

INVEST IN BRISBANE, AUSTRALIA FOR ENERGY AND RESOURCES

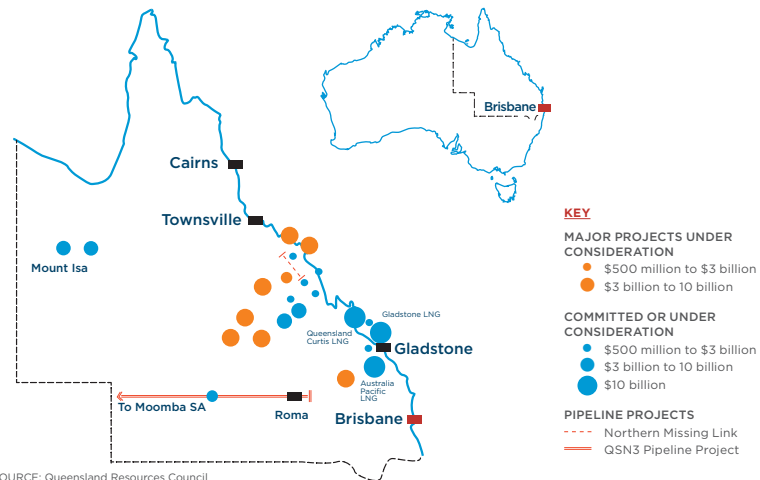
Brisbane's already established and world leading resource hub is well placed to capitalise on the world's growing demand for energy and natural resources.

Investment in Australia's energy and resource sectors is currently at record levels, accounting for the vast majority of business investment occurring across the country. With non-agricultural commodity exports expected to reach **\$237.2 billion** in 2012-13,¹ activity in energy and resources is set to continue as the major source of growth for the Australian economy.

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 **30 per cent of all private capital investment in mining and exploration in Australia**. It is estimated that during 2011-12, the energy and resources sectors accounted for one in every four dollars of Queensland's economy, and one in every five jobs across the state².

Brisbane, as Queensland's business centre, is **home to 177 energy and resource company headquarters**. 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 in 2014, supported by sales agreements with customers in China, Japan and Singapore. Brisbane is the closest major Australian 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 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.

Please contact our team for more information:

investbrisbane.com.au

Steven Silvester, Director - Investment Attraction

tel: +61 7 3006 6239 email: ssilvester@brisbanemarketing.com.au

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.³

"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 **\$142 Billion (AUD)** in future resource investments under construction, committed or under study in Queensland.⁴ 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 is the world's largest seaborne metallurgical coal exporter, sending **134 million tonnes** abroad in 2010, and a further **51 million tonnes** of thermal coal.⁵ Coal exploration expenditure in Queensland in 2011-12 was a record **\$718.3 million (AUD)**, accounting for over half of all exploration expenditure in the state. Queensland accounts for almost half of all internationally traded coking coal and 8 per cent of internationally traded thermal coal.⁶

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.⁷

CSG to LNG

Australia's significant CSG resources have allowed it to become the **world's fourth largest liquefied natural gas (LNG) exporter**. If all of the CSG to LNG projects currently in the pipeline reach fruition then Australia will officially become the world largest LNG exporter by the year 2020.⁸ Queensland, home to **92 per cent of Australia's CSG resources**, is well placed to benefit from this growth in demand.

Please contact our team for more information:

investbrisbane.com.au

Steven Silvester

Director - Investment Attraction
+61 7 3006 6239

ssilvester@brisbanemarketing.com.au

brisbanemarketing.com.au

Companies in the Brisbane market include;

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

1. Ibis world 2012

2. Queensland resources council 2012

3. Australian Government, Bureau of resources and energy economics, Australian gas resource assessment, 2012

4. Queensland resources council, Queensland Economy, November 2012

5. Queensland Government, State Budget 2011-12 Highlights

6. Queensland Government Mining Journal, 2012

7. Alex Cull, 2011

8. Australian Petroleum Production and Exploration Association, 2012

Please contact our team for more information:

investbrisbane.com.au

Steven Silvester, Director - Investment Attraction

tel: +61 7 3006 6239 email: ssilvester@brisbanemarketing.com.au