

## Sarah Partosh

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**From:** Julia Sheedy  
**Sent:** Wednesday, 10 June 2020 1:52 PM  
**To:** Dave Stewart  
**Cc:** Madison Cann  
**Subject:** FW: TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC  
**Attachments:** PREMIER MEETING BRIEF - Premier virtually meeting with Mr Andrew Liveris AO - 11 June 2020.DOCX; Attachment 1 - Talking Points - Premier virtually meeting with Mr Andrew Liveris AO - 11 June 2020.DOCX; Attachment 2 - NCCC Manufacturing Taskforce - Interim Draft Report presentation.PDF

Hi Dave

For your approval.

Thanks  
Julia

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**From:** Correspondence DG (DPC) <CorrespondenceDG.DPC@premiers.qld.gov.au>  
**Sent:** Wednesday, 10 June 2020 12:01 PM  
**To:** Julia Sheedy <julia.sheedy@premiers.qld.gov.au>  
**Subject:** TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Hey Julia.

Please find attached TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC for your review.



Queensland  
Government

**Madison Cann**

Senior Administration Officer  
**Office of the Director-General**  
Department of the Premier and Cabinet

P 07 3003 9476 M [REDACTED] E [Madison.cann@premiers.qld.gov.au](mailto:Madison.cann@premiers.qld.gov.au)  
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## Premier's Meeting Briefing Note

**SUBJECT**

The following information is provided to support your virtual meeting with Mr Andrew Liveris AO, Special Adviser to the Federal Government's National Covid-19 Coordination Commission (NCCC).

<b>JOBS</b>	The Queensland manufacturing industry employed over 165,000 workers as at March 2020.
<b>FUNDING BREAKDOWN</b>	N/A

**DETAILS**

- Date: Thursday, 11 June 2020
- Time: TBC by PO
- Venue: TBC by PO (virtual meeting)

**KEY ISSUE/S EXPECTED TO BE RAISED IN RELATION TO EVENT**

**1) COVID-19 – Personal protective equipment manufacturing**

- The COVID-19 global pandemic exposed the fragility of global supply chains for Personal Protective Equipment (PPE) and other essential products and revealed limited local manufacturing of these products. A lack of secure supply chains meant there was a risk in healthcare workers having insufficient supply of equipment.
- As part of the Queensland Government's response to COVID-19, Queensland companies were supported to produce PPE and essential products to address critical supply chain issues and to build self-reliance against the possibility of future epidemics.
- Examples of companies that, with Queensland Government support, pivoted their existing capabilities to manufacture PPE and other essential products, include:
  - Evolve Group and ██████████ – to pivot their manufacturing to make P2 and surgical masks respectively at Level 2 and 3 for hospitals.
  - Sacha Drake – a Queensland clothing manufacturer, producing fabric reusable gowns for Queensland Health.
  - Distilleries such as Bundaberg Rum, Beenleigh Rum and Saleyards Distillery – switching production to supply ethanol to support the production of hand sanitiser.
  - Triple Eight Motor Race Engineering – retooling to manufacture an emergency ventilator prototype.
- The #MakingItForQLD marketing campaign was launched in April 2020 to showcase the work in the manufacturing sector and its capabilities in Queensland. This campaign has been viewed more than five million times.
- As part of the Queensland Economic Recovery Strategy: *Unite and Recover for Queensland Jobs*, up to \$50 million has been announced for the Making it for Queensland fund, to target and support the expansion of Queensland's vital manufacturing sector and production capacity, with a focus on Queensland's advanced manufacturing capacity, particularly in biomedical and health.
- A dedicated Queensland Government website landing page was established to match manufacturers to the products they needed to keep operating, with over 400 enquiries from industry, and 330 connections from businesses to potential suppliers since the Manufacturing Supply Matching webpage was launched in March 2020.

