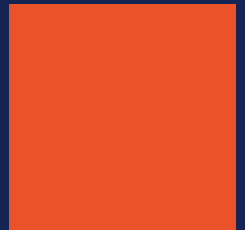


# Queensland Major Projects Pipeline 2023

QUEENSLAND  
MAJOR  
CONTRACTORS  
ASSOCIATION



We would like to thank and acknowledge our partners from across the industry for their support of the 2023 QMCA CSQ Queensland Major Projects Pipeline Report

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# EXECUTIVE SUMMARY



The Queensland Major Contractors Association (QMCA), in conjunction with Construction Skills Queensland (CSQ) and key authors (Oxford Economics, Arcadis and Aurora Marketing) is proud to present the 12th edition of the Queensland Major Projects Pipeline Report (QMPPR). The 2023 version of this report and pipeline highlights the significant rise in engineering construction activity in Queensland and identifies that the work ahead of the industry is robust and solid, despite the current headwinds of rising costs, challenging labour

markets, declining productivity and the Federal Government's current ongoing and slow review of infrastructure investment.

For over a decade, the QMPPR has delivered a comprehensive list of major engineering construction projects combined with an analysis on the corresponding level of construction activity. The coverage of the 2023 QMPPR are projects expected to be in the construction phase over the next five years to 2027/28. Major project activity in Queensland is expected to rise strongly in the coming years,

with double digit annual growth rates over the first four years of the pipeline. The current five year pipeline has risen to \$92b, a \$20.6b (29%) increase from 2022. Funded activity accounts for a large portion of this upgrade and has risen in each of the forward years compared to the 2022 report, with total funded activity in the 2023 QMPPR growing by \$16.7b to \$54.4b. Much of the increase in funded work is due to a selection of utilities and mining and heavy industry projects concentrated in the western and south-east regions of the state.

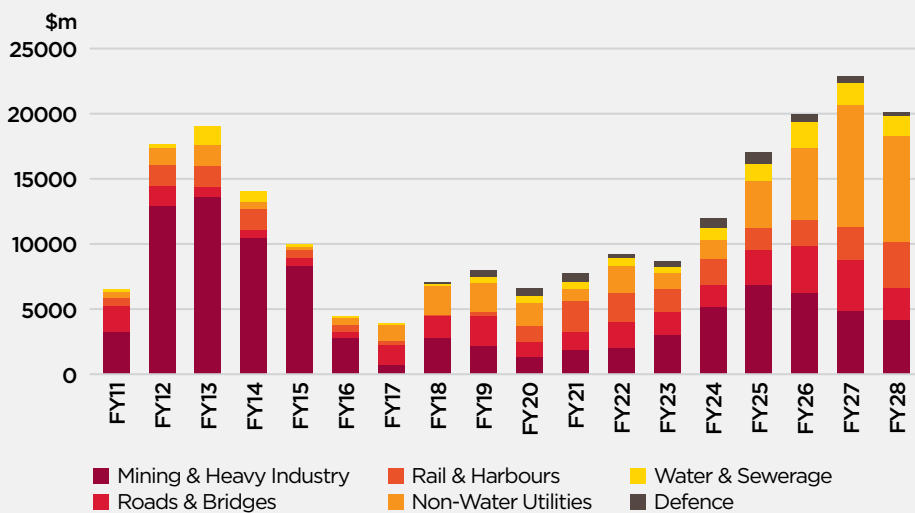
The total pipeline by sector graph highlights the change in the pipeline since 2010/11, where the mining and heavy industry sector (including gas) accounted for up to 80% of the spend; through to the prospect of the industry delivering a much more diversified spread of activity in excess of \$20b annually from 2026.

**Unfunded work done on major projects over the next five years is \$3.9b higher than 2022, at an aggregate value of \$37.6b.** The peak in unfunded activity has been shifted back (compared to the previous report) and is now anticipated for 2026/27 but will also remain elevated into 2027/28. The non-water utilities sector, reflecting the ‘energy transition’ infrastructure investment, is the biggest contributor to the net increase in unfunded activity and the sector has the second highest value of unfunded construction work (after mining and heavy industry).

Despite an overall improvement in the pipeline outlook for Queensland, the regional outcomes are varied. Funded activity rose in all regions except for Darling Downs-Maranoa and Ipswich-Toowoomba-Logan, while almost half of the regions experienced a decline in unfunded activity. The Ipswich-Toowoomba-Logan region was the only area to see a reduction in both the funded and unfunded construction activity over the next five years. In contrast, the remainder of South East Queensland (Brisbane, Sunshine Coast and Gold Coast) experienced a rise in construction work done that is sufficient to offset this decline. As with the 2022 QMPPR, the bulk of unfunded work is concentrated outside of Greater Brisbane, which raises the pipeline risk in these regions. The locations with the largest net gain in construction work over the pipeline are Wide Bay, Fitzroy and Brisbane - these regions represent 43% of activity.



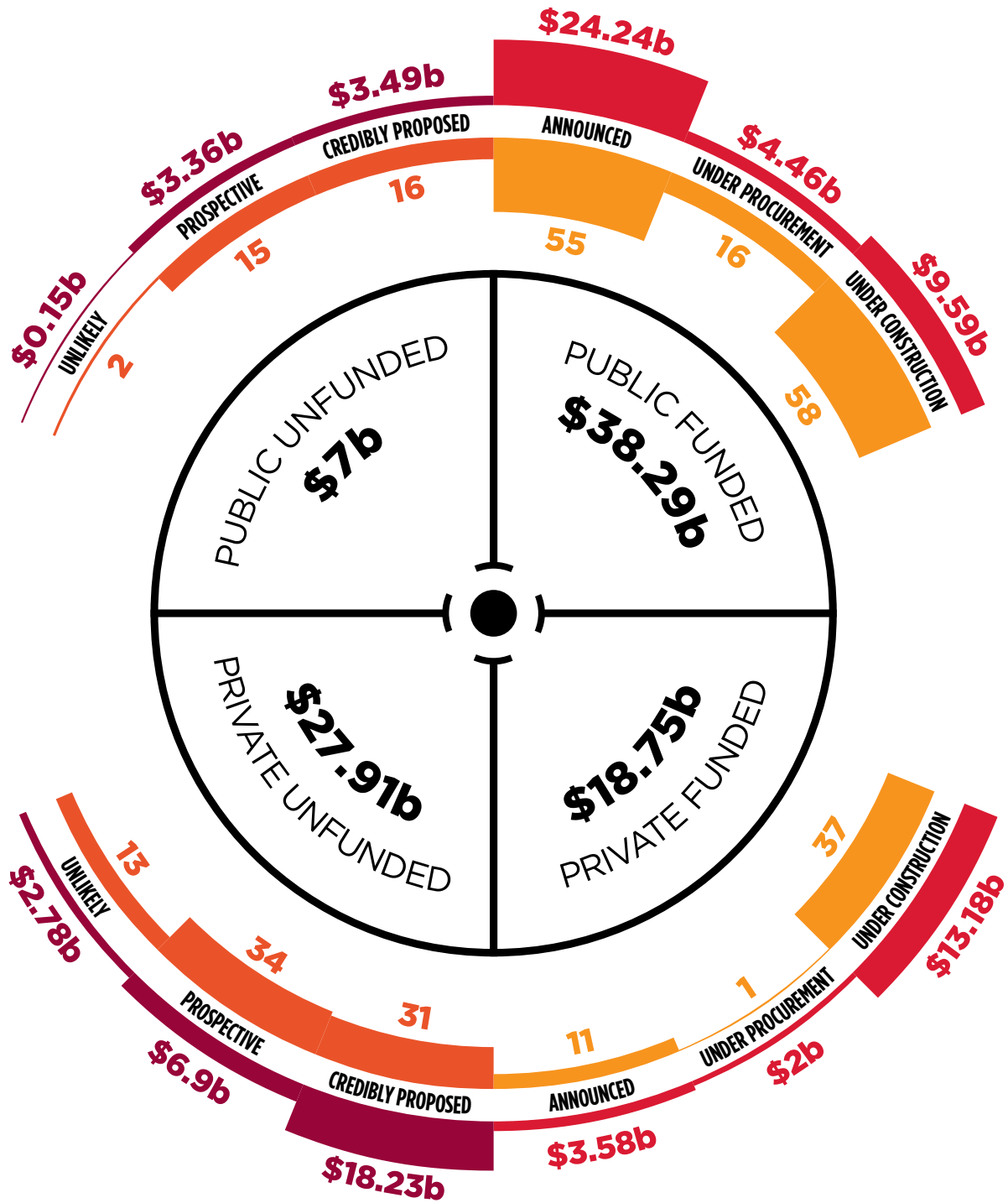
**Total pipeline by sector**



Source: Oxford Economics and QMCA







Funded work will remain at an elevated level over the entire pipeline period, rising to \$11.4b in 2024/25, dipping slightly in 2025/26 and then peaking at \$12b in 2026/27. The risk to pipeline activity stems from the high level of unfunded work scheduled from 2025/26 onwards.

To ensure the momentum in pipeline activity is sustained, addressing infrastructure gaps early and establishing effective funding and financing initiatives will support investment in productive projects.



# KEY FINDINGS

The major projects pipeline continues to grow. In the five years between 2023/24 and 2027/28 inclusive, the major projects pipeline is valued at \$92b. This is much higher than the previous two reports, whereby activity was \$71.3b in the 2022 QMPPR and \$61.9b in the 2021 QMPPR.

