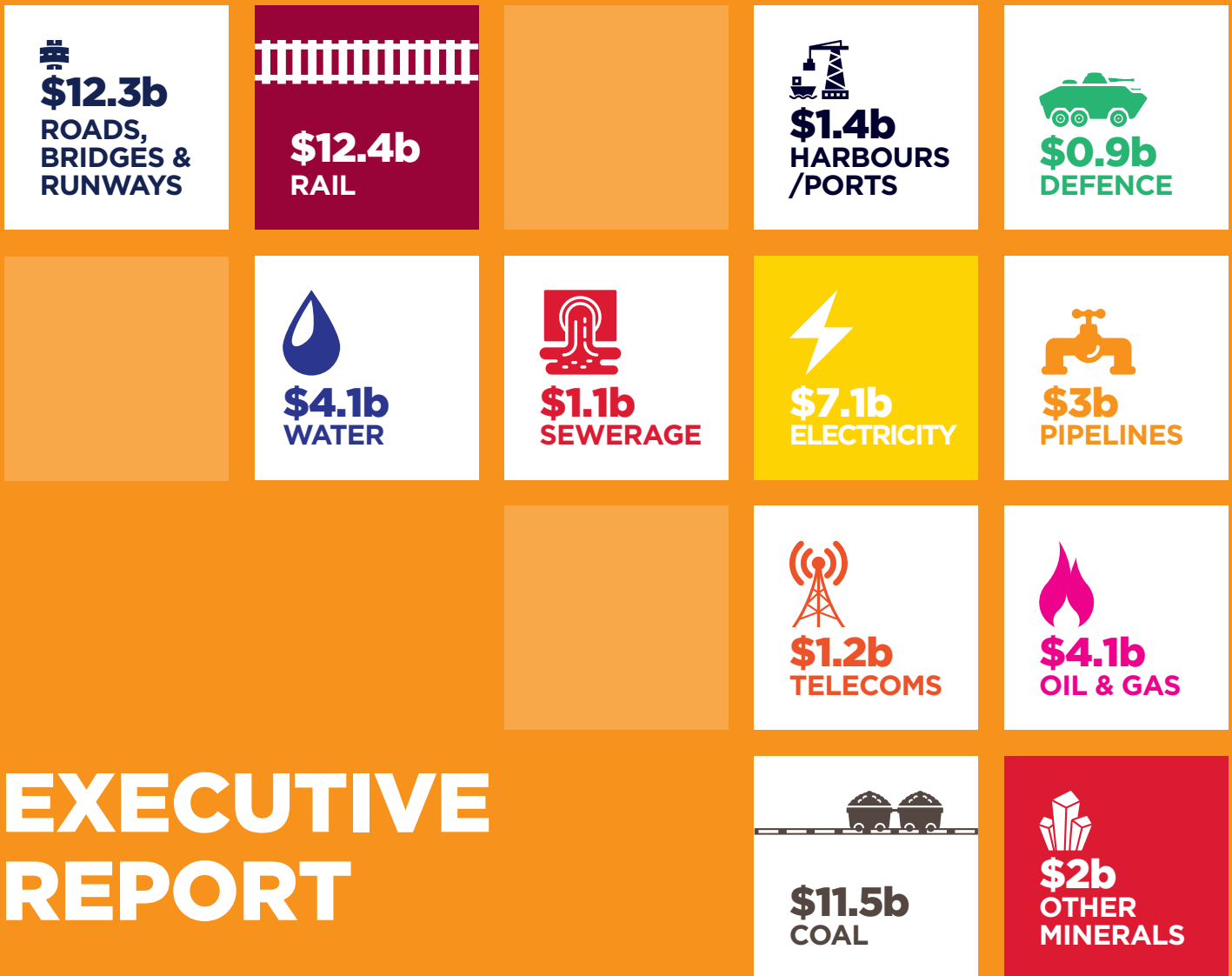


Queensland Major Projects Pipeline 2021

QUEENSLAND
MAJOR
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EXECUTIVE REPORT

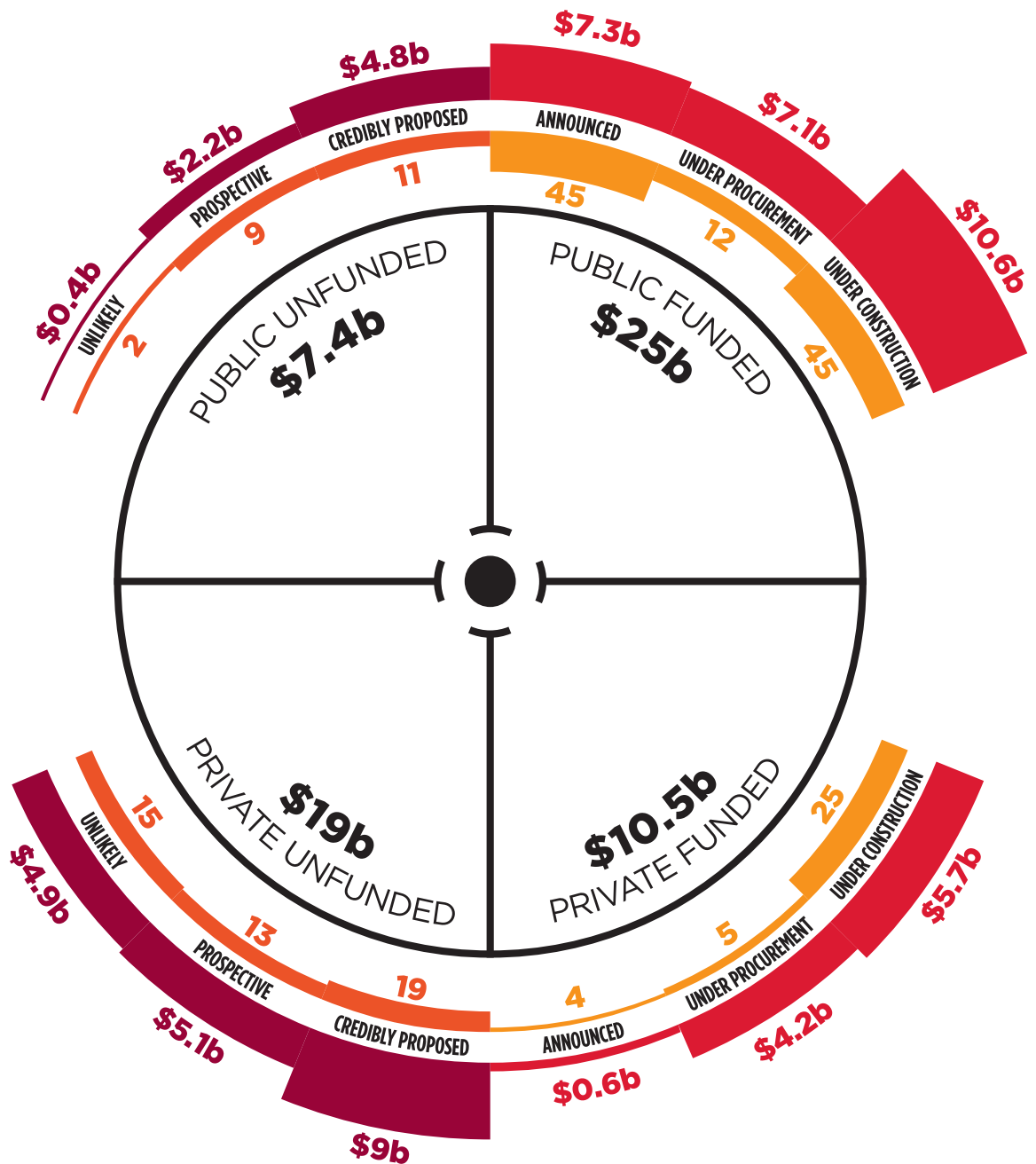
The QMCA is proud to provide the 10th instalment of the Queensland Major Projects Pipeline Report (QMPPR). Developed in conjunction with BIS Oxford Economics; over the past decade, the QMPPR has become the barometer of current and future major project activity and construction industry conditions in Queensland.