**2) Advanced manufacturing in the post COVID-19 economy**

- The *Advanced Manufacturing Roadmap and Action Plan* (the Roadmap) was launched in December 2016 and an updated second edition of the Roadmap was released in November 2018.

- The Roadmap highlights the importance for industry to embrace advanced manufacturing, also known as Industry 4.0. The Roadmap provides the framework for accelerating the adoption of robotics and autonomous systems by Queensland manufacturers.
- The Queensland Government's \$46 million Made in Queensland initiative is helping small-to-medium-sized business to adopt innovative processes and technology, expand operations and hire more Queenslanders.
  - Since 2017, 75 projects across Queensland have been supported through the program, with 32 of these projects located in regional Queensland.
  - To date, 61 projects have been completed totalling \$22.3 million in grant funding, with 26 completed projects located in regional Queensland (protecting over 1600 existing regional jobs and generating 90 new jobs).
  - The manufacturers who implemented these projects have reported that more than 3400 existing jobs have been protected, more than 340 new jobs created, and more than \$59 million in private sector investment generated.
  - Made in Queensland Round 3 fund recipients are yet to be announced.
- To support the growth of regional manufacturers, the Queensland Government has invested \$30 million into regional Manufacturing Hubs in Cairns, Townsville and Rockhampton.
  - Each hub provides a place for local manufacturing businesses to receive expert advice and support to transition to advanced manufacturing through world-leading technologies.
  - The Hubs have strong links with local universities, schools and TAFE Queensland to develop a workforce with skills in science, technology, engineering and maths (STEM).
  - The establishment of the Hubs is an action of the Roadmap to grow manufacturing productivity and innovation across Queensland.
  - In addition to the establishment of the three regional manufacturing hubs, the Queensland Government has made available \$13.5 million through the Manufacturing Hubs Grant Program to assist eligible businesses, with up to \$4.5 million available for each manufacturing hub, to invest in and help to build advanced manufacturing capability in the Cairns, Townsville and Rockhampton regions.
  - This is an opportunity for manufacturers to become more productive and create the jobs of the future through: technology adoption, skills and training, and business development.
- The Queensland Government has invested more than \$7.7 million towards the \$18 million Advanced Robotics for Manufacturing (ARM) Hub in Brisbane.
  - The ARM Hub is a collaborative facility for the local manufacturing sector, led by the Queensland Government and delivered in partnership with the Queensland University of Technology and Urban Art Projects.
  - The ARM Hub will enable Queensland manufacturers to collaborate with research institutions on a very practical level to build capability, be competitive, reshore manufacturing activity and generate jobs.
  - Although located in Brisbane, the ARM Hub services will be delivered across the State and available to all manufacturing firms in sectors as diverse as aerospace, biomedical, METS, defence, rail manufacture, beef and food processing, and space.
- On 19 April 2020, Queensland was recognised as a World Advanced Manufacturing Hub by the World Economic Forum, which will continue to open doors internationally bringing more business and opportunities to Queensland.
- To ensure the Queensland manufacturing sector continues to grow and become increasingly globally competitive, the Queensland Government has broadened engagement on the future direction of advanced manufacturing through a Manufacturing Ministerial Council (the Council).
  - The Council's first meeting in 2020 was held online on Thursday, 21 May and the Council is to support Queensland's diverse manufacturing industry to focus on innovation, business transformation, workforce development and building supply chain capability.

- The Council will provide advice on emerging trends and issues that could potentially impact on the sustainability and future development of industry and manufacturing in Queensland.