**\$54.4b (59%) of the pipeline value is funded, up from \$37.6b in 2022. \$37.6b (41%) is unfunded, up from \$33.7b in 2022.**

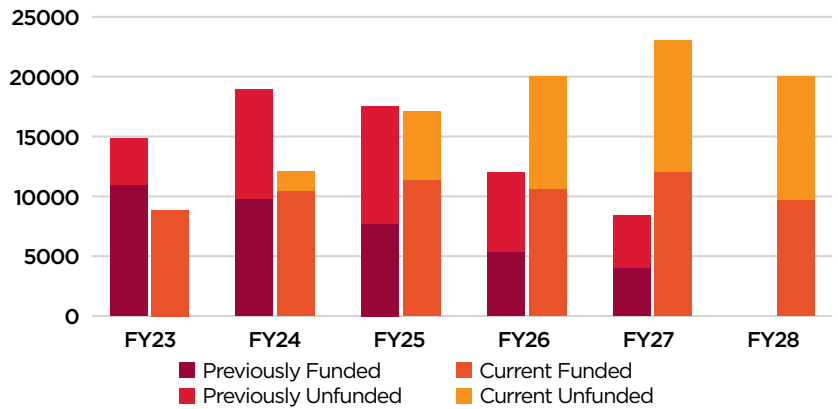
The share of unfunded projects grows across the pipeline from 13% in 2023/24 to 51% in 2027/28. This introduces uncertainty about project development towards the end of the pipeline and calls for a more streamlined approval process.

**The public sector remains a key funder of major project work.**

51% (up from 49%) of the total pipeline activity is attributed to the public sector, and the public sector represents 67% (down from 74%) of all funded work.

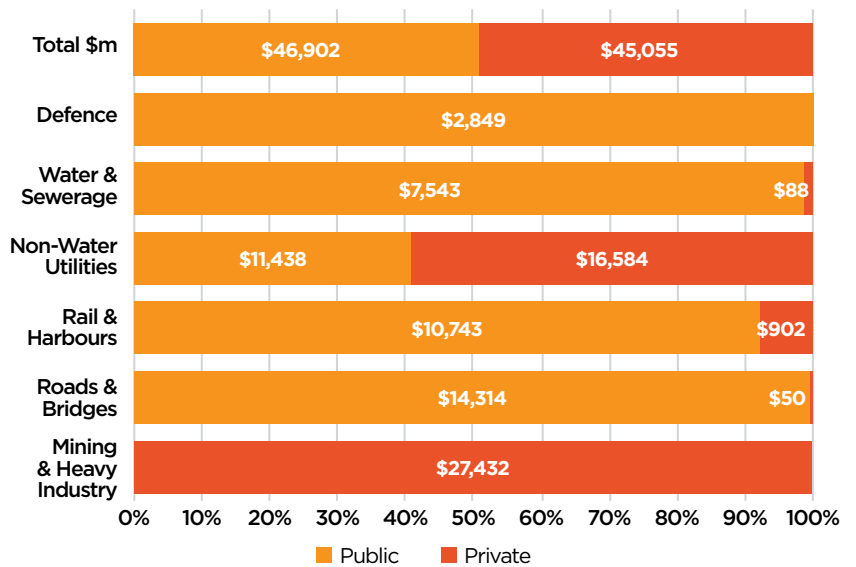
**2026/27 is on track to be the strongest year of work since the end of the resources boom in 2014/15, with the highest level of funded activity in the pipeline at \$12b.** If all unfunded work proceeds, total major project activity will surge to \$22.9b and exceed the level of completed work seen at the peak of the resources boom in 2012/13 (\$19.1b).

Comparison of major project activity, 2023 versus 2022, \$m

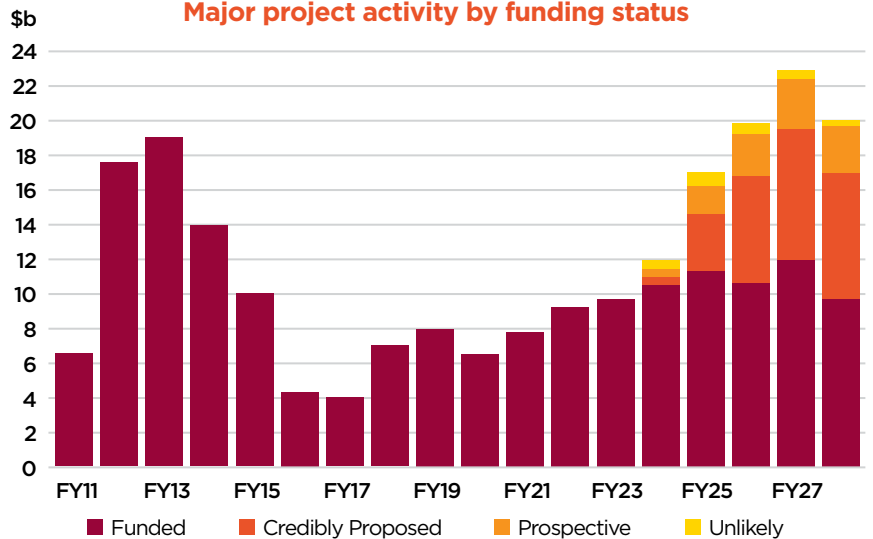


Funding mix by asset class, 2024 - 2028, \$m, all projects

(Total pipeline, next five years)



Major project activity by funding status



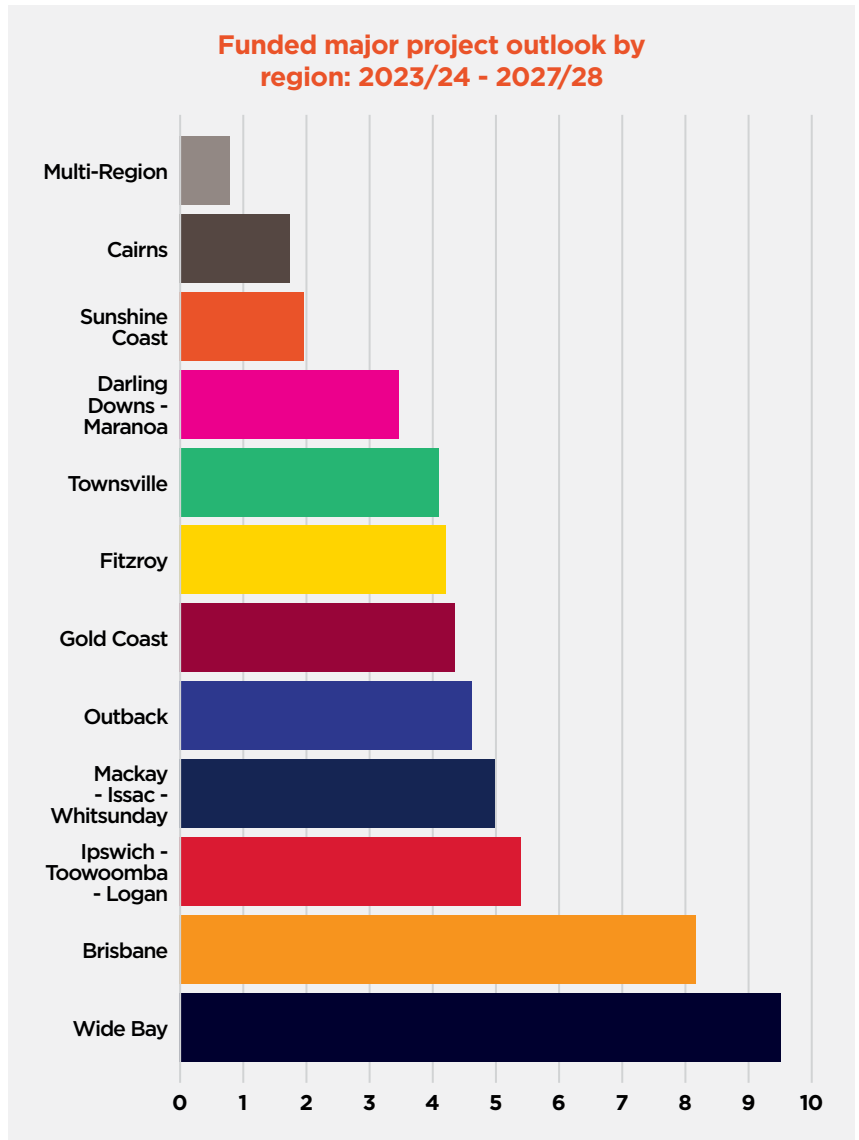
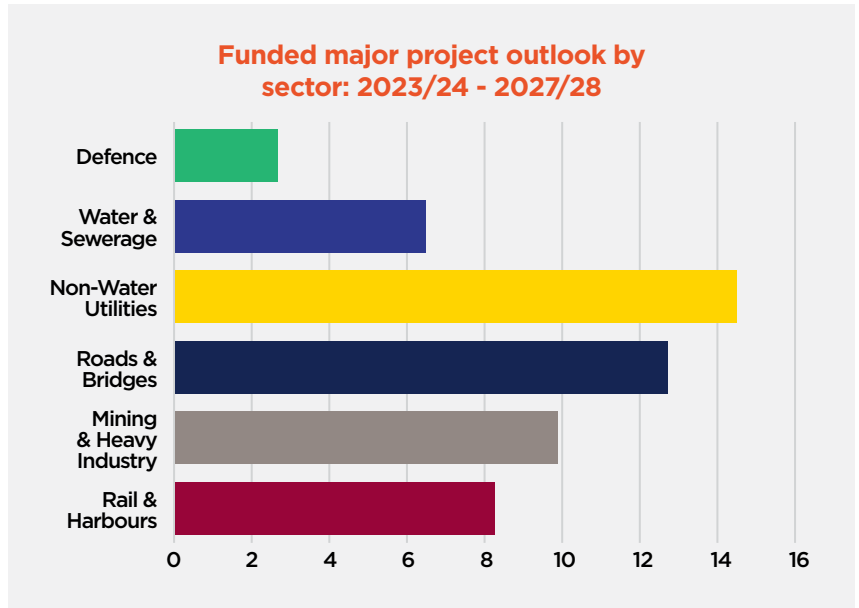
Source: Oxford Economics Australia, QMCA member knowledge

**High construction costs coupled with rising domestic demand and supply constraints create barriers that can limit pipeline capacity.** Road and bridge construction costs (as reflected by the ABS Road and Bridge Producer Price Index) continue to rise and are 7% higher than one year ago, with broader engineering construction costs remaining above historical averages. Increased input costs, labour shortages and reduced availability of materials and equipment pose a real risk to the construction of major projects and may result in extensive delays, or even cancellations.

