connectivity.

What other game-changing themes should be considered? Refer to section on Emerging Themes



NOTE:

Some critical public infrastructure will continue to be led by State Government.

Any additional infrastructure investment opportunities must be in areas of demonstrable strong potential – both as a government priority and where there is known private sector interest.

» DECARBONISING OUR FUTURE

As worldwide energy use changes, consumers, investors, trading partners, and society are demanding more sustainable and low emissions products and supply chains. Notably, there is a significant opportunity for renewable energy to power and replace traditional carbon intensive energy used heavily in sectors such as manufacturing.

Queensland, with its abundance of natural resources and land, has a unique opportunity to lead the way in our nation's decarbonisation agenda and become a world leader in renewable energy.

Our targets:

- > 70% renewable energy by 2032 and 80% by 2035
- > 30% emissions reduction below 2005 levels by 2030
- > Net zero emissions by 2050

OPPORTUNITY SNAPSHOT

- Renewable energy generation and storage
- Global demand for cleaner liquid fuels
- Manufacturing with green energy

UNLOCKING A TRULY RENEWABLE SUPPLY CHAIN...

Queensland holds the key to unlocking a renewable energy supply chain by:

- > using our natural endowment of critical minerals
- > harnessing low-cost renewable energy to onshore refining of new economic minerals and green manufacture of renewable energy products;
- > delivering affordable, clean and secure energy
- > growing investment in sectors such as R&D, advanced manufacturing and material suppliers that contribute to the development of renewable energy infrastructure and
- > manufacturing green energy, renewable hydrogen, sustainable liquid fuels and key renewable energy equipment locally.

BATTERY PRODUCTION, CERTIFICATION AND STORAGE

1.1

Queensland, while not having key reserves of lithium, benefits from its ability to access significant reserves of other key critical minerals such as vanadium, and our broader ability to comply with global ethical origins expectations and standards.

At present, there is a key gap in Queensland's supply chain for **battery production**. The supply chain considers the production of critical minerals, the processing of these minerals, the production of highly technical componentry and finally, the assembly of that componentry into batteries. In Queensland, we currently produce critical minerals and assemble the end componentry however there is a key gap across the processing of critical minerals and the production of highly technical componentry. Harnessing this advantage will reduce dependence on international suppliers and lower the carbon footprint of existing battery manufacturing processes. Other opportunities exist in what will be an increasing demand for battery testing and certification.

To ensure an optimal and efficient transmission and storage network, **Queensland requires distribution level batteries with medium 4-12 hour storage across varied locations, to support South East Queensland (SEQ)** and ensure reliable energy supply to regional and remote communities.

The Queensland Government is prioritising the development of a multi-technology battery industry and sees opportunities for private sector investment in Common User Infrastructure (CUI) to stimulate and add to the development of Queensland's battery value-chain. That opportunity extends to **manufacturing advanced materials using critical minerals** and **recycling and remanufacture of batteries**, linking our future as a renewable energy superpower to our vision to be a zero-waste society.

SUPPORTING AN EMERGING RENEWABLE HYDROGEN INDUSTRY

1.2

Hydrogen is a clean, renewable fuel that can be used in transport, power supply and to drive industrial processing.

Several critical inputs are needed to ensure the successful development of the industry in Queensland.

There are opportunities for private sector investment in the enabling infrastructure underpinning the emerging renewable hydrogen industry, including: **renewable generation and transmission, water supply and distribution** (including desalination, pipelines and tank farms), **product transmission, storage and port infrastructure**.

SUPPORTING THE TRANSITION TO SUSTAINABLE LIQUID FUELS

1.3

Biofuels can support the use of low emission fuels across industrial, civilian and military sectors.

Queensland produces a diverse array of agricultural and waste resources that can be used to create liquid fuels that help decarbonise hard-to-abate sectors like aviation, marine, construction and mining.

There is an opportunity for industry to unlock capital investment that will **increase local biofuel production capabilities, accelerate its uptake** and improve its accessibility across Queensland.



For opportunities presented in this paper, what are the preferred common-user infrastructure investment models?