The QMPPR provides a comprehensive list of major engineering construction projects, together with analysis on the corresponding level of construction activity. Activity is based on both the completion of existing projects and the likelihood of potential projects proceeding.

A complete list of major projects considered for this analysis, and the explicit assumptions for each project regarding work done, and construction workforces employed each year, are provided in this report.

Infrastructure provision is critical to maintaining Queensland's economic health and growing the economy. It's just as important to maintaining and improving the quality of life for Queenslanders, connecting communities and providing essential services.

The QMPPR tracks major investments in economic infrastructure including transport, utilities, defence and resources assets.



The economic benefits of timely and adequate infrastructure provision are well documented. At the macroeconomic level, the **development and delivery of infrastructure provides a welcome boost to employment and economic activity.**

But infrastructure investment also has a critical microeconomic role. Through good project selection, **investment in economic infrastructure can be a powerful**

determinant of productivity growth and productive capacity for the Queensland economy in the long term.

Over the past decade, the volatile performance of the major projects market in Queensland, and the broader Queensland economy, can be put down to the impact of large, long cycles of investment, across both the public and private sectors..




A POSITIVE OUTLOOK

- The five-year pipeline is \$11.3b larger than in April 2020.
- \$8b of the increase comes from funded projects.

Funded major project work: in brief

- Strongest growth is in Roads and Non-water Utilities sectors.
- Road work has risen from \$7b in April 2020 to \$11.5b.
- Non-water Utilities projects have risen 95% from \$2.3b to \$5.5b on the back of renewable energy projects and NBN ongoing investment.
- Mining and Heavy Industry activity rose from \$4b to \$5.4b.
- Activity in Railways, Harbours and Defence is slightly lower than in April 2020.
- Almost half of all funded activity – and two-thirds of funded transport activity – occurs within the South East Queensland (SEQ) region.
- Brisbane and the broader SEQ region remain critical for funded major project activity even though its share of activity is lower than in 2020.
- Outside of the SEQ region there are still substantial risks to the pipeline given the higher share of unfunded work: many of the major projects in regional Queensland are Resources and Energy based where global market factors still heavily influence short- to medium-term investment decisions.

Source: Richard Greenwood.



Sustaining major project activity in the medium to longer term requires a longer-term view for funding commitments beyond the ‘two year fixed plus two year indicative timeframe’ in public sector funding with a further two years a little more variable. Committing to a longer fully funded cycle of, say, four years and another two years indicative, will give industry more certainty and visibility for the longevity of the pipeline.

In this respect, Brisbane’s success in winning the right to host the 2032 Olympic and Paralympic Games presents a once-in-a-generation opportunity to accelerate economic

infrastructure development over the second half of this decade to meet Queensland’s longer-term infrastructure needs, particularly in the fast-growing SEQ region.

However, the very strong growth in major project work over the next three years is also likely to bring serious challenges regarding industry capacity and capability to deliver. Given substantial infrastructure investment programs already underway in New South Wales and Victoria in addition to COVID-19-related international border closures, access to suitably experienced resources will start to become severely constrained.

“

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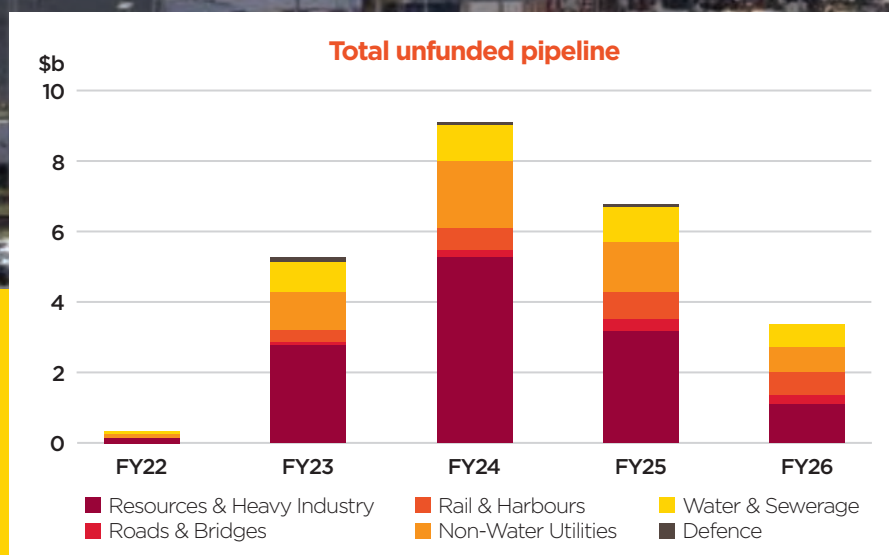
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In responding to this impending resource challenge, Government and the infrastructure industry, (including private sector proponents), will need to consider different approaches to labour. Meeting this strong growth in industry demand requires actions