### **3) Skills implementation plan for advanced manufacturing**

- The Queensland Government is supporting the technological transformation of the State's manufacturing industry and looking ahead to attract, develop and retain world-class talent and skills.
- Announced on 17 December 2019, the *Skills Implementation Plan for Advanced Manufacturing* (Skills Plan) has been developed to support manufacturers in their transition to advanced manufacturing and create high-skilled workforces.
- The Skills Plan addresses the 10 Priority Action Areas in Jobs Queensland's *Advancing Manufacturing Skills Strategy* and builds on the Queensland Government's overarching strategy for skills, Skills for Queensland – Great training for quality jobs.
- The Skills Plan recognises that a highly skilled workforce is vital to manufacturing's future growth and diversifying Queensland's economy.
- The use of robotics, leading-edge technologies, autonomous systems and new processes requires knowledge and skills in complex problem solving, design-led thinking and the use of knowledge and skills in the STEM areas.
- The Queensland Government understands that Queensland students need a strong foundation in STEM and a range of initiatives that support STEM education in Queensland state schools is being implemented, including the \$81.3 million Advancing STEM in Queensland state primary schools' initiative.
- As part of its response to COVID-19, the Queensland Government launched a new online Jobs Finder Queensland portal to connect Queenslanders who have lost their jobs with new job opportunities, and to facilitate access to free online training courses through TAFE Queensland and Central Queensland University, with a focus on digital skills.

### **4) National COVID-19 Coordination Commission: Manufacturing Taskforce Draft Interim Report**

- Advice from the Department of Natural Resources, Mines and Energy (DNRME) notes that a presentation related to the NCCC Manufacturing Taskforce Draft Interim Report (draft report) was leaked online in May 2020, with many media organisations reporting on it (**Attachment 2**). The official approved draft report has **not** been released. DNRME further notes that:
  - The presentation states two key areas of focus for the draft report: (1) growing advanced manufacturing; and (2) creating a competitive domestic gas market.
  - The two areas are linked, as an increased supply of affordable gas will support the expansion and development of advanced manufacturing in Australia.
  - DNRME has not been formally consulted by the NCCC Manufacturing Taskforce on its draft report, and first learned of the draft report's recommendations and findings through media reports.
  - DNRME met with officers from the NCCC who advised that the leaked presentation does not represent the NCCC's final view; rather represents views of an individual engaged by the NCCC.
- DNRME has significant concerns about the direction of the Manufacturing Taskforce's draft report as reported in **Attachment 2** and considers predictions for a domestic gas price of \$4/gigajoule as unrealistic. Such a price cannot be realised without significant government subsidies and implications of supporting a domestic reservation policy.
- DNRME notes the presentation indicates the draft report has a limited focus on supporting Queensland projects, other than a brief mention of the Bowen Basin pipeline. Queensland is a significant contributor to the east coast gas market, and Federal Government investment in Queensland to support the gas sector is warranted.
- Federal Government support for pipelines would be required to connect Queensland's prospective regions (Bowen, Galilee, Cooper and Eromanga basins) to the east coast gas market. In the short term, for example, Federal Government funding for a feasibility study into the Bowen Basin pipeline could be sought to prove up the investment.

**BACKGROUND**

- Key documents to support your attendance are provided at **Attachments 1–2**.
- I will attend as the Department of the Premier and Cabinet’s (DPC) representative.

**CONSULTATION**

- DPC COVID-19 Response and Recovery Taskforce, DNRME, Department of Regional Development and Manufacturing; and Department of State Development, Tourism and Innovation.

Dave Stewart  
**Director-General**

<p><b>Comments</b> <i>(Premier or DG)</i></p>
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Released under RTI - DPC

## Talking Points

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### Virtual meeting with Mr Andrew Liveris AO regarding the manufacturing industry in Queensland

