## Sport & Olympic Fact-Finding Mission Report

Brisbane, QLD 19-23 May 2024





**Netherlands** 

#### Colofon

This report was commissioned by SportsNL and executed by Willem Overbosch - Driven by Entrepreneurship, in cooperation with the Consulate-General of the Kingdom of the Netherlands in Sydney and Orange Sports Forum, representing 300 public and private, internationally oriented Dutch organisations.

Cover photo: Brisbane Story Bridge, in Brisbane, QLD, by Marjon Wind June 2024

# Acknowledgement of Country

In the spirit of reconciliation, the Consulate General of the Kingdom of the Netherlands in Sydney acknowledges the Traditional Custodians of Country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

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#### Foreword SportsNL



Anne Le Guellec
Director International Enterprise
Department, Ministry of Foreign
Affairs, The Netherlands



As the chair of SportsNL, I am proud to present this market study report prepared for Dutch entrepreneurs in the lead-up to the Olympic and Paralympic Games in Brisbane in 2032.

The Olympic and Paralympic Games offer an unparalleled platform to introduce new technologies and products to an exceptionally wide audience.

There are significant opportunities in Brisbane in the areas of sustainability, circular solutions, and inclusivity. The organising committee has committed to delivering a lasting, positive impact, with sustainability at the heart of its work.

Despite the long physical distance between the Netherlands and Australia, I do not want to withhold the opportunities that these Olympic and Paralympic Games offer you. Australia, with its robust economy, vibrant culture and strong ties to the global community, offers fertile ground for Dutch entrepreneurship. The upcoming Olympic and Paralympic Games amplify these opportunities, presenting a plethora of avenues for collaboration, investment and growth.

From infrastructure and technology to hospitality and creative industries, the scope for Dutch expertise is vast. This study aims to provide a comprehensive analysis of the market dynamics, potential sectors for engagement, and strategic insights tailored to maximise your success. We delve into the specifics of Australia's economic environment, regulatory landscape and consumer behaviour, ensuring you have the information needed to make informed decisions and seize the opportunities that lie ahead.

We are confident that the insights contained within this report will empower you to leverage the Olympic and Paralympic Games as a springboard for your business endeavours in Australia. Together, we can build on the strong foundation of Dutch-Australian relations and contribute to a legacy of excellence, innovation and mutual prosperity.

We look forward to seeing the remarkable contributions of Dutch businesses to the success of the Olympic and Paralympic Games 2032 and beyond.

#### Foreword Consul General



Consul General Hugo Klijn



This year's Magic Round, when all of Australia's National Rugby League games are played in Brisbane over one long weekend, was an ideal kick-off for a first SportsNL mission to the State of Queensland to explore business potential with an eye to the 2032 Olympic and Paralympic Games. This event gave the mission a good sense of how Aussies enjoy, celebrate and organise their sports games, with tens of thousands of fans from across the country mingling inside and outside the main stadium, of their harmonious and family-friendly nature.

Though 2032 seems far away, with the Paris and Los Angeles Games in between, Queensland has opted for a long runway.

The fast-growing region views the Games as a lever for development guided by strong sustainability and legacy requirements.

Our interlocutors in Brisbane, the Gold Coast and Sunshine Coast appreciated our timing and generously gave their time and effort to this mission, for which I thank them warmly. I also want to thank RVO, Orange Sports Forum, and the participants.

It is hoped this mission report will generate broader interest in the trajectory toward 2032 by identifying opportunities for Dutch know-how, expertise and innovative solutions. This will enable us to forge a public-private partnership to position Dutch companies in the run-up to the Games!

# Executive Sumary



#### **Executive Summary:**

The sports industry catalyses sustainable economic growth and societal development: connecting global communities, attracting investment, creating jobs and delivering positive health outcomes.

The Brisbane 2032 Olympic & Paralympic Games are a once-in-a-lifetime opportunity for individuals, communities, and businesses in Queensland, Australia, and the Netherlands.

#### 2032 Facts & 2042 Futures

Brisbane was awarded the 2032 Olympic and Paralympic Games ("the Games") hosting rights on July 21, 2021, by the International Olympic Committee (IOC). They will be the first Games hosted under the IOC's 'New Norm', providing cities increased flexibility in aligning the Games with long-term development goals.<sup>1</sup>

The Games will be **Brisbane's first Olympic Games, but the third Olympic Games in Australia,** following Melbourne in 1956 and Sydney in 2000.

The Games will create a 2042 legacy for Queensland:

"By 2042, we will live in an inclusive, sustainable and connected society, with more opportunities in life for everyone."

The following interconnected themes have been identified to drive this transformation:

- Sports health and inclusion
- Economy of the future
- A better future for our environment
- Connecting people and places

These align with the Olympic and Paralympic Movement's objectives and the United Nations Sustainable Development Goals.

### Opportunities for Dutch Businesses

The Games will propel international sustainable growth for Queensland, especially South East Queensland (SEQ), over the next 20 years, leading to economic, social and environmental benefits:

#### **Economic Benefits**

- AUD 8.1bn in total benefits for Queensland and AUD 17.61bn across Australia.
- AUD 180bn of government procurement over the next eight years
- 91,600 full-time equivalent job years in Queensland and 122,900 across Australia.
- AUD 4.6bn uplift in international tourism and trade for Queensland and AUD 8.5bn across Australia.

Queensland's unique biodiversity, including the Great Barrier Reef, the Daintree rainforest and the Sunshine Coast UNESCO Biosphere, presents a unique opportunity to showcase the region.

Infrastructure development plans for Brisbane include enhancements in public transport and new community facilities, presenting opportunities for Dutch companies in infrastructure development, urban planning, and sustainable building. The Games are seen as an opportunity to grow Australia's AUD 4bn Sportstech economy.

<sup>&</sup>lt;sup>1</sup> What is the New Norm?

#### **Social Benefits**

Sports organisations regenerate communities by bringing people from all backgrounds and cultures together, improving civic pride, and diversifying cultural offerings. Using sports and sports venues as anchors, local governments can drive footfall and create thriving, sustainable places that attract visitors and residents.

- AUD 3.5bn in social benefits for Queensland and AUD 9.11bn across Australia;
- Increase public health through sports engagement programs;
- Foster an inclusive society in Oceania where people with disabilities are treated equally, with sports catalysing this change.

#### **Environmental Benefits**

Environmental benefits will be achieved by prioritising redevelopment over new developments, minimising the carbon footprint, and growing the circular economy.

#### Recommendations

Dutch companies can "team up" with local entities to create "local procurement" leverage by collaborating on projects that enhance climate positive outcomes. Working together with local Governments, Dutch financial institutions can provide supplementary investment in infrastructure, such as transportation links and community resources.

The runway of these projects is 20 years, making it crucial to identify business opportunities and build partnerships now to be "game-fit" by the time the Games commence.

# Introduction



#### Introduction

In 2032, South East Queensland will host the Olympic and Paralympic Games (the Games), with main activities in Brisbane, Gold Coast, and Sunshine Coast. This region, approximately the size of the Netherlands, will grow from 3.8 million to 6 million people over the next 20 years. The event is used as an infrastructural 'overhaul' for a climate-neutral economy and sustainable inclusivity.

Brisbane 2032 is the first Games under the IOC's New Norm<sup>2</sup>, promoting sustainable solutions with social benefits to local communities. Brisbane has committed to being 'climate positive', aiming for net zero by 2050 and 70% reliance on renewable energy by 2032. This supports local and national social, economic, and environmental improvements.

Australia plans significant investments for the Games, leveraging the event for pre-planned state investments. Hosting a climate-positive Games is challenging, Australia lags in greenhouse gas reduction and climate change mitigation. Queensland must shape government spending to meet this mission.

The Brisbane 2032 Olympic event includes an AUD 7.1bn infrastructure program:

- Five new locations: Brisbane Arena, Chandler Indoor Sports Centre, Moreton Bay Indoor Sports Centre, Redland White Water Centre, and Sunshine Coast Indoor Sports Centre.
- Nine locations for sustainable renovation: Lang Park / Suncorp Stadium, QSAC, The Gabba, Barlow Park, Brisbane Aquatic Centre, Brisbane International

Shooting Centre, Sunshine Coast Stadium, Sunshine Coast Mountain Bike Centre, Wyaralong Flat Water Centre.

The Q2032 Procurement Strategy outlines investments in stadium construction, transport, logistics, road construction, education and services, energy infrastructure and waste processing. The Elevate 2042 Legacy strategy addresses long-term themes.

#### Opportunities

Dutch organisations can significantly contribute to venue improvements with innovative solutions and temporary infrastructure. Queensland's investment pipeline extends beyond the games, with over AUD 180bn expected in tenders to meet the ambitions of 2032 and 2042.

#### Fact-finding mission

Sports-NL conducted a fact-finding mission from May 19-23 in collaboration with the Netherlands Consulate-General in Sydney (CG-Sydney) and Orange Sports Forum (OSF).

#### Scope of the report

This report offers NL stakeholders insights into business opportunities around the Brisbane 2032 Games. It includes key facts and insights from the mission, interviews and spotlights to provide context about opportunities in Australia.

#### Conclusion

The report concludes with recommendations for ongoing exchanges between the Netherlands and Australia to support sustainable and inclusive business around the Brisbane 2032 Games.

<sup>&</sup>lt;sup>2</sup> OLYM<u>PIC-GAMES-New-Norm</u>

# Timeline Brisbane 2032:

Major upcoming events









2024 2025 2026 2027







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2028 2029 2030 2031 2032







More information and latest events

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# Australia: Facts & Futures



#### Australia: Facts & **Futures**

#### Understanding the Opportunities in Australia

To explore business potential in Australia and plan global expansion towards and beyond the Brisbane 2032 Olympics, it is crucial to understand the size and scope of the country compared to Europe.



#### Australia key facts

- Australia is the 12th largest economy in the world.
- Australia is the 6th largest country globally and 184 times bigger than the Netherlands.
- With a population of 26 million people, it's one of the least densely populated countries in the world.
- 86% of the population lives in and around the major cities comparable to the Netherlands' 93% urban population.
- The Netherlands is the ninth-largest investor and the fifth-largest source of direct investment.

In 2022, the Netherlands' foreign direct investment in Australia was AUD 57bn, representing 2.3% of Australian GDP.

#### Country Comparison: Australia vs. Netherlands (2023 data)

Metric	Australia	Netherlands
Total area (land and water)	7,741,220 km <sup>2</sup>	41,543 km <sup>2</sup>
Population	26,966,000	17,701,000
Population density (inhab./km²	3.4	426.1
Total GDP (USD)	\$ 1,693bn	\$ 1,009bn
GDP per Capita (USD)	\$62,783 (approx.)	\$ 57,002 (approx.)
Financial year	1 July – 30 June	1 January - 31 December
Sustainability reporting	TCFD	CSRD (EU)
Data source: Country comparison: Australia /		

#### Historical & cultural perspective

Australia is home to the oldest continuing living culture in the world, with Aboriginal and Torres Strait Islander peoples being the traditional custodians of the lands and waters. The first European contact was in 1606 by Willem Janszoon, with British explorer James Cook claiming the eastern part for the British crown in 1770. Modern Australia is a multicultural society with strong European and Asian cultural influences, often called 'The Lucky Country' due to its quality of life. Australia's social and economic growth has enabled many to achieve the 'Australian dream' of owning a home as an expression of security and success.

Australia and the Netherlands rank 10th on the United Nations Human Development Index (HDI)<sup>3</sup>, which measures a long and healthy life, access to knowledge, and a decent standard of living. HDI also considers gender gaps, inequality, planetary pressures and multidimensional poverty. Australia and The Netherlands share the 10th place on the HDI Rankings 2024.<sup>4</sup>

**Cultural Characteristics** 

The Cultural Atlas describes Australian culture: "Australia's society reflects its British penal history as well as the subsequent waves of migration from elsewhere in Europe and almost every other continent. Australians (or Aussies) have been inventive in adapting their cultural roots to suit the new environment, climate and resources of the country. Modern society is asserting a confident and unique identity through its diversity, language(s), architecture, 'Australianised' cuisine, bush identity and sporting prowess (skills)." <sup>5</sup>

Keywords reflecting Cultures

Australian	Dutch
Mateship Egalitarianism Authenticity Optimism Humility Informality Easy-going Common sense Humour	Tolerance Egalitarianism Industriousness Pragmatism Permissiveness Pride Privacy

#### Acknowledgement of Country

Acknowledgement of Country Strengthens relationships between Aboriginal and Torres Strait Islander peoples and

<sup>3</sup> Country Insights | Human Development Reports

non-Indigenous peoples. It is delivered at significant meetings or events.

Types of Acknowledgement:

- Generic: Used when the name of the people on whose land you are gathered is unknown or disputed.
- Specific: Used when the name of the people is known and undisputed.
- 3. **General:** Used Australia-wide for webinars, websites, and printed material: 'In the spirit of reconciliation, the [organisation] acknowledges the Traditional Custodians of Country throughout Australia and their connections to land, sea and community. We pay our respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.'

<sup>&</sup>lt;sup>4</sup> Country Insights | Human Development Reports

<sup>&</sup>lt;sup>5</sup> <u>Australian - Core Concepts — Cultural Atlas</u>

#### Australian Government

The Commonwealth of Australia, established in 1901, is a federation of six British colonies: New South Wales, Victoria, Queensland, South Australia, Tasmania and Western Australia. This federation also includes two mainland territories: the Northern Territory and the Australian Capital Territory. Australia's government has three tiers: federal, state and local councils.

#### **Current Government**

Prime Minister: Anthony AlbaneseParty: Labour Government

• **Election**: 2022

 Next federal Elections: 2025 (3-year cycle)

Government Tier	Responsibility	Topics
Federal	laws for the whole of Australia including:	International and Australian trade and commerce Foreign policy Citizenship Taxation Immigration
State & Territory	Six states and two mainland territories have their parliaments, Responsible for:	Schools Hospitals & Health Roads and railways Public transport Utilities Comm. services Police Emergency Services
Local	500 local councils manage local laws (by-laws) for their respective regions, covering:	Local roads, Waste management Parking Recreational facilities Town planning Building approvals and inspections

#### **Economic perspectives**

Key facts:

- The Netherlands' investment in Australia has grown at an average rate of 5.6% over the past decade.
- The Netherlands is the fifth largest source of foreign investment in Australia, after the USA, UK, Japan and Canada.

Leading sectors for Dutch Investment in Australia (2022): Resources (manufacturing), Financial services, Warehousing and transportation, ICT and consultancy services.

Leading sectors for Australian trade to the Netherlands (2022): Resources, Agriculture, Medical Instruments, Professional and Technical Services.

The Netherlands is Australia's second-largest export market in the EU and serves as a key entry point for Australian goods distributed across the continent.

### Promising Areas of Trade and Investment Activity:

Identified by Austrade:

- Agribusiness and Food;
- Circular Economy;
- Clean Energy;
- Future Mobility.

#### **Sustainability Focus**

The Australian government increasingly prioritises net-zero emissions, circular economy initiatives, and economic security. This shift is reflected in the 2024-2025 Federal Budget emphasising sustainability.

When considering investing in Australia, it is essential to understand the funding mechanisms and jurisdictional responsibilities of state or local interest, which should be addressed at the respective state or local level.





#### **Catherine Hill**

Austrade AU Rolf Karst Austrade NL



#### Bio

Catherine Hill, Senior investment advisor Europe Desk, based in Australia and Rolf Karst, Trade and Investment promotion, with a focus on Circular Economy, Agribusiness & Food is based in the Netherlands, represent the Australian Trade and Investment Commission (Austrade).

#### **Insights**

Australia's economy is recognised for its strength and resilience. Here are key highlights and statistics that underscore Australia's economic prowess and attractiveness for investment:

#### **Economic Growth**

From 2019 to 2024, Australia's economy is projected to grow by 11.1%, significantly outpacing the 7.8% average growth rate for advanced economies.

#### **Tax environment**

Australia boasts one of the lowest overall tax rates among high-income countries, with tax revenue constituting only 29% of GDP.<sup>1</sup> This is 5 points below the OECD average of 34%.

#### **Solar Power Production**

In 2022, Australia ranked as the world's 6th-largest producer of solar power, generating nearly double the

solar power of Mexico and the UK combined.

On a per capita basis, Australia became the world's largest producer of solar electricity in 2022.

#### **Hydrogen Industry**

Australia is on the path to becoming a global leader in hydrogen production. There are over 100 active hydrogen projects, with potential investments reaching up to AUD 300bn.

#### **Talent Attraction**

The OECD ranks Australia 4th for talent attractiveness, attributed to its clean, safe, and well-organised cities, excellent educational institutions, and robust healthcare system.

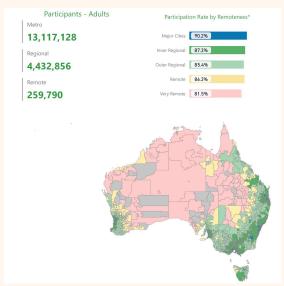
These factors collectively make
Australia a highly attractive destination
for business and investment, promising
strong economic growth, favourable tax
conditions, significant advancements in
renewable energy, extensive trade
agreements, and a high quality of life.