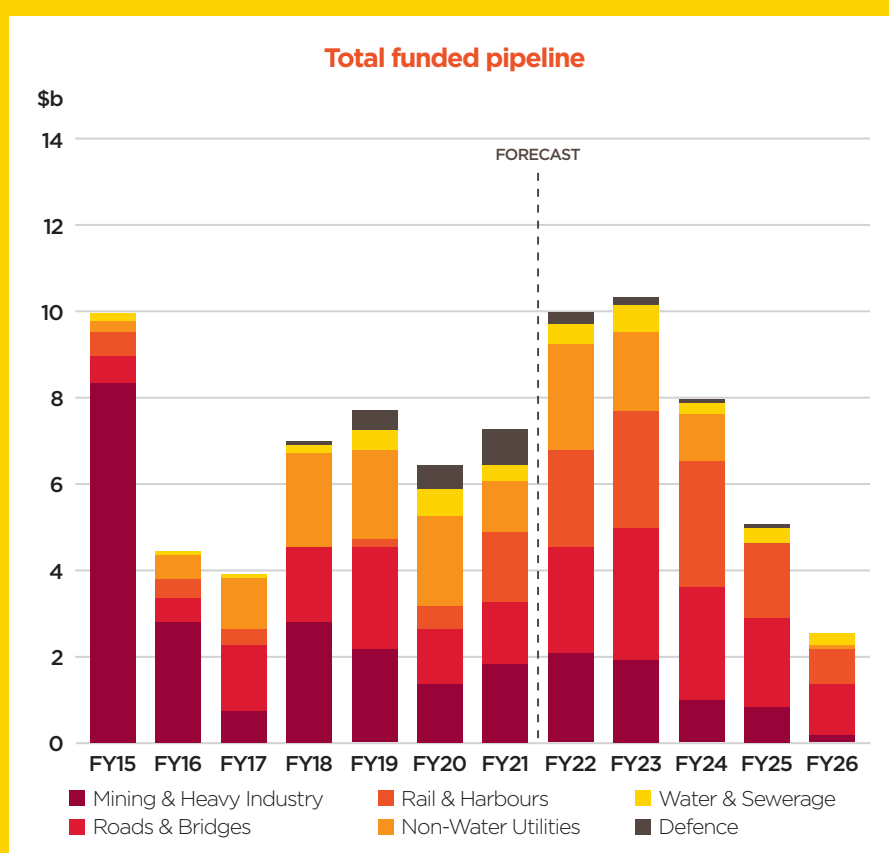
that boost supply chain capacity and resilience. This could include encouraging and embracing new technologies, innovation and productivity; supporting sustainability in the industry; providing education and training; and ensuring diversity.

KEY FINDINGS

- **In the five years between 2020/21 and 2025/26, the major projects pipeline is valued at \$61.9b.** This compares with \$50.7b identified in the 2020 QMPPR between 2019/20 to 2023/24.
- **The public sector accounts for 52% of the total pipeline (compared to 50% in 2020) but 70% of funded work (compared to 73% in 2020).** In this year's pipeline there is a significant increase in privately funded electricity and mining and heavy industry projects which means the pipeline is slightly less reliant on publicly funded projects than in the past.
- **Pipeline activity is projected to surge over the next two years.** Major project activity rises 41% in 2021/22, surpassing \$10b for the first time since 2013/14. Critically, 97% of activity in 2021/22 is funded, meaning that a substantial increase in activity – barring capacity and capability constraints – is locked in. Total pipeline activity is expected to surge to over \$15b in 2022/23, although one third of activity in that year remains unfunded.

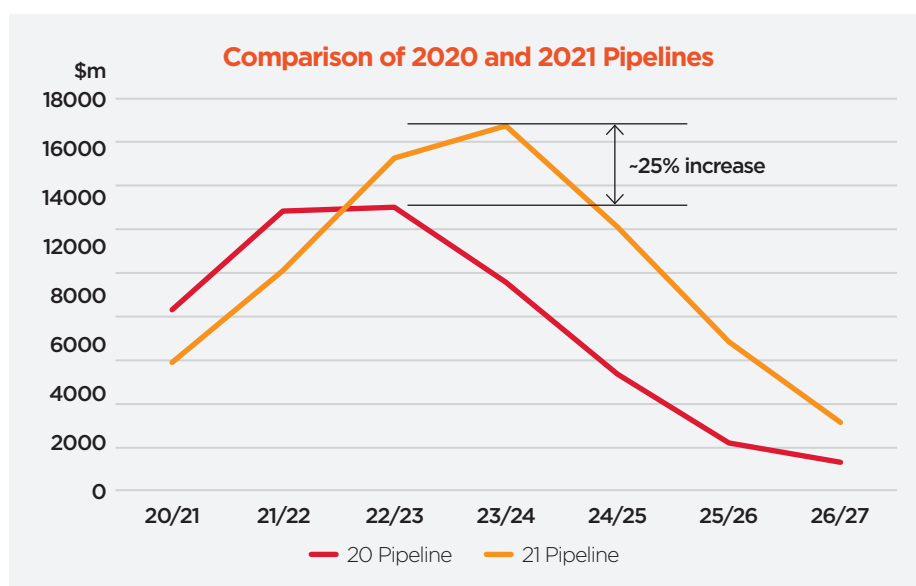


ABOVE: Total unfunded pipeline by sector with five-year forecast.
Source: BIS Oxford Economics and QMCA member knowledge.



ABOVE: Funded pipeline by sector with five-year forecast.
Source: BIS Oxford Economics and QMCA member knowledge.

- **\$35.5b (57%) of the pipeline value is funded compared to 55% in April 2020, while \$26.4b (43%) is unfunded.** Unfunded projects represent just 3% of activity in 2021/22, but this rises to over 50% from 2023/24.
- **As reported in 2020, funded work is increasingly being concentrated in 'mega projects' over time.** In 2019/20, 20% of major project work was in projects valued at \$50m to \$200m. In 2020/21 this had dropped to 13% – and this downward trend is projected to continue through the next five years. By contrast, over half of all pipeline activity is expected to be concentrated in projects worth over \$1b in each of the next five years, up from 36% in 2018/19. This creates challenges for industry sustainability, risk management and the ability for companies to grow and develop through project execution.
- The graph below highlights the difference in the magnitude of the major project pipeline outlook from 2020 to 2021. The peak is approximately 25% higher and extended from previous years. The tail off in investment, however, is likely to be filled with infrastructure investment brought forward and required for the Olympics.