Thursday, 11 June 2020

- My Government is committed to the ongoing growth and development of Queensland' manufacturing industry and has implemented initiatives to support manufacturers through the COVID-19 crisis and beyond.
- I recently announced the first stage of our economic reset, The Queensland Economic Recovery Strategy: *Unite and Recover for Queensland Jobs*, to help Queensland's recovery from COVID-19 with a focus on backing Queensland jobs.
- The COVID-19 global pandemic exposed the fragility of global supply chains for Personal Protective Equipment (PPE) and other essential products and revealed limited local manufacturing of these products. A lack of secure supply chains meant there was a risk in healthcare workers having insufficient supply of equipment.
- A key initiative of the strategy includes the \$50 million Making it for Queensland fund, to target and support the expansion of Queensland's vital manufacturing sector and production capacity, with a focus on Queensland's advanced manufacturing capacity, particularly in biomedical and health.
- My Government launched the *Advanced Manufacturing Roadmap and Action Plan* (the Roadmap) back in December 2016.
- The Roadmap highlights the importance for industry to embrace advanced manufacturing, also known as Industry 4.0.
- It provides the framework for accelerating the adoption of robotics and autonomous systems by Queensland manufacturers, and an updated second edition of the Roadmap was released in November 2019.



## Talking Points

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- To ensure the Queensland manufacturing sector continues to grow and become increasingly globally competitive, my Government has established a Manufacturing Ministerial Council (the Council) to drive ongoing engagement on the future direction of Queensland's diverse manufacturing industry.
- The Council will provide advice on emerging trends and issues, with a focus on innovation, business transformation, workforce development and building supply chain capacity.
- I am proud to say that Queensland is ahead of the curve in advanced manufacturing and was recognised as a World Advanced Manufacturing Hub by the World Economic Forum on 19 April 2020.
- This international acknowledgement will continue to open doors and bring more business and opportunities to Queensland.
- Our \$46 million Made in Queensland initiative is helping small-to-medium-sized business to adopt innovative processes and technology, expand operations and hire more Queenslanders.
- To date, 61 of the 75 projects supported have been completed, totalling \$22.3 million in grant funding.
- The manufacturers who implemented these projects have reported that more than 3400 existing jobs have been protected, more than 340 new jobs created, and more than \$59 million in private sector investment generated.
- And close to half of these completed projects (43 per cent) are in regional Queensland (protecting over 1600 existing regional jobs and generating 90 new regional jobs).
- Adding to our commitment to regional manufacturers, my Government has invested \$30 million into the establishment of regional Manufacturing Hubs in Cairns, Townsville and Rockhampton.

## Talking Points

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- Each Hub has a local manufacturing focus and provides a place for local manufacturing businesses to receive expert advice and support, enabling them to transition to advanced manufacturing through world-leading technologies.
- The Hubs have strong links with local universities, schools and TAFE Queensland to develop a workforce with skills in science, technology, engineering and maths.
- To further build advanced manufacturing capability in the Cairns, Townsville and Rockhampton regions, my Government has made available, through the Manufacturing Hubs Grant Program, up to \$4.5 million for each Hub, totalling \$13.5 million.
- These funds will assist eligible businesses to become more productive and create the jobs of the future, through technology adoption, skills and training, and business development.
- Complementing the work being done at the regional Manufacturing Hubs is the \$18 million Advanced Robotics for Manufacturing (ARM) Hub in Brisbane, in which my Government, in recognition of the future requirements of advanced manufacturing, invested more than \$7.7 million.
- The ARM Hub is a collaborative facility for the Queensland manufacturing sector, led by the Queensland Government and delivered in partnership with the Queensland University of Technology and Urban Art Projects.
- The ARM Hub will enable Queensland manufacturers to collaborate with research institutions on a very practical level to build capability, increase competitiveness, reshore manufacturing activity and generate jobs.
- Although located in Brisbane, the ARM Hub services will be delivered across the State and available to all manufacturing firms in sectors as diverse as aerospace, biomedical, METS, defence, rail manufacture, beef and food processing, and space.