Find Austrade latest report on the Netherlands here: https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/australia-netherlands-trade-and-investment-report

#### Sports in Australia

Australia is a proud sporting nation and is a successful global leader and innovator in sport. With a population of only 9 million larger than the Netherlands, both countries compete at the highest levels in international sports. According to the Department of Health and Aged Care<sup>6</sup>:

- 90% of Australians have an interest in sports
- 3 million kids participate in sports
- 128,000 jobs are supported by sports
- Major cities have the highest participation rates



Australia is currently reviewing its Sports Agenda. The Labour Government of PM Anthony Albanese announced a sharpened approach to sports diplomacy to harness Australia's sporting abilities and advance national interests, leading up to the Brisbane 2032 Olympic and Paralympic Games.<sup>7</sup>

For more details, see the Australian Sports Diplomacy 2030 strategy here: Sports diplomacy | DFAT Australia

<sup>6</sup> Sport | Australian Government Department of Health and Aged Care

Compared to the Netherlands, the latest Olympic medal tally (pre-Paris 2024) ranks Australia 14th place with 636 medals and the Netherlands 16th with 512 medals.

#### Sport in society

Some sports are unique to Australia, with their popularity varying by state

- National Rugby League (NRL):
   Dominates in Queensland and
   New South Wales, where it has a significant following and a strong cultural presence.
- Cricket (CRI): Popular nationwide, especially in the summer, and a major sport in every state.
- Australian Rules Football (AFL):
   The most popular sport in Victoria,
   South Australia, Western Australia,
   and Tasmania. It has a growing
   presence in Queensland and New
   South Wales.
- Soccer (SOC) or Football: Widely played across all states, with substantial participation rates at the community and youth levels.
- Rugby Union (RU): Known as the European style of rugby, it has a notable following, in New South Wales and Queensland, but less so compared to rugby league and AFL.

From a sports attendance perspective, however, AFL is the most well attended sport in Australia, with crowds reaching 8.1 million in 2023.8

The figure is almost double that of the National Rugby League (NRL) with 4 million while.

The 2023 Women's World Cup (hosted in Australia and New Zealand) with an attendance of 1.98 million, Soccer in the A-League with 1.35 million and cricket in

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Making Australia stronger and more influential through sport | Australian Minister for Foreign Affairs

<sup>&</sup>lt;sup>8</sup> Austadiums Year That Was 2023

the Big Bash League (BBL) with 1.05 million.The 2023 Formula 1 Grand Prix w

Top 20 Sports and Physical Activities Australia overall.9			
Top 20 overall	Top 20 organised		
1. Walking 2. Fitness / Gym 3. Swimming 4. Running 5. Cycling 6. Football/ soccer 7. Bushwalking 8. Tennis 9. Yoga 10. Basketball 11. Golf 12. Australian Football (AFL) 13. Netball 14. Cricket 15. Pilates 16. Dancing 17. Surfing 18. Gymnastics 19. Touch football 20. Virtual-based physical activity	1. Fitness / Gym 2. Swimming 3. Football / Soccer 4. Running 5. Golf 6. Tennis 7. Basketball 8. Netball 9. Australian Football (AFL) 10. Yoga 11. Dancing 12. Pilates 13. Walking 14. Cricket 15. Gymnastics 16. Touch Football 17. Cycling 18. Rugby League (NRL) 19. Bowls 20. Hockey		

as the highest-attended, standalone single-day sporting event since 2006 and drew 131,124 guests to race day at Melbourne's Albert Park.

Ausplay statics database is an excellent reference for further analysis of Australian sports statistics: AusPlay results | Clearinghouse for Sport

Here are Queensland's top five sports in stadium attendance and a comparative matrix for the rest of Australia.

	1	2	3	4	5
QLD	NRL	CRI	AFL	RU	soc
NSW	NRL	CRI	soc	AFL	RU
VIC	AFL	CRI	soc	NRL	RU
SA	AFL	CRI	soc	NRL	RU
WA	AFL	CRI	soc	NRL	RU
TAS	AFL	CRI	soc	NRL	RU
NT	AFL	NRL	CRI	SOC	RU
ACT	AFL	AFL	CRI	soc	RU

Let's hear from three-time Olympian Marleen Veldhuis, who has lived in Sydney for over 10 years.

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<sup>&</sup>lt;sup>9</sup> Ausplay, The sport and physical activity landscape

# INTERVIEW



Marleen OLY Veldhuis Athene 2004, Beijing 2008, Londen 2012



#### Bio

Marleen Veldhuis represented the Netherlands as a swimmer in 3 Olympics. She won 4 Olympic medals, including bronze in 2004 in Athens and gold in 2008 in Beijing. After her daughter Hannah was born in 2010, she won silver and bronze in the 2012 London Olympic Games. She is a three-time Olympian and world record holder in the 50-metre freestyle. In 2014 she moved to Sydney, Australia. Today, she uses her high-performance athletic experience as a sports coach.

#### Australian sports culture:

As an Olympian, the idea of the Olympic & Paralympic Games coming to Australia is very cool. It's a sports-oriented country, welcoming to Olympians, and high-performance athletes are highly regarded.

Sport in Australia is entertainment.

Australians enjoy the thrill and competition as a friends-and-family event, making it part of their culture.

They like the heroic part of sports, enjoying underdogs becoming winners.

Inclusiveness and equality are important and increasingly embedded in Australian sports culture. At sports events and competitions, there's always a multiclass event. The willingness to pay for sports coaching, training camps and academies to improve skills and performance is high, presenting opportunities for coaches and sports professionals.

#### **Organised sports**

Swimming competitions and, school sports & carnivals are part of the primary and secondary education system, with a significant role played by the government and education system (dominated by private schools), unlike in the Netherlands, where sports are organised by clubs,

Compared to Australia, Dutch sporting clubs are very well-organised and professional, supported by digital tools and apps. In the Australian context, there is still room for improvement in digital integration to enhance both user and fan experience.

Marleen concludes by sharing that her daughter Hannah (13) is participating in the Olympic 50m swimming trials for Paris 2024, organised in Brisbane. Is Hannah going to be a future Olympian? Time will tell. For now, she just has to enjoy the experience and learn.

#### Digital transformation

Australia has an AUD 167bn tech sector that has grown 80% in the past 5 years with 21 unicorns like Canva, Atlassian and Afterpay. The great lifestyle attracts tech pioneers and skilled tech talents from around the world, making Australia a top investment destination for Google, Amazon, Microsoft, BT, NEC, and CISCO. Many companies see Australia as a springboard for growth in the Asia-Pacific region.

The IMD Digital competitiveness ranking measures the capacity and readiness of economies to adopt and explore digital technologies for economic and social transformation, based on knowledge, technology infrastructure and future readiness. Australia ranked 16th on the IMD Digital Competitiveness ranking 2023 compared to the Netherlands ranked 2nd.<sup>10</sup>

In comparison, the average broadband speed in Australia<sup>11</sup> is 54 Mbs and 180 Mbs in the Netherlands<sup>12</sup>. With 5G mobile internet infrastructure rolled out rapidly across Australia, the mobile internet speed is 94 Mbs compared to 123 Mbs in The Netherlands.

According to Austrade, the Australian Government, states and territories support the tech sector. National science bodies channel public investment into future-critical research. Australia offers generous R&D tax incentives for businesses and funding pools to grow the private venture capital market. A strong

and transparent regulatory culture promotes innovation while protecting IP.<sup>13</sup>

#### Sustainable Development

Australia is known for its extreme weather events, such as droughts, floods, cyclones and bushfires. Sustainability, therefore, is often perceived in the context of Climate change. In recent years (since 2022), the Australian Government has opened up towards climate adaptation and climate action in line with the 2030 Agenda and Net-Zero ambitions.

Sustainability means different things to different people. In Australia, it is typically perceived in the context of extreme weather conditions, environmental regulations and renewable energy transition. However, the UN defines sustainable development as, meeting the needs of the present without compromising the future generations' ability to meet their needs. The UN 2030 Agenda for Sustainable Development, signed by 193 countries in Paris in 2015, is the leading framework with 17 goals. The Sustainable Development Goals are often used as a reference for progress in a global context.



Australia, ranked 37th on the global 2024 Sustainable Development Index, is making significant progress in

<sup>10</sup> 

https://www.imd.org/centres/wcc/world-competitiveness-centre/rankings/world-digital-competitiveness-ranking/

<sup>&</sup>lt;sup>11</sup> Digital 2024: Australia — DataReportal – Global Digital Insights

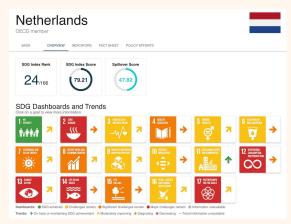
<sup>12 &</sup>lt;u>Digital 2024: The Netherlands — DataReportal – Global Digital Insights</u>

sustainability through initiatives aligning with global goals and national priorities.<sup>14</sup>



Source: Australia

In comparison, the Netherlands is ranked 24th, dropping from 9th in 2021, mostly due to improvements in other countries. A Challenge for both countries is their spillover on other nations' SDG achievements.



Source: Netherlands

Australia is committed to clean energy, circular economy, and environmental protection at different government levels.

The 2024-2025 Australian Federal budget highlights significant investments and strategic initiatives:

- Future Made in Australia Fund: AUD 22.7bn
- 2. International Climate Change and Energy Issues: AUD 76.2 million

For more detailed information, see the Australian Federal Budget 2024-25.<sup>15</sup>

#### Sustainability reporting

In Sustainability reporting, there are differences between the EU, the Netherlands, and Australia. About 20 countries have adopted the International Sustainability Standards Board (ISSB) Reporting Standards, issued by the International Financial Reporting Standards (IFRS) Foundation in September 2021.

The Australian government is implementing the Task Force on Climate-related Financial Disclosures (TCFD) reporting regime. After a six-month delay, starting in January 2025, companies with a turnover of at least AUD 500 million will be required to disclose climate-related financial risks.

Businesses in the Netherlands comply with the EU's stringent sustainability reporting regulations under the Corporate Sustainability Reporting Directive (CSRD), which mandates detailed reporting on environmental, social, and governance (ESG) aspects. Australian companies with subsidiaries in the EU must adhere to these standards, necessitating robust sustainability reporting systems for both jurisdictions.

#### The opportunity

Digital- and sustainable transformation in Australia go hand in hand presenting opportunities for collaboration, investment, and innovation in the Australian market leveraging new growth areas in clean energy, circular economy, and ethical practices.

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Circular Economy Policy: AUD 23 million

<sup>&</sup>lt;sup>14</sup> SDG Index Australia report

<sup>&</sup>lt;sup>15</sup> Federal Budget

### INTERVIEW



Willem Overbosch
CEO SDG Align



#### Bio

Willem co-founded SDG Align, a sustainability stakeholder engagement platform. He moved to Australia in 2022 and since then worked with industry peak bodies and corporates to help SMEs on the sustainability maturity journey and make sustainable practices a business habit.

#### Learnings

There's an opportunity for sustainable growth, especially in broadening the scope from decarbonisation to social aspects such as gender equality and inclusivity. Having been in Australia for a little over two years now, he emphasises that it takes time to unpack the cultural differences between the Netherlands and Australia.

A lot of people are still unfamiliar with sustainability. This is a challenge but also an opportunity. As larger businesses move towards mandatory reporting, they must engage their SME supply chain partners to get data.

Sustainable Transformation goes hand in hand with Digital Transformation.

Big opportunities in technology, to support the **sustainability maturity journey** of Australian small businesses following what is happening in the EU with CSRD.

Sustainable procurement for example is more than decarbonisation. Leverage Dutch showcases, experience and knowledge to create meaningful partnerships. The **Business for Good community** is growing and certificates like **B-Corp** and **Social Traders** are favoured by consumers and support sustainable procurement criteria.

There is still a lot of opportunity in **Circular Economy** initiatives shifting waste away from landfill. In general, he recommends highlighting the "social" aspects of sustainability to avoid the "carbon-tunnel-vision".

Finally, Australians love their sport.
Connecting sports, the Olympic Games, and sustainability provides an inspiring narrative for building an international sustainability engagement strategy for all stakeholders.

# Queensland: Facts & Futures



# Queensland: Facts & Futures





Honorary Consul Marjon Wind

"Queensland has entered its so-called 'Golden Decade' as it undergoes a once-in-a-generation transformation to host the Brisbane 2032 Olympic and Paralympic Games.

Since I relocated to Brisbane from the Netherlands in 2017, I have seen a tremendous change in Brisbane, a sense of optimism that has resounded since it was announced that Brisbane would host the 2032 Games. Around the same time, in June 2021, I was appointed as Honorary Consul for the Netherlands, and I had the opportunity to speak to many people in government and businesses about their vision for Queensland. I was invited to join 500 selected community members to be part of the Legacy Forum, which informed the legacy strategy of Elevate 2042.

For South East Queensland, the Games serve as a catalyst for substantial infrastructure investment, addressing the needs of its rapidly growing population. Emphasising a strong post-Games legacy, this initiative represents a long-term growth strategy. For Queensland, this opportunity also presents a challenge, as the region has never hosted an event of this magnitude. They seek to establish partnerships with countries, organisations, and knowledge institutions to ensure their success. This situation offers a unique opportunity for the Netherlands, along with Dutch businesses and knowledge institutions, to invest, collaborate, and benefit from this expanding market, and I look forward to welcoming many Dutch businesses to Queensland".

#### Queensland Key facts

Queensland (Nickname; The Sunshine State), located in the northeastern part of Australia, is known for its diverse landscapes, ranging from tropical rainforests to arid outback regions. It is Australia's second largest state by area and third largest by population.

Queensland is home to 72% of Australia's native bird species, 85% of its native mammals, and just over 50% of its native reptiles and frogs. The State has five World Heritage areas: K'gari (Fraser Island), Gondwana Rainforests, the Great Barrier Reef, Riversleigh, and the Wet Tropics.



	QLD	SE QLD	NL
Total area (land and water)	1,727,000 km²	35,248 km²	41,543 km²
Population	5,460,420	4,016,559	17,701,000
Population density Inhabi/km2	3.15	113.7	426.1
Total GDP (USD)	\$325bn (approx.)	\$202bn (approx.)	\$1,009bn (approx.)
GDP per Capita (USD)	\$59,139 (approx.)	\$53,439 (approx.)	\$56,832 (approx.)
Hours of Sunshine/yr		2968 (Brisbane)	1662 (Amsterdam)

Profile.ID data converted to USD

https://profile.id.com.au/comseq/about?WebID=10#

https://profile.id.com.au/australia/about?WebID=12

#### Government

Queensland is divided into 77 local government areas, 12 of which form South East Queensland (SEQ). The state government has significant autonomy in managing its affairs, although it coordinates with the federal government on national issues.

The political landscape is primarily dominated by the Labor Party and the Liberal National Party. State elections will be held in October 2024. The current polls indicate a win for the Liberal National Party. They support the Games but have indicated a 100-day review of venue infrastructure.

- The capital and largest city in the state is Brisbane, Australia's third largest city;
- Queensland is the most decentralised State, with ten of Australia's thirty largest cities located in Queensland, with the largest outside Brisbane being the Gold Coast, the Sunshine Coast, Townsville, Cairns, Ipswich, and Toowoomba;
- Legislative authority is exercised by the Queensland Parliament, which, uniquely for Australian states, is unicameral, containing only one house, the Legislative Assembly;
- The state's population is multicultural, with 28.9% of inhabitants being immigrants
- Queensland has a dynamic workforce, highly educated, multicultural, and growing thanks to a 'knowledge corridor' with dozens of innovation-led businesses and academic institutes;
- Queensland is Australia's most disaster-affected state and, since 2011, has been impacted by more

than 90 disaster events, with more than AUD 17.2bn spent on recovery and reconstruction of damaged essential public infrastructure.

#### Lifestyle

Queensland offers an exciting blend of cosmopolitan city living and a relaxed outdoor lifestyle. Unlike much of urban Australia, more than half of Queensland's population lives outside the greater metropolitan area of Brisbane.

The state offers safe multicultural communities, a strong economy, and universities with high international rankings. Most of Queensland receives an average of between eight and nine hours of sunshine every day. The warm subtropical environment has minimum temperatures rarely below 15.7C in Brisbane but can go up to the mid-thirties in tropical Cairns in the North of the State.

The Games will take place across South East Queensland. This region is projected to grow significantly, increasing from 3.8 million people today to 6 million by 2046.



Source: Profil.id.com South East Queensland

#### **Economic Perspectives**

Queensland's economy has strong fundamentals and is one of the fastest growing in Australia due to its fast population growth and resources sector expansion. It is the third-largest economy among Australian states, with strengths in mining, agriculture, transportation, international education, tourism, insurance

and banking. The state is one of the world's largest exporters of coal and minerals, contributing significantly to Australia's GDP. Of Queensland's total AUD 135bn export, AUD 103bn is from coal and gas exports.

Queensland and, in particular, SEQ have seen tremendous change in the last few years. Their economy has been growing faster than the national average, and they have now truly committed to a greener future, with an AUD 62bn investment in the 'Queensland Energy and Jobs plan to achieve 70% renewable energy by 2032.

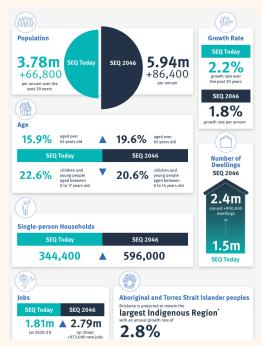
In 2022, Queensland introduced progressive coal royalties, which have added AUD 33bn to Queensland's budget over the last three years and support the funding of the transition to renewable energy.