- **There are very large differences in the major project outlook by region.** Unsurprisingly, given the concentration of Qld's population in SEQ, around 45% (\$15.9b) of all funded work in the pipeline is focused there. Brisbane itself has the highest levels of work (\$6.8b). Meanwhile, more of the riskier, unfunded projects lie in central, northern and western regions of the state, as these regions tend to have a greater share of investment in mining, large water projects and electricity generation projects that are more typically unfunded. The Ipswich-Toowoomba-Logan corridor has the strongest growth in funded work over the next three years, while the Townsville, Cairns, Fitzroy, Wide Bay and Outback regions all have very strong growth potential.



Source: reneweconomy.com.au.



Source: QMCA Member,
MCD Northern Gas Pipeline.

THE WAY FORWARD

The 2021 QMPPR shows a large cycle in major project activity playing out across the next five years. There are significant upside and downside risks from the ongoing impacts of COVID-19, and the tightening industry capacity and capability.

There is a need to rethink infrastructure targets given relatively strong population growth, hosting the 2032 Olympics, and meeting industry and environmental sustainability goals.

We recommend:



Governments continue to seek consistent, collaborative, long-term value approaches to tendering and procurement. Collaborative Contracting models offer this.



Queensland Government to transition to more stable, growing revenue streams for funding infrastructure, including debt and asset recycling measures and direct private investment either in partnership or alongside Government investments.



Focus on medium-term development of the funded pipeline, particularly from 2023-2026.



Queensland Government to review policies that may be constraining growth in private infrastructure provision.



Accelerate infrastructure development in fast-growing regions of Queensland to support regional economic growth and development (water and energy projects).



Government and industry to develop an infrastructure plan to reduce carbon emissions in Queensland and identify opportunities for investment in the future low carbon economy, particularly through new industries such as hydrogen.



Finalise the SEQ City Deal in 2021. This is critically important to ensure investment is targeted in the right areas ahead of the Olympics.



National and State Governments to include resilience/adaptation work in infrastructure audits.



Governments to target regional deepening of the project pipeline.



Work with Infrastructure Australia to develop a comprehensive quantitative analysis to aid public decision-making.

For all the details see the full Report, available online at www.qmca.com.au/2021qmppr

This is an exciting time for Queensland. All of us at the QMCA will continue to be your strong industry voice, supporting contractors as we plan, build, progress and innovate for this next phase in Queensland's future.

Andrew Chapman
QMCA, CEO

Queensland Major Projects Pipeline Listing 2021

Source: QMCA Member, Cross River Rail Roma Roadheader launch.





ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
BNE Auto Mall	Brisbane Airport	Private	Brisbane - North	300	168	Under Construction	40	34			
Breakfast Creek Green Bridge	Brisbane City Council	Public	Brisbane	67	54	Under Procurement	11	33	10		
Brisbane Metro CP	Brisbane City Council	Public	Brisbane Inner City	1244	858	Under Construction	330	330	132		
Bruce Highway - Caboolture to Steve Irwin Way	Qld Government & Federal Government	Public	Sunshine Coast	663	500	Under Construction	200	200			
Bruce Highway - Cairns Southern Access Corridor Stage 3 - Edmonton to Gordonvale	Federal Government	Public	Cairns	481	300	Under Construction	110	80			
Bruce Highway - Cairns Southern Access Corridor Stage 4 - Kate Street to Aumuller Street	Federal Government	Public	Cairns	124	65	Under Construction	15				
Bruce Highway - Cairns Southern Access Corridor Stage 5 - Foster Road intersection	Qld Government	Public	Cairns	225	162	Announced			20	80	62
Bruce Highway - Caloundra Road to Sunshine Motorway	Qld Government & Federal Government	Public	Sunshine Coast	932	541	Under Construction	25				
Bruce Highway - Cooroy to Curra Section D	Qld Government & Federal Government	Public	Wide Bay	1000	750	Under Construction	250	250	125		
Bruce Highway - Deception Bay Road Upgrades	Qld Government & Federal Government	Public	Moreton Bay - North	163	121	Under Construction	59	34			
Bruce Highway - Dohles Rocks Road North Facing Ramps	Qld Government & Federal Government	Public	Brisbane	150	113	Announced			37	38	38
Bruce Highway - Haughton River Floodplain Upgrade Project	Qld Government & Federal Government	Public	Townsville	514	298	Under Construction	15				
Bruce Highway - Linkfield Road Overpass	Qld Government / Federal Government	Public	Brisbane	125	101	Announced		15	40	46	
Bruce Highway - Mackay Northern Access Upgrade	Federal Government	Public	Mackay - Isaac - Whitsunday	120	87	Under Construction	42				
Bruce Highway - Mackay Ring Road Stage 2	Qld Government & Federal Government	Public	Mackay - Isaac - Whitsunday	350	228	Announced			38	76	76
Bruce Highway - Managed Motorways Program - Gateway Motorway to Caboolture	Qld Government & Federal Government	Public	Moreton Bay - North	105	53	Announced	20	20	13		
Bruce Highway - Maroochydore Road and Mons Road Interchanges Upgrade	Qld Government & Federal Government	Public	Sunshine Coast	301	240	Under Construction	116	26			
Bruce Highway - Pine River to Dohles Rocks Road interchange	Qld Government / Federal Government	Public	Moreton Bay - North	1098	834	Announced			40	160	200
Bruce Highway - Pine River to Caloundra Road - Smart Motorways (Stage 2)	Qld Government / Federal Government	Public	Moreton Bay - North	105	63	Under Procurement	10	33	20		
Bruce Highway - Pavement Widening - South of Home Hill to North Ingham	Qld Government / Federal Government	Public	Townsville	100	75	Under Construction	4	5			
Bruce Highway - Rockhampton Northern Access Upgrade Stage 1	Federal Government	Public	Wide Bay	158	110	Under Construction	15				
Bruce Highway - Rockhampton Ring Road	Qld Government & Federal Government	Public	Fitzroy	1100	825	Announced	55	220	220	220	110



ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Bruce Highway - Saltwater Creek Upgrade	Federal Government	Public	Townsville	103	77	Announced	26	26	26		
Bruce Highway - Tiaro Flood Immunity Upgrade	Federal Government	Public	Wide Bay	336	252	Announced		42	105	105	
Bruce Highway - Townsville Northern Access Intersections Upgrade	Qld Government & Federal Government	Public	Townsville	108	81	Under Construction	38	38			
Bruce Highway - Townsville Ring Road Stage 5	Qld Government & Federal Government	Public	Townsville	230	115	Under Construction	58	57			
Bruce Highway - Upgrade Burdekin River Bridge	Qld Government / Federal Government	Public	Townsville	94	51	Under Construction	3	6	9	10	9
Cairns Ring Road	Qld Government & Federal Government	Public	Cairns	359	251	Announced		31	90	90	40
Cairns Western Arterial Road - Redlynch Connector Road to Captain Cook Highway, Duplication	Qld Government / Federal Government	Public	Cairns	300	230	Announced		18	60	60	50
Capricorn Highway (Rockhampton to Gracemere)	Qld Government & Federal Government	Public	Fitzroy	75	60	Under Construction	5				
Centenary Highway Capacity Upgrade - Ipswich Motorway to Toowong	Qld Government	Public	Ipswich	400	240	Prospective			40	80	80
Centenary Hwy Bridge Duplication	Qld Government	Public	Ipswich	244	176	Under Procurement	56	70	49		
Cleveland - Redland Bay Road Upgrade	Qld Government	Public	Brisbane	97	68	Announced	12	20	20	16	
Cooktown to Weipa Corridor Upgrade	Qld Government & Federal Government	Public	Outback - North	238	162	Announced	30	70	62		
Coomera Connector Stage 1 - Coomera to Nerang	Qld Government & Federal Government	Public	Gold Coast	1531	995	Under Procurement	124	187	337	347	
Cunningham Highway Upgrade	Qld Government	Public	Ipswich	213	155	Announced		56	75	24	
Gateway Motorway - Bracken Ridge to Pine River	Qld Government & Federal Government	Public	Brisbane - North	1000	781	Announced			49	120	140
North South Urban Arterial Corridor (Moreton Connector)	Qld Government / Federal Government	Public	Brisbane	920	690	Credibly Proposed				83	121
Gladstone Port Access Road Extension	Qld Government & Federal Government	Public	Outback - North	125	88	Announced		33	55		
Gympie Arterial Road Interchange Upgrade	Qld Government & Federal Government	Public	Brisbane	65	51	Under Construction	22	20			
Inland Freight Route (Mungindi to Charters Towers) Upgrades	Qld Government / Federal Government	Public	Darling Downs - Maranoa	500	363	Announced		15	40	50	50
Ipswich Motorway; Rocklea to Darra Stage 2 - Oxley to Darra	Qld Government	Public	Ipswich	520	390	Prospective		30	150	150	60
Kangaroo Point Green Bridge	Brisbane City Council	Public	Brisbane Inner City	190	150	Under Procurement	75	75			
Level Crossing Removal - Beams Road	Qld Government	Public	Brisbane - North	248	174	Announced		58	116		
Level Crossing Removal - Boundary Road	Qld Government / Federal Government	Public	Brisbane	146	112	Announced	30	42	40		



ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Lindum Rail Crossing Upgrade	Brisbane City Council / QLD Government / Federal Government	Public	Brisbane - East	85	60	Announced	26	34			
M1 Pacific Motorway - Varsity Lakes to Tugun	QLD Government & Federal Government	Public	Gold Coast	1000	750	Under Construction	250	250	125		
M1 Pacific Motorway North: Daisy Hill to Logan Motorway	QLD Government & Federal Government	Public	Logan - Beaudesert	1000	670	Announced		33	180	200	155
M1 Pacific Motorway North: Eight Mile Plains to Daisy Hill	QLD Government & Federal Government	Public	Logan - Beaudesert	750	493	Under Construction	164	164	83		
M1 Pacific Motorway Upgrade Program - Intersection Upgrades (Exit 49)	QLD Government / Federal Government	Public	Brisbane - South	110	60	Announced	10	30	20		
Mt Isa to Rockhampton Corridor Upgrade (incl. Yeppoon Road Duplication)	QLD Government & Federal Government	Public	Outback - North	237	150	Announced		27	50	50	23
Mackay Port Access - Bruce Highway to Mackay - Slade Point Road	QLD Government / Federal Government	Public	Mackay - Isaac - Whitsunday	350	250	Announced		40	100	100	10
Mt Lindesay Highway - Stony Camp Road to Chambers Flat Road	QLD Government / Federal Government	Public	Logan - Beaudesert	75	56	Under Construction	22	22			
Neville Bonner Bridge	Destination Brisbane	Private	Brisbane Inner City	110	70	Under Construction	15				
Northern Transitway	QLD Government / Federal Government	Public	Brisbane	72	50	Under Construction	20	26			
Peak Downs Highway - Walkerston Bypass	QLD Government & Federal Government	Public	Mackay - Isaac - Whitsunday	150	76	Under Procurement	28	33	16		
Cape York Region Package Stage 2	QLD Government / Federal Government	Public	Outback - North	238	178	Under Construction	50	55	43		
Riverway Drive Stage 2 (Allambie Lane - Dunlop Street)	QLD Government	Public	Townsville	95	68	Announced		13	38	18	
Smithfield Bypass	QLD Government & Federal Government	Public	Cairns	152	106	Under Construction	10				
Sunshine Motorway - Mooloolah River Interchange Stage 1	QLD Government	Public	Sunshine Coast	320	220	Announced		30	80	80	30
Tennant Creek to Townsville Corridor Upgrade - Queensland	QLD Government & Federal Government	Public	Townsville	250	180	Announced			35	50	50
Toowoomba to Ipswich Corridor Upgrade	QLD Government & Federal Government	Public	Ipswich	75	56	Announced	3	6	6	8	12
Townsville to Roma Corridor Upgrade	QLD Government & Federal Government	Public	Townsville	125	94	Announced			13	33	33
Underground Busway Interchange at Roma Street Station	QLD Government	Public	Brisbane Inner City	250	160	Announced	65	70	25		
Warrego Highway Upgrades between Ipswich and Toowoomba	QLD Government & Federal Government	Public	Toowoomba	543	400	Announced		50	100	100	100