## Talking Points

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- The recent announcement by my Government of a partnership with GO1, an online training company based in Logan, Queensland that offers a 'Netflix for training' style platform, is another example of our commitment to upskilling.
- Thanks to this partnership more than 400 free training courses will be available to small businesses and employees impacted by COVID-19, including on the topics 'Digital Skills and Adapting to Change' and 'Programming and IT'.
- This initiative supports other Queensland Government programs such as free online training courses through TAFE Queensland and Central Queensland University focusing on digital skills, and the new online Jobs Finder Queensland portal, which connects Queensland workers who have lost their jobs to find new job opportunities.
- Such initiatives support my Government's recognition that a highly skilled workforce is vital to manufacturing's future growth and diversifying the Queensland economy.
- Announced on 17 December 2019, the *Skills Implementation Plan for Advanced Manufacturing* (Skills Plan) has been developed to support manufacturers in their transition to advanced manufacturing and create high-skilled workforces
- The use of robotics, leading-edge technologies, autonomous systems and new processes requires knowledge and skills in complex problem solving, design-led thinking and the use of STEM knowledge and skills.
- We understand that Queensland students need a strong foundation in STEM and a range of initiatives that support STEM education in Queensland state schools is being implemented, including the \$81.3 million Advancing STEM in Queensland state primary schools initiative.
- Another area where my Government recognises the importance of diversifying and growing our economy is in the resources sector.

## Talking Points

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- In response to the impact of COVID-19, my Government is providing a range of relief measures to support eligible exploration companies, and fast-tracking industry development initiatives to ensure the pipeline of future resource projects and jobs continues.
- By bringing forward \$2.8 million in Collaborative Exploration Initiative funding to the 2020–21 financial year, we can encourage innovative exploration across the state, including the North West Minerals Province, home to new economy minerals like silica, titanium, lithium and vanadium.
- Since 2015, my Government has released more than 79,000 square kilometres of land for petroleum and gas exploration. These releases have included 20,212 square kilometres released on the condition that any gas produced must be supplied to the Australian domestic market.
- Queensland has been the leader in getting gas to Australian users, including our manufacturers.
- We know that gas is critical to our manufacturers as a feedstock as well as an energy source to fuel jobs.
- We already have Senex producing critical gas feedstock and energy, including to building products manufacturer, CSR Limited; packaging company Orora; and glass manufacturer O-I.
- As well, Australian Pacific LNG and Armour Energy have entered a joint venture agreement near Chinchilla to supply gas next year, securing around 650 manufacturing jobs in plants across Queensland.
- Other exploration permits have been granted to gas explorers such as Comet Ridge, Denison Gas, Central Petroleum, Armour Energy, Chi Oil and Gas and a Shell/Santos joint venture.
- The release of the 2020 Queensland Exploration Program tender for petroleum and gas exploration on 14 May 2020 makes more than 6700 square kilometres of land available for gas exploration, including five domestic supply areas totalling 872 square kilometres.



National COVID-19  
Coordination Commission

# Manufacturing Taskforce

Interim report – DRAFT

14 MAY 2020

Released under RTI - DPC

85-170,000+ well paid direct jobs in energy-enabled industries, and 3-5X indirect jobs in associated industries (an additional 255-850,000 jobs)<sup>1</sup>

*\*\*\*top down estimates may be conservative – bottom up view is 5x higher*

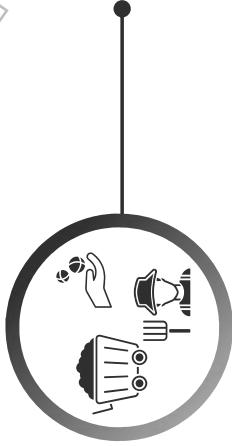
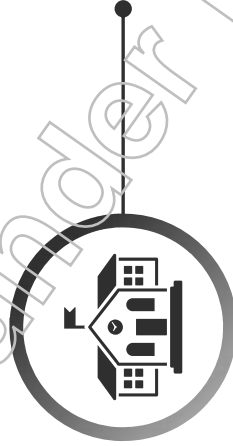
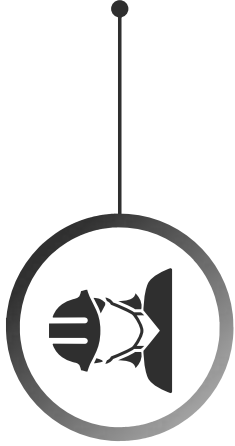
Underpin growth and prosperity through \$10-20B+ in direct GDP, with up to an 8x multiplier effect on the broader economy<sup>1</sup>