Source: Queensland Energy and Jobs Plan

Queensland's economy is expected to grow at least 31% between 2023-2033, but with new opportunities such as hydrogen and critical minerals, this could be as much as 46% by 2032-2033. Key drivers for Queensland's growth are:

- Strong population growth
- Substantial investment in infrastructure and renewable energy to support its decarbonisation
- Abundance of critical minerals
- Proximity to Asia



Source: ShapingSEQ South East Queensland Regional Plan 2023

#### Spotlight sectors in Queensland Sportstech sector

The Australian Sports and Technology Network (ASTN) defines the sector as activity at the intersection of data, digital, technology, and business, with direct applications to Sports, Fitness, Media, Entertainment, Esports, Stadiums and venues, Wearables, Wellness, and Active Living.

The sector is valued at AUD 4.69bn in revenue (June 2024) and has an annual growth rate of 10%. This makes the sector close to the maturity phase and equal to the fast-growing Australian Fintech industry with AUD 4 to 5bn in annual revenue. The sector employs over 14,906 people in 765 businesses, with 40% based in Victoria, 30% in NSW and 19% in SE QLD. The majority of companies (58%) serve the Mass Participation & Active Living market, followed by the Business of Sport & Entertainment (43%), and Professional & Elite Sport (18%).

The ASTN 2024 report identifies 10 emerging sports tech trends presenting new opportunities:<sup>16</sup>

- 1. Artificial Intelligence (AI) in Sport,
- Active Living, Fitness and Wellness.
- Virtual Sports, Esports, Gaming, Metaverse and Blockchain
- 4. Sports Broadcasting and Smart Stadium tech.
- Smart Apparel, Equipment & Wearables and their role in Paralympics, Special Needs and Mobility,
- 6. Sustainability and Environment, Social and Governance (ESG)
- 7. Quantum Technology, Big Data, Privacy and Security,
- 8. Women in Sportstech,
- Investment and Venture Capital into Australian Sports Companies,
- 10. Global Trade and Business Matching.

More specifically, there's a demand for companies active in:

- Improving gameplay e.g.
   Hawkeye, Snickometer (cricket),
   automated video analysis and
   machine learning;
- Fan engagement at home and in-stadium experiences, broadening potential revenue streams, personalised fan content, VR/Augmented reality, eSports, fantasy leagues;
- Performance and well-being wearable tech, analytics, coaching, equipment, automated safety;
- Driving participation converting more fans to grassroots participation, fin-tech, volunteer engagement and management.

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<sup>16</sup> ASTN Industry Reports





#### Sion de Jong

Director of Business & Strategy Sport Cloud Australia



#### Bio

Sion is one of the co-founders of Eindhoven-based Techonomy, a digital & data-driven marketing & sales company. The company has been active in Australia under Sports Cloud Australia (SCA) since 2019. To strengthen its presence in Australia, SCA opened an office in Melbourne in May 2022 and expanded to Sydney in August 2023. SCA works with Australian-based clients such as the Australian Grand Prix Corporation (Government), AFL (League) Western Sydney Wanderers FC and Melbourne City FC (Sports).

#### Learnings

To do business in Australia you have to be in Australia. You need to have a local representation on the ground. It is easier to communicate in the same time zone. As Australians like to do business for the long term, make sure to offer long-term partnerships instead of short-term projects. Sion finds that the Australian way of doing business is very hierarchical, more than the Dutch, more similar to English. He finds that trust is the foundation of business and recommends taking time to ensure you are recognised as an Australian-based business.

#### Frictionless fan experience

Australia has a major events calendar with the Australian Open, F1 Grand Prix and recently the FIFA Women's World Cup. The Olympics are the next big event to get the eyes of the world on this beautiful country. The US is leading in sports fan experience, followed by the EU and AU in the shift towards sports entertainment/ But how can you make the experience digital? There are opportunities here where Dutch businesses can add value in delivering digital fan zones to connect online.

#### Sports data

There seems to be more focus on infrastructure and hardware than software and services. Many venues facilitate different sports clubs, operators for ticketing, membership and merchandise. The data is just not connected yet. There is a lot of potential to develop and visualise aggregated data to support digital transformation towards a more mature digital economy.

Dutch companies like Signify (formerly known as Philips Lightning) and AAA-Lux have representatives in the Australian market and provide led-light equipment to stadiums & venues and amateur sports facilities. Their solutions contribute to carbon reduction strategies.

#### Renewable energy

In 2022, the federal government has set emission targets to reduce by 43% (vs 2005 levels) by 2030 and net-zero emissions by 2050. Since then, the government has developed multiple policies and strategies to deliver on this target. This provides opportunities for Dutch businesses active in alternative fuels, circular economy, and waste management.

The transition to net-zero presents numerous opportunities, with a strong emphasis on renewable energy sources such as wind, hydro, and solar, as well as future fuels like Sustainable Aviation Fuel (SAF) and hydrogen. The 2024-2025 Federal budget includes AUD 8.7bn investment into renewable energy generation, storage, transmission and distribution infrastructure. The renewable infrastructure plan encompasses over 2,000 kilometres of transmission lines, 2,700 wind turbines and solar panels, and integrated storage solutions, including pumped hydro and batteries.

With energy targets now legislated,
Australia faces a stringent framework for
delivering the necessary infrastructure. A
key opportunity lies in deploying and
enabling infrastructure more rapidly.
Australia's high rate of rooftop solar has
posed challenges for the grid, yet better
integration of these consumer energy
resources is recognised as beneficial for
the transition.

Australia needs to urgently decarbonise its transport sector, which currently accounts for 18.6% of greenhouse gas emissions, if the country is to meet its net-zero commitments. Heavy vehicles are a key contributor to these emissions.<sup>17</sup> The image below shows possible use cases for green hydrogen<sup>18</sup>.





### Partners in International Business Hydrogen

In line with the signing of the MOU between Australia and the Netherlands in February 2023, the Dutch government started a Partnership in International Business (PIB) program on hydrogen. The H2 Australia program aims to support the upcoming hydrogen industry by stimulating bilateral exchanges between Australian and Dutch businesses, knowledge institutes and the government.

The Netherlands is also a proud contributor to the H2 Global Fund created by the German government to stimulate the offtake of green hydrogen globally. The Netherlands government currently contributes up to one-quarter of the total fund, amounting to €300 million.

More information here:

<sup>&</sup>lt;sup>17</sup> New report to accelerate Australia's hydrogen-powered transport future - CSIRO

<sup>&</sup>lt;sup>18</sup> GH2 <u>ClusterGuidelines-FINAL-digital-1210.pdf</u>

However, currently, there are only five operational hydrogen fuelling stations in Australia, with another 20 either planned or under development.

Renewable fuels, such as SAF, are considered crucial for sectors that are difficult to decarbonise, like aviation. The decarbonising transformation will require not only substantial capital investment but also a significant change in the workforce, particularly in the construction sector.

#### Green Infrastructure & Energy

The Queensland Procurement Strategy outlines a substantial investment of AUD 180bn in government procurement from 2022 to 2032, primarily allocated to infrastructure and energy projects. This includes the Big Build program, with an AUD 89bn investment, and the Queensland Energy & Jobs Plan, which accounts for AUD 62bn. The key focus of these infrastructure investments is on developing renewable energy solutions (hydrogen, solar, wind and hydro) and upgrading the energy network. In 2022, the Queensland Government signed an MOU with the port of Rotterdam to collaborate on opportunities and develop a hydrogen export supply chain. 19

#### Waste & Circularity

Australia's circularity rate – the measure of efficiency in which resources are reused and recycled within a system – is half (4%) that of the global average (8%).

As governments increasingly look for new ways of thinking to move away from Business as Usual and the concentration of powers in the waste sector 'white space opportunities emerge. Circular economy principles are gaining traction in Australia, driven by concerns about resource

19 Queensland signs hydrogen agreement with massive European port - Ministerial Media Statements. scarcity, waste management, and climate change. State and local governments are developing policies and strategies to encourage circular practices across various sectors. The Federal government is only just committing to a circular economy and has the ambition to divert 80% of all waste from landfills and recently appointed a Circular Economy Ministerial Advisory Group.<sup>20</sup>



Waste and Circular Business Australia - Netherlands (WasteBAN)

In 2021, the Netherlands started a Partnership in International Business (PIB) on waste and the circular economy. This represents a public-private partnership between the Dutch government and business which supports innovative Dutch businesses in waste and the circular economy to identify opportunities in the Australian market. It also emphasises knowledge exchange and building connections between the governments of the Netherlands and Australia.

As the PIB matures and Australia progresses towards a Circular Economy, collaboration themes include water, food-waste prevention, digitisation, renewable energy, critical minerals, advanced manufacturing, and the medical sector. Additional themes gaining traction are Transition Brokerage, Circular Digitization, next-generation CE policies, and the development of end-markets.

#### More information <u>here</u>:

Leading businesses are exploring circular business models, focusing on product design, material recovery, and innovative waste solutions. The built environment

31 of 88

<sup>&</sup>lt;sup>20</sup> Interim report Circular Economy Ministerial Advisory Group

sector, for example, produces 40% of all waste in Australia and offers a large opportunity to replace 27% of virgin materials in road infrastructure.21

One of the challenges in Australia is that legislation is organised at a local government level and that the public sector is risk averse.

But things are moving forward with the recently released Environmentally Sustainable Procurement Policy (ESPP).<sup>22</sup> ESPP will be phased in over the next two years, starting 1 July 2024 focused on ensuring government construction services projects above AUD 7.5 million meet agreed sustainability outcomes. These outcomes will focus on reducing and repurposing waste generated from such projects and replacing construction materials from virgin resources with those made with recycled content.

The second ESPP phase from 1 July 2025 onwards, will extend the policy to include tenders for textiles, ICT goods, and furniture, fittings and equipment above \$1 million, which will represent a significant increase in policy scope. The project categories were chosen for their high impacts on natural systems and the potential for such projects to provide work opportunities within Australia's domestic recycling industry.

The Netherlands, with a 24.5% circularity rate according to the Circularity Gap report, is seen as leading this space, and that provides opportunities for collaboration between the Dutch and Australian public and private sectors.23

Dutch companies can help to lower barriers that include a lack of understanding of the concept, lack of market signals, infrastructure, consumer awareness, and standardised measurement and verification systems.



The Role of the Olympics in Creating a Circular Economy

- **Global Showcase:** The Olympics can act as a global showcase for circular solutions, demonstrating their potential to a large audience.
- Infrastructure Legacy: The development of Olympic infrastructure can incorporate circular design principles, promoting resource efficiency, and having a legacy focus.
- Procurement Power: The procurement of goods and services for the Olympics can prioritise circular products and suppliers, creating market demand.
- Behavioural Change: The Olympics can raise public awareness about the circular economy and encourage sustainable behaviours.

<sup>21</sup> Understanding the market for replacement materials across major infrastructure road projects
22 Environmentally Sustainable Procurement Policy and

Reporting Framework - DCCEEW

<sup>23</sup> Netherlands- Circularity Gap Reporting Initiative





#### **Ashleigh Morris**

CEO and founder Coreo Member of the Brisbane 2032 Olympic and Paralympic Games Legacy Committee



#### Bio

Ashleigh started Coreo in 2017, which supports organisations in developing and implementing circular economy solutions. She is a founding Board Member of the Australian Circular Economy Hub and was appointed to the Brisbane 2032 Olympic and Paralympic Games Legacy Committee in 2022. We asked Ashleigh to provide some learnings.

#### What Can We Learn from the Dutch?

- National Commitment: The Netherlands has a strong national commitment to the circular economy, with ambitious targets and a comprehensive road map.
- Collaboration: Dutch businesses, governments, and knowledge institutions collaborate closely to develop and implement circular solutions.
- Innovation Hubs: The Netherlands hosts several innovation hubs and clusters that foster circular entrepreneurship and knowledge sharing.

#### Specific Opportunities for Collaboration

procurement.

- Public service leaders forum -Sharing the journey to a National position on circular and challenging others to follow it
- Knowledge Exchange: Sharing best practices and lessons learned in areas like circular design, material recovery, business incentives, procurement, governance
- Technology Transfer:
   Collaborating on innovative technologies and solutions for circularity, such as resource tracking.
- Joint Projects: Developing pilot projects and demonstrations to test and scale circular solutions in the Australian context.

#### Water management

In February 2022, South East Queensland and Northern New South Wales were hit by extreme weather conditions that led to heavy flooding. It was Brisbane's second-worst flood (2011) and Northern Rivers's worst flood in recorded history. The aftermath made it the second largest insured event in the world in 2022 with more than 240,000 claims with a total value of AUD 6bn, including:

- AUD 3.4bn in home property claims;
- AUD 710 million in home contents claims:
- AUD 304 million in personal motor claims.<sup>24</sup>

Opportunities for Water management, resilience in housing and built environment remain large.

#### **Critical Minerals**

Queensland is rich in critical minerals and has 51 of the world's most sought-after minerals. Second in the world for lead production, third for bauxite and zinc, fifth for silver and one of the largest copper producers in Australia. Globally, the demand for critical minerals is expected to quadruple by 2040, driven by global commitments to renewable energy. Most critical minerals are processed offshore. One example is Lithium. Australia produces around 50% of the global lithium supply. However, all of this is exported.<sup>25</sup> Queensland is focusing not only on the supply of critical minerals but is looking to improve local processing and advanced manufacturing industries to build their onshore critical minerals sector.<sup>26</sup> Under this strategy, funding has been made available for research and development in

circular economy and mineral discovery, processing and recycling.

#### **Digital Transformation**

In 2023, the Queensland Government announced an AUD200m investment over three years to grow the state's digital economy and launched a new digital economy strategy and action plan<sup>27</sup>. Key focus areas include closing the digital divide, improving connectivity for regional areas, growing Queensland's businesses, industries, and digital talent, and creating a more digitally enabled and responsive government.

#### **Technology**

Queensland is a key player in Australia's AUD 167bn technology sector, contributing to fintech, agtech, edtech, medtech and sports tech. South East Queensland is the fastest growing region for tech employment in Australia.<sup>28</sup> The Queensland Government invests in advancing technology and driving innovation via the Advance Queensland innovation agenda with a strong focus on sectors like biotechnology, mining technology, agtech, sports tech, medtech and renewable energy. Brisbane, the Gold Coast, and the Sunshine Coast are key technological hubs. The mission report provides more details on the sports tech sector.

27

<sup>24 &</sup>lt;u>Comprehensive review released into insurers' response</u> to 2022 flood - Insurance Council of Australia.

<sup>&</sup>lt;sup>25</sup> Resource Rich to Resourceful - Coreo

<sup>26</sup> Queensland Critical Minerals Strategy, 2023

https://www.qld.gov.au/\_\_data/assets/pdf\_file/0035/46963 7/digital-economy-strategy-action-plan.pdf

<sup>&</sup>lt;sup>28</sup> The economic contribution of Australia's tech sector

#### **Quantum Computing**

In April 2024, it was announced that Australia will invest almost a billion AUD in a bid to build the world's first commercially useful quantum computer in Brisbane.<sup>29</sup> The Queensland and Australian governments are each paying AUD 470 million in grants, loans, and share purchases for the tech startup PsiQuantum, which was founded by former University of Queensland graduates Jeremy O'Brien and Terry Rudolph. PsiQuantum will attempt to build the world's first large "fault-tolerant" quantum computer, free from the errors and instabilities that render other quantum computers impractical. The large government investment shows the commitment of Australia and Queensland to stimulate tech and innovation back to Australia.

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<sup>&</sup>lt;sup>29</sup> Delivering a Future Made in Australia with 400 new technology jobs in Brisbane





#### Simone de Kleermaeker

Regional coordination Oceania Deltares



#### Bio

Simone has been working with operational water information systems and hydrodynamic data modelling since 2001. She has gained this experience both in Marine and Coastal systems as well as Industrial systems and has lived in Brisbane Australia since 2015.

#### **Lessons learned**

Australians are willing to collaborate and learn and this is especially true for flood risk reduction. The 2011 floods in Brisbane, for example, led to the establishment of a Flood Community of Practice (Floodcop) led by Dutch water expert Piet Filet.

The Royal Dutch Trade mission visit to Brisbane in 2016 has helped to focus more local attention on Dutch solutions for resilient infrastructure & water management. Simone highlights two opportunities:

Early warning systems
Infrastructure planning in general starts with 'flood risk management', whereas "already built" requires early warning systems, such as river flood prediction. Deltares provides a data model for this called Delft-Fews, a free-to-use platform.

The Australian Bureau of Meteorology (BOM) is a user of this data platform for the data and weather forecast models used for predicting river water levels in Australia. There's a growing awareness among state and local governments for nature-based solutions in adaptation for climate change and population growth. Climate change adaptation and mitigation also offer opportunities to drive innovation and green growth.

#### Resilient design:

Dutch architects can help in creating flood-resilient housing & infrastructure and innovative solutions and design. They can also inspire colleagues such as James Davidson, a leading Brisbane-based architect in creating flood-resilient housing. As a Winston Churchill fellow, he visited the Netherlands to learn about resilient design. He is the lead architect for the **Queensland Reconstruction Authority** launched after the 2011 floods and is now also helping to set up the NSW Northern Rivers Reconstruction Authority established after the 2022 floods.

#### **Transport and Logistics**

Demand for transport and logistics, particularly in South East Queensland, is high, driven by a growing export sector, particularly to Asia. Queensland is the second highest exporter to Asia of any Australian State. <sup>30</sup> Brisbane's overall exports are expected to grow at an annual rate of 3.5% over the period to 2031. Food and beverage exports are expected to grow 42% in real terms over the period to 2031, which will require a strong growth of two key ports in Brisbane: The Brisbane Airport and Port of Brisbane.