1.4

COMMON USER INFRASTRUCTURE FOR CRITICAL MINERAL PROCESSING

Historically, a challenge for investment in this sector has been the disparate nature of these deposits, coupled with the cost of extraction and production. The Queensland Government committed ~\$75 million to establishing a common user facility in Townsville to support pilot and demonstration scale trials of processing methods and technologies for critical minerals and rare earth elements, including vanadium, recognising the importance of mineral processing to the achievement of the State's renewable agenda. Prospective vanadium projects in Queensland are at varying stages of development and largely at a point of investigating the economic and technical viability of extraction and processing techniques for vanadium. The new State owned facility will lower costs for junior mining companies that lack available capital for testing and processing facilities. Companies will transport samples of ore from mining tenements to Townsville and use the facility to trial extraction and production processes.

Supported by the QRIDP and informed by early outcomes of this trial, there is an opportunity for the private sector to **accelerate the delivery of CUI infrastructure for minerals processing and recovery and processing of end-of-life products produced from these minerals, such as batteries, to be processed for reuse.**

1.5

LOCAL MANUFACTURING OF RENEWABLE COMPONENTS

Infrastructure and **facilities needed to produce renewable energy components**, including solar panels and wind turbine blades, cables for high voltage transmission, transmission towers, and green steel, with focus on facilities and processes that enable end-to-end management of the components, such as recycle and re-manufacture.

1.6

ALTERING EXISTING PORT INFRASTRUCTURE TO SUPPORT FUTURE ECONOMY

As we move into a future economy focussed on the production and use of green energy and renewable hydrogen, there is a need to **alter or expand existing port infrastructure to accommodate the production and processing of renewables for export and domestic consumption.**

Specific opportunities to alter current port infrastructure to adjust to green economy requirements are emerging, as well as opportunities to expand resource recovery facilities to support the end-to-end management of componentry and equipment such as solar panels, batteries and turbine blades, along with the incorporation of recycled-content materials into the front-end manufacturing of these products.

DECARBONISATION – our strategies and plans

Plans and Strategies that underpin the decarbonisation agenda for Queensland

Queensland Energy and Jobs Plan and Infrastructure Blueprint

Queensland Supergrid Infrastructure Blueprint

Market Memorandum – Queensland’s renewable energy supply chain

A Strategic Blueprint for Queensland’s North West Minerals Province

North West Queensland Economic Diversification Strategy

Queensland Zero Emission Vehicle Strategy

Queensland Climate Action Plan

Queensland New Industry Development Strategy

Queensland Resources Industry Development Plan

Regional Energy Transformation Partnerships Framework

Hydrogen Industry Strategy

Hydrogen Industry Prospectus

Low Emissions for Agriculture Roadmap

Biofutures 10-year Roadmap and Action Plan

Conserving Nature – Biodiversity Conservation Strategy for Queensland

Advanced Manufacturing Roadmap

Queensland as a renewable energy superpower

70% renewable energy by 2032, and 80% by 2035.

Coming soon

Critical Minerals Strategy

Battery Industry Strategy which will set an overarching policy framework to grow Queensland’s multi-technology battery value-chain over the next 5 years

Net Zero Emissions and Infrastructure Roadmap (action under the State Infrastructure Strategy)

» ADVANCING THE CIRCULAR ECONOMY

We've developed a powerful vision for Queensland to be a zero-waste economy by 2050.

Resource recovery is critical to a circular economy approach. This approach places importance on retaining as much value as possible, at the highest practicable value, from each step in a product's supply chain, to create a sustainable system of reuse, refurbishment, remanufacturing and recycling⁵. In the first instance, a focus on avoidance activities including redesign, plays an important role in ensuring that difficult to manage or recover materials are eliminated.

As the nature of our critical changes, new and emerging waste stream sectors will arise – renewables, natural resources, manufacturing, pharmaceuticals, and agriculture.

We need infrastructure that not only recovers and processes waste and resources, but that supports reuse or reprocessing materials for a higher value purpose.

Queensland is ripe for opportunity, boasting a natural endowment of resources, renewable energy sources, manufacturing capability, skills and a diverse agricultural sector, all of which are needed to deliver a successful circular economy.

OPPORTUNITY SNAPSHOT

- New or expanded recovery and processing facilities to manage future materials and end-of-life products
- Focus on Construction and Demolition, Commercial and Industrial, and Municipal Solid Waste

The Queensland Government recognises an opportunity to lead the way in industry development on a global stage, and has developed guidance to industry for sector planning through:

- > Queensland Resources Industry Development Plan – is progressing circular economy opportunities in the resources sector by investigating the feasibility of re-commercialisation of abandoned mines and market needs to unlock the value in mine waste through reprocessing and reuse opportunities.
- > Under the New Economy Minerals Initiative and Queensland Resources Industry Development Plan, \$3 million has been committed, between 2019 and 2024, to research Queensland's mine waste to create a baseline dataset of metal content with a focus on critical metals, and alternative uses for non-metalliferous waste.
- > Waste Management and Resource Recovery Strategy - outlining waste management practices to reduce the amount of waste produced by business, industry and households. The strategy sets priorities and stretch targets for 2050.