*\*\*\*Does not yet include any GDP estimates for advanced manufacturing, or from lower electricity prices*

Support the reskilling of many of those affected by current pandemic

Build an ecosystem that supports high value skills, engages Australia’s raw materials and agriculture

Improve resilience of the Australian economy by diversification



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# Manufacturing can deliver jobs and growth

Note: GDP and jobs estimates assume 10-20% growth in overall manufacturing sector – does not include any new positions or GDP contributions<sup>1</sup> from advanced manufacturing – further work required to estimate those values; additional uplift may be possible as further conversations pursued (e.g., potential for growth in steel sector). 1. Based on US experience. Source: Department of Industry (Manufacturing Performance Report, 2019), Expert interviews and analysis.

# What is holding Industry back?

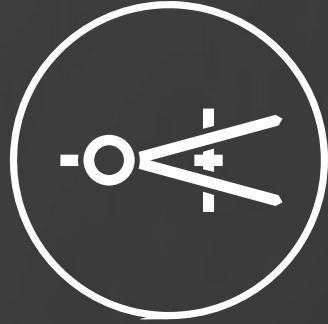
## Observed barriers to faster growth

- Predominance of short-term solutions and misaligned incentives
- Insufficient focus of investment on areas of competitive advantage
- Limited talent pipeline and workforce capabilities

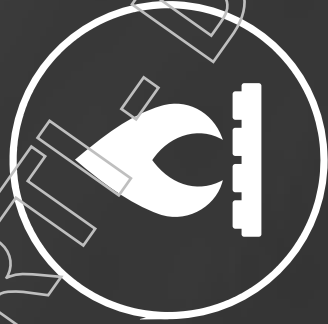
## Disadvantaged by high gas & electricity prices

- Market failure means insufficient investment in new supply despite high prices, due to uncertainty & barriers
- Many heavy industrial players struggling to achieve acceptable returns even before COVID-19 impacts

# Two areas for taskforce focus



Growing advanced manufacturing



Creating a competitive domestic gas market



## Growing advanced manufacturing

✓ Take a longer term view to create more value from our investments



Drive rigorous implementation and measurement of impact



Support with structural reforms, starting with skills



## Creating a competitive domestic gas market



Remove barriers to supply



Build the bridge of supply in the near-term



Create the market by underwriting a bookbuild



Lower the cost of pipelines



Complete the network of pipelines to markets



Scale & win in the medium-term

## Overview of our recommendations

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# The Manufacturing Taskforce's regular meetings were informed by many of Australia's leading business and government officials, as well as a number of international experts. We would like to acknowledge the particular contributions of the following individuals

## Energy and Resources

Stephen Bell, Qenos  
 Jack Brodo, Dow  
 Alberto Calderon, Orica  
 Drew Clarke, AEMO  
 John Ellice-Flint, Blue Energy  
 Stephanie Fahey, Austrade  
 Kevin Gallagher, Santos  
 Mark Gerhardt, Viva Energy  
 John Grill, Worley  
 Matt Howell, Tomago  
 Angus Jaffray, Santos  
 Jeanne Johns, Inditec Pivot  
 Margi Johnson, Australian Aluminium Council  
 Jonathan McCarthy, Rio Tinto  
 Ken McKenzie, BHP  
 John Phillips, Blue Energy  
 Sunil Salhotra, Pangea Resources  
 Peter Toth, Rio Tinto  
 Bill Townsend, Inpex  
 Tracey Winters, Santos