In addition, Australia is catching up on the growth of e-commerce, with about 17% of retail spending coming from online shopping.<sup>31</sup> Queensland is one of the fastest growing states for e-commerce which has resulted in a strong growth in warehouse construction and putting additional pressure on the transport system.

The two key ports critical for transport and logistics in South East Queensland are the Port of Brisbane and Brisbane Airport.

#### Port of Brisbane

- Located at the mouth of the Brisbane River and one of the country's largest and fastest-growing multi-cargo ports.
- Critical hub for international trade, handling a wide range of cargo, including containers, motor vehicles, agricultural products, and bulk commodities.
- Handles 31,878,000 tonnes of cargo (approx.), 896,205 TEU and 2000 ships per year.

The Port of Brisbane is currently developing its vision 'PortBris2060' for the

future through a public consultation process<sup>32</sup>.

#### Brisbane Airport

Brisbane Airport is a private company, and one of its key shareholders is Schiphol Airport (19.6%).

- The airport is one of the largest airports in Australia by land size.
- It runs 24/7;
- 600 businesses are located at the airport, providing employment for 20,000 people;
- It transports 17 million passengers through its domestic terminal and 5.6 million through the international terminal per year;
- AUD 5bn of investment planned over the coming decade, including a third passenger terminal and major refurbishments to existing terminals.



#### (Cyber) security

In Brisbane, there are about 6,000 people with a security licence (most of them employed by the Brisbane airport). The Games will need about 20,000 licensed people.

The opportunities for Dutch organisations in Brisbane, are a multiple of those in Paris (population of 11.2m) and LA (population of 10m in greater LA). Both Paris and LA, due to their size, already have larger and more established support systems. Organisations specialising in crowd surveillance and AI can capitalise on these opportunities to secure their position and help mitigate security risks.

**Cyber security** is another growing risk for cities, especially for those organising major events like Brisbane as it prepares for the Olympics.

<sup>32</sup> PortBris 2060 - Port of Brisbane

<sup>&</sup>lt;sup>30</sup> DFAT, 2024 Trade Statistical Pivot Tables

<sup>31</sup> Australia Post Ecommerce Report





#### Gert-Jan de Graaff

CEO Brisbane Airport JetZero Council Advisory Council -Committee for Brisbane



#### Bio

Gert-Jan de Graaff started his career at Schiphol Airport and worked at Brisbane Airport from 2007-2012. After four years at JFK airport as CEO International Air Terminal, he returned to Brisbane as CEO of Brisbane Airport in 2018.

#### Insights

People-Centric Business Culture.
In Australia, business is conducted between individuals rather than companies. Therefore, building relationships and trust is critical.
Personal presence is important; being on the ground is necessary.

#### Role of Government

The government has an active and significant role in facilitating and organising the Olympics. The government will fund the majority of the infrastructure, including the stadiums and transportation. This involvement highlights the importance of political interests, which often extend beyond mere financial outcomes. Developing relationships with the government is essential; send top executives, like the CEO, for important engagements

Brisbane 2032 Olympic challenges Organising the Olympics is a significant challenge due to limited local resources. SE QLD, with a population of only 3.5 million (in a country of 'only' 27m), needs to scale up infrastructure and services, everything from hotel rooms to security staff.

#### **Opportunities**

Sustainability/Circular Economy
The Netherlands is a frontrunner in this space. Australia is progressing but still struggles with the 'how' when it comes to implementation. A significant challenge for the Olympics is managing carbon emissions, with 70% attributed to flights. Thus, innovations in Sustainable Aviation Fuel (SAF) and hydrogen technology are critical. Sustainable infrastructure is another opportunity.

#### Inclusivity

The Netherlands excels in creating inclusive infrastructure and services, particularly for Paralympic athletes. This expertise can greatly enhance the inclusivity of the Brisbane Olympics. Schiphol's involvement as a key shareholder in Brisbane Airport Corporation brings advanced insights into managing your social licence as an airport, including the impact on your surroundings, emissions, and traffic. Dutch labour laws, such as the use of machinery to assist with heavy lifting, contribute to improving the well-being of employees, and we still have a way to go in this space in Australia. Brisbane Airport wants to be an airport that is better for people; for our customers, our employees and our neighbours!

#### Knowledge to Knowledge (K2K)

Queensland is home to eight universities and houses campuses from another three, teaching over a quarter of a million university students. The top three universities and their average enrollment numbers are:

- University of Queensland (55,000)
- Queensland University of Technology (50,000)
- Griffith University (46,000)

The University of Queensland (UQ) is a top-tier Australian research and teaching institution, ranked among the top 1% of global universities and second worldwide in sports technology.

Since 2007, Brisbane's city planning has centred on developing 'The Brisbane Knowledge Corridor,' a 5 km north-south stretch through the inner city, featuring significant infrastructure investments to enhance connectivity. It integrates major universities like UQ, QUT, and Griffith University, along with R&D centres and tech startups, fostering collaboration between academia, industry, and government.

#### Opportunity for K2K collaboration

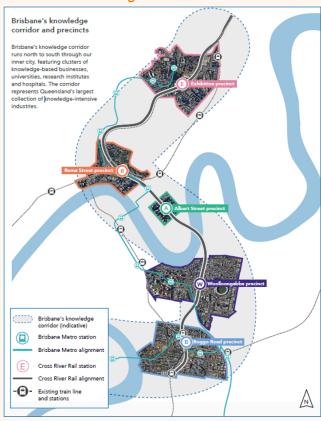
Given the requirement for the Games to be climate-positive, there is a significant opportunity for Dutch and Australian knowledge institutes, particularly UQ and QUT, to collaborate on various topics, including:

- Sustainable aviation: Exploring SAFs and sustainable airport operations to reduce emissions for Games attendees.
- Infrastructure: Timber-based stadia construction and Green Star buildings, and public transport PPP investment models
- Sustainable Procurement: Sharing knowledge on sustainable

- procurement processes for the Organising Committee and vendors
- Clean energy transitions: Focusing on workforce transition
- Carbon offsets: Financing and scaling climate-action projects to meet the Games climate-positive goals.
- Circular design and connecting circular economy accelerators in NL such as
  - <u>Circular Economy -</u>
     <u>Kenniskaarten het Groene</u>

     Brein
  - https://versnellingshuisce.nl /en
- Innovation in sports participation: Promoting behaviour change in sports

#### Brisbane's knowledge corridor



Source: Brisbane City Council

#### Doing Business in South East Queensland

Australia and Queensland have solid foundations of a highly rated legal system and low corruption, and their low overall country risk score of 1.3 is reflected in high confidence, transparency, and stability in political, economic, legal, tax, operational, and security factors.

Queensland remains a secure and competitive destination for foreign direct investment against the evolving geopolitical environment and global economy. Queensland provides:<sup>33</sup>

- A stable system of government and political framework
- Strong financial management and liquidity
- High business confidence and a diverse and growing economy Generous grants and incentives for business
- Lowest standard payroll tax rates in Australia

In 2023, the Queensland government released its latest procurement policy and strategy, 'Buy Queensland,' and a specific procurement policy for the Games, 'Q2032.' The policy's important focus is on 'buying local' and using the procurement strategy to support businesses in Queensland in becoming more sustainable in their practices. More information on government procurement can be found in the mission section.

Three organisations in Queensland specifically focus on supporting businesses both domestically and internationally:

- Trade Investment Queensland
- Advance Queensland
- Business Chamber Queensland

#### Trade Investment Queensland

Trade and Investment Queensland is the Queensland Government's dedicated global business agency, helping Queensland exporters take their products to world markets and support investors and entrepreneurs keen to invest in Queensland.<sup>34</sup> They have offices in Frankfurt and London dedicated to organisations in the European market, with a third office expected to open in Amsterdam soon.

#### Advance Queensland

Advance Queensland was launched by the Queensland Government in 2015 to support the tech and innovation economy in Queensland. It runs a diverse number of programs and initiatives to support entrepreneurs, innovators, and researchers to turn their ideas into commercial success. The Chief Entrepreneur (appointed by the government) heads up this innovation ecosystem.

In 2022, Advance Queensland released its roadmap 'Innovation for a Future Economy: 2022-2032', which sets out the direction, key priority outcomes and initiatives for the next phase in Queensland's innovation journey.35 One of their programs is the Private Sector Pathways (PSP) Program which supports innovative small-to-medium, Queensland-based, enterprises to collaborate with corporate partners to develop commercialisation opportunities.36 Small-to-medium businesses can receive up to AUD 100K in funding from Advance Queensland and a corporate partner for solutions to be trialled for up to 6 months.

<sup>33</sup> Spotlight on Queensland report 2023

<sup>34 &</sup>lt;u>TIQ - Trade and Investment Queensland — invest, buy, export</u>

<sup>&</sup>lt;sup>35</sup> Innovation for a future economy: 2022–2032 roadmap

<sup>&</sup>lt;sup>36</sup> Private Sector Pathways Program | Advance Queensland

#### **Business Chamber Queensland**

For over 155 years the Business Chamber Queensland (BCQ) has represented businesses of every industry, every size and in every part of the state. BCQ is the state chamber of commerce, an independent, not-for-profit organisation, with a rich legacy of putting Queensland business first, providing practical support backed by innovative thinking and powerful advocacy.

BCQ is there to help businesses prosper by supporting, educating, and empowering them to capitalise on the extraordinary opportunities on offer in Queensland—now and into the future. BCQ recognises the importance of this as a state, a nation, and a global network.

- International partnerships
- Future focussed business readiness
  - Digital Economy & Data
  - o Business resilience
  - Sustainability & Climate Action

#### Opportunities for Dutch Businesses

- The Dutch are considered innovative in agriculture, the circular economy, and the digital economy. They can be a source of inspiration for Queensland businesses in various sectors
- Businesses in transition change the way they think about products and services. They rethink their business models and can develop shared value propositions. This can inform business in Australia.
- Opportunity to develop new partnership models based on shared IP<sup>37</sup>.

#### Council of Mayors (SEQ)

The Council of Mayors (SEQ) was established in September 2005 as an

independent advocacy organisation to represent the interests of 11 key Councils in South East Queensland. The Council of Mayors was instrumental in delivering the South East Queensland (SEQ) City Deal Implementation Plan, which was released in July 2023.

#### Brisbane Economic Development Agency (BEDA)

BEDA is Brisbane City's official economic development board. BEDA's role is to grow Brisbane's economy, drive demand for Brisbane and create growth and trade opportunities for local Brisbane businesses. BEDA supports potential domestic and international investors with full market entry and expansion strategies.

#### **Gold Coast Investment**

The City of Gold Coast has an investment and business attraction program to support continued growth and new investment in the city.

The program is open to both existing local businesses planning for significant expansions, and companies outside the city looking to relocate or invest in new business ventures on the Gold Coast.

#### Invest Sunshine Coast Australia

Sunshine Coast Council has a Regional Economic Development strategy which includes a Business Investment Framework to secure targeted and suitable investment and reinvestment in the regional economy. The council offers an innovative range of non-financial and financial incentives to eligible investment projects in the region.

37

https://iccwbo.org/global-insights/global-trade/intellectual-property/

#### Procurement timelines

Keep up to date with the latest opportunities through the Olympic procurement website via this link:

Business opportunities | Plans & Progress

7	2	3	<u></u>	5	6	7
CATEGORY	EXAMPLE	INDICATIVE PERIOD	PARIS	CATEGORY	EXAMPLE	INDICATIVE PERIOD
Corporate	Professional services	2024	2024	Technology	Radio systems	2030
Venues	Construction services	2024	Olympic and Paralympic	Technology	IT outsourcing	2030
Corporate	Professional services	2025	Summer Games	Operations	Catering	2030
/enues	Construction services	2025	MILANO CORTINA	Corporate	Printing material and services	2030
Corporate	Professional services	2026	2026 Olympic and Paralympic	Operations	Housekeeping services	2030
/enues	Construction services	2026	Winter Games	Operations	Security services for the Games	2030
orporate	Professional services	2027	LOS ANGELES	Corporate	Cleaning and maintenance services	2030
enues	Construction services	2027	2028	Operations	Laundry services	2030
orporate	Professional services	2028	Olympic and Paralympic Summer Games	Furniture, Fixtures	Air conditioning	2030
enues	Construction services	2028	HOST TBC	and Equipment		
orporate	Professional services	2029	2030	Corporate	Personalised/custom gifts	2030
enues	Construction services	2029	Olympic and Paralympic	Operations	PPE and safety equipment	2030
orporate	Ticketing system and call center	2029	Winter Games	Sports and Ceremonies  Operations	General fitness equipment  Restaurant equipment for IBC,	2030 2030
orporate	Professional services	2030			MPC and Media Villages	
enues	Construction services	2030		Furniture, Fixtures and Equipment	Furniture, fixtures, and equipment (2nd wave)	2030
urniture, Fixtures nd Equipment	Towels and bed linen	2030		Operations	Catering	2030
orporate	Planning and management of look	2030		Operations	Signage for transport services	2030
	of the Games and signage program		AND	Corporate	Functional signs/ signage and wayfinding	2030
perations	Corporate bus rental	2030		Venues	Water and waste temporary system	2030
echnology	Computers and tablets	2030		Corporate	Professional services	2031
cilities	Temporary power	2030	<b>3</b>	Venues	Construction services	2031
ports and Ceremonies	Gymnastic and trampoline equipment	2030		Technology	Audio and video cabling for venues/facilities	2031
urniture, Fixtures nd Equipment	Furniture, fixtures, and equipment (1st wave)	2030		Facilities	Temporary floor cover	2031
perations	Catering	2030		Operations	Waste collection/services	2031
ports and Ceremonies	Sports flooring	2030		Operations	Power services	2031
ports and Ceremonies	Podium for sports competitions	2030		Corporate	Look of the Games production and installation	2031
perations	Bus rental operations	2030		Facilities	Emergency signaling/	2031
enues	Stands and seats	2030		ractities	Statutory signage	2051
orporate	Brisbane 2032 flags	2030		Facilities	Exhibition equipment	2031
enues	Barriers and fences	2030	999	Corporate	Athlete participation medals	2031
ports and Ceremonies	Eco-friendly transport	2030		Facilitation	and diplomas	2021
perations	Logistics	2030	Brisbane 2032 Olympic and Paralympic Games Host	Facilities	Construction and carpentry work	2031
enues	Portable buildings	2030	Games Host  Queensland	Operations	Signage	2031
enues	Management and implementation	2030		Corporate	Professional services	2032
	of overlay		( \ \	Corporate	Flowers	2032

#### Q2032

You can download this image here: Q2032

Procurement Strategy

#### **Local Insights**

Queensland hosts a significant Dutch community, with close to 14,000 residents born in the Netherlands and around 81,000 who claim Dutch heritage. Many of these 'Dutchies' have been here for many years and have built successful businesses in Queensland. Their experiences and insights provide valuable perspectives on doing business in Queensland. For this report, several interviews were conducted with several members of the Dutch community in Queensland.

- in Marco Van Velzen immigrated to Australia in 2014 and set up his company Hydrorock in 2016, which offers an innovative range of natural water management products.
- in Harry Hartman moved to
  Australia in 2005 and currently
  works for the Royal BAM group
  who are part of the consortium
  delivering the Cross River Rail
  project in Brisbane.
- in Bas Kamp moved to Australia 30 years ago and in 1997 set up Petal Peddlers (Fleurametz) who are now the largest wholesale supplier of flowers in Queensland.

#### Their key insights:

- Cultural Adaptation and building rapport: Take time to understand Australian culture and business practices; it will take longer than expected. Australians value personal connections over professional ones and love to talk about sport!;
- Building strong local connections and leveraging partnerships with

- Dutch and Australian trade support organisations (e.g. TIQ, Austrade) is crucial;
- Partnering with larger businesses that have supply chain procurement power can accelerate change;
- Developing pilot projects to prove concepts and build reputation is essential, especially for innovative products:
- Transport & Logistics: Australia's vast size presents transportation and logistical challenges.
   Collaboration or scale is essential to offset high transportation costs.
   With airfreight, there may be limited space during peak seasons;
- Compliance and Governance:
   These are integral to Australian business, so important to be familiar with rules and regulations relevant to your industry;
- Union Influence: Recognize the significant impact of Australian unions, which differ from Dutch ones; The Australian built environment sector is traditional in material choices, so innovative Dutch solutions are not immediate sales:
- Biosecurity Compliance:
   Australia has some of the strictest biosecurity regulations in the world and it is important to familiarise yourself with this if you plan to import any products into Australia

Further insights into <u>Australian business</u> culture.

<sup>38</sup> Population: Census, 2021 | Australian Bureau of Statistics

# Mission Report



### Mission Report Introduction

The fact-finding mission was led by the Consulate General in Sydney and SportsNL bringing together a diverse group of Dutch and Australian representatives. The participants included members from Dutch sports federations, distributors from Dutch LED lighting manufacturers, Dutch business subsidiary offices in Australia and Australian businesses with strong Dutch backgrounds. Among them was expertise in:

- Fan experience & engagement through data
- Crowd management
- Architecture
- Sustainability
- Policy advisory of future societies& Smart cities
- Lighting
- Water management solutions

The geographic focus of the fact-finding mission is South East Queensland.



The mission started with an informal event on Sunday in Brisbane (Day 1), followed by a full day of overview presentations (Day 2) and a visit to the venues in Greater Brisbane (Day 3). The delegation then visited the Gold Coast (Day 4),

focusing on universities and sports centres, and to conclude the tour, visited the venues in the Sunshine Coast (Day 5) North of Brisbane.