2.1

DELIVERING ON OUR WASTE TARGETS

The Queensland Waste Management and Resource Recovery Strategy targets are ambitious and the investment needed to support our transition to a zero-waste society is significant.

The Queensland Government endeavours to reduce the amount of waste created in the first instance; maintain, reuse and repair products to extend their lives; and maximise the value of materials before energy can be recovered or before they are discarded.

Underpinning the achievement of our long-term objective to reach a zero-waste society in Queensland is an emerging focus on the materials and feedstocks that support our circular economy, traditionally considered waste.

There are key opportunities for the private sector to invest in critical **new infrastructure or in the expansion of existing resource recovery infrastructure to support the collection, processing and re-manufacturing of end-of-life materials and products to be inserted back into the production lifecycle.**

Opportunities exist to support the creation of higher value resources from organic materials including for example, food and garden waste and textiles.

2.2

BUILDING QUEENSLAND'S BIOENERGY FUTURE

The national decarbonisation agenda will see a continued move away from the use of traditional energy sources towards low-emission alternatives.

Supported by a strong circular approach and strong agricultural commodities, Queensland is well positioned to produce bioenergy. Bioenergy is renewable energy produced by converting biomass or other combustible waste materials into electricity, heat, gas or liquid fuels. Bioenergy is relatively cheap to generate and has broader benefits in supporting a circular economy, achieving emission reduction targets, economic diversification and improving energy security.

The generation of renewable industrial heat through bioenergy is a key market opportunity for Queensland, with industrial heat an identified hard-to-abate sector. For example, solid fuels produced from waste such as Refuse Derived Fuel (RFD) or Process Engineered Fuel (PEF) can be used as coal substitutes to generate heat during the production of cement.

Opportunities exist in relation to **expanding and upgrading Queensland's existing bioenergy facilities including co-generation and tri-generation plants located in industrial precincts.**

2.3

EMERGING WASTE STREAMS

As the supply chain for production and manufacturing industry transforms to focus on green and renewable solutions, we need to **adapt recovery, processing and remanufacturing infrastructure to accommodate the emergence of new material and end-of-life product streams.**

Specifically, the future will require us to manage the rapid generation of materials from various renewable processes.

There are significant opportunities to improve the management of materials and end-of-life products from the renewable energy and zero emissions vehicle (EV) sectors, including solar panels, batteries, wind turbines and blades. Additionally, Queensland's aim to better manage and reduce Perfluoroalkyl and Polyfluoroalkyl Substances (PFAS) contamination will drive a need to manage contaminants, support remediation and treatment technologies and safely destroy PFAS waste, while investing in manufacturing approaches to avoid the addition of PFAS and the generation of additional PFAS containing products.

2.4

RECYCLING HUBS

As success builds in moving towards a circular approach to waste, waste generation and the demands on waste treatment and disposal infrastructure will lessen.

Striking a balance between ensuring recycling infrastructure meets changing waste management needs and ensuring that new technologies and waste streams can be accommodated within existing communities, is key.

Opportunities exist for the private sector to invest in approaches to optimise the recycling supply chain through the development of **regional collection and pre-processing precincts** that support the co-location of complementary end-user activities.

DEVELOPING THE CIRCULAR ECONOMY – our strategies and plans

Plans and Strategies that underpin creation of a circular economy for Queensland

Queensland Waste Management and Resource Recovery Strategy

Queensland Waste and Resource Recovery Infrastructure Report

Regional Resource Recovery Plans

Energy from Waste Policy

Advanced Manufacturing Roadmap and Action Plan

SEQ Waste Management Plan

Biofutures 10-year Roadmap and Action Plan

Queensland Resource Recovery Industries 10-year Roadmap and Action Plan

Resource Recovery Precincts Guiding Principles and Location Strategy

Respecting Country: A Sustainable waste strategy for First Nation communities

Mining Equipment, Technology and Services (METS) 10 year road map and Action Plan

Tackling Plastic Waste - Qld's Plastic Pollution Reduction Plan and Single-Use Plastic Items Roadmap

Queensland New Industry Development Strategy

Queensland Organics Strategy and Action Plan

Queensland as a zero-waste economy by 2050

» CONNECTING OUR REGIONS

Digital innovation and technology are transforming business models, communications, ways of delivering and accessing services and making the world increasingly interconnected. The COVID-19 pandemic accelerated changes to the way we work, our willingness to adopt new technologies and our capacity to deliver and use online products and services.