**Funded activity is expected to remain elevated over the pipeline, tapering off in 2027/28.** Boosting growth in the industry (assuming supply constraints are able to be managed) can be achieved through securing unfunded projects in the pipeline. Unfunded activity is anticipated to surpass \$10b in 2026/27, with the private sector responsible for an average of \$8.1b of unfunded projects per annum in the last three years of the pipeline. The mining and heavy industry sector makes up 57% of private unfunded work and the non-water utilities sector accounts for 41%.

**Funded work is highly concentrated in ‘megaprojects’ (valued at over \$1b).** Megaprojects comprise over half (51%) of funded pipeline activity over the next three years, consistent with previous iterations of the report. However, the ratio of projects valued at under \$200m has fallen to 7% of major project work over the next three years, compared to an average of 14% over the past four publications.

**Major project outlooks differ considerably by region.** Compared to last year, funded work has declined by 23% in the Ipswich-Toowoomba-Logan region and 33% in Darling Downs-Maranoa, while increasing in all other areas. Wide Bay and Townsville have received the highest growth in pipeline funded work at 497% and 196%, respectively. Projects in the utilities (specifically electricity and defence) and mining and heavy industry sectors are the main drivers of this change.



Source: Oxford Economics Australia, QMCA member knowledge





# UPSIDE AND DOWNSIDE RISKS TO THE MAJOR PROJECTS PIPELINE

With Major Projects Pipeline construction activity significantly increasing over the coming years and potentially set to exceed levels seen during the mining and resources boom of 2011-15, capacity constraints may materialise as a downside risk. The heightened drought conditions have also been identified as a downside risk. However, the outlook could experience upside risks should accelerated project deliveries be required for the 2032 Olympic and Paralympic Games and Queensland Government's 2032 70% renewable target.

**As the country's construction activity remains elevated, competition for materials and labour is identified as a downside risk. While the industry booms, interstate projects limit Queensland's ability to deliver construction projects on time.**

Capacity constraints have already been seen over the past years and are likely to intensify with the

residential and non-residential construction boom expected towards the end of the decade. Heightened construction cost escalation in recent years, with potential for further escalation in coming years, could also mean that some projects may need to be re-evaluated to determine their value for money.

**The announcement of the transition back to the El Nino climate cycle, along with subsequent increased likelihood of severe drought conditions, are also a downside risk to the sector.**

These weather conditions may mean some infrastructure projects may be prioritised with timelines brought forward, or additional projects may be added. The need for long term bulk water supply and dam upgrades (including the dam safety upgrade program) provide for further upside.

**Political and social motivations surrounding the 2032 Olympic and Paralympic Games pose**

**notable upside risk to the Major Projects Pipeline.** Despite the majority of Queensland's planned \$7.1b Olympic and Paralympic Games infrastructure spend tailored towards building projects, the desire to accommodate the event to the highest standard, and to impress the world stage, will necessitate the need for fast tracking of certain transport investments in time for 2032. It is noted that the State Government has yet to announce any of this.

**The Queensland Government's commitment to renewable generation targets poses an upside risk to the construction industry.**

With net zero emission targets of 50% by 2030, 70% by 2032 and 80% by 2035, increased investment in energy transition infrastructure such as high voltage transmission lines, renewable energy generation and pumped hydro energy storage and generation facilities will drive major investment for the sector for the next decade or more.



# COST ISSUES

## WHEN WILL CONSTRUCTION COST ESCALATION RETURN TO TREND?

The construction industry experienced hyper-levels of cost escalation during 2022, fuelled by the rising cost of materials, logistics and energy exacerbated by the Ukraine War. During 2023, there has been a growing clamour that material costs are returning to normal levels and that cost escalation is, overall, returning to trend. But is that the case?

Before the pandemic, and going back as far as 2000, average construction cost escalation across Australia was about 3.2% per year. In Queensland, it's been in the region of 3.5%. Cost escalation between 2019 and 2022 averaged 6.8% in Queensland – with the bulk of this falling in 2021 and 2022 where the levels of hyper-inflation were experienced most. 2022 alone saw construction cost escalation at 14.3%.

Expected normal construction escalation trend has been regarded as 3-4% per annum. This expectation is largely based on the assumption that many of the challenges of 2022 have now largely been resolved. However, while the cost of timber and steel has reduced significantly, materials such as sand, concrete, insulation, glazing, and floor coverings remain elevated. So, the narrative that material costs have returned to pre-pandemic levels is far from accurate.

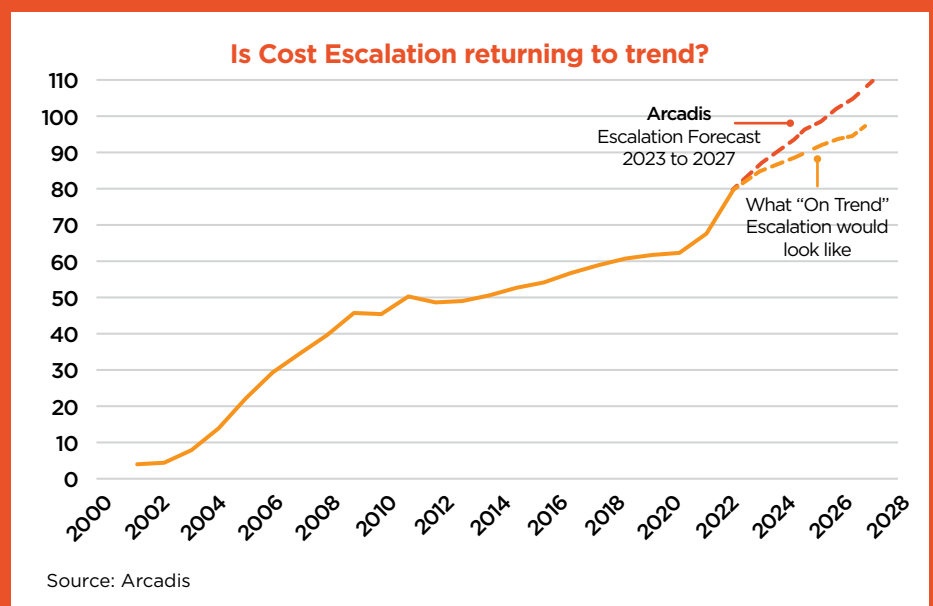
It is also highly unlikely that cost escalation will return to trend in 2024 and beyond (which several forecasters are currently predicting). This is due to several prevailing factors and a growing list of challenges:

- An unprecedented pipeline of government investment (largely transport and social infrastructure) that is yet to hit the market
- A construction supply chain that is already stretched thin with a growing number of industry insolvencies
- There is too much work and not enough people to deliver it
- An unprecedented and growing housing crisis
- The growth in public sector spend will only make it more difficult for private sector clients

to compete for contractors and trades, likely resulting in costs rising further as demand increases and once the private sector recovers. This is exacerbated using Best Practice Industry Conditions, which effectively adds a significant premium to project labour costs.

Ultimately, increasing demand for labour and skilled workers is now beginning to outstrip supply – and with the investment in the Hospital Capital Expansion Program and the 2032 Olympic and Paralympic Games not yet hitting the ground, this situation will only become more challenging.

Based on this, construction cost escalation is unlikely to return to trend any time soon. This will have ongoing impacts on budgets and forecasts for future projects.





# INDUSTRY CAPACITY & CAPABILITY ISSUES

Queensland is stepping into its next wave of construction activity. A growing population, 2032 Olympic and Paralympic Games and the state's ambitious net zero transition will drive construction activity over the coming years. The significant volume of work will add to an already bulged infrastructure pipeline and further intensify the state's long-running workforce challenge.

An estimated 33,515 workers on average will be required from now out to 2027/28 to deliver the state's incredible pipeline of civil work.

The average requirements for the funded and unfunded segments are almost the same. Unfunded projects will likely need 17,022 workers, marginally more than the 16,493 workers needed for the funded domain.

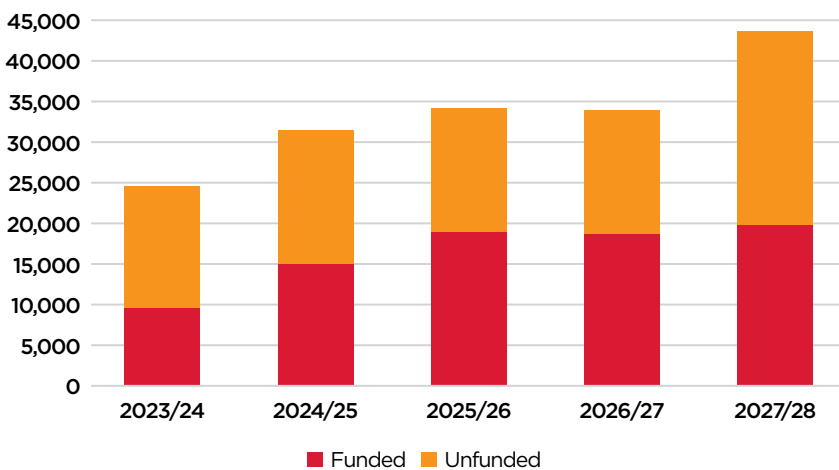
The peak labour demand across funded and unfunded projects is expected to occur in 2027/28 at an average of 43,702 workers. This is a significant 78% surge relative to the average workforce requirements in 2023/24.