RAIL

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Beerburum to Nambour Rail Upgrade	Qld Government / QR	Public	Sunshine Coast	740	440	Under Procurement	25	50	170	195	
Varsity Lakes to Elanora Extension	Qld Government / QR	Public	Gold Coast	859	470	Prospective				130	180
CRR; Tunnel, Stations and Development (TSD) PPP	Qld Government	Public	Brisbane Inner City	3700	3400	Under Construction	933	933	560		
CRR; Rail, Integration and Systems package (RIS)	Qld Government	Public	Brisbane Inner City	900	900	Under Construction	228	228	200		
CRR; European Train Control System Level 2	Qld Government	Public	Brisbane Inner City	634	600	Under Construction	155	28	27		
CRR; Three new stations (Pimpama, Helensvale North and Worongary-Merrimac)	Qld Government	Public	Brisbane Inner City	120	80	Announced			40	40	
North Coast Line Capacity (Brisbane to Cairns)	Qld Government	Public	Cairns	116	70	Under Construction	17	17			
Inland Mainline Freight Upgrade; NSW/QLD Border to Gowrie	ARTC	Public	Darling Downs - Maranoa	1600	1350	Under Procurement		120	440	450	340
Inland Mainline Freight Upgrade; Gowrie to Kagaru	ARTC	Public	Ipswich	3550	2900	Under Procurement	250	560	800	800	490
Inland Mainline Freight Upgrade; Kagaru to Acacia Ridge & Bromelton	ARTC	Public	Logan - Beaudesert	150	100	Announced		40	60		
North Galilee Basin Rail	Adani	Private	Mackay - Isaac - Whitsunday	1000	900	Under Construction	201	296	242	128	
Ipswich to Springfield	QLD Government	Public	Ipswich	1500	1050	Credibly Proposed					250
Moura - Aldoga Link Project (Wiggins)	QR National	Public	Outback - North	500	325	Unlikely		135	140	50	
Wiggins Island Coal Rail Infrastructure Stage 3	Aurizon	Private	Outback - North	450	315	Unlikely			100	215	
Gold Coast Light Rail Stage 3	Qld Government & Federal Government	Public	Gold Coast	1044	741	Under Procurement	216	216	216	93	
Loganlea Station Relocation	Qld Government & Federal Government	Public	Logan - Beaudesert	95	62	Announced	14	24	24		
Mt Isa to Townsville	Queensland Rail	Public	Outback - North	380	320	Under Construction	80	80	80	40	
CRR; Clapham Yard Stabling (Moorooka)	Queensland Rail	Public	Brisbane - South	299	120	Under Construction	40	40	20		
Kuraby to Beenleigh Rail Upgrade	Qld Government & Federal Government	Public	Logan - Beaudesert	1000	700	Credibly Proposed			120	230	230
Gold Coast Light Rail Stage 4	Qld Government & Federal Government	Public	Gold Coast	750	600	Prospective				150	250



HARBOURS/PORTS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Townsville Port Expansion Project - Outer Harbour Expansion (Berths 14+15)	Qld Government	Public	Townsville	200	150	Prospective			50	50	50
Townsville Port Expansion Project - Channel Capacity Upgrade	Qld Government	Public	Townsville	232	186	Under Construction	40	50	46		
Urangan Boat Harbour	Watpac / Seymour	Private	Wide Bay	800	200	Unlikely		90	100	10	
Abbot Point Dredging	Qld Government	Public	Mackay - Isaac - Whitsunday	600	240	Credibly Proposed		80	80	80	
Hay Point Berth 2 Upgrade	BMA	Private	Mackay - Isaac - Whitsunday	200	150	Under Construction	50	50			
BP Wharf Repurposing	Port of Brisbane	Public	Brisbane - East	100	80	Unlikely			40	40	
Port of Gladstone - Second Shipping Lane (Gatcombe and Golding Cutting Channel Duplication Project)	Gladstone Port Authority	Public	Fitzroy	760	532	Prospective			170	210	152



DEFENCE

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Shoalwater Bay - Remediation	Federal Government	Public	Fitzroy	140	120	Under Construction	60				
Singapore Force Posture Initiatives - Shoalwater Bay	Federal Government	Public	Fitzroy	1100	400	Under Construction	133	133			
Singapore Force Posture Initiatives - Townsville	Federal Government	Public	Townsville	1100	100	Under Construction	33	33			
EST02202 Other Sites and Redevelopment - Upgrade and Remediation Works to 9 sites	Federal Government	Public	Multi-Region	326	279	Credibly Proposed		93	93	93	
RAAF Base Townsville - Pellegrine Facilities (AIR 555 Phase 1)	Federal Government	Public	Townsville	88	70	Under Construction	22	22	22		
HMAS Cairns (NCIS) Facility Upgrade	Federal Government	Public	Cairns	155	100	Under Procurement		22	44	33	
LAND 121 Stage 2A[a] - Lavarack Barracks (Qld - Herbert)	Federal Government	Public	Townsville	129	96	Under Construction	19				



WATER

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Lower Fitzroy River Infrastructure Project - Rookwood Weir	Qld Government	Public	Fitzroy	352	195	Under Construction	60	99			
Somerset Dam Upgrade	SEQWater	Public	Ipswich	600	450	Credibly Proposed		100	125	125	100
Lake McDonald Dam Upgrade	SEQWater	Public	Wide Bay	127	102	Announced	40	62			
Wivenhoe to Warwick Pipeline	SEQWater	Public	Toowoomba	100	90	Credibly Proposed		90			
Urannah Dam	Bowen Collinsville Enterprises	Public	Mackay - Isaac - Whitsunday	2900	1933	Credibly Proposed		564	564	564	243
Burdekin Falls Dam - Saddle Dam and Monolith Improvement	Sunwater	Public	Townsville	190	121	Announced		37	48	35	
Big Rocks Weir - Upper Burdekin	Townsville Enterprise	Public	Townsville	60	60	Announced			18	18	18
Galilee Basin Water Supply	Adani	Private	Mackay - Isaac - Whitsunday	80	60	Under Construction	30				
Beaudesert Water Supply Zone Projects Stage 1 and 2	Qld Government	Public	Logan - Beaudesert	160	120	Under Construction	30	15			
Cedar Grove Connector	Qld Government	Public	Logan - Beaudesert	100	70	Prospective			35	35	
Emu Swamp Dam	Granite Belt Irrigation	Public	Darling Downs - Maranoa	84	67	Under Procurement	27	40			
Haughton Channel Capacity Upgrade	Qld Government	Public	Townsville	90	70	Prospective		20	50		
Haughton Pipeline Duplication - Stage 2	Qld Government	Public	Townsville	195	130	Announced	40	60	30		
Paradise Dam Primary Spillway Improvement Project (DIP)	Sunwater	Private	Wide Bay	877	658	Credibly Proposed		12	11	37	193
Burdekin Falls Dam - Raising	Qld Government	Public	Townsville	500	350	Credibly Proposed					100
Water Treatment for Bowen Fields	Arrow Energy	Private	Mackay - Isaac - Whitsunday	250	175	Prospective		88	88		
Hughenden Irrigation Scheme	North Queensland Water Infrastructure Authority	Public	Fitzroy	300	210	Announced		70	70	70	