As global technology advances and industries transition through digital enablement, it becomes increasingly important to ensure Queensland has a thriving and inclusive digital economy.

Underpinning this ambition is the need for faster, more reliable digital infrastructure across the state, including to our remote and First Nations communities to enable full participation in the digital economy and support digital inclusion.

Reliable, high-capacity, resilient connectivity is key to improving access to education, healthcare, employment and services for individuals and helps drive innovation. This connectivity is also a critical factor for attracting new businesses, enabling industry competitiveness, increasing employment opportunities and growing the digital economy - enabling Queensland to flourish.

There are many opportunities to provide all Queenslanders and Queensland businesses with better digital connectivity. Queensland is a highly decentralised state with a dispersed population and providing reliable, high capacity resilient connectivity is a challenge.

Ultimately the need to improve digital connectivity presents an opportunity for significant investment and greater market innovation – extending or replacing existing delivery models.

The Queensland Government is working with the Australian Government (which regulates telecommunications networks) and service providers on a range of digital infrastructure opportunities through mobile blackspot and regional connectivity programs that will deliver new/upgraded digital connectivity to communities to underpin the digital economy.

OPPORTUNITY SNAPSHOT

- Know the extent of digital disadvantage by location
- Define what “good” connectivity looks like and make it better
- Plan strategic co-investments through collaboration with the Australian and local governments, the telecommunications providers and peak industry bodies based on telecommunication providers’ forward plans for connectivity improvements and status of Queensland’s digital dis-advantage
- Trial new/emerging technologies

3.1

CONTEMPORARY DIGITAL ACCESS FOR ALL QUEESLANDERS

Contributing to improved digital connectivity for all Queenslanders – connecting regions and remote communities, could include:

- opportunities to co-invest/partner to establish improved connectivity solutions in Queensland
- consideration of longer timeframe investments to connect under and un-serviced locations
- exploring innovative options to provide to affordable, reliable, future focussed, digital services by moving beyond the traditional approaches to the provision of digital services
- community based carrier solutions enabled by the future proofed technology

3.2

LEVERAGE FUTURE INVESTMENT IN LINEAL INFRASTRUCTURE

Consideration may also be given to leveraging lineal infrastructure and investments to improve for digital infrastructure – such as roads and highways, energy lines, water infrastructure, and railway lines.

The challenge and task to deliver contemporary digital connectivity is great but this presents opportunities for significant long-term investments in Queensland.

The Queensland Government will provide a clear message to the market on the investment opportunities and its priorities through the Queensland Digital Infrastructure Plan.

The Queensland Government is developing a Queensland Digital Infrastructure Plan (QDIP) to focus collaborative efforts and investments across sectors to respond to the 'digital divide'.

The QDIP will provide a state-wide view of the gaps and opportunities for investment.

CONNECTING OUR REGIONS– our strategies and plans

Plans and Strategies that underpin development of digitally connected regions for Queensland

SEQ City Deal

Strategic Plan 2022-2026: a thriving digital economy

Digital Economy Strategy

Queensland as a thriving and connected digital economy

Coming soon

Queensland Digital Infrastructure Plan

» DOING BUSINESS IN QUEENSLAND

Queensland has a dynamic and diverse economy supported by a pro-business government, sophisticated infrastructure and a skilled workforce. The state's economic environment and projected strong growth offers an ideal long-term investment climate. There's never been a better time to invest in Queensland.

Business confidence and taxation

Queensland's outstanding health response to the pandemic and more than \$14.2 billion in support initiatives has seen the domestic economy rebound strongly, with business and consumer confidence currently at elevated levels.

Over the past two years, business conditions in Queensland have been amongst the highest of any state economy (National Australia Bank Quarterly Business Survey).

Queensland's tax system can deliver a competitive advantage for your business, including offering the lowest standard payroll tax rate in Australia.

Taxation in Queensland in 2021-22 is estimated to be \$452 per person less than the average of other Australian states and territories.