Regional and remote Queensland will face stronger labour demand

with most of the renewable energy projects located in these parts of the state. Around 70% of the labour demand will be in these areas where the workforce challenges have always been exacerbated.

Electricity, telecommunications and water projects are expected to dominate labour demand across the project types. Notably, electricity projects will require almost 10,000 workers on average, twice the number of workers needed in telecommunications and water projects.

**Major project construction labour demand, Queensland, average, by financial year**



Source: CSQ for QMCA

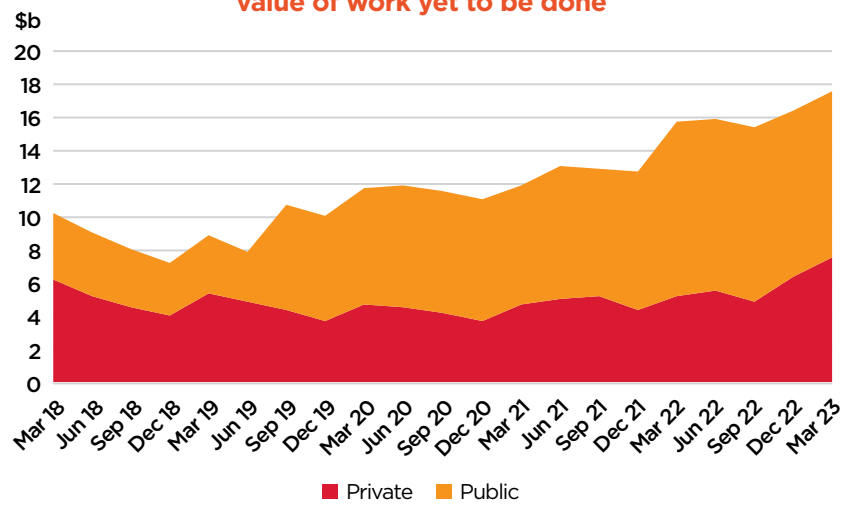


All occupations in the construction bucket will be highly impacted. The labour requirements are spread across the different occupations, with most expected to require more than 1,000 workers on average over the next five years, with most of these being civil construction jobs.

The significant new volume of capital work will add to an already inflated infrastructure pipeline and further intensify the state's long-running workforce challenges. There is already a significant backlog of around \$18b of unfinished projects in the civil pipeline, 60% of which are public projects. This pipeline has grown post-pandemic and currently sits at a new record high. Adding to this is the state's buoyant building activity. While the residential segment has slowed as expected, commercial building activity has turned out stronger with recent data showing a significant 32% surge in approvals.

The labour market challenges refuse to budge despite the growing demand. Supply bottlenecks remain amidst the significant surge in labour demand. Construction industry employment is only 13% more than the pre-pandemic level. This slow pace of growth is insufficient given the mounting volume of residual and new work in the pipeline. The persistent unfilled construction vacancies, which are twice the levels seen before the pandemic, reflect the industry's struggle in finding workers. Unfilled vacancies have grown across all regions of the state. Most of the open vacancies reflect jobs essential to civil projects. These include electricians, structural steel and welding trade workers, and earthmoving plant operators.

**Civil construction activity, Queensland, value of work yet to be done**



Source: ABS (2023), CSQ (2023)



**Construction industry vacancies, Queensland**



Source: NSC (2023), CSQ (2023)







# THE PRODUCTIVITY CONUNDRUM

Across the nation, the construction industry is experiencing a productivity conundrum. We are delivering less at a higher cost compared to 10, 20, even 30 years ago, and the issue is exacerbated further in Queensland.

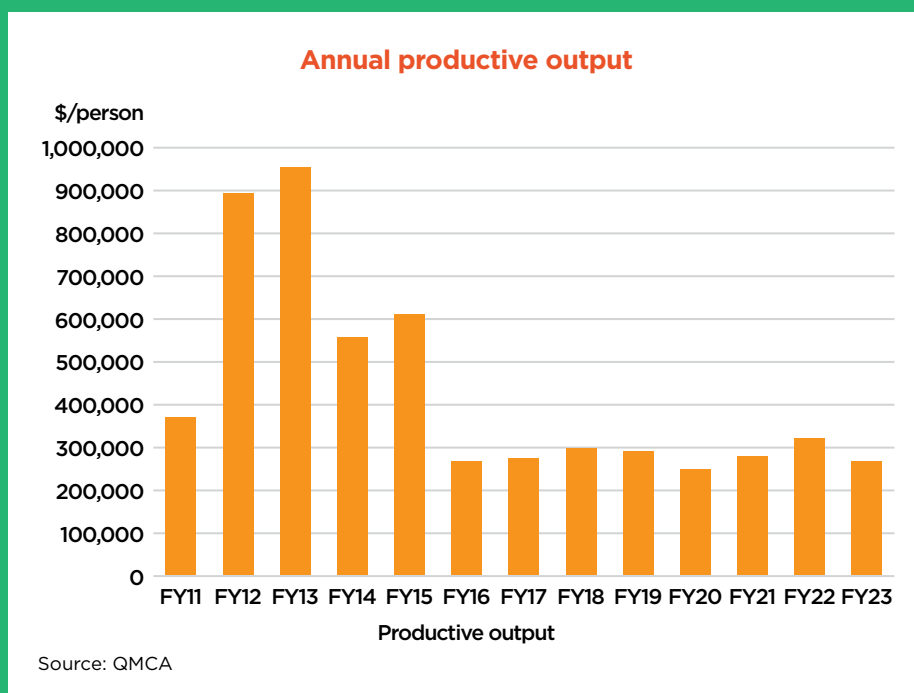
In the five year period between 2011 and 2015, the state's engineering and construction sector delivered on average ~\$13.5b of work annually with a corresponding average workforce of close to 20,000 people. This equates to an average output of \$679k/person. In the

following five year period from 2016 to 2020, the workforce increased to 21,600 people on average, but our annual output per person employed dropped to \$276k/person.

The resources boom of the 2012 to 2015 period involved substantial use of modularisation and other productive construction techniques, which have yet to be further deployed in scale across the industry. This accounts for some of the higher productivity measures during this time.

In the period after the resources boom, Queensland lost a large portion of skilled workforce to the southern states as they commenced large construction programs. A significant number of these workers are largely yet to return to Queensland.

The challenge for the industry in Queensland is to find a way to improve productivity in the short-to-medium term to deliver better value for money, while at the same time sustaining the gains created during this period.



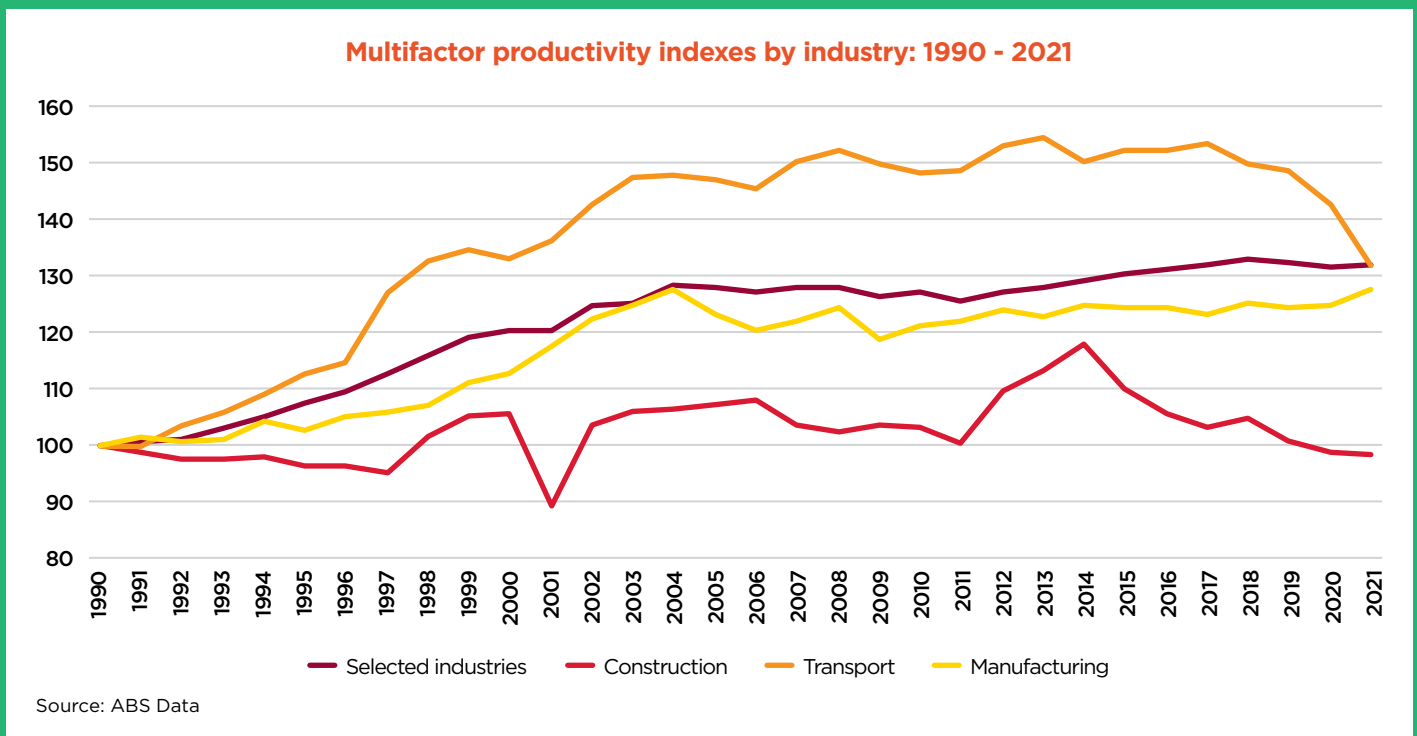
# PRODUCTIVITY: WHAT ARE THE IMPACTS?