SEWERAGE

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Luggage Point Sewerage Scheme	Queensland Urban Utilities (QUU)	Public	Brisbane - North	600	500	Under Construction	38	38	38	38	38
Gold Coast Council Long Term Recycled Water Release Stage 2 - South Stradbroke Pipeline	GCC	Public	Gold Coast	250	188	Announced				60	128
Northern Treatment	Urban Utilities	Public	Brisbane Inner City	220	175	Under Construction	37	23			
Southern Treatment Ipswich	Urban Utilities	Public	Ipswich	170	136	Under Construction	40	53			
Norman Creek Sewer Augmentation - Brisbane	Urban Utilities	Public	Brisbane Inner City	122	92	Announced			12	12	12
Eagle Farm Rising Main Upgrade - A	Urban Utilities	Public	Brisbane - North	165	124	Announced				16	16
S1 & S18 Main Sewer Rehabilitation - Brisbane	Urban Utilities	Public	Brisbane Inner City	71	53	Under Construction	5				
S2 & Corinda Chelmer Sewer Augmentation	Urban Utilities	Public	Brisbane - West	69	52	Announced		9	9	9	9
Cazwell Street SPS to Hamilton Siphon	Urban Utilities	Public	Brisbane	94	70	Announced		12	12	12	12
Logan Water Infrastructure Program Alliance	Logan City Council	Public	Logan	1000	746	Under Construction	83	83	83	83	83



ELECTRICITY

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
North Queensland Power Station	Private / Qld Gov / Federal Government	Private	Townsville	800	600	Unlikely		100	250	250	
Clarke Creek Wind (800MW) - including 400MW Solar & Battery System	Energy Pacific Vic Pty Ltd	Private	Mackay - Isaac - Whitsunday	1500	525	Under Construction	150	150			
Raglan Solar (300MW)	Eco Energy Group	Private	Fitzroy	310	109	Announced	54	55			
Columboola Solar Farm (Miles) (310MW)	Luminous Energy	Private	Fitzroy	300	105	Under Construction	53				
Bouldercombe Solar Farm (200MW)	Eco Energy Group	Private	Fitzroy	240	84	Announced		42	42		
Kidston Solar Project - Stage 2 (270 MW)	Genex Power	Private	Far North	400	140	Credibly Proposed		70	70		
Kidston Stage 3 Wind Project (150MW)	Genex	Private	Far North	250	88	Prospective		15	60	13	



ELECTRICITY

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Kidston Transmission Project	Genex / Powerlink	Public	Far North	200	150	Under Construction	150				
Kidston Pumped Hydro Storage Project	Genex Power	Private	Far North	330	200	Under Construction		100	100		
Rollingstone Solar Farm (110 MW)	ESCO Pacific	Private	Townsville	210	74	Under Construction	34				
Gangarri Solar Farm 120MW	Shell Australia	Private	Darling Downs - Maranoa	80	64	Under Construction	29				
Kaban Green Power Hub 157MW	Neoen	Private	Cairns	300	90	Under Construction	40	40			
Moura Solar Farm 110MW	ESCO Pacific	Private	Fitzroy	180	63	Announced	32	32			
Aramara Solar Farm (140 MW)	Eco Energy World (EEW) Australia	Private	Wide Bay	280	98	Credibly Proposed	48	50			
Powering North Queensland: Transmission Line	Powerlink	Public	Cairns	150	128	Credibly Proposed		64	64		
Burdekin Falls - Hydro-Electric Power Station (50MW)	Stanwell	Public	Townsville	200	120	Prospective		30	60	30	
Galilee Basin Transmission Project	Adani	Private	Mackay - Isaac - Whitsunday	100	80	Under Construction	40	20			
Aldoga Solar Farm 480MW	ACCIONA / Qld Government	Public	Outback - North	500	150	Announced	50	100			
Copperstring Transmission Line (2.0)	CuString Pty Ltd	Private	Outback - North	1700	1500	Under Procurement	500	500	500		
Forest Wind	Clean Sight / Siemens Financial Services	Private	Wide Bay	2000	1000	Prospective		167	417	417	
MacIntyre Wind Farm	CleanCo / ACCIONA	Private	Darling Downs - Maranoa	1960	980	Under Procurement	430	430	120		
Western Downs Solar Farm 400MW	Neoen Australia	Private	Darling Downs - Maranoa	525	184	Under Construction	92				
Dulacca Renewable Energy Project Wind Farm	Renewable Energy Systems	Private	Darling Downs - Maranoa	450	225	Under Procurement	110	115			
Lockyer Valley Gas Power Station	Quinbrook	Private	Darling Downs - Maranoa	200	120	Credibly Proposed	60	60			
Qld to NSW Interconnector (QNI) medium - Qld Component	TransGrid	Private	Multi-Region	375	281	Under Construction	156				
Borumba Dam Pumped Hydro	PowerLink	Public	Sunshine Coast	1500	1000	Credibly Proposed				175	325



PIPELINES

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Arrow Bowen Pipeline	Shell / Arrow / Bow	Private	Mackay - Isaac - Whitsunday	450	360	Unlikely		160	200		
Northern Gas Pipeline Extension/Expansion (Qld Component)	Jemena / Galilee Energy	Private	Outback - South	3800	2660	Credibly Proposed		450	750	750	710



TELECOMMUNICATIONS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
National Broadband Network - Qld component	NBN Co.	Public	Multi-Region	9352	6878	Under Construction	459	290	266	60	67
Public Safety Regional Radio Communication	Qld Government	Public	Multi-Region	500	300	Under Construction	75				



OIL & GAS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Queensland Curtis LNG Upstream Field Development (Sustaining)	QGC & Shell	Private	Fitzroy	1375	1250	Under Construction	150	150			
Gladstone LNG Upstream Field Development (Sustaining)	Santos & Petronas	Private	Fitzroy	990	900	Under Construction	100	100			
Australia Pacific LNG Upstream Field Development (Sustaining)	Origin / Conoco Phillips	Private	Darling Downs - Maranoa	1375	1250	Under Construction	150	150			
Arrow - Upstream Field Development (Sustaining)	Arrow / Shell	Private	Darling Downs - Maranoa	715	650	Under Procurement	150	150	200	150	
Western Surat Gas Project	Senex	Private	Darling Downs - Maranoa	1500	1200	Under Construction	186	186	186	186	186
GLNG Roma East Project	Santos & Petronas	Private	Darling Downs - Maranoa	750	375	Under Construction	35	35			
Australia Pacific LNG Salt Handling Facility	Origin / Conoco Phillips	Private	Outback - North	200	160	Unlikely				40	80
Curtis LNG Project (Salt Concentrator)	QGC & BG Group	Private	Outback - North	200	150	Unlikely				30	45
Ironbark Gas Facility (Domestic Supply)	Origin	Private	Darling Downs - Maranoa	300	240	Unlikely		140	100		
Surat Gas Expansion Projects	Arrow Energy	Private	Darling Downs - Maranoa	1800	1500	Under Construction	300	300	300	300	