Strong Economy

Our economy remains strong with growth in 2022 across key industries ranking higher than Australia's as a whole²:

- > 5.3 million people
- > \$366 billion Gross State Product (GSP)³
- > 3.7% annual GSP growth
- > Rated AA+/Aa1/AA+

Connectivity and infrastructure

Queensland offers great connectivity, through six major international

passenger airports and extensive road and rail networks that move people efficiently across cities and regions.

Queensland will host the Brisbane 2032 Olympic and Paralympic Games, resulting in significant funding commitments by the Australian and Queensland Governments to upgrade and maintain the state's highways, keeping the vital network running smoothly and reducing travel times.

Congestion cost in Queensland is significantly lower than the New South Wales and Victorian average.

Highly skilled workforce and world-class universities

Our state's workforce of more than 2.8 million is highly skilled, motivated and employment ready. Companies have a broad choice of skilled workers, due to world-class educational facilities.

Queensland has consistently recorded high levels of interstate migration, having the highest net interstate migration levels in Australia in 2020-21, and in 35 of the past 40 years.

We're home to twelve universities, including some of the newest universities in the world.

Liveability

The people of Queensland enjoy an enviable outdoor lifestyle with world-class beaches and waterways, national parks and rainforests and reefs.

² Queensland Treasury Corporation, Investor Book 30 June 2022 Queensland.

³ GSP growth estimate relates to the long-run trend.

» DOING BUSINESS IN QUEENSLAND (Cont.)

Information and communications technology

Queensland plays a vital role in ensuring the state has access to world-class digital infrastructure.

As of December 2021, Queensland had more than 1.6 million premises connected to the national broadband network, the third largest of any state or territory in Australia.

The Queensland Government is continuing to work with providers and the Australian Government to facilitate improvements to the state's digital infrastructure to boost communication and data speeds.

The Sunshine Coast in Queensland is home to Australia's fastest telecommunications connection to Asia and the second fastest to the United States with the Sunshine Coast International Broadband Submarine Cable.

Competitive property costs

The commercial rental and industrial land markets in Queensland are competitive, with rental/leasing costs and land purchase values comparing favourably against other major state capital cities.

Strong government alignment

The Queensland Government has a range of comprehensive policies, strategies and action plans that clearly outline Queensland's infrastructure priorities. Additionally, there is a strong narrative about the need to develop our regions, not just SEQ.

Abundant natural resources

Queensland benefits from an abundance of natural capital and resources including land, raw materials and minerals and diverse agriculture industries.

Additionally, we benefit from having an existing presence in the energy and natural resources industries.

» GOVERNMENT LEVERS AND SUPPORT

DSDILGP is responsible for delivery of coordinated and resilient infrastructure for Queensland. This includes implementing key priorities in the State Infrastructure Strategy, planning and delivery of the Brisbane 2032 Olympics and Paralympics Infrastructure Program, implementation of the Regional Growth Framework (which includes integrated Regional Infrastructure Plans), and leading strategic capital program planning and reporting.

As the lead infrastructure agency for Queensland, DSDILGP has access to a range of coordination levers and planning and delivery powers, including coordinated project declarations, State Development Area designations, and mandating the Queensland Planning Framework.

Key issues for DSDILGP to consider when using these levers and powers include:

- > Demonstration of alignment to government policy
- > Demonstration of broader benefits
- > Sustainability
- > Demonstration of potential to provide value for money
- > Enable economic growth during construction and post-construction

Infrastructure for a growing state includes significant investment by the Queensland Government as part of Queensland's Big Build, which includes \$89 billion in infrastructure investments over the next four years, including \$19 billion to support the Queensland Energy and Jobs Plan.

The Queensland Government has also established the Queensland Renewable Energy and Hydrogen Jobs Fund with up to \$4.5 billion for government investments. This Fund will allow energy government-owned corporations to develop commercial renewable energy and hydrogen projects, as well as supporting infrastructure, including in partnership with the private sector.

» GOVERNMENT LEVERS AND SUPPORT

THE COORDINATOR-GENERAL

The Coordinator-General administers the *State Development and Public Works Organisation Act 1971* (SDPWO Act), along with the relevant Minister. Under the SDPWO Act, the Coordinator-General has wide-ranging powers to plan, deliver and coordinate large-scale projects and infrastructure, while ensuring their environmental impacts are properly managed.