Productivity across the construction sector has been on the decline since 2014, now sitting lower than rates recorded back in 1990. This decline is further compounded when compared to industries such as manufacturing which, despite slightly decreasing over the past five years, have seen a 30% increase since 1990.

Recently, the Commonwealth Government released an inter-generational report which cited the following:

- Average labour productivity growth is at a 60-year low, with just 1.1% growth from 2010 - 2020
- Despite technological optimism, annual productivity growth is projected at only 1.2% over the next 40 years
- Economic growth is expected to slow down to an average of 2.2% per year.

Wage and productivity growth have increasingly separated since the early 2000s, and this ongoing disconnection amplifies the challenge of achieving value for money.



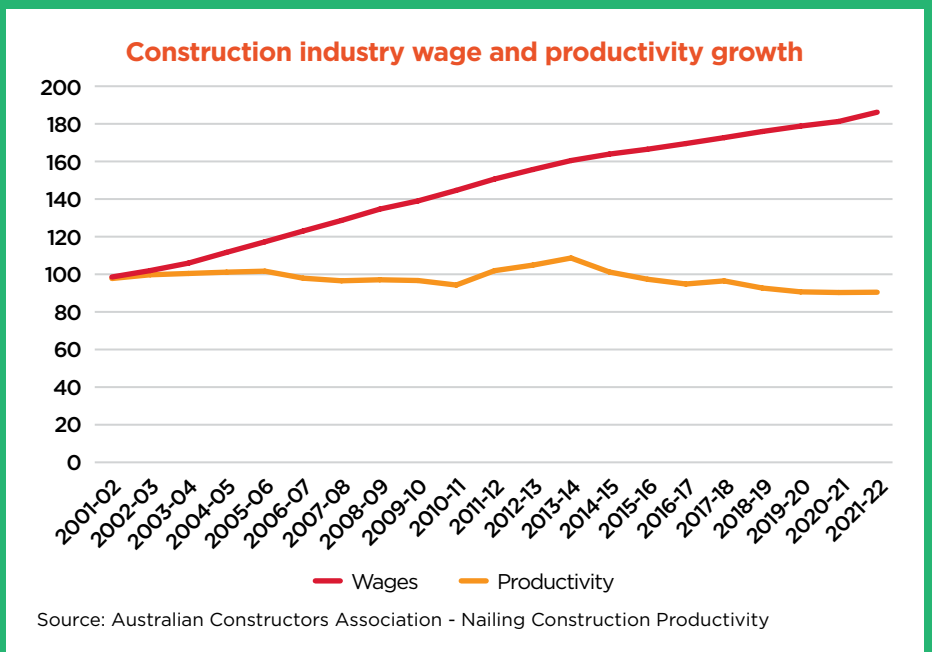


With the Queensland Government's intrusion into Industrial Relations (IR) arrangements via the Best Practice Industrial Conditions (BPIC) policy, construction wages are set to increase by 20-30%. In contrast, productivity is expected to decrease by a similar amount if the conditions included in BPIC are implemented. This will result in a substantial reduction in the value for money equation.

To be able to deliver the pipeline, productivity will be the challenge. The increase in cost against the drop in productivity, with ongoing labour shortages going forward presents a significant hurdle. What we know and can work with, is that the Queensland construction sector's productivity is being impacted by the following key areas:

- Procurement
- Industrial relations
- Adoption of technology and new specifications.

In light of this, a recommended solution for each key area is to promote collaborative efforts among clients, engineers, contractors and third parties. The objective is to gain a strong start to project delivery with collaborative procurement and contracting processes implemented as early as possible, to ensure that appropriate industrial conditions that engender productivity are included, as well as the adoption of initiatives and technology that will drive value for money.





# COLLABORATION: THE KEY TO BOOSTING PRODUCTIVITY

## PROCUREMENT

Collaborative procurement and contracting is an effective way to start to address these productivity challenges. Typically, the procurement process has involved contractors having to develop a firm price considering all the relevant project risks and opportunities over a 4 - 12 week period. This period of time has shown to be insufficient to develop a strong understanding of price associated with the risks and opportunities. It is often based on unreliable information and the time is not adequate for thoroughly exploring where risks should be

allocated between parties and how to overcome them.

A collaborative procurement process invites diversity of thought and a mutual understanding and sharing of the risks and opportunities involved. The current approach requires parties to price the risk, without the benefit of the information developed through the planning stages. It also doesn't allow enough time for considering appropriate and innovative solutions to evolve in order to successfully manage the risks.

When less productive procurement

processes such as this have been adopted, additional costs are incurred and longer delivery times ensue. **To remedy this, embracing a more collaborative procurement process will set up projects for success.** The outcomes from collaboration tend to generate more suitable innovative solutions to risks, and by identifying opportunities early on, methods to improve productivity are considered up front. When these outcomes have been achieved by mutual input from both parties, it is more likely that better value for money can be achieved.

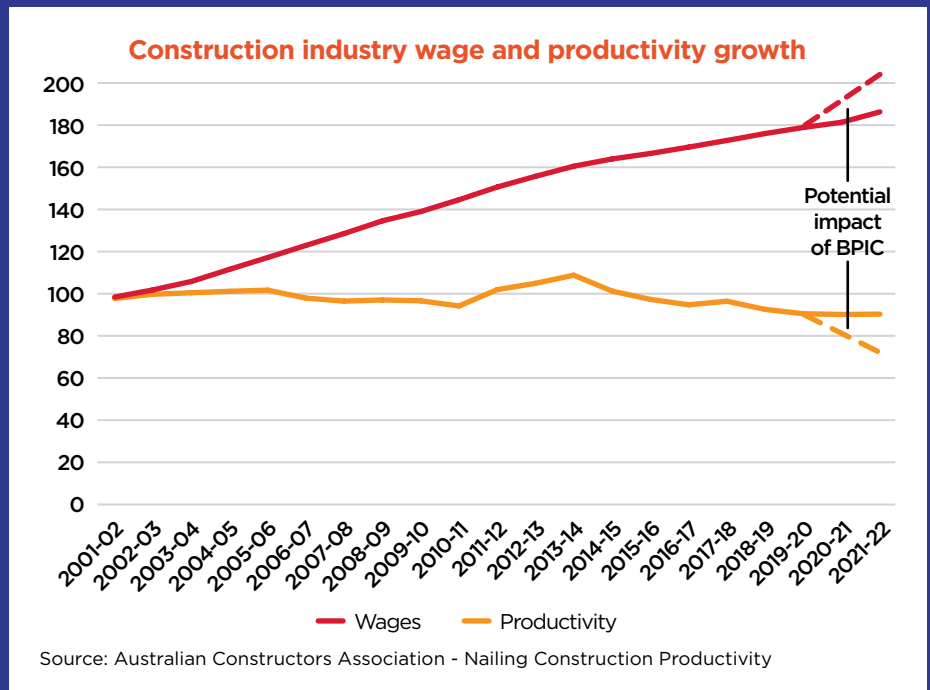


## INDUSTRIAL RELATIONS (IR)

The civil construction IR environment has remained relatively stable for a lengthy period of time. This is mainly due to the positive working relationship between employers, employees and their representatives. Since 2020, the introduction of BPIC policy by the Queensland Government has disrupted this harmonious working relationship.

The BPIC policy and 'guidance information' has set a new 'high floor' for construction rates, extending across the entire sector during times where companies are competing for labour. Additionally, the BPIC policy outlines the conditions upon which work will be undertaken - conditions that have already impacted productivity - with projected times for work being affected and up to 20-30% of additional project costs incurred.

BPIC does not benefit productivity, effectively widening the gap between wage and productivity growth. It has resulted in the industry delivering less for more money, over longer time periods and has removed the workable nexus between employees, employers and their representatives. The conditions BPIC has introduced are at base levels that don't accurately reflect where the industry is currently at. From an IR perspective, solutions could be derived through collaboration between employers, employees and their representatives, however, BPIC restricts this unified approach, stymieing productivity.





# ADOPTION OF TECHNOLOGY AND NEW SPECIFICATIONS

The construction sector is often referred to as a 'technology laggard'. This is a moderately accurate reflection on the state of technology adoption when compared to other industries. While parts of the engineering and construction sector have higher technology adoption than others, there is more work required to reap the benefits of significant productivity gains.