**Government**  
 Greg Combet, NCCC  
 Stephanie Fahey, Austrade  
 Tony Fraser, Department of Defence  
 David Fredericks, DISER  
 Michael Gunner, Chief Minister, Northern Territory  
 Peter Harris, NCCC  
 Mike Lawson, Department of Industry, Science, Energy and Resources  
 Ian Learmonth, Clean Energy Finance Corp.  
 Vivien Lim, Austrade  
 Lyndall Milward-Bason, DISER  
 Tim Pallas, Treasurer, Government of Victoria

Martin Parkinson, Former Secretary, PM&C

Rachel Parry, DISER  
 Hon Keith Pitt, Minister for Water, Resources and Northern Australia  
 Nev Power, NCCC  
 Rod Sims, ACCC  
 Stephen Skala, Clean Energy Finance Corporation  
 Roland Stephens, Austrade  
 Hon Angus Taylor, Minister for Energy  
 Bruce Wilson, DISER

## Industry

Michele Allan, Food and Agribusiness Growth Centre  
 Geoffrey Annison, Australian Food & Grocery Council  
 Stephen Armitage, Southern Strength, Agile Manufacturing Network

Philip Bart, Bruck Textiles  
 Lindsay Barton, GGBV  
 Samantha Blake, Australian Food & Grocery Council  
 Neville Bradbury, GGBV  
 Greg Combet, NCCC

Alex Commins, Jamestrong  
 Mark De Ambrosis, Armitage Associates  
 James Dick, Coastal Shipping  
 Karen Dobson, Dow Australia  
 John Drake, Heavy Vehicle Industry Association  
 Steven Flynn, Baxter Healthcare  
 Sanjeev Gupta, EPC Technologies  
 Todd Hacking, Heavy Vehicle Industry Assoc.  
 Martin Hay, EPC Technologies  
 Brad Hordern, Dulux  
 Pat Houlihan, Dulux  
 Sean Infanti, AMTIL  
 Megan Jeremenko, AFGC  
 Warren Kirchner, GGBV

Ben Lazzaro, Australian Made Campaign Ltd

Wayne Manners, Boral  
 Peter Meurs, FMG (former)  
 Richard Moore, Coastal Shipping  
 Michele O'Neil, ACTU

Steve Pelacanos, Coastal Shipping  
 Sandip Ranjan, Bruck Textiles  
 Charles Rignall, GGBV

Rob Spurway, Graincorp  
 Darren Thomas, Thomas Foods International  
 Margi Thomson, Cement Industry Federation  
 Gareth Trickey, Baxter Healthcare  
 Michael Tuckman, Osteon Medical  
 Denita Wawn, Master Builders Australia

## Research

Professor Eliathamby Ambikairajah, UNSW  
 Warwick Dawson, UNSW  
 Professor Roy Green, UTS  
 Merete Daniel Neilson, Cluster Excellence Denmark  
 Professor Ian Jacobs, UNSW  
 Christian Ketels, Harvard Business School  
 Dr Ramin Shayan, Gertrude Biomedical  
 Alix Ziebel, ATSE