Specifically, the Coordinator-General can facilitate industry and infrastructure delivery through:

Coordinated projects

The Coordinator-General has the power to declare a project a coordinated project for which an environmental impact statement (EIS) is required under SDPWO Act. The 'coordinated project' process is designed for projects of economic, social and/or environmental significance to Queensland with complex approval requirements, significant environmental effects or significant infrastructure requirements.

Prescribed projects

The Minister may, by gazette notice, declare a project to be a prescribed project. A prescribed project is one which is of significance, particularly economically and socially, to Queensland or a region. Declaring a prescribed project enlivens the Coordinator-General's powers to ensure timely decision-making in relation to prescribed processes and prescribed decisions.

THE COORDINATOR-GENERAL (Continued)

State Development Areas

State Development Areas (SDAs) are clearly defined areas of land established by the Coordinator-General to promote economic development in Queensland. SDAs are typically industrial hubs, multi-user infrastructure corridors or major development sites and public works.

Private infrastructure facility

A proponent of an infrastructure facility may apply to the Coordinator-General for approval as a private infrastructure facility. The Coordinator-General, on behalf of the proponent, can compulsorily acquire land or easements for a private infrastructure facility if agreement with the owners of the land cannot be reached. An investigator's authority may also be granted by the Coordinator-General to allow a proponent to investigate land where access to land cannot be negotiated.

Other powers

The Coordinator-General also facilitates many of the large-scale infrastructure projects that underpin Queensland's economic development. The Coordinator-General may compulsorily acquire, or resume, the land on which these projects are to be built. The Coordinator-General can compulsorily acquire land for undertaking works, SDAs, other purposes, including a private infrastructure facility.

www.statedevelopment.qld.gov.au/coordinator-general

» GOVERNMENT LEVERS AND SUPPORT

STATE DEVELOPMENT

The Department of State Development, Infrastructure, Local Government and Planning is charged with shaping Queensland's future by securing responsible economic development and liveable communities.

Exclusive Transactions

The Department supports the attraction and facilitation of investment through its Exclusive Transactions Process. Specifically, this process offers a pathway for complex private sector commercial proposals to seek an exclusive mandate with government.

Proposals are to include a role for government and are expected to provide additional benefits to government and/or the Queensland community. They need to demonstrate value for money for Queensland and must present a clear case as to why they should be considered under an exclusive arrangement as opposed to procurement through a competitive process.

An exclusive transaction must:

- > align with government priorities
- > justify its exclusive dealing with government
- > represent value for money
- > be financially feasible with an investor that has the financial and technical capacity, capability and experience to deliver the proposal.

www.statedevelopment.qld.gov.au/industry/exclusive-transactions

STATE DEVELOPMENT (continued)

Queensland Government Land Transactions

The Queensland Government Land Transaction Policy supports government to procure land for strategic purposes and establishes a whole-of-government property ownership and management framework for land transactions (disposals, acquisitions, and leases) based on openness and transparency, defensibility, streamlined decision-making, and best value for Queensland.

Ministerial Infrastructure Designations

A Ministerial Infrastructure Designation (MID) is a development assessment pathway, administered by the Department of State Development, Infrastructure, Local Government and Planning on behalf of the Planning Minister.

A MID can be used to facilitate the delivery of certain types of community-supporting infrastructure (both State-led and private), including:

- > hospitals
- > schools
- > emergency services
- > sporting facilities
- > utilities infrastructure (power lines, water supply infrastructure and sewerage treatment plants)
- > social and affordable housing.

<https://planning.statedevelopment.qld.gov.au/planning-framework/infrastructure-planning/ministerial-infrastructure-designations>

» GOVERNMENT LEVERS AND SUPPORT

ECONOMIC DEVELOPMENT QUEENSLAND (EDQ)

EDQ is the Queensland Government's land use planning and property development agency, creating and investing in sustainable places for Queensland to prosper. EDQ embraces partnerships across government, industry, and the community to deliver new residential communities, urban precincts, and industrial ecosystems. Backed by the *Economic Development Act 2012*, EDQ has unique planning and approval powers and a mandate to create private sector investment opportunities by de-risking and unlocking land for redevelopment.

Priority Development Areas (PDAs)

PDAs are parcels of land throughout Queensland, declared by the state government through the Minister for Economic Development Queensland (MEDQ), to facilitate the development of land for economic development or community purposes.

PDAs give investors visibility of future potential development projects. Through the support of the Queensland Government, in partnership with local councils, investors are able to streamline the planning, approval and development processes for investment within PDAs. PDAs provide opportunities for investment in a broad range of infrastructure projects.