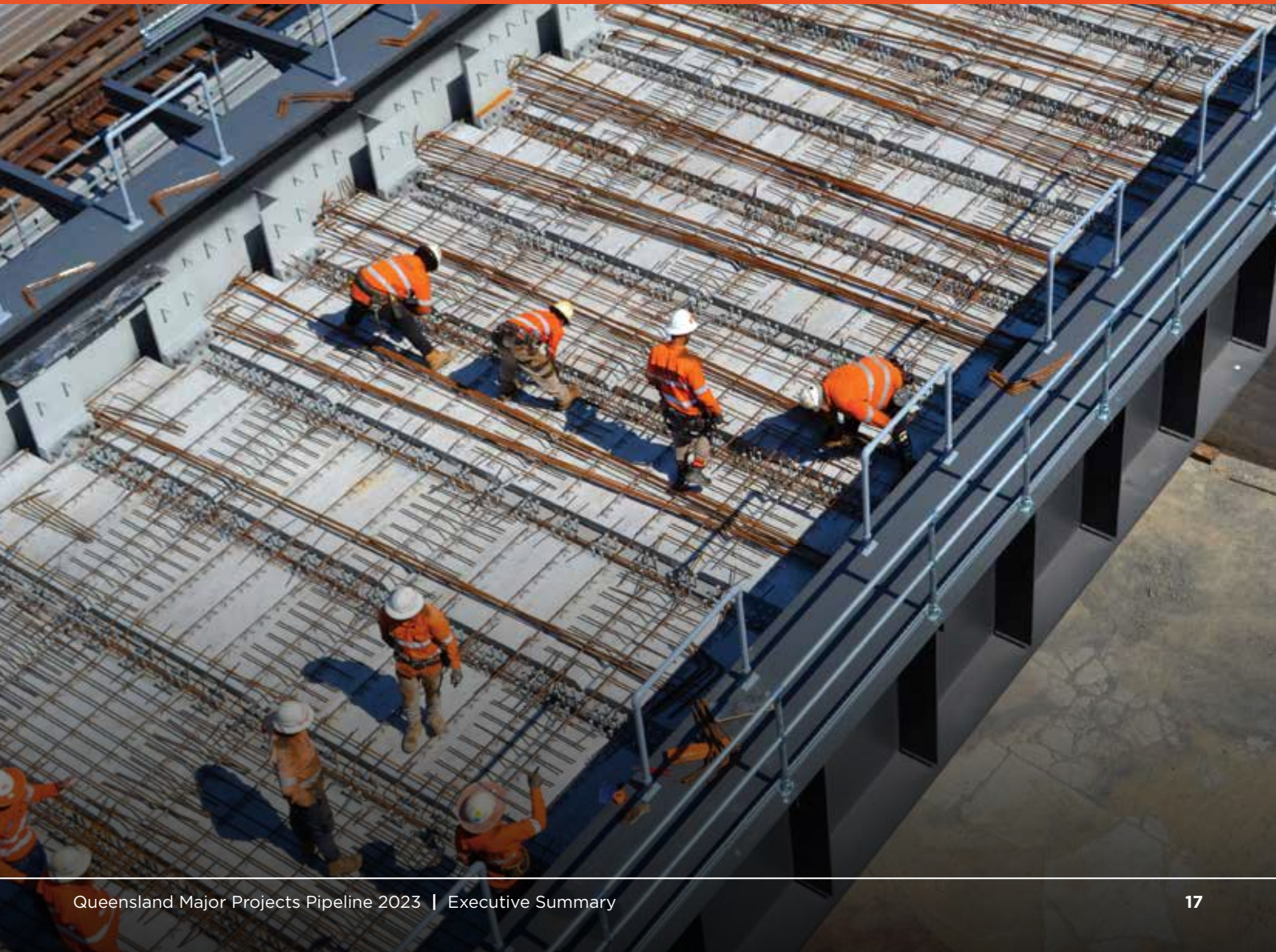
Technology options have the capacity to improve productivity across the sector in ways such as:

- Greater use of modularisation, especially in the resources sector and commercial building

- Greater digitisation deployment of engineering information from planning and design phase, through to construction and operations
- Automated plant operations including earthmoving, paving and craneage
- Use of Artificial Intelligence (AI).

Clients, engineers, contractors and third parties – such as technology providers – are encouraged to work together to set technology more in motion in project delivery. The time has come to adopt new technologies to create safer workplaces, remove human error, improve efficiency, and increase productivity.

In addition to overcoming this lag in technology adoption, we also need to consider how specifications that are too rigid do not encourage industry to offer innovative solutions and alternatives that can improve productivity. **Again, collaborative project planning and delivery** enables consideration of innovative options that will deliver time and cost savings without affecting quality. This has shown to equate to much higher productivity, and when we start seeing this happening industry-wide, it will create the framework that enables construction project teams to look at alternative options and ideas with clients that can deliver productivity benefits.



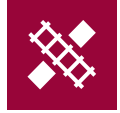








# QUEENSLAND MAJOR PROJECTS PIPELINE LISTING 2023







# ROADS, BRIDGES & RUNWAYS

Product Description	Sponsor	Funding Source	Region	Total Value Eng Value (\$m)												Status	
				21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33		
Brisbane Metro CP	Brisbane City Council	Public	Brisbane Inner City	1700	765	Under Construction	140	170	140	140	140	75					
Breakfast Creek Green Bridge	Brisbane City Council	Public	Brisbane - North	67	54	Under Construction	11	33	10								
Bruce Highway - Caboolture to Steve Irwin Way	QLD Government / Federal Government	Public	Sunshine Coast	663	500	Under Construction	180	180	40								
Bruce Highway - Cairns Southern Access Corridor Stage 3 - Edmonton to Gordonvale	Federal Government	Public	Cairns	535	334	Under Construction	110	80	34								
Bruce Highway - Cairns Southern Access Corridor Stage 5 - Foster Road intersection	QLD Government	Public	Cairns	225	162	Announced				41	81	40					
Bruce Highway - Cooroy to Curra Section D	QLD Government / Federal Government	Public	Wide Bay	1000	750	Under Construction	250	250	125								
Bruce Highway - Dohles Rocks Road North Facing Ramps	QLD Government / Federal Government	Public	Brisbane - North	250	188	Announced				57	73	58					
Bruce Highway - Linkfield Road Overpass	QLD Government / Federal Government	Public	Brisbane - North	150	120	Under Procurement				30	45	45					
Bruce Highway - Proserpine Floodplain Upgrade	QLD Government / Federal Government	Public	Mackay - Isaac	700	600	Credibly Proposed					200	200	200				
Bruce Highway - Mackay Ring Road Stage 2 - Mackay Port Access Road	QLD Government / Federal Government	Public	Mackay - Isaac	350	350	Announced					100	150	100				
Bruce Highway - Managed Motorways Program - Gateway Motorway to Caboolture Stage 2	QLD Government / Federal Government	Public	Moreton Bay - North	105	53	Under Construction	20	20	13								
Bruce Highway - Pine River to Dohles Rocks Road Interchange	QLD Government / Federal Government	Public	Moreton Bay - North	1500	1200	Announced				120	175	200	210	200	175	120	
Bruce Highway - Pavement Widening - South of Home Hill to North Ingham	QLD Government / Federal Government	Public	Townsville	109	81	Under Construction	4	6	5								
Bruce Highway - Rockhampton Ring Road (North & South Packages) - Stage 1	QLD Government	Public	Fitzroy	300	280	Under Construction				140	140						
Bruce Highway - Rockhampton Ring Road (North & South Packages) - Stage 2	QLD Government / Federal Government	Public	Fitzroy	1000	800	Under Procurement				250	300	250					
Bruce Highway - Tiaro Flood Immunity Upgrade	Federal Government	Public	Wide Bay	336	251	Announced				46	175	30					
Bruce Highway - Townsville Northern Access Intersections Upgrade	QLD Government / Federal Government	Public	Townsville	117	81	Under Construction	31	30	15								
Bruce Highway - Townsville Ring Road Stage 5	QLD Government / Federal Government	Public	Townsville	280	140	Under Construction	58	57	25								
Bruce Highway - Upgrade Burdekin River Bridge	QLD Government / Federal Government	Public	Townsville	97	53	Under Construction	3	6	9	10	9	9	6				
Caloundra Transport Corridor Upgrade	Sunshine Coast Council	Public	Sunshine Coast	100	80	Credibly Proposed					25	30	25				
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	42			









# RAIL

Product Description	Sponsor	Funding Source	Region	Total Value Eng Value (\$m)												Status
				21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	
Beerburum to Nambour Rail Upgrade (Stage 1)	QLD Government / Queensland Rail	Public	Sunshine Coast	550.8	375	Under Construction	130	150	50	45						
Varsity Lakes to Elnora Extension	QLD Government / Queensland Rail	Public	Gold Coast	859	470	Prospective				130	180	160				
CRR - Tunnel, Stations and Development (TSD) PPP	QLD Government	Public	Brisbane Inner City	4354	4000	Under Construction	933	560	350	250						
CRR - Rail, Integration and Systems package (RIS)	QLD Government	Public	Brisbane Inner City	1080	1080	Under Construction	228	200	100	80						
CRR - European Train Control System Level 2	QLD Government	Public	Brisbane Inner City	736	699	Under Construction	155	88								
CRR - Three New Stations (Pimpama, Hope Island and Merrimac)	QLD Government	Public	Brisbane Inner City	1500	1200	Under Construction		350	450	400						
Inland Mainline Freight Upgrade - NSW/QLD Border to Gowrie	ARTC	Public	Darling Downs - Maranoa	2600	1954	Under Procurement					100	160	260	304	370	530
Inland Mainline Freight Upgrade - Gowrie to Kagaru	ARTC	Public	Ipswich	7000	4900	Unlikely										180
Elnora to Coolangatta Extension	QLD Government	Public	Gold Coast	700	490	Prospective					196	294				
Ipswich to Springfield	QLD Government	Public	Ipswich	1500	1050	Credibly Proposed					250	250	250	300		
Moura - Aldoga Link Project (Wiggins)	QLD Government	Public	Fitzroy	500	325	Unlikely						135	140	50		
Wiggins Island Coal Rail Infrastructure Stage 2	Aurizon	Private	Fitzroy	714	499.8	Unlikely					83	167	167	83		
Wiggins Island Coal Rail Infrastructure Stage 3	Aurizon	Private	Fitzroy	450	315	Unlikely					126	126	63			
Gold Coast Light Rail Stage 3	QLD Government / Federal Government	Public	Gold Coast	1200	663	Under Construction	200	263	100	100						
Shorncliffe Line	Queensland Rail	Public	Brisbane - North	350	250	Prospective				125	125					
Brisbane to Toowoomba Rail Passenger Services	Queensland Rail	Public	Townsville	500	325	Prospective					150	175				
Salisbury to Beaudesert - Passenger	Queensland Rail	Public	Logan - Beaudesert	500	325	Prospective					100	125	100			
Loganlea Station Relocation	QLD Government / Federal Government	Public	Logan - Beaudesert	95	62	Under Procurement		14	24	24						
Mt Isa to Townsville	Queensland Rail	Public	Outback - North	380	320	Under Construction	80	80	40							
CRR - Clapham Yard Stabling (Moorooka)	Queensland Rail	Public	Brisbane - South	299	120	Under Construction	40	40								
Logan and Gold Coast Faster Rail (Main Line Upgrade)	QLD Government / Federal Government	Public	Logan - Beaudesert	2600	1820	Announced		114	228	455	569	455				
Logan and Gold Coast Faster Rail (Level Crossing Removals)	QLD Government / Federal Government	Public	Logan - Beaudesert	500	500	Announced		150	200	150						
Direct Sunshine Coast Line	QLD Government	Public	Sunshine Coast	2000	1500	Announced				350	400	400	350			
Sunshine Coast Mass Transit (Light Rail)	QLD Government	Public	Sunshine Coast	1000	1000	Prospective				250	400	350				
Gold Coast Light Rail Stage 4	QLD Government / Federal Government	Public	Gold Coast	750	600	Announced				150	250	200				
North Coast Line Upgrade between Townsville and Rockhampton	QLD Government	Public	Townsville	77	60	Under Construction	20	5	5							
Beerburum to Nambour Duplication (Stage 2)	QLD Government	Public	Sunshine Coast	600	500	Announced				125	125	125	125			
Station Upgrade Program for Olympics	Queensland Rail	Public	Brisbane Inner City	500	500	Credibly Proposed		125	125	125	125	125				