This section reports on the fact-finding, with summaries from presenters and venues and relevant contact information for future reference.

The participants were generously welcomed at all locations and given full access. They had the opportunity to ask questions and form their own opinions. The report below is contextualised with facts from the locations' websites and presentations of the various stakeholders. While growth and opportunity were evident, some plans are still in development. Context is provided where possible with reference to updates and finalisation towards the Games.

# Day 1: Brisbane A magic welcome Queensland Brisbane

#### Day 1: Brisbane, May 19th

An informal start of the mission with all participants arriving in Brisbane prior to the official program starting on Monday. Introductions were made at the hotel, and after a failed attempt to use public transport, the group walked to Brisbane Stadium, also known as Suncorp Stadium or Lang Park.

The mission participants experienced the NRL **Magic Round** atmosphere with a city full of fans from all over Australia supporting their home teams. The walk from the Central Business District (CBD) to the Stadium takes approximately 25 minutes by foot. Public transport is available as the stadium is situated next to the train and bus station to get people in and out smoothly.

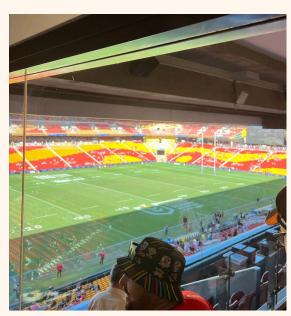


Photo Source: Willem Overbosch. Suncorp Stadium view from VIP box

#### **Key Facts**

- Suncorp Stadium is one of the most likely venues for the Brisbane 2032 Olympic & Paralympic opening and closing ceremonies;
- Stadiums Queensland (The Queensland government) owns the

- stadium and it is managed by ASM Global:
- 55,000 seats capacity
- located in the North West of the city (see map)
- a multipurpose venue for concerts, such as those by Andre Rieu and Taylor Swift
- home of the Broncos, Brisbane's home NRL team.
- Magic Round, with all eight games of the round played in a single venue over one weekend sold out with 140,000 tickets;<sup>39</sup>
- Recently upgraded facilities and fan zones with food and beverages behind grandstands;
- special facilities (rooms) for people with auditory disabilities or neurodiversity to experience the games in a tranquil environment;
- Close proximity of residential houses, therefore a lot of attention on community management and engagement



Source: <u>Suncorp stadium</u> (Click map to download pdf)

<sup>&</sup>lt;sup>39</sup> Brisbane keeps the magic until 2027! | Department of Tourism and Sport.

#### Fact-finding tour

#### Host:



**Lorelle Chittick**, General Manager Tourism, Business and Major Events BEDA

The streets around Suncorp stadium are temporarily blocked for traffic to create a fan zone with restaurants and pubs.



Photo Source: Willem Overbosch. Suncorp Stadium introduction to Magic Round

#### **Presenters:**



**Trevor Bow**, Director Operations, Suncorp Stadium



Rhys Watkins, General Manager Industry Engagement BEDA

It is not certain yet if Suncorp stadium will be the Olympic Opening venue. On March 18th, Queensland's Premier Steven Miles announced that he did not follow the recommendation of a formal venue review committee led by former Brisbane Major Lord Mayor Graham Quirk to build a new Olympic Oval in Victoria Park for AUD 3.4 bn. The Premier announced that he was supporting an Olympic opening at the

Suncorp Stadium<sup>40</sup>. However, no final decisions have been made on the opening venue.



Photo Source: Marjon Wind: Mission participants wearing Magic Round hats.

Most participants watched the three games and headed back to the hotel early in the evening.

<sup>40</sup> New direction for Brisbane 2032 Olympic and Paralympic Games sports venues has community sport at its heart - Ministerial Media Statements



#### Day 2: Brisbane, May 20th

On Monday, the ambassador of NL to Australia, H.E. Ms Ardi Stoios-Braken and the consul-general from Sydney, Hugo Klijn, kicked off. Followed by a brief presentation from Sports NL and Orange Sports Forum (OSF).



Elmir Gobeljic presented on behalf of SportsNL



Rick Sleegers presented on behalf of OSF

Hereafter all participants introduced themselves by also highlighting their specific interests in Brisbane and South East Queensland.

#### Key facts 2032 Olympic & Paralympic Games



Host City: Brisbane, with co-hosting cities stretching over 2000 kilometres of Queensland coastline: Gold Coast, Sunshine Coast, Townsville, Cairns

- Sustainability Focus: circular economy principles, aiming to minimise waste and promote recycling and reuse of materials.
- **Infrastructure Development:** The 'Big Build' Infrastructure program includes AUD 89bn of planned investments in transport. accommodation, and sporting venues, emphasising sustainable and green infrastructure.
- Economic Impact: significant economic benefits for the region, including job creation, increased tourism, and enhanced global profile.
- **Collaboration Opportunities:** numerous opportunities for international collaboration, particularly in areas such as sustainable construction, environmental technology, and urban planning.
- **Local Procurement:** The 2Q32 Procurement strategy, released together with the BuyQueensland Strategy, are the key procurement policies.41 The procurement focus is open to all businesses but with additional points for local Queensland businesses. Target is >30% sourced from local SMEs.
- Legacy Planning: Post-Games, the infrastructure and developments are designed to provide lasting benefits, supporting long-term growth and sustainability.
- Community Engagement: The organising committee emphasises community involvement and aims to create inclusive opportunities for local and indigenous communities.

<sup>&</sup>lt;sup>41</sup> Q2032 Procurement Strategy

#### Fact-finding tour

During the morning, we had presentations from the Trade Investment Queensland (TIQ) and the Queensland Government. After lunch, a presentation from the Brisbane Economic Development Agency (BEDA) was followed. Together, they provided a comprehensive overview of what the Games mean for Queensland and Brisbane and the opportunities this presents for international organisations.

Trade and Investment Queensland

#### **Presenters:**

in

**Sean Bohannon**, Manager of Health, Innovation and Tech

in

**Devinka Wanigesekera**, Director International Markets



**Rita Skipp**, Senior Trade and Investment Officer International Markets.

Sean set the scene for a 20-year pipeline of investments worth AUD180bn towards 2032 and beyond. Queensland's approach is aligned with the Games, and business opportunities are presented using a 'Team up, get ready, set and match approach'. The aim of TIQ is to get business "fit" to benefit from the games. Queensland, home to 19% of Australia's sports tech sector (AUD 4bn), is committed to the development and expansion of the sports technology industry as the host of the Games.

Queensland Government
Department of State Development and
Infrastructure and Department of
Tourism and Trade

#### **Presenters:**



**Richard Watson**, Senior Executive Director of the

Brisbane 2032 Coordination Office





Richard, Damon and Tiana provided an overview of the main features of the Games:

- Hosted in a region, not a precinct with multiple games delivery partners;
- Aligned with the IOC's New Norm, with a focus on legacy and inclusivity;
- Requires the Games to be Climate Positive:
- Focus on existing venues and first summer games with four athletes' villages;
- Emphasis on sports technology and broader sports participation.

#### Multiple Games Delivery Partners

The Games will be hosted across multiple venues and cities in South East Queensland rather than the traditional approach of a consolidated Olympics park or precinct. This means that the governance model for the Games is more complex than usual. In parallel, the State government is delivering a large infrastructure program to improve not only venues but also transport and energy infrastructure.

There are nine Games Delivery Partners that represent the different cities and stakeholders.



On 23 May 2024, it was announced that an 'Independent Venue and Legacy Delivery Authority' would be set up to deliver the new and upgraded venues and develop a Transport and Mobility Strategy.

#### **Breaking News:**

Emma Thomas has been appointed as the Interim CEO for the new independent Games Venue and Legacy Delivery Authority, beginning July 1, 2024 This will provide continuity towards the Games.

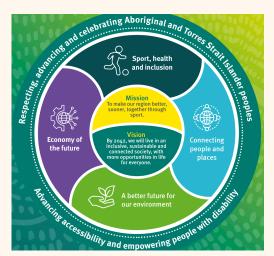
Interim CEO appointed to lead new Games Authority - Ministerial Media Statements

#### Climate Positive Games & Legacy

The Games are the first to require climate-positive status and a dedicated legacy strategy. The Elevate 2042 Legacy strategy focuses on Inclusion and Diversity, particularly for people with disabilities and Australia's First Nation peoples. The key themes are:

- Sports health and inclusion
- Economy of the future
- A better future for our environment
- Connecting people and places

Our legacy will be about how the Games are felt 10 years after they are done. This is the opportunity to change how people see those with disabilities across this country, reshaping how people with disabilities access all areas of our country. Brisbane 2032 will be the lever to create that change." Kurt Fearnley AO PLY, Paralympian.



Elevate 2024 Legacy Strategy

#### **Paralympics**

Advancing accessibility and empowering people with disability is a key theme of the Games. Almost 20% of people in Australia live with a disability, but only one in four of these participate in sports. 75% of Australians with disabilities want to take part in sports but feel there are limited opportunities. The Paralympic Games aim to encourage greater awareness and sport participation for the community. A new world-leading Paralympic Centre of Excellence will be built at the University of Queensland which will combine research, rehabilitation, and sports technology and will cater for 20 of the 22 Paralympic sports.

#### **First Nations**

The Games will provide a platform to promote and advance First Nations communities through storytelling, arts, business opportunities, and sport. Specifically, through the Legacy Strategy, there will be a focus on greater understanding and inclusion of, career and employment opportunities for Aboriginal and Torres Strait Islander peoples.

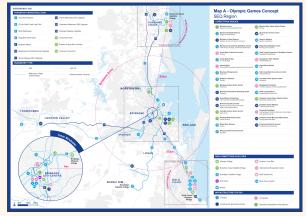
#### Venues

The Olympic guidelines stress the importance of using legacy based on community needs. The venues that are

being upgraded will have the capacity to meet the needs of the community rather than have overcapacity. A total of 35 venues will be used to host 29 Olympic and 22 Paralympic Sports. The venues are spread across Brisbane, the Gold Coast, and the Sunshine Coast. In addition, there will be four athletes' villages.

- 15 Existing venues
- 9 Upgraded venues
- 6 New venues
- 5 Temporary venues
- 4 Athletes villages

Since the Independent Venue and Legacy Delivery Authority was only recently established, there remains some uncertainty regarding certain venues, the sports they will host, and the necessary upgrades. A full list of venues can be found in the appendix.



https://q2032.au/map

#### Sports technology and increasing sport participation

Queensland is a passionate sporting state with a strong innovation ecosystem and 2032 is seen as a tremendous opportunity to grow Australia's sports tech economy. and explore technologies to improve the event, game, fan experience and engagement of the broader community.

The Queensland department of Tourism and Sport has developed the Queensland Pathway Blueprint to develop talent and

participation pathways so every Queenslander can reach their potential in their chosen activity.<sup>42</sup>

Some of the key areas identified for development are:

- Increasing participation rates in communities with below-average engagement
- Improving participation retention rates
- Better balance resources between elite talent pathways and general participation

The key takeaway from the TIQ and Government presentations is the "Qualify for Team Queensland" by thinking:

- Locally Games procurement will apply a Q2032 procurement strategy for the games supporting a local benefits approach. For international businesses important to focus on the pre-Olympic calendar and major events in the lead-up to the Games to establish local relationships
- Sustainably Games procurement will contribute to achieving the Queensland Government's economy-wide emissions reduction targets of 30% below 2005 levels by 2030 and net-zero emissions by 2050.
- Ethically Games Suppliers will agree to ethical standards set out in the Queensland government <u>Supplier</u> <u>Code of Conduct</u>, <u>Supplier Guide to</u> <u>Government Procurement</u> and <u>Ethical</u> <u>Supplier Requirements</u>.
- Diversely Games Suppliers will be a diverse range of businesses, including small and medium enterprises (SMEs), Aboriginal and/or Torres Strait Islander businesses, businesses owned or operated by people with disability, culturally and linguistically diverse suppliers and social enterprises.

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<sup>&</sup>lt;sup>42</sup> Queensland Pathways Blueprint | Department of Tourism and Sport





**Kees Hertog**Director JBus
Consulting Pty Ltd



#### Bio

With a 12-year background in procurement from Transportation, Oil and Gas to Queensland Health and over 25 years in Australia, Kees has a good understanding of Queensland procurement practices. Kees is also the President of the <u>Dutch Chamber of Commerce in Queensland</u>, representing over 300 members.

#### **Key insights**

The Queensland Government and the Olympic offices need many services and goods. Some are very specific Although they want to buy locally, they will not be able to find those skills and capabilities. They will more likely have to go outside Queensland and Australia. This might go against their own policies, but opens opportunities for Dutch businesses to partner up.

An example of this could be circular procurement. This is something where the Dutch have a lot more expertise and the same could be said for Water management around Olympic venues The sustainable aquatic centre in Paris, for example, is designed by Dutch Architects.

The Dutch are very well positioned to tender on circular government requirements and tenders It would be good to do a Gap analysis on what the government needs toward the Olympics.

A Brisbane-based 'Holland circular hotspot' or ACE hub could be a real opportunity for Dutch businesses to follow an existing model with existing partners.

#### The Brisbane Economic Development Agency (BEDA)

#### **Presenters:**



**Anthony Ryan**, Chief Executive Officer



**John Cowie**, GM Investment attraction



**Julia Vernon**, Head of Major Events

The Brisbane Economic Development Agency (BEDA) supports potential domestic and international investors with full market entry and expansion strategies and supports new and established local businesses to grow.

	Greater Brisbane	Netherlands
Total area (land and water)	15,842 km²	41,543 km <sup>2</sup>
Population	2,706,966	17,701,000
Population density inhab/km2	170.9	426.1
Total GDP (USD)	\$120bn	\$1,009bn
GDP per Capita (USD)	\$44,330 (approx)	\$ 56,832 (approx.)

Anthony Ryan and John Cowie presented the key insights from the recently released State of the City report. They highlighted Brisbane's opportunities and the 20-year vision (2022-2042) of sustainable economic growth.

The Games are seen as a key opportunity to raise Brisbane's global profile and grow local businesses' capability through collaboration internationally.

According to Anthony, Brisbane's superpower is an open and welcoming environment with a focus on collaboration.

#### Key facts

From the Brisbane State of the City report:<sup>43</sup>

- Economic Growth: Forecast to grow 68% to AUD 275bn by 2041.
- Industry Growth by 2031: Health: 36%, Building: 41%, Transport and Logistics: 43%, Advanced Manufacturing: 29%, Knowledge: 50%, Experience: 41%;
- Population Growth: Fastest among major Australian cities, up 21% since 2013; leading in net internal migration for 21 consecutive quarters;
- Working Age Population: Grew by 7.7%, above the 4% average in major cities;
- Trade and Logistics: Closest major port to East Asia; lowest freight costs at AUD 7.34 per payload tonne;
- Manufacturing Exports: Over AUD 9bn, growing 27% in the past decade; forecast to increase 41% by 2031;
- Tourism: Record visitor spending of AUD 10.1bn in 2023; highest revenue growth per available room, up 47% from 2019.
- Innovation and Education: The highest concentration of innovation hubs per capita, home to Australia's top universities.
- Health Ecosystem: Largest in the Southern Hemisphere; 160 clinical trial sites, 40 contract research organisations, and set to grow by 36% by 2031.

<sup>43</sup> State of the City I Choose Brisbane, Australia

 Sustainability: Second city globally to achieve UN-Habitat Gold status for sustainability.<sup>44</sup>

#### University of Queensland (UQ)

UQ has established "The Office of 2032 Games Engagement (OGE) as the central coordination office for UQ's Olympic and Paralympic activity and partnerships.<sup>45</sup> The focus of the visit is UQ's Paralympic Centre of Excellence.<sup>46</sup>



#### Host:



**Andrew Flannery,** Chief Operating Officer

The group had a bus tour around the premises, visiting the river rowing facilities, athletics track, aquatic centre, tennis courts, outdoor fields and multisport centre before sitting down for a 2-hour overview of the University's credentials as well as the plans for the Olympic & Paralympic Games.

#### Presenter:



#### Professor Bruce Abernethy, AM – Executive Director 2032 Games Engagement

The University, founded in 1909 and operational since 2011, is located west of the CBD of Brisbane.

The university is ranked in the top 50 global universities, has over 7,000 FTE on staff, and has over 55,000 students. UQ has three campuses, including two hospitals and a 35-hectare sports precinct (UQ Sports).

About 40% of the students come from overseas. The university is also home to more than 250 elite student-athletes and is Australia's primary University for sports-related topics, ranked 2nd in the world.



Prof. Bruce Abernethy and Her Excellency Ambassador Ms Ardi Stoios - Braken

#### **UQ** Sports

#### Presenter:



**Ben Fisher,** Operations Manager UQ Sports

The sports precinct is the focus of Ben Fisher's presentation. The overview of the facilities is impressive and understandably why UQ is so well positioned to facilitate Olympic athletes as well as athletes from overseas to train for the Olympics and other events.

<sup>44</sup> SDG Cities

<sup>&</sup>lt;sup>45</sup> Office of 2032 Games Engagement | UQ

<sup>&</sup>lt;sup>46</sup> Brisbane on track to be Australia's home of Paralympic sport

#### Sports facilities



UQ Sport, established in 1911, has led sport and recreation at The University of Queensland. UQ Sport is a not-for-profit organisation committed to promoting sport, physical recreation and the benefits of a healthy lifestyle within UQ and one of the state's largest multi-sport complexes, with a purpose to deliver exceptional sporting opportunities for the UQ Community. The membership base spans more than 4,000 customers, with a further 7,000 people actively involved across UQ's 35 affiliated sporting clubs.