EDQ plans and funds trunk infrastructure, implementation programs and early public transport services for PDAs such as new and upgraded transport, park, community facility land, water supply, sewer and stormwater infrastructure. EDQ also manages development projects in some PDAs.

ECONOMIC DEVELOPMENT QUEENSLAND (Continued)

Land Acquisition and Development Powers

EDQ has land available across the state for a variety of uses. This includes:

- > industrial estates for sale and lease which suit a cross-section of industries, including manufacturing, transport and logistics, resource processing, energy and renewables, resource recovery, aerospace and defence, ancillary activities and more
- > well planned, affordable residential communities that deliver quality urban design and amenities
- > mixed use urban renewal precincts, including commercial, education and precincts.

www.statedevelopment.qld.gov.au/economic-development-qld

» GOVERNMENT LEVERS AND SUPPORT

QUEENSLAND TREASURY

Queensland Treasury is a central agency which drives government's plan to grow the Queensland economy and create jobs in line with the government's economic recovery priorities and longer-term economic strategy. Part of Treasury's role is to incentivise and attract high impact private sector investment in priority industries. This is done through a number of initiatives.

Investment Facilitation

Project facilitation is a service assisting proponents of complex and high impact projects to engage with government, solve problems and make decisions through the project development life. It helps accelerate project delivery and increase the likelihood of project success.

Facilitation support may include:

- > Providing business case information addressing project requirements, business costs, skills availability and other investment drivers
- > Identifying suitable site options
- > Streamlining approvals and access to Queensland Government contacts
- > Coordinating pre-lodgement meetings and providing advice
- > Introductions to partners like universities and other training organisations
- > Investigation of potential funding pathways.

QUEENSLAND TREASURY (Continued)

Invested in Queensland Program

The Invested in Queensland Program forms part of the \$3.34 billion Queensland Jobs Fund. The Investment team within Queensland Treasury is working with qualified investors, on significant projects that align with the government's priorities. Treasury has a range of incentive schemes and non-financial support mechanisms to assist proponents with projects that demonstrate a strong potential for delivery. This includes a Strategic Investment Facilitation Framework to provide tailored facilitation support for identified high profile and impactful significant investment projects.

» GOVERNMENT LEVERS AND SUPPORT

QUEENSLAND TREASURY (Continued)

Strategic Investment Scheme and Investment Support Scheme

The Strategic Investment Scheme is designed to provide tailored assistance packages to Queensland based, interstate and internationally based business to support large-scale projects that result in significant economic benefits in terms of new jobs and wider supply chain and industry benefits. Projects may include new investment, significant expansions and supply chain capability enhancements.

The Investment Support Scheme is a rebate program for payroll tax and other state-managed taxes, designed to incentivise international and interstate businesses, with proven capability, to invest in Queensland through a transfer or expansion of operations.

Targeted investment by government through the Strategic Investment Scheme and Investment Support Schemes will focus on the following objectives:

- > attract projects linked to the State's natural and competitive advantages
- > leverage significant additional private sector investment
- > promote regional economic diversity and prosperity.
- > create ongoing employment opportunities in priority sectors and related supply chains.

www.treasury.qld.gov.au/investment

TRADE AND INVESTMENT QUEENSLAND (TIQ)

TIQ is responsible for ensuring that foreign investors have the information and support they need to take advantage of the opportunities Queensland offers.

TIQ have a specialist investment team that provides a range of business and investment services to investors including:

- > Detailed industry knowledge about business costs
- > Preparing business cases
- > Arranging site visits
- > Introductions to industry and service providers
- > Government liaison
- > Market intelligence
- > Partnering with local councils, economic development agencies and private service providers to identify 'investment ready' projects.

TIQ recently released the Queensland Trade and Investment Strategy 2022-2032 which highlights the opportunities for attracting more international investment into Queensland leveraging the upcoming Brisbane 2032 Olympic and Paralympic Games.

www.tiq.qld.gov.au/about/queensland-trade-and-investment-strategy

» GOVERNMENT LEVERS AND SUPPORT



What other mechanisms or support do industry or investors require to realise these opportunities?



What do we need to do/develop to help industry and investors make investment decisions?

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CONTACT US

DSDILGP infrastructure team:

infrastructurestrategy&innovation@dasilgp.qld.gov.au

3214 9571