# DEFENCE

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
							103	103	91	150	150	150	150	150	150	150	150	150
Singapore Force Posture Initiatives - Shoalwater Bay	Federal Government	Public	Fitzroy	1100	400	Under Construction	103	103	91									
Singapore Force Posture Initiatives - Townsville	Federal Government	Public	Townsville	1100	600	Announced				150	150	150	150					
C11 80 Cairns	Federal Government	Public	Cairns	200	200	Under Construction	67	67	67									
EST02202 Other Sites and Redevelopment - Upgrade and Remediation Works to 9 sites	Federal Government	Public	Multi-Region	326	279	Under Construction		93	93	93								
EST02039 - Borneo Barracks Redevelopment	Federal Government	Public	Toowoomba	200	200	Under Construction		67	67	67								
RAAF Base Townsville - Pellegrine Facilities (AIR 555 Phase 1)	Federal Government	Public	Townsville	294	234	Under Construction	18	72	72	72								
HMAS Cairns (NCIS) Facility Upgrade	Federal Government	Public	Cairns	155	100	Under Construction		22	44	33								
PO010 National Airfields Maintenance RAAF Amberley	Federal Government	Public	Ipswich	100	100	Under Construction			50	50								
PO012 National Airfields Works - Oakey & Edinburgh	Federal Government	Public	Multi-Region	100	100	Announced				50	50							
PO012 National Airfields Works - Townsville	Federal Government	Public	Townsville	150	150	Under Construction			75	75								
ESTJP2093PHI Guided Weapons Explosive Ordnance Storage Project (NSW and QLD)	Federal Government	Public	TBC	200	200	Announced				67	67	67						
Sherger Airbase Upgrade	Federal Government	Public	Far North	300	200	Credibly Proposed					60	80	60					
Harveys Range Facility Upgrade	Federal Government	Public	Townsville	1000	800	Under Procurement			200	200	200	200						



# WATER

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
							70	67	60	203	100	100	125	100	120	30	30	81
Paradise Dam Improvement Project	SunWater	Public	Wide Bay	1200	720	Under Procurement			70	140	300	140	70					
Burdekin Falls Dam - Raising	SunWater	Public	Townsville	1000	850	Announced				180	255	245	170					
Fitzroy to Gladstone Pipeline Project - Pipeline	GAWB	Public	Fitzroy	647	453	Under Construction			60	203	130	60						
Someset Dam Upgrade	SEQ Water	Public	Ipswich	600	450	Announced				100	125	125	100					
Lower Fitzroy River Infrastructure Project - Rookwood Weir	SunWater	Public	Fitzroy	569	310	Under Construction	120	67	63									
Fitzroy to Gladstone Pipeline Project - Water Treatment Plant	GAWB	Public	Fitzroy	336	235	Under Construction			30	95	70	40						
Toowoomba to Warwick Pipeline	SEQ Water	Public	Toowoomba	370	222	Announced				30	81	81	20	10				
Haghton Pipeline Duplication - Stage 2	Townsville City Council	Public	Townsville	275	183	Under Construction	58	58	37	20	10							



# WATER

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
Water Treatment for Bowen Fields	Arrow Energy	Private	Mackay - Isaac	250	175	Under Construction	88	88										
The Cairns Water Security Stage 1	Cairns City Council	Public	Cairns	300	250	Under Procurement	75	90	85									
Lake MacDonald Dam Upgrade	SEQ Water	Public	Wide Bay	200	161	Under Procurement	64	96										
Wyralong Dam WTP Stage 1	SEQ Water	Public	Logan - Beaudesert	1000	850	Announced			200	225	200							
Beaudesert Water Supply Zone Projects Stage 1 and 2	SEQ Water	Public	Logan - Beaudesert	160	120	Under Construction	30	10	5									
Big Rocks Weir - Upper Burdekin	Townsville Enterprise	Public	Townsville	90	80	Announced			23	23	23	23	11					
Houghton Channel Capacity Upgrade	SunWater	Public	Townsville	90	70	Prospective			20	50								
Gold Coast Desal Expansion	SEQ Water	Public	Gold Coast	600	400	Credibly Proposed				200	200							
Sunshine Coast Desal Plant	SEQ Water	Public	Sunshine Coast	1000	800	Prospective					250	300	250					
Coolmunda Dam	SunWater	Public	Darling Downs - Maranoa	100	100	Credibly Proposed							50	50				
Teemburra Dam	SunWater	Public	Mackay - Isaac	100	100	Credibly Proposed							50	50				
Leslie Dam	SunWater	Public	Darling Downs - Maranoa	100	100	Credibly Proposed								50	50			
North Pine Dam	SEQ Water	Public	Moreton Bay - North	200	180	Announced			90	90								
Cressbrook Dam Upgrade	Toowoomba Regional Council	Public	Ipswich	200	180	Under Procurement			90	90								
Ross River Dam Remediation	Townsville City Council	Public	Townsville	500	400	Announced				200	200							
Rockhampton - Mt Morgan Water Pipeline	Rockhampton City Council	Public	Fitzroy	80	50	Announced			20	30								
Burdekin- Bowen Pipeline	SunWater	Public	Multi-Region	250	200	Credibly Proposed				90	110							
Wivenhoe Dam Safety Upgrade	SEQ Water	Public	Ipswich	1000	850	Credibly Proposed							250	350	250			
Awoonga Dam Spillway Upgrade	GAWB	Public	Fitzroy	150	100	Announced					30	40	30					





# SEWERAGE

Product Description	Sponsor	Funding Source	Region	Total Value Eng Value (\$m)		Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
				(\$m)	(\$m)													
Luggage Point Sewerage Scheme	Urban Utilities	Public	Brisbane - North	600	500	Under Construction	38	38	38	38	38	38						
S1 Tunnel Extension to Eagle Farm PS - B	Urban Utilities	Public	Brisbane - North	96	72	Announced								18	18	18	18	18
Wamuran Irrigation Scheme	Unity Water	Public	Sunshine Coast	120	72	Under Construction	10	35	20	7								
Caswell Street SPS to Hamilton Siphon	Urban Utilities	Public	Brisbane - East	94	70	Announced			12	12	12	12	12					
Burpengary East STP Upgrade	Unity Water	Public	Sunshine Coast	65	55	Under Procurement			25	30								
Brendale STP Upgrade	Unity Water	Public	Sunshine Coast	65	55	Under Procurement			25	30								
S2 & Corinda Chelmer Sewer Augmentation	Urban Utilities	Public	Brisbane - West	69	52	Announced			9	9	9	9	9					
Logan Water Infrastructure Program Alliance	Logan City Council	Public	Logan - Beaudesert	1000	746	Under Construction	83	83	83	83	83	83	83					
Cannery Creek Sewer Upgrade	Urban Utilities	Public	Brisbane - North	65	39	Under Construction		9	21	9								
Aura & Harmony Water and Sewerage Network	Unity Water	Public	Sunshine Coast	230	200	Under Construction		33	80	57	30							
Gold Coast Council Long Term Recycled Water Release Stage 2 - South Stradbroke Pipeline	GCC	Public	Gold Coast	250	188	Announced				60	128							
Eagle Farm Rising Main Upgrade - A	Urban Utilities	Public	Brisbane - North	165	124	Announced				16	16	16	16	16	16	16	16	16
Coombah Sewerage Treatment Plant Stage 6	Gold Coast City Council	Public	Gold Coast	150	105	Under Construction		40	65									
Kawana STP Upgrade	Unity Water	Public	Sunshine Coast	150	100	Under Procurement					25	40	35					
Norman Creek Sewer Augmentation - Brisbane	Urban Utilities	Public	Brisbane Inner City	122	92	Announced			25	37	30							









# PIPELINES

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	
Arrow Bowen Pipeline	Shell / Arrow / Bow	Private	Mackay - Isaac	450	360	Prospective					160	200	710						
Northern Gas Pipeline Extension / Expansion (QLD Component)	Jemena / Galilee Energy	Private	Outback - South	3800	2660	Credibly Proposed				450	750	750							



# TELECOMMUNICATIONS

Product Description	Sponsor	Funding Source	Region	Total Value (\$m)	Eng Value (\$m)	Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33	
National Broadband Network - Qld Component	NBN Co.	Public	Multi-Region	9352	6878	Under Construction	459	290	266	60	67								
HyperOne Network - QLD	HyperOne	Private	Multi-Region	280	138	Announced			60	48	30								