UQ Sports prides itself on the fact that it has over 250 elite athletes. More information and an interactive map of the facilities can be found here:

https://uqsport.com.au/

#### University of Queensland & Paralympics

#### Presenter:



John Cairney, Professor and Head of School, Human Movement and Nutrition Sciences

Sports can change lives, that's the banner for John's spotlights on the **ParaSTART Program**. A sports training program for people eligible to participate in the Paralympic Games.<sup>47</sup> **START** stands for **Sports Training And Research Team**.

The team is exploring the therapeutic benefit of sports training for people with high support needs. He main focus of the program is:

- Sustainable Health Propositions to close the research to practise gap
- Breaking Boundaries
  - What we know vs What we do
- International research networks
  - Enhance Athletes
  - Sports & society
  - Business of sport
  - Healthy and sustainable communication

#### **Opportunity:**

There is not enough data yet on Queensland health to benchmark pre Olympic games

When asked John agrees with the fact that cross referencing of data and profiling of Queensland health is an opportunity in the context of the Olympics and Legacy ambitions.

#### Opening dinner

The day was concluded with dinner & drinks at Felons Brewers on the Howard Smith Wharves entertainment area, scenically located under the Brisbane Story Bridge.



Photo Willem Overbosch: Brisbane by night, Story bridge



Photo Willem Overbosch: Opening dinner at Felons Brewers with delegates from the Dutch Chamber of Commerce Queensland.

<sup>&</sup>lt;sup>47</sup> ParaSTART Program

# Day 3: Brisbane Exploring Olympic & Paralympic venues

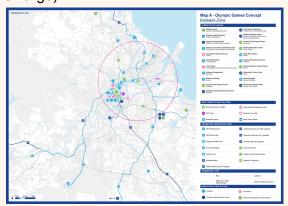
Queensland





#### Day 3: Brisbane - May 21st

The goal of this day was to visit the key venues in and around Brisbane that either have been selected as a potential Olympic venue or will be (re) developed as such. The Brisbane Zone map shows the locations in more detail. The final locations are still being considered (click to enlarge).



#### Key facts

There's still discussion about where the Olympic venues are being developed. There are several sites being taken into consideration:

- North Shore Olympic Park in Hamilton at a riverfront location (new development)
  - a. Approx AUD 3.0 3.23bn
  - b. new development
- 2. Gabba Olympic site
  - a. AUD 3.1bn
  - b. upgrade of existing venue
- 3. Victoria Park Olympic site
  - a. AUD 3.0 3.4bn
  - b. new development
- 4. Breakfast Creek Olympic Site
  - a. AUD 4.0 5.0bn
  - b. new development
- 5. Queensland Sports & Athletics Centre (QSAC) Olympic Stadium
  - a. Approx AUD 3.1bn
  - b. upgrade of existing venue

An independent task force was appointed in December 2023, to advise the Queensland government on the location and development of Olympic venues and

a full report was published on March 17th 2024 48

Fact-finding tour
Queensland Sports and Athletics
Centre (QSAC)

#### Host:



**Graham Clarke**, General Manager QSAS



Photo: Willem Overbosch Graham Clarke welcomes the delegation at QSAQ

First stop of the day is the Queensland Sports and Athletics Centre and the delegation is welcomed by General Manager Graham Clarke. The stadium is one of the considerations for the Olympic opening ceremony, however, it is also far away from the CBD, and there are no trains leading to this location.

#### Key facts

- QSAC's Main Stadium features a Class 1 ten-lane "Rekortan track" surrounding a playing field suitable for high-performance sports and training.
- The stadium seats 48,500 grandstand seats
- Bad connectivity to the city
- It was the training home for the Australian women's soccer team for the FIFA 2023 women's World Cup

QSAC is a home to the Queensland Academy of Sport (QAS).

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<sup>&</sup>lt;sup>48</sup> Sport Venue Review - State Development and Infrastructure



#### **High-Performance Centre**

The QAS gym facilities support high-performance athletes. In addition, they allow the QAS Performance Support Teams to deliver more targeted and integrated services to our athletes as they prepare for the Paris 2024 Olympic and Paralympic Games and beyond.

QAS Headquarters – Nathan gym facilities include:

- a wide range of strength and cardio machines
- a 30-metre athletics track on the mezzanine level and a dual-laned 25-metre astroturf track on the ground floor
- world-class technology, including our audio-visual set-up and augmented feedback technology, including force plates and bar velocity trackers
- additional training modalities, including reformer Pilates and pin-loaded strength training machines.

#### National Throws Centre of Excellence

The National Throws Centre of Excellence is a high-tech, high-performance training centre for Queensland stars of discus, shot put, javelin, hammer throw and decathlon to achieve international success. Funded by QAS in partnership with Athletics Australia (AA) and the Australian Institute of Sport (AIS), it provides consistent conditions for discus

throwers, shot put, javelin, and hammer as well as decathletes to train no matter the weather conditions - setting them up for success.



Photo Willem Overbosch: Nationals Throws Centre of Excellence, a carbon-neutral facility

This carbon-neutral building stands to give Queensland athletes the competitive advantage that they need on the road to the Brisbane 2032 Games. Furthermore, it will help accelerate the QAS' vision of Inspiring Extraordinary Sporting Success.

#### High-Performance Lab

An expansion of the QAS Performance Science department has recently been completed. The new Science Lab includes four biomechanics areas, an upgraded physiology testing space, a haematology lab, a heat chamber and an instrumented running track. It also contains five additional health suites and an altitude chamber.

#### **Recovery Centre**

The QAS Recovery Centre's 'one-stop shop' design includes a 25m cross-training pool, underwater viewing capabilities, sauna, hot spa, cold plunge pool, ice baths, stretching area, and changing rooms for Performance Support Teams.

The Recovery Centre building's environmentally sustainable design maximises energy efficiency and reduces

air conditioning use and water consumption.

#### High Performance Clinic

QAS houses an on-site medical centre incorporating a rehabilitation room, dietitian training centre and consultation rooms. The medical centre provides coaches with the ability to conduct medical screenings for their athletes, as well as musculoskeletal, medical, dietitian, and psychological evaluations. More information about the QSAC facilities can be found here: https://gsac.com.au/

Sleeman Sports Complex (Chandler) **Host:** 



**Darryl Marien**, Facilities Manager <u>Sleeman Sports Complex</u>

The Sleeman Sports Complex in Chandler, managed by Stadiums Queensland, was originally built for the Brisbane 1982 Commonwealth Games and has been a community and event venue for 40 years. Under the Brisbane 2032 Master Plan, the broader Chandler Sports Precinct is earmarked to host:

- Olympic Gymnastics and Wheelchair Basketball during the Paralympics with 10,000 spectator seats at the proposed new Chandler Indoor Sports Centre
- Olympic Diving, Artistic Swimming, Water Polo and Paralympic Aquatics, with 4,300 spectator seats at the Brisbane Aquatic Centre
- Olympic and Paralympic Track Cycling and BMX Racing, with up to 5,000 seats at each venue (some temporary) adjacent to the Velodrome.

Significant works are proposed to be carried out in the broader Chandler Sports

Precinct to improve connection and accessibility to all venues including:

- Increased equitable access throughout the site
- Improvements to lighting, CCTV, signage, etc to enhance safety/visibility and connectivity throughout the precinct
- Significant hard landscaping to create new gathering and meeting spaces within a green hub
- Improvements to services and inter-building connectivity to provide capacity to manage concurrent events
- New footpaths to support the movement of large crowds.



Click the <u>link</u> to see in large.

In addition to works to improve connection and accessibility to all venues in the Sleeman Sports Complex, options related to scheduling and programming events need to be explored to minimise transport and logistics pressure at the Complex during the Games.

According to the latest asset review only Minor upgrades are also required to the

Anna Meares Velodrome and BMX Supercross track to bring them up to international competition standards.



Photo Willem Overbosch: Sleeman velodrome

The velodrome is open to air, so keeping the temperature constant during "winter" is a challenge that has to be addressed.

#### **BMX Centre**

The track has been upgraded to the latest international design and construction trends in August 2023, including the following;

- UCI Certification;
- International standard 5m and 8m start ramps;
- Decoders on each hill and finish line, accessed via a Sqorz account;
- Lighting for day and night use.

The track is ready for the International and National BMX Racing calendar already confirmed for coming years, including the 2024 UCI BMX Racing World Cup Rounds 3 & 4 and 2026 UCI BMX Racing World Championships and the Games.

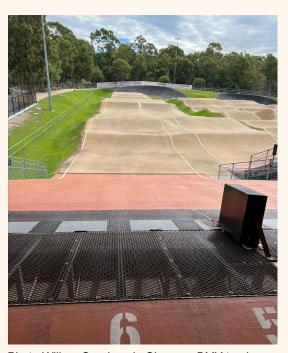


Photo Willem Overbosch: Sleeman BMX track



Photo Willem Overbosch: Sleeman BMX centre mission group



Photo Willem Overbosch: Sleeman QAS aerial skiing ramps

62 of 88 Sport & Olympic Fact-Finding Mission Report In addition to the facilities at QSAC, QAS has this High-Performance Hub at Sleeman with state-of-the-art facilities such as a gym, pool, aerial skiing, ramps and diving platforms.

More information about Sleeman can be found here: <u>Sleeman Sports Complex</u>

#### The Gabba

#### Host:



**Zoe Cunningham,** Operations Manager The Gabba Stadium

#### Key facts

- established in 1895
- a capacity of 42,000 seats
- home ground for the
  - Brisbane Lions (AFL),
  - Brisbane Heat (Cricket) and
  - Queensland Bulls (Cricket).



Photo Willem Overbosch: The Gabba mission group

Some of the key takeaways from the venue visit:

- It is currently unclear if there is going to be a redevelopment or renovation
- Expansion possibilities on site are very limited
- Not fit for Olympic purposes,
- Last redevelopment 1993-2005
- Connectivity to the city is good because of the cross-river rail (Gabba station)
- Disability access is a huge challenge

- VIP access limited
- Limited parking for suppliers

More information about the stadium: the Gabba Stadium facilities

#### Queensland Cricketers' Club

The participants were invited for lunch at the cricket club with exclusive views of the Gabba Stadium.



Photo Willem Overbosch: lunch at the Gabba

The club itself is very exclusive and has a long waiting list for members to join. Cricket is still one of the most popular sports in Australia, and the Queensland Club is one of the leading business and leisure clubs in Queensland.

#### Brisbane Convention and Exhibition Centre

The delegation participated in the <u>Venue</u> <u>Management Associations' 31st Asia</u> <u>Pacific Venue Industry Congress.</u>

The delegates participated in the session: Harnessing Venue Legacy: Shaping for Lasting Benefits



The forum consists of four experts: **Host:** 

- of State Development and Infrastructure
- in Cameron Jones, Department of Tourism and Sport
- in Prof. Alan Patching, Director of Industry Engagement at Bond University
- in Dr Neil Gibson, Director of Blacktown sportspark

The forum discussed lessons learned from the Sydney Olympics and reflected on the Legacy strategy to ensure venues contribute to communities' long-term vitality and well-being.

According to Alan Patching, who managed the Olympic Stadium for the Sydney 2000 Olympics, the legacy approach wasn'tuted well. He says it doesn't consider the real needs of the community. Venues should reflect:

- 1. Connectivity
- 2. Creativity First Nations and fine arts as an everyday culture
- 3. Equitable
- 4. Enterprising

Making a venue sustainable is to make sure it is used and has "bums on seats" and does not become a "white elephant". He urges the need for community collaboration and breaking down the silos between all parties. His example is about engaging the community to reduce complaints and resolve issues around parking restrictions.

Cameron Jones addresses the issue of loneliness. Venues can have societal and health benefits often overlooked as positive impacts. That story is not often told. Connectivity helps to reduce loneliness through the volunteer network and develop social ties beyond sports. This is also addressed as one of the potential positive outcomes in the KPMG preliminary study in 2021, highlighting that mental health issues for young kids under 14 can be reduced through sports.



#### **Crowd management**

The forum addresses that mobility & crowd management should be addressed in time to allow for behavioural change as well as changes in travel patterns and public transport.

Event Crowd Safety Institute Australia,
The topic of crowd safety as part of
crowd management, is also addressed
by delegate member Roderik van Gelder.
He's the Australian representative and
licensee of Keith Stil's crowd
management methodology applied during
the Sydney 2000 Olympics.

Theme areas within ESI are Safety Management, Security Management, Crowd Management, Mobility Management and Crisis Management The crowd safety institute has a full subsidiary in Australia.

More about: Event Crowd Safety Institute

For reference a full conference delegates list can be downloaded here.

#### Official State Visit Reception

On Tuesday evening, we attended the reception hosted by the Dutch Ambassador, Her Excellency Ms Ardi Stoios-Braken, with the theme; "Building a Sustainable Future Together". The event was attended by representatives from the Queensland Government, business representatives and representatives of the Dutch community.

#### Welcome to Country ceremony

#### Presenter:



Baringa Barambah Meeanjinu, Songwoman & Director

Turrbal

A Welcome to Country (different from an acknowledgement of the country as discussed in the section about Australian culture) is an Aboriginal cultural practice and can only be delivered by Traditional Owners/ Custodians of the land on which the event takes place. It is a spiritual ceremony in which Traditional Owners welcome people to their ancestral homelands.<sup>49</sup>

Meanjin (Brisbane) falls within the ancestral homelands of the Yuggera and Turrbal People.



The Welcome to Country was delivered by Turrbal Songwoman Baringa, a proud Turrbal and Gubbi Gubbi woman from Queensland with connections to Wakka Wakka, Kamilaroi and Birri Gubba country. Barninga added a nice touch to the

Ceremony and shared her story about living in the Netherlands. Baringa sang the Brisbane River Dreaming song, shared the story of her people, and sang the blessing song, deeply moving the audience.



Photo Floyd de Kruijff: Baringa Barambah Meeanjinu Welcome song wearing a traditional cloak.

One of the primary objectives of the descendants is to continue to keep their culture and traditions alive, through practices such as Welcome to Country.

<sup>&</sup>lt;sup>49</sup> Welcome to Country or Acknowledgement of Country | Indigenous.gov.au



#### Bio

Advier is a business partner with Springfield in a net-zero cities CRC application. Like Advier, Springfield is looking for other governance models for circular and new area development projects. Elke and her colleague Minze Walvius went on a fact-finding tour of their own to Springfield City Group.

#### Springfield site visit

Greater Springfield is a private development undertaken by the Springfield City Group and one of the fastest-growing developments in Australia; it is located in the south-west of the Brisbane metropolitan area in Queensland, Australia. It is the first privately built city in Australia and the country's largest master-planned community (tenth largest globally), encompassing 2,860 hectares (963 acres) designed to support population growth from Brisbane radiating out along the coastal strips from the Sunshine Coast down to the Gold Coast. In 2021, the population of Greater Springfield was estimated around 47,000, with a projection to grow to 105,000 residents by 2030. by 2030. Springfield's ambition is to become the world's greenest city.

Community development is managed and coordinated by Springfield City Group. The plan is to have a group of suburbs with a population of 130.000. Learnings from our visit to Springfield:

- A good balance between private and public investment can help accelerate towards the future in climate, mobility and spatial solutions.
- They have the ambition to be a city that by 2038, produces more energy than it uses. They work on combining innovation, long-term thinking and a commitment to improve the lives of residents to create a city of the future.
- With the lessons learned,
   Greater Springfield can become a blueprint for the world to follow.
- There is interest from Australian and Dutch parties in setting up a knowledge exchange with Springfield.

More information: <u>Greater Springfield</u> website.



"Inspired by Lifestyle, Driven by Opportunity"

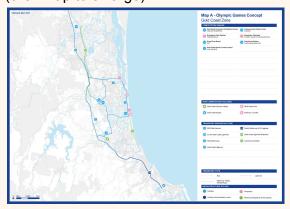
Queensland

**Gold Coast** 



#### Day 4: Gold Coast - May 22

The drive South from Brisbane CBD to the Gold Coast takes about one hour on the M1, depending on traffic. The Olympic venues and infrastructure plans can be found in the Gold Coast Zone map below (click map to enlarge):



The first stop, in good Australian morning tradition, is a fresh coffee at the Burleigh Pavillion in Burleigh Heads with a great view of the beaches.



Photo Willem Overbosch: mission team at Burleigh Heads with Gold Coast in the background.

This is the perfect welcome and embodiment of the Gold Coast city council payoff: "Inspired by Lifestyle, Driven by Opportunity"

#### Key facts

 The Gold Coast is home to the Yugambeh People and they are

- recognised as the traditional owners of the land
- Australia's largest regional economy
- Australia's 2nd largest Local Government
- Australia's 6th largest city overall
- Host city of the Gold Coast 2018
   Commonwealth Games
- 22nd best sports city in the world (BCW Global index 2022)
- Host City Sport Accord 2019
- Based on 2023 data: 78,000 business and 336,343 jobs
- Top 5 largest industries by employment: Healthcare & hospitals, Construction, Retail trade, Education, Accommodation and Food services

General comparison to South East Queensland:

Queenolana.					
	Gold Coast	SEQ			
Total area (land and water)	1,334 km²	35,248 km <sup>2</sup>			
Population	666,087	3,780,000			
Population density inhab/km²	499.4	107.24			
Businesses	78,020	372,664			
Employment	346,474	2,111,431			
Total GRP (USD)	\$ 29.99bn (approx)	\$ 202bn (approx)			
GRP per Capita (USD)	\$ 45,02bn (approx)	\$ 53,439 (approx)			
For more information and community profile, visit					

For more information and community profile, visit <a href="https://profile.id.com.au/gold-coast">https://profile.id.com.au/gold-coast</a>

#### Fact-finding tour

After the coffee break at the Southern end of the Gold coast we drove West towards the Gold Coast Stadium and Bond University for the second stop of the tour.