COAL

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Eagle Downs Coking Coal	South 32	Private	Mackay - Isaac - Whitsunday	1250	600	Prospective		158	228	215	
Maryborough (Colton)	Northern Energy (Owned By New Hope)	Private	Wide Bay	300	180	Prospective		66	114		
Peak Downs Expansion	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay - Isaac - Whitsunday	460	345	Unlikely		80	160	105	
South Walker Creek	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay - Isaac - Whitsunday	150	100	Prospective		24	40	36	



COAL

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Grosvenor Underground Stage 2	Anglo Coal	Private	Mackay - Isaac - Whitsunday	500	350	Credibly Proposed		70	90	105	85
Central Queensland Coal Project (Styx)	Waratah Coal / Queensland Nickel	Private	Fitzroy	300	270	Credibly Proposed		50	220		
Middlemount Coking Coal Mine Stage 2	Peabody / Yancoal	Private	Mackay - Isaac - Whitsunday	325	284	Prospective		100	184		
Hail Creek Extension - Underground	Glencore	Private	Mackay - Isaac - Whitsunday	1100	660	Prospective		150	180	180	150
Rolleston Expansion	Xstrata / Glencore	Private	Fitzroy	400	280	Prospective		70	140	70	
Aquila	Anglo Coal / Mitsui	Private	Mackay - Isaac - Whitsunday	240	228	Under Construction	91	46			
Foxleigh Plains Project	Anglo / CAML / Nippon	Private	Mackay - Isaac - Whitsunday	200	140	Unlikely		70	70		
Eaglefield Coal Mine Expansion	Peabody	Private	Mackay - Isaac - Whitsunday	1500	1200	Unlikely			250	350	320
Monto Coal Mine Further Stages	Peabody / China Huaneng Group	Private	Wide Bay	265	159	Unlikely		60	99		
Drake Coal	Qcoal	Private	Mackay - Isaac - Whitsunday	900	690	Unlikely			130	240	240
Olive Downs	Pembroke Resources	Private	Mackay - Isaac - Whitsunday	1000	800	Under Procurement	400	400			
Carmichael Coal Mine Project (Stage 1)	Adani	Private	Mackay - Isaac - Whitsunday	1150	978	Under Construction	270				
Baralaba South Open Cut	The Mount Ramsay Coal Company (Liberty Mutual)	Private	Outback - North	200	160	Credibly Proposed		80	80		
Cameby Downs Expansion	Yancoal	Private	Darling Downs - Maranoa	250	225	Under Construction	100	50			
Millennium Expansion	Stanmore Coal / M Resources	Private	Mackay - Isaac - Whitsunday	400	320	Credibly Proposed		60	100	100	60
Minyango Coal Project Stage 1	QCoal	Private	Outback - North	750	600	Credibly Proposed	120	240	240		
Oaky Creek Longwall Stage 2	Glencore Xstrata / Sumisho / Itochu / ICRA	Private	Outback - North	650	455	Unlikely		150	230	75	
Saraji East	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay - Isaac - Whitsunday	2400	1800	Credibly Proposed		360	990	450	
Winchester South	Whitehaven Coal	Private	Mackay - Isaac - Whitsunday	1000	900	Prospective		100	400	300	100
Moranbah North	Anglo	Private	Mackay - Isaac - Whitsunday	500	400	Credibly Proposed		100	150	150	
Valeria Met Coal Mine	Glencore	Private	Fitzroy	1000	650	Prospective			200	350	100



OTHER MINERALS & HEAVY INDUSTRY

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26
Merlin Molybdenum-Rhenium Phase 2	Chinova	Private	Outback - North	345	250	Unlikely			100	100	50
Cannington Expansion	BHP Billiton	Private	Outback - North	400	120	Credibly Proposed	30	60	30		
Cloncurry Copper Project (Roseby Copper / Little Eva / Eva)	CMMC	Private	Outback - North	320	96	Prospective		50	46		
Red Dome Mungana	Consolidated Tin Mines Limited	Private	Cairns	330	215	Credibly Proposed		65	85	65	
Ravenswood Extension Project	EMR Capital / Golden Energy and Resources Ltd	Private	Townsville	167	92	Under Construction	54				
Charters Towers	Citigold Corporation	Private	Townsville	246	135	Prospective		35	80	20	
SCONI Scandium Project (Phase 1)	Australian Mines	Private	Townsville	1014	304	Credibly Proposed		94	140	70	
Highland Plains - Phosphate Project	P205 Resources	Private	Outback - North	100	80	Unlikely		40	40		
North Queensland Bio Energy - Ethanol Plant	North Queensland Bio Energy	Private	Townsville	640	200	Under Construction	50				
Gladstone Energy and Ammonia Project	Australian Future Energy	Private	Fitzroy	1000	600	Credibly Proposed		200	200	200	
Agripower Amorphous Silica - Fertiliser Processing Plant	Agripower Australia Ltd	Private	Townsville	663	500	Credibly Proposed		150	200	150	
St Elmo Vanadium Project	Multicom Resources	Private	Outback - North	470	329	Announced	29	200	100		
Central Queensland Hydrogen Project (3GW)	Stanwell / Iwatani	Private	Fitzroy	TBC	TBC	Credibly Proposed					50
Townsville Hydrogen Facility (300MW)	Origin / Kawasaki Heavy Industries	Private	Townsville	TBC	TBC	Credibly Proposed					50

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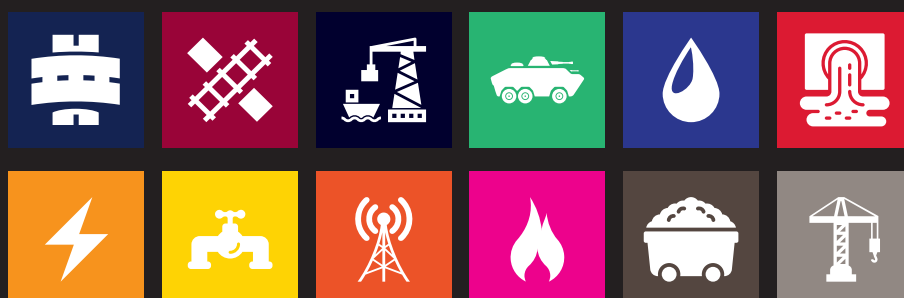
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