# OIL & GAS

Product Description	Sponsor	Funding Source	Region	Total Value Eng Value (\$m)		Status	21/22 22/23 23/24 24/25 25/26 26/27 27/28 28/29 29/30 30/31 31/32 32/33											
				(\$m)	(\$m)		21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
Queensland Curtis LNG Upstream Field Development (Sustaining)	QGC & Shell	Private	Fitzroy	2200	2000	Under Construction	150	150	150	150	150	150	150	150	100			
Gladstone LNG Upstream Field Development (Sustaining)	Santos & Petronas	Private	Fitzroy	1540	1400	Under Construction	100	100	100	100	100	100	100	100	150			
Australia Pacific LNG Upstream Field Development (Sustaining)	Origin / Conoco Phillips	Private	Darling Downs - Maranoa	2200	2000	Under Construction	150	150	150	150	150	150	150	150				
Arrow - Upstream Field Development (Sustaining)	Arrow / Shell	Private	Darling Downs - Maranoa	715	650	Under Construction	150	150	200	150								
Western Surat Gas Project	Senex	Private	Darling Downs - Maranoa	1500	1200	Under Construction	186	186	186	186	186	186	186	186				
Australia Pacific LNG Salt Handling Facility	Origin / ConocoPhillips	Private	Outback - North	200	160	Unlikely				40	80	40	30					
Curtis LNG Project (Salt Concentrator)	QGC & BG Group	Private	Outback - North	200	150	Unlikely				30	45	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	300							
Vali Gas	Vintage / Metgasco / Bridgeport	Private	Outback - South	70	56	Under Construction		36	20									
Arcadia Valley CSG Development	Santos & Petronas	Private	Darling Downs - Maranoa	1000	600	Credibly Proposed								200	200	200		



# COAL

Product Description	Sponsor	Funding Source	Region	Total Value Eng Value (\$m)		Status	21/22	22/23	23/24	24/25	25/26	26/27	27/28	28/29	29/30	30/31	31/32	32/33
				(\$m)	(\$m)													
Eagle Downs Coking Coal	South 32	Private	Mackay - Isaac	1250	600	Prospective			158	228	215							
Colton Coal Mine	New Hope Corporation	Private	Wide Bay	300	180	Prospective					66	114						
New Acland Stage 3 Project	New Hope Corporation	Private	Darling Downs - Maranoa	556	445	Under Construction		45	150	100								
Peak Downs Expansion	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay - Isaac	460	345	Under Construction		80	160	105								
South Walker Creek	Stannore	Private	Mackay - Isaac	183	122	Under Construction		30	52	40								
Grosvenor Underground Stage 2	Anglo Coal	Private	Mackay - Isaac	500	350	Under Construction		70	90	105	85							
Middlemount Coking Coal Mine Stage 2	Peabody / Yancoal	Private	Mackay - Isaac	325	284	Under Construction		100	184									
Hail Creek Extension - Underground	Glencore	Private	Mackay - Isaac	1100	660	Under Construction		150	180	150								
Rolleston Expansion	Xstrata / Glencore	Private	Fitzroy	400	280	Under Construction		70	140	70								
Yarrabee	Yancoal	Private	Fitzroy	260	150	Unlikely						75	75	18				
Boundary Hill South Mine Extension	Anglo Coal	Private	Fitzroy	100	70	Unlikely						18	35					
Foxleigh Plains Project	Anglo / CAML / Nippon	Private	Mackay - Isaac	200	140	Under Construction		70	70									
Eaglefield Coal Mine Expansion	Peabody	Private	Mackay - Isaac	1500	1200	Unlikely			250	350	320	280						
Monto Coal Mine Further Stages	Peabody / China Huaneng Group	Private	Wide Bay	265	159	Unlikely							60	99				
Drake Coal	Qcoal	Private	Mackay - Isaac	900	690	Under Construction			130	240	80							
Lake Vermont (Underground)	Jellinbah Resources	Private	Mackay - Isaac	320	300	Announced				100	100	100						
Olive Downs Coal Mine	Pembroke Resources	Private	Mackay - Isaac	1200	960	Under Construction		220	250	240								
Baralaba South Open Cut	The Mount Ramsay Coal Company (Liberty Mutual)	Private	Outback - North	200	160	Credibly Proposed				80								
Millennium Expansion	Stannore Coal / M Resources	Private	Mackay - Isaac	400	320	Under Construction		60	100	60								
Minyango Coal Project Stage 1	QCoal	Private	Outback - North	750	600	Under Construction	120	240	240									
Oaky Creek Longwall Stage 2	Glencore Xstrata / Sumisho / Itochu / ICRA	Private	Outback - North	650	455	Under Construction		150	230	75								
Saraji East	BHP Billiton / Mitsubishi Alliance (BMA)	Private	Mackay - Isaac	2400	1800	Credibly Proposed			360	990	450							
Winchester South	Whitehaven Coal	Private	Mackay - Isaac	1000	900	Prospective			350	450	100							
Moranbah North	Anglo	Private	Mackay - Isaac	500	400	Under Construction		100	150	150								
Gemini Coal Project	Magnetic South	Private	Mackay - Isaac	250	200	Prospective			67	89	44							
Carborough Downs Metallurgical Coal Mine Extension	Fitzroy Australia	Private	Mackay - Isaac	350	263	Credibly Proposed			133	130								
Isaac River Coal Mine Project	Bowen Choking Coal	Private	Mackay - Isaac	250	200	Credibly Proposed			50	75	50							
Vulcan Coal Mine	Vitrinite	Private	Mackay - Isaac	250	100	Prospective				50	50							





# 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	26/27	27/28	28/29	29/30	30/31	31/32	32/33	
Merlin Molybdenum-Rhenium Phase 2	China	Private	Outback - North	345	250	Unlikely		100	100	50									
Cannington Expansion	BHP Billiton	Private	Outback - North	400	120	Under Construction	30	60	30										
Cloncurry Copper Project (Roseby Copper / Little Eva / Eva)	CMCC	Private	Outback - North	320	96	Under Construction		50	46										
Red Dome Mungana	Consolidated Tin Mines Limited	Private	Cairns	330	215	Unlikely		65	85	65									
Charters Towers Gold Mine	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								
Paradise Phosphate South project	Phosphate International	Private	Outback - North	300	225	Announced			65	95	65								
Mt Dromedary - Graphite Project	Novonix	Private	Outback - North	100	80	Unlikely			40	40									
Gladstone Energy and Ammonia Project	Australian Future Energy	Private	Fitzroy	1000	600	Prospective				200	200	200							
Agripower Amorphous Silica - Fertiliser Processing Plant	Agripower Australia Ltd	Private	Townsville	663	500	Under Construction	150	200	150										
Agripower Amorphous Silica - Stage 2 Development	Agripower Australia Ltd	Private	Townsville	2000	1600	Credibly Proposed				400	800	400							
St Elmo Vanadium Project	Multicom Resources	Private	Outback - North	470	329	Under Construction	29	200	100										
Townsville Hydrogen Facility (300MW)	Origin / Kawasaki Heavy Industries	Private	Townsville	1000	1000	Credibly Proposed					167	333	333	167					
H2-Hub™ Gladstone Green Hydrogen and Ammonia Production Facility	Hydrogen Utility (H2U)	Private	Fitzroy	4700	2585	Credibly Proposed				800	1300	485							
Aldoga Renewable Hydrogen Facility - Stage 1	Stanwell / Iwatani	Private	Fitzroy	500	350	Announced			50	200	100								
Hydrogen-Equipment Manufacturing Facility - Stage 2	Fortescue	Private	Fitzroy	885	619.5	Prospective							103	310	207				
Eva Copper Project	Harmony Gold Mining	Private	Outback - North	836.4	501.84	Prospective			102	200	200								
Green Energy Manufacturing Centre - Stage 1	Fortescue	Private	Fitzroy	114	91	Under Construction	21	60	10										
Collinville Green Energy Hub	Ark Energy	Private	Mackay - Isaac	20000	11000	Credibly Proposed							850	1700	1700	2750	2725	1275	
Green Ammonia production facility	Keppel / Dyno Nobel	Private	Fitzroy	2,000	1,000	Credibly Proposed					200	280	270	250					
Gibson Island Green Ammonia and hydrogen Electrolysis Facility	Fortescue Future Industries / Incitec Pivot Fertilizers	Private	Brisbane Inner City	3,000	1,000	Credibly Proposed					230	265	265	240					
Julia Ck Vanadium Project	GEM	Private	Outback - North	242	100	Credibly Proposed				20	50	30							
Critical Minerals Processing Facility	QLD Government	Public	Townsville	75	15	Announced			6	9									
Alpha HPA Project - Stage 1	Alpha HPA	Private	Fitzroy	308	40	Under Construction			10	20	10								
Alpha HPA Project - Stage 2	Alpha HPA	Private	Fitzroy	300	40	Credibly Proposed					10	20	10						
Townsville Energy Chemicals Hub (TECH) Project	Queensland Pacific Metals	Private	Townsville	2,100	250	Announced			50	65	70	65							
Cape Flattery Silica Sand Project	Metallica Minerals Ltd	Private	Far North	80	10	Under Construction			3	4	3								
Northern Silica Project	Diatreme Resources Ltd	Private	Far North	1,000	100	Credibly Proposed					30	40	30						
Richmond - Julia Creek Vanadium	Richmond Vanadium Technology Pty Ltd	Private	Outback - North	242	25	Credibly Proposed			7	10	8								





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TSBE is an independent, member-driven economic development organisation actively linking our business community to opportunities across the Toowoomba, Western Downs, Maranoa and surrounding areas.



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Our success and longevity within the industry comes from our experience, and ability to work with an outstanding array of clients who continue to put their trust in us. Through collaboration, ongoing improvement, upskilling and technology investment we are able to adapt our services to best meet their changing needs, whilst ensuring we remain current in an evolving market.



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For all the details, see the full Report,  
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