#### Host of today:



**Lachlan McKallar**Sports Attraction lead

#### **Bond University**

#### Host:



**Michael Collins**, Director of Sport, Bond University

Bond University, established in 1987 as Australia's first private university, enrolled 5,600 students in 2022. During the past 30 years, Bond has become one of Australia's leading tertiary institutions, renowned for its expertise in study areas ranging from business, law, medicine, architecture, and data analytics, to film and television, communication, sports management, and occupational therapy.



Photo source: Joren Schep. Centre-right CEO Micahel Collins at the sports facilities.

Michael, A former New Zealand Chief Rugby CEO and professional rugby player, hosted the tour around the university premises, emphasising the high-performance facilities at Bond.



Photo source: Joren Schep. Bond University with Gold Coast Stadium in the background.

#### **Gold Coast City Council**

#### Presenter:



Peter McGuinnes, Principal Industry & economic development officer

Peter kicks off by sharing the story that 60 years ago, the Gold Coast was just a 56 km long strip of white sand. It is now one of Australia's most striving Councils with research institutes, a diversity of biodiversity, warehousing, people living at the marinas, a sport tech ecosystem and an Airport.



Photo source: Lachlan McKallar. City of Gold Coast presentations

#### Presenter:



#### Scott Krueger, Infrastructure manager

Scott continues the presentations by sharing more information about the Gold Coast and the games. There are four existing venues and two temporary venues for the Games.

#### **Existing Gold Coast venues**

- Gold Coast Sport and Leisure Centre
  - Olympic judo and wrestling, and the
  - Paralympic boccia.
  - spectator capacity of 7,500
- Gold Coast Stadium
  - football (soccer) preliminaries;
  - spectator capacity of 27,400.

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- Coomera Indoor Sports Centre
  - Olympic volleyball;
  - Paralympic wheelchair rugby;
  - spectator capacity of 11.000.
- Gold Coast Convention and Exhibition Centre
  - Olympic volleyball preliminaries
  - o weightlifting;
  - Paralympic sitting volleyball and powerlifting
- spectator capacity of up to 6,000

#### Temporary venues

- Broadbeach Park Stadium
  - Olympic beach volleyball;
  - Paralympic 5-a-side football;
  - capacity for 12,000 spectators.
- Southport Broadwater Parklands
  - Olympic triathlon;
  - aquatics (swimming marathon);
  - Paralympic triathlon;
  - o spectator capacity of 5,000.

#### Non-competition venues

- Olympic and Paralympic Village home to 2,600 athletes and officials.
- Festival / live site where spectators can watch all the action.

Four pillars for the Gold Coast in the Legacy Framework:

- Connected
- · Healthy and Green
- Future
- Inclusive

#### Presenter:



Angus Rose, Investment manager

Angus highlights a lack of **affordable housing** on the Gold Coast. He highlights

this as an opportunity to develop "built-to-rent" properties. The Gold Coast is looking for partnerships with long-term investment partners such as pension funds.

This is typically an opportunity for companies like Dutch investor <u>Invesis</u>. They recently added a <u>social housing</u> <u>project</u> in Melbourne to their portfolio.

In general, all presenters agree that data is key to developing the region and that aggregated (connected) data is still something they could improve on. They work with the Australian Sports & Technology Network to improve this but welcome suggestions from the Dutch.

Collaboration is a key success factor for delivering the games, and to achieve a sustainable transformation it is important to "break down the silos" between all stakeholders.

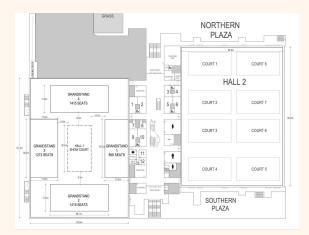
The tour continues via the "Green Heart" of Robina, where the Athletics village development is planned. Currently an undeveloped (empty) area. We continue to The Gold Coast Sports Precinct.

#### Gold Coast Sports and Athletics Centre

The centre, opened in 2017 hosted the Gold Coast 2018 Commonwealth Games and is the home to the AFL's Gold Coast Suns. The Centre is earmarked to host the Olympic judo and wrestling, and the boccia for the Paralympics, with 7,500 spectator seats, including temporary seats.

It is a multipurpose venue with

- 2 indoor halls,
- 15 multisport courts to host a range of sports like basketball, netball, Futsal, badminton



During our visit, there are school tournaments in hall 1 and the middle "corridor" is full of students. We are all quite impressed by the sheer size of Hall 2 with 8 courts, and agree that buildings this size are unseen in The Netherlands.

Some of the facility specifics can be found here: Gold Coast Sports & Leisure Centre venue hire and here Gold Coast Sport and Leisure Centre | The Games Map | Q2032

Additional information on Gold Coast:

<u>Gold coast Sports attraction program</u>

<u>Gold coast Investment prospectus</u>

#### Gold Coast Health & Knowledge Precinct (GCHKP)

"If you never look beyond the horizon, you'll never see the future."

The tour continues to the GKHKP, and the participants enjoy lunch at the COHORT innovation hub left on the map below (click the map to enlarge).





Photo Source: Willem Overbosch the "esky" with drinks

Following good Australian traditions, the drinks are served in a coolbox, commonly known as the "esky"

After lunch the lunch is further familiarised with the opportunities at the GCHKP.

#### Griffith University Sports College

#### Presenter:



## Duncan Free, Director, Sports Engagement; Gold Medal Olympian (rowing)

Griffith University is not only Australia's third largest University, but the Sports College is Australia's most successful sports university according to the statistics below:



#### Women in Sports

One of the important takeaways of the high-performance athletes program is the focus on female athletes. Griffith's Women in Sport strategy aims to achieve greater equity and better outcomes for all women in sport, including athletes and those

working in the industry. More information on the program can be found here: Griffith university women in sport.

#### Gold Coast Health & Knowledge Precinct **Presenter:**



#### Craig Rowsel,

Director Gold Coast Health and Knowledge Precinct

Graig, addresses the key stats of the GCHKP below:



#### Key niche capabilities:

- Advanced design and prototyping
- New materials and sensors
- · Al and digital health
- Tourism and hospitality research
- Advanced Neurorehabilitation
- Clinical Trials
- Aerospace
- Nursing
- Midwifery and allied health medtech
- Vaccines, drugs and diagnostics
- Environmental solutions
- Sports Management, Technologies & facilities
- Neurovascular treatments and training
- Robotic surgeries

Greg highlights that the GCHKP is a thriving ecosystem with lots of opportunities for industry and business to connect. Philips, for example, is one of the international companies investing in the region via GCHKP.

#### **COHORT** - incubator

Craig then introduces COHORT, with 50 startups on site, is Queensland's largest startup facility. The ecosystem of sport & knowledge and hospital facilities as well as the access to athlete athletes from the Southport B.

#### Presenter:



#### Robert Nash,

CEO Braineye

Braineye, an Israel-founded eye-tracking technology with Australian Investors, helps to detect brain damage and concussions with an app that looks into your eyes. This is a good example of what's possible in leveraging sports and technology, The Olympics and the knowledge ecosystems at the GCHKP. Robert provides insights into a 43% R&D tax incentive grant available for eligible companies with an office and Intellectual property in Australia. More information about the R&D tax incentive grants can be found here



Photo Source: Willem Overbosch: participants at Cohort

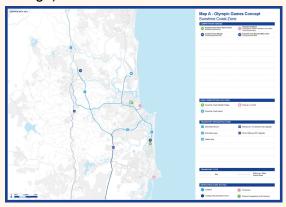
More information about Cohort can be found here: <u>Cohort Innovation Space</u>.



## Day 5: Sunshine Coast - May 23



Final day of the mission and a trip to Sunshine Coast, approximately 100 km North of Brisbane. It takes about 1,5 hours via the main M1 highway to get to the city centre to Maroochydore, the central hub of the region. The 60 km coastline stretches from Caloundra in the South to Noosa in the North. The Sunshine Coast Olympic Zone venue map is below (click map to enlarge).



#### **Key Facts**

- The Sunshine Coast is home to Kabi Kabi peoples and the Jinibara peoples, and they are recognised as the traditional owners of the land <sup>50</sup>;
- Sunshine Coast will host Olympic and Paralympic events such as::
  - o Football / Soccer
  - Marathon
  - Cycling
  - Mountain Biking
  - Kite-surfing
- One of Australia's fastest growing regions
- Attracting national and global talent

- Ninth largest local government area in Australia
- Workforce catchment of 1+ million
- 35,000+ businesses
- Population forecast\* to grow to
  - 498,500 by 2031
  - o 583,000 by 2041
- Highly connected business community
- 2022 & 2023 Sunshine Coast crowned in the top three "most loved travel destination in the world".

#### General comparison to the Netherlands:

	Sunshine Coast	SEQ
Total area (land water)	2,291 km²	35,248 km²
Population	365,942	3,780,000
Population density inhab/km2	159,8	107.24
Businesses	36,811	372,644
Employment	186,932	2,111,431
Total GRP (USD)	\$ 15,69bn	\$ 202bn
GRP per Capita (USD)	\$ 42,876	\$ 53,439

More information and community profile visit About the profile areas | Sunshine Coast

#### Fact-finding tour



Photo Source: Willem Overbosch: Presentation at Sunshine Coast Council

<sup>&</sup>lt;sup>50</sup> Kabi Kabi people recognised as native title holders over the Sunshine Coast - ABC News

#### Economic development

#### Presenter:



Chris Le Serve, Head of Economic Development of Sunshine Coast Council

Chris welcomed the mission and provided an overview of the region. He states that Australia is in transformation, and people from the cities are migrating to the Sunshine Coast for lifestyle reasons. One of the key takeaways is that, on June 15th 2022, the Sunshine Coast is the latest of Australia's five UNESCO biosphere reserves. The reserve will link the existing Noosa and Great Sandy biosphere reserves along the southern Queensland coast. The Sunshine Coast Biosphere Reserve aligns with the boundaries of the Sunshine Coast Council. It covers a total area of 258,500 hectares and features protected marine and terrestrial areas, rural lifestyles, and urban areas where people live and work.

This puts economic development in a very unique perspective, encompassing both biological and cultural diversity with a rich Indigenous and multicultural history that provides for a range of lifestyles and includes historical places that are valued by the community.

At the same time, there's a regional development blueprint with a 20-year horizon and a focus on seven key industries:

- Knowledge Industries & Professional services
- Education & Research
- Health and Well-being
- Food and Agribusiness
- Aviation and Aerospace
- Tourism, Sport & Leisure
- Clean Technologies

There's key attention on topics like AI, Robotics, automation and remote operation centres.

The aspiration is to grow the regional economy from AUD 23.73bn in 2023 to AUD 33bn in 2033. At the same time, the Sunshine Coast wants to exceed Household income levels by then.

#### Testing tech in Paradise

#### Presenter:



#### Alex Lever-Shaw

Head of Investment Trade and International Economic Development

The region is banking its growth partly on the higher-than-average Broadband connection to Asia and the USA. It will allow high-tech companies to work and connect to the rest of the world without latency.

High focus on ESports (gaming industry Sportstech and remote operations like:

- Immersive Technologies (AR), (VR) and (XR)
- Robotics and Drones
- Automation
- Remote Operation Supervision
- Cyber security

### Olympic & Paralympic games at Sunshine Coast

#### Presenter:



#### **Grantly Switzer**, Sunshine Coast Program

Lead - Brisbane 2032

Grantly presented the venues Masterplan for the Sunshine Coast with

- Sunshine Coast Stadium
- Kawana Sports Precinct
- Sunshine Coast indoor sports centre
- Mountain bike centre
- Athletes Village in Maroochydore

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As recently as May 17th, three Sunshine Coast sporting venues have been given the green light to progress to tender following a funding commitment of almost AUD 300 million by the Queensland and Australian governments.

The funding signals the largest-ever investment in community sporting infrastructure on the Sunshine Coast, including

- AUD 148 million for Sunshine Coast Stadium expansion;
- AUD 142 million new Indoor Sports Centre in Kawana;
- AUD 14 million Mountain Bike Centre at Parklands.

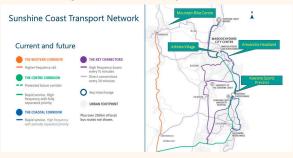
These upgrades are on track to be delivered in 2027, with construction of the Sunshine Coast Stadium Expansion planned to start later in 2024.

The planning and design phase of the Sunshine Coast Indoor Sports Centre and Mountain Bike Centre will continue to progress, with construction of those two venues proposed to start in 2025 and 2026, respectively.

Most capital funding for the three venues will come from the Queensland and Australian governments, with Sunshine Coast Council set to assume ownership and management of these venues once complete.

#### Last mile transportation connectivity

Key to the development of the region and a good "fan experience" for the Olympics is improving the connectivity.



The plans to connect Brisbane to the Sunshine Coast have been on the books since the 1990s. Now that the Games are coming, the infrastructure project's first stage from Beerwah to Caloundra ( the green line at the Southern end of the Sunshine Coast map above) includes 19 km of track, ten bridges, an overpass over the Bruce Highway, and about 7km of elevated rail over wetlands.

The construction phase will start in 2026, to be completed by 2032.

#### **Smart Cities & internet**

#### Presenter:



Michael Whereat, Smart Cities Lead

Michael unpacked the development of the Maroochydore city centre and the development of the Athletics village:

- AUD 2.5bn
- 53 hectares of council-owned land
- 4000 new dwellings
- 20 years horizon
- 2032 Olympics and Paralympics Athletes village

Michael emphasised the importance of "digital plumbing" of infrastructure and the unique position it puts the Sunshine coast in compared to other regions that do not have fast internet.

It was good to hear about the progress on Smart Cities. Willem Overbosch, participating in this mission was also a participant in the 2016 Royal Trade Mission to Australia and visited the Sunshine Coast when Michael Whereat was presenting the fast internet plans. It is impressive to see how much progress has been achieved over an eight-year period.

While the Sunshine Coast, no doubt, has the digital plumbing in place, it will take a lot more to make the fan experience smooth towards the Game. Accessibility both for residents and Paralympians seems to be the challenge and an opportunity for Dutch Businesses to look into.

#### **Sunshine Coast Stadium**

#### Presenter:



### **Simon Ball,** Venue manager

The mission team then visited the Sunshine Coast Stadium located on the Kawana Sports Precinct, a 45-hectare facility which hosts an array of events, including international, national, state and local games, training camps, community events, as well as major live entertainment events.



Simon kicks off with a story that the stadium was home to Dutch Head Coach Sarina Wiegman and her English soccer team "the Lionesses" during their preparations towards the FIFA 2023 Women's World Cup in Australia.



Photo Source: Willem Overbosch: participants at Sunshine Coast Stadium

#### Key facts:

- Sunshine Coast Stadium
  - International Standard
     playing field with broadcast
     standard LED lighting
  - Grandstand seating capacity of 1,046 and 10,000 general admission capacity (today)
  - Upgrade to 20,000 seat capacity (9,000 temporary) will start later 2024 and completion 2027 The
  - An additional 9 National Standard sized fields within close proximity, including field lighting.
  - Home to the Olympic Football preliminary matches and a quarter-final;
- Kawana Sports (Eastern) Precinct
- Kawana Sports Western Precinct
- Lake Kawana
- High-Performance Training Facility



Photo Source: Willem Overbosch: participants at Sunshine Coast Stadium, inspecting the grass

The stadium is located approximately one hour north of Brisbane. It is easily accessible by car, but public transport requires more planning at this moment. Alternatively, you can fly into the Sunshine Coast Airport and drive 20 minutes to the venue by car, taxi, or shuttle bus.

The new development of the Sunshine Coast Indoor Sports Centre, with a foreseen capacity of 6,000 seats, will be developed on this precinct to host the Olympic basketball events.

The newly developed stadium will support long-term professional sports, entertainment, and community needs in the context of Legacy 2042.

The group of beach explorers rejoined the rest of the mission and the week was concluded with an Italian lunch before leaving for home interstate in Australia or back to The Netherlands.

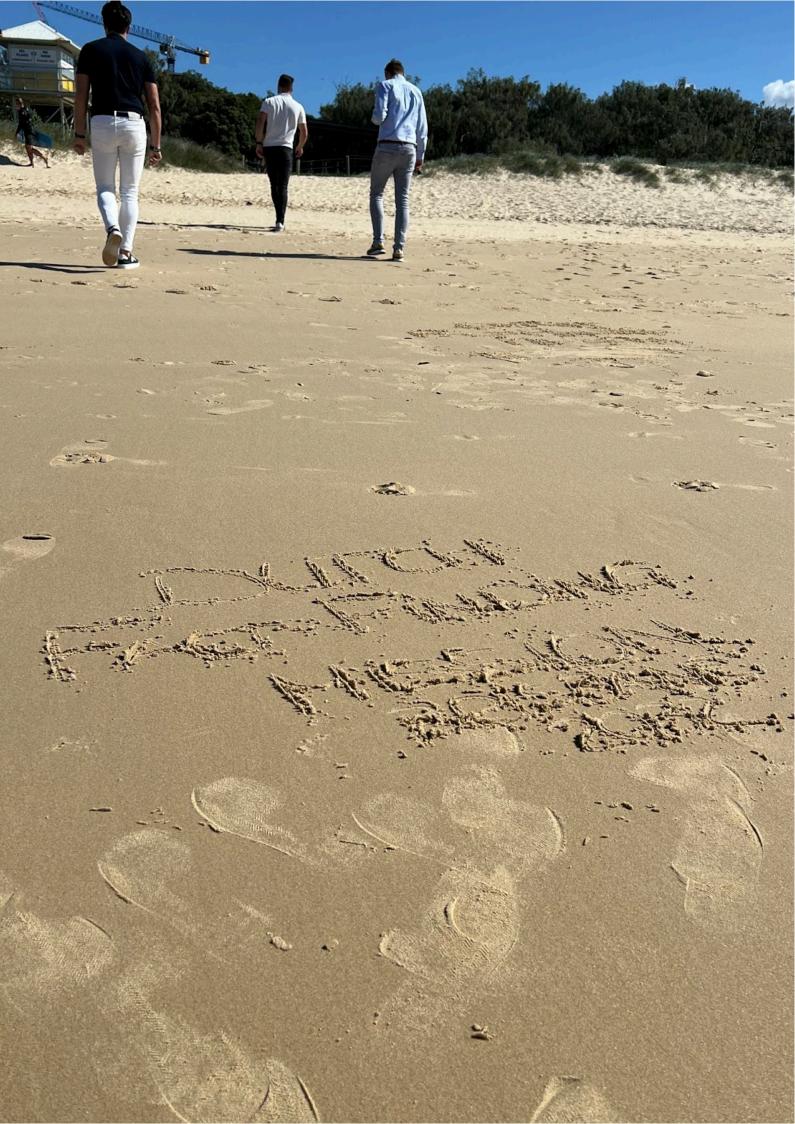
Before lunch, a small team explored the beach and left a final writing in the sand: "Dutch Fact Finding Mission Brisbane 2024" (see next page)

#### Radio interview

<u>Hugo Klein</u> NL Consul General Sydney



Link: Nederlandse sportmissie naar QLD



# Conclusions



# Conclusions Think Big, Act Small, Start Now

Australia, the 'Lucky Country', offers numerous opportunities, but is far from the Netherlands and Europe. Australia's passion for sports and the upcoming Olympics is huge and something to leverage in business. The 2032 Olympic and Paralympic games fit into a 20-year (Elevate 2042) vision for the South East Queensland (SEQ) region while also serving as a catalyst for collaboration and business opportunities across four themes:

- Sports health and inclusion
- Economy of the future
- A better future for our environment
- Connecting people and places

With the proximity of more than five Universities, favourable R&D incentives, a rapidly improving digital infrastructure and a great lifestyle SEQ is a very attractive Australian region to invest in, position **NL branding** and facilitate business. The fact-finding mission and the research have identified the following potential pathways to make Australia a top priority in the years to come.

#### **Built environment & water**

Building resilient and low-carbon infrastructure is key to meeting the Olympic ambitions. The majority of the AUD 180bn investments will go to develop infrastructure so this is a key focus for organisations in Infrastructure, Stadiums & venues and Water management. This provides opportunities to showcase Dutch venues like **Johan Cruijff Arena** and help existing and new Olympic venues meet Global Sustainability Standards like **GSES**.<sup>51</sup>

With the recent flooding events as well as other extreme weather conditions the opportunities in water management are evident in designing for a better future.

#### Mobility & crowd management

Public transport in SEQ is still underdeveloped. Despite the recent commitments to connect Brisbane, Sunshine Coast and Gold Coast there's potential for sustainable buses and cycling infrastructure suppliers. Our leading knowledge and expertise in mobility, Smart Cities and crowd management as well as connected data capabilities allows Dutch suppliers to partner up with Australian stakeholders. Dutch companies have experience with large events like the F1 Zandvoort Grand Prix and the Rotterdam Marathon. Companies like **Argaleo** leverage data to help improve crowd safety, security and vitality via digital twin-related dashboards.<sup>52</sup>

#### Digital- and sports technology

Australians love their sport and that shows in the commitments SEQ stakeholders have made to the various sports campuses and technology hubs. Digital transformation is driving value chains to develop technology solutions at scale and with the rapidly growing number of sports events in the region in the years to come sports can enable health and inclusion. There's opportunity here in Smart stadium tech companies like **Sorama** <sup>53</sup>using sound technology to increase fan engagement in stadiums.

#### Sustainable Development

It is important to recognize sustainability variations between Australia and the Netherlands. Climate action and circular economy are key topics for business and

<sup>&</sup>lt;sup>51</sup> <u>Johan Cruijff ArenA en GSES lanceren internationale</u> <u>duurzaamheidsstandaard</u>

 <sup>52</sup> Integral Safety Dashboard for Marathon Rotterdam -Argaleo
 53 Smart Stadium Acoustic Camera for Fan Engagement &

<sup>53</sup> Smart Stadium Acoustic Camera for Fan Engagement & Security

government, but familiarity with the broader concept of sustainability is still emerging. Mandatory non-financial reporting on ESG topics will take effect starting in 2025 for large corporations and change is on the horizon. This is an excellent opportunity for Dutch companies like **Metabolic** (consulting in the Circular economy space), **Excess Materials Exchange** (shifting waste streams away from landfill) and **Madaster** (providing materials passports to circular buildings) delivering ESG data and insights.<sup>54</sup>

#### Collaboration: The new competition

Australian counterparts are keen to learn from the Dutch and are inspired by the 2050 Circular economy ambitions with an emphasis on decarbonisation and waste management. There is room to improve landfill diversion and shift attention towards higher-value programs to refuse, reuse and repurpose before recycling is discussed. Crossovers with existing programs should be considered and brought into the longer-term conversation. In particular around circular procurement practices, hydrogen and alternative fuels. There is also an opportunity to develop public-private partnerships to dismantle the barriers between Federal, State, and Council levels in South East Queensland, identify gaps, and bridge them. True collaboration is essential to fully realising Legacy 2042 and ensuring a better future for the environment.

#### Key takeaways from participants

Early involvement in Brisbane's procurement is crucial, emphasising sustainability and local content. Visit Australia to understand opportunities firsthand. Invest time in building strong business connections and realise that introductions are essential for effective

<sup>54</sup> <u>Metabolic</u>, <u>Excess Materials Exchange</u>, Madaster business operations. Local governments need efficient procurement support and collaboration with local firms is essential. Act quickly to capitalise on innovation opportunities linked to the Olympics. Establishing continuity in public and private business relationships in Australia, particularly in SEQ. Building trust requires time, effort, and access to real-time information and relevant contacts. Avoid **Business As Usual** pitfalls and ensure that that initial '**positive energy**' is not lost due to the physical distance.

#### Next Steps: Team up and Get Fit

Identify local demand, capabilities, and ecosystems and fill gaps with Dutch capabilities via a SEQ Gap Analysis. Given the physical distance and the long-term horizon of the opportunity, explore the concept of Internationalisation "as a Service" Collaboration reduces the costs of Business Development and information aggregation (data) through shared services and resources. Support from private sector representatives, such as Orange Sports Forum, can help develop a network of partners in Australia to support the Business Case while leveraging existing (local on- and offline) networks, including the Dutch Chamber of Commerce in Queensland to provide **Business Matchmaking Services.** 

#### The future is now

Sport is the perfect catalyst for a long-term narrative. To get ready by 2032 the recommendation is to think **Big**, act **Small** and start **Now**. The long-term goal is to streamline information gathering and business development operations at a national level, focusing on execution and achieving **sustainable growth** for the Dutch and Australian public and private sector organisations towards the Brisbane 2032 Games and beyond.

# INTERVIEW



#### Rick Sleegers

Director of Internatinal Affairs
Orange Sports Forum



#### Bio

Rick has been working with Orange Sports Forum for 10 years. Orange Sports Forum is a platform for the promotion of companies, organisations and institutions involved in Dutch sports. Its members include organisations that focus both on the 'hardware' (infrastructure, accommodation, goods), but also on 'software' (training, coaching, education, marketing) of the sports world.

#### **Learnings**

#### Venues

Compared to the USA and The Netherlands, the current state of the venues we have seen provide opportunity for improvement. They were relatively "basic" in terms of ticketing, entry points and led light shows. This was explicitly mentioned when we visited the Gabba.

Fan engagement is another opportunity. Member company Sorama.eu is a good example of how technology can help identify hot spots with noise and relay that back to lights and video to increase experience. The technology is not limited to fan experience and is also applied in oil and gas (detecting leaks in pipelines based on sound patterns) as well as in road transportation to measure the types of vehicles based on sound.

So, many major international events will take place in the upcoming years. This offers opportunities for event suppliers (water, AV equipment, fan engagement, ticketing, etc.).

Some organisations rely on EU summer peak seasons for their work. Perhaps there are opportunities to leverage the difference between peak seasons in the Northern and Southern Hemisphere.

MTD is a specialised company that delivers temporary water infrastructures to large events like Formula1 in Miami, Vegas, and European championships. The venues need to be ready at least one year in advance of the Olympics. Towards 2032, there will also be many major (test) events in the new venues.

#### Logistics

Logistics and infrastructure are already a challenge and will become more important towards the Olympics. This is an opportunity for Dutch companies in the built environment, infrastructural projects and transportation (cycling or electric buses)

Sustainability and circularity.

Fokker Next Gen is developing a hydrogen-powered plane. Sydney to Melbourne is one of the most traffic intense routes in the world and is very well equipped for aeroplanes on sustainable aviation fuels.

Collaboration presents another opportunity. For example, talent scouting is a chance for Dutch soccer teams. In general, Rick is very positive about the opportunities for Dutch Businesses.

#### Next Steps:

- Presenting the fact-finding mission conclusions in The Netherlands is a first step to familiarise stakeholders with the opportunities in Australia;
- It is key to start building the (digital) networks in Australia and Queensland to prepare for future business opportunities;
- Identifying the demand in Australia and the supply from the Netherlands;
- Potentially a three-year PIB program with annual trade missions;





#### Elmir Gobeljic

Teamcoördinator BD & Sector Accounts Netwerkcoördinator Trade & Innovate NL



#### Bio

Elmir works for the Netherlands Enterprise Agency and represented SportsNL on this mission.

#### **Observations:**

Australians have a broad perspective on sports compared to the Netherlands. Sports are everywhere. At schools, in pubs, on television and in the field. And it's not just one sport, Australians are passionate about all sports at all levels.

This broad and inclusive approach is reflected in the plans for the Games with a focus on inclusivity, the environment as well as a legacy for communities. As a lot of attention seems to be going towards Brisbane and the Gold Coast, Elmir recommends businesses considering going to Australia to take a closer look at the Sunshine Coast.

Digitalisation & digital infrastructure
The opportunity for data still seems to be very large, especially around stadiums and events. Think about drone displays or holographics, e-ticketing, AI crowd monitoring, 'smart stadiums' and augmented reality.

#### Recommendation

Elmir emphasises that the fact-finding mission was a mix of local and international businesses. There was so much crossover and learning. That should be part of more missions moving forward.

Another benefit is that it offers direct access to individuals with local expertise, which is essential for building long-term partnerships, especially given the geographical distance between Australia and the Netherlands.

#### **APPENDIX**

## Olympic & Paralympic Venues

A total of 34 venues will be used during the Games. The majority of the venues are existing or temporary<sup>55</sup>

This is a link to the <u>Olympic sport venues</u> connect finder.

#### **NEW VENUES**

Venue	Capacity*	Brisbane 2032 use**
Brisbane Arena	15,000	Swimming, Paralympic swimming, Waterpolo (finals)
Brisbane Indoor Sports Centre	TBD	TBD (High performance sport centre)
Chandler Indoor Sport Centre (Brisbane)	10,000	Gymnastics, wheelchair Basketball
Moreton Bay Indoor Sports Centre	7,000	Boxing
Redland Whitewater Centre (Redlands)	8,000	Canoe slalom
Sunshine Coast Indoor Sports Centre	6,000	Basketball

<sup>\*</sup> Capacity reflects seats available during the Games and may include temporary seating.

#### **UPGRADED VENUES**

Venue	Capacity*	Brisbane 2032 use**
Barlow Park (Cairns)	20,000	Football preliminaries
Brisbane Aquatic Centre	5,000 (tbc)	Diving, water polo, aquatics
Brisbane Cricket Ground (Gabba)	42,000	TBD
Brisbane International Shooting Centre	2,000	Olympic and Paralympic Shooting
Brisbane Stadium (Lang Park)	52,500	TBD - (Opening/Closing Ceremony)
QSAC (Brisbane)	48,500	TBD (Athletics)
Sunshine Coast Mountain Bike Centre	10,000	Mountain bike events
Sunshine Coast Stadium	20,000	Football preliminaries
Wyaralong Flat Water Centre	14,000	Canoe Sprint, Rowing

<sup>\*\*</sup> Final uses of all venues will depend on final sports to be included and will be determined by 2027.

#### **EXISTING VENUES**

Venue	Capacity*	Brisbane 2032 use**
Ballymore Stadium (Brisbane)	10,000	Hockey
Brisbane Convention and Exhibition Centre	6,500	Table tennis, fencing, taekwondo, badminton, Paralympic judo
Brisbane Entertainment Centre	11,000	Handball, Paralympic goalball
Brisbane Showgrounds	15,000	Equestrian
Chandler Sports Precinct (Brisbane)	5,000	Track cycling, BMX racing
Coomera (Gold Coast)	11,000	Indoor Volleyball, wheelchair rugby
Gold Coast Convention and Exhibition Centre	2x 6,000	Volleyball, weightlifting
Gold Coast Sport and Leisure Centre	7,500	Judo, wrestling, boccia

Venue	Capacity*	Brisbane 2032 use**
Gold Coast Stadium	27,000	Football preliminaries
Ipswich Stadium	10,000	Pentathlon
Manly Boat Harbour (Brisbane)	10,000	Sailing
North Queensland Stadium (Townsville)	25,000	Football preliminaries
Queensland Tennis Centre (Brisbane)	5,500	Tennis
Royal Queensland Golf Club (Brisbane)	15,000	Golf
South Bank Piazza	4,500	Basketball 3x3

<sup>\*</sup> Capacity reflects seats available during the Games and may include temporary seating.

\*\* Final uses of all venues will depend on the final sports

to be included and will be determined by 2027.

#### **About**

## The Diplomatic Mission of the Netherlands



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The Economic Team of the Netherlands' consulate-general covers all trade and investment-related matters across Australia. Its mission is to promote economic relations between the Netherlands and Australia. The main objective is to identify opportunities for Dutch businesses in the Australian market and to do so in a manner that emphasises collaboration and partnerships to achieve mutual benefits.

For more info, visit Netherlands And You

#### **SportsNL**

SportsNL is a public-private initiative that connects stakeholders in the Dutch sports sector. By bringing together Dutch companies, government agencies, social organisations, and knowledge institutions, the Netherlands aims to be an internationally recognised partner for inclusive, sustainable, and innovative sports experiences.

SportsNL is dedicated to elevating sport, sustainability, inclusivity, and innovation to the next level through international collaboration. We seek to connect with a global network of businesses, government bodies, sports and social organisations, and knowledge centres through shared priorities and long-term public-private partnerships. This will be achieved through various inbound and outbound activities.

SportsNL is coordinated by the Netherlands Enterprise Agency.

#### Further reading & references

#### **AUSTRALIA**

- Australia-Netherlands Trade and Investment Report | Austrade
- 2017 Report Dutch Tech
   Fact-Finding Mission to Australia

#### **OLYMPICS**

- KPMG Pre-Olympic review Brisbane 2032 Olympic and Paralympic Games
- Establishment of independent
   Games Delivery Authority
- Brisbane Olympics Q2032
- Go For Gold (Schools; infrastructure & equipment)
- YouFor2032 (multi sport talent identification program)
- Sports mission to Los Angeles, USA
- RVO Bidbook OS 2024 by RVOsport Issuu

#### **QUEENSLAND**

- Spotlight on QLD Report TIQ
- <u>BUY Queensland Procurement</u> policy & Procurement Strategy
- Queensland Energy and Jobs Plan
- Long term vision for SouthEast QLD
- Doing Business in Queensland
- Investment Prospectus
- Queensland's 2035 Clean
   Economy Pathway
- State Infrastructure Strategy

#### Other plans/strategies

- Queensland Organics Strategy 2022-2032
- Queensland Clean Energy Workforce Roadmap
- Hydrogen Industry Workforce
   Development Roadmap 2022-2032

- Queensland New Industry
   Development Strategy
- Queensland Resources Industry Development Plan
- Queensland Critical Minerals Strategy
- Zero Emission Vehicle Strategy 2022-2032
- Zero Emission Vehicle Action Plan 2022-2024
- Advanced Manufacturing 10-Year
   Roadmap and Action Plan

#### BRISBANE

- State of the City Report
- Brisbane. Clean, Green, Sustainable
- Zero Waste Strategy (Draft)
- Brisbane Voluntary Local Review
- Brisbane, Australia reaches SDG
   Cities Gold Level
- Voluntary review Brisbane

#### GOLD COAST

• Gold Coast Investment Prospectus

#### SUNSHINE COAST

• Corporate Plan 2024-2028

#### OTHER LINKS

- Business Chambers Queensland -Ecobiz program
- CSIRO Circularity report 2024
- Interim Report Circular Economy Advisory Committee (Federal)
- Fact-finding study on status and future needs regarding low- and zero-emission urban mobility