## Other

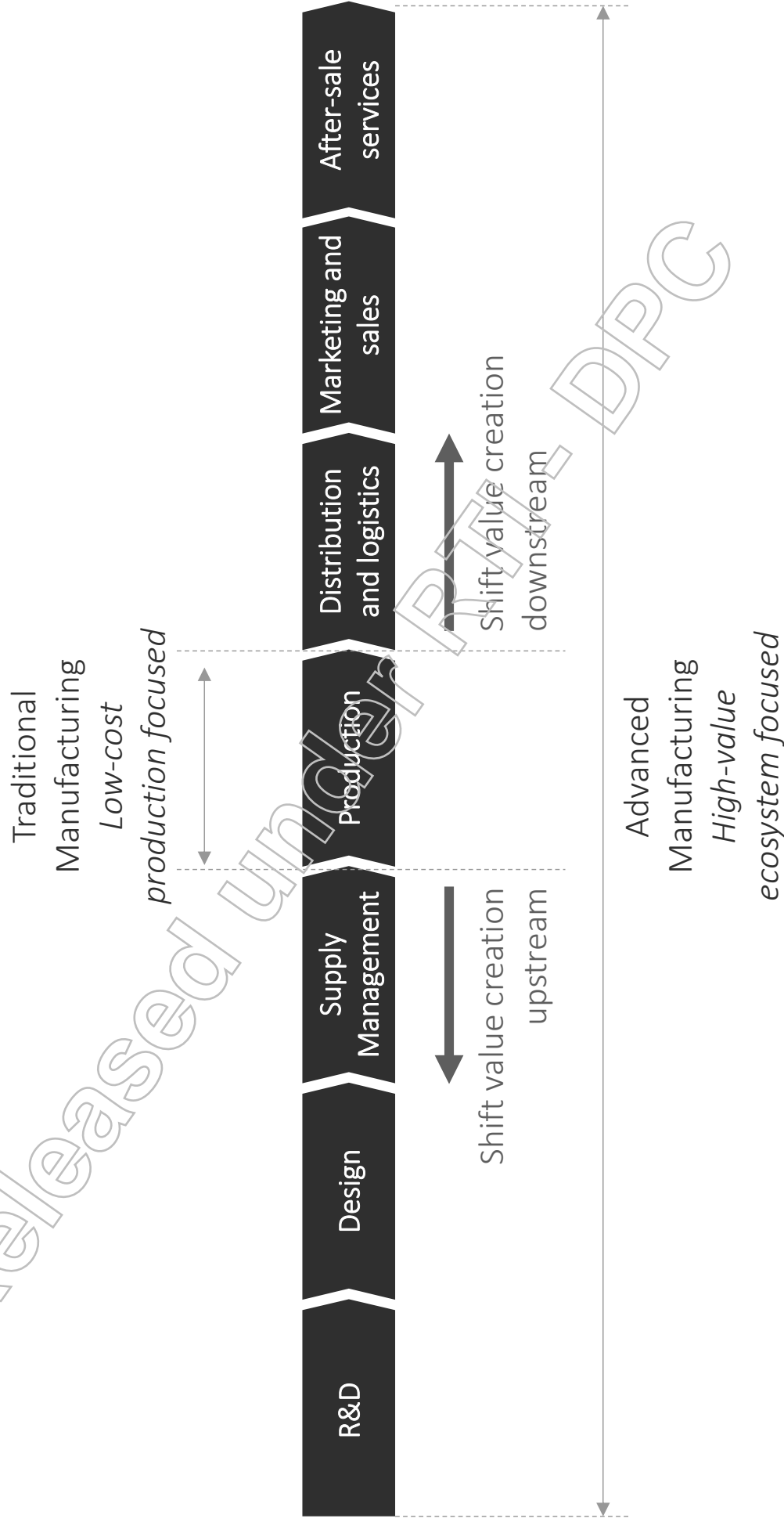
Michael Gill, Dragoman  
 Tom Harley, Dragoman  
 Keith Hunter, Dragoman  
 Craig Mickle, EY  
 Ben van Delden, KPMG

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# Growing advanced manufacturing

# Advanced Manufacturing is about high value ecosystems



# Multiple barriers impede stronger growth

## Barriers

## Practical impacts for advanced manufacturing



### Governance

- Fragmented policy and program landscape



### Innovation and partnerships

- Grants spread too thinly, sub-scale to overall objectives
- Inefficient collaboration between academia, industry and SME to bring discovery to market and transfer capabilities



### Workforce capabilities

- Poor perceptions of manufacturing industry careers and skilled jobs
- Vocational training insufficiently aligned to industry needs and real workplace requirements
- Limited focus on leadership & entrepreneurship programs



### Government incentives

- Structures (e.g., R&D tax credits, grant programs) poorly aligned to government priorities and industry needs
- Programs lack scale and targeting to realise policy ambitions



### Infrastructure and supply chain

- Significant capacity and efficiency constraints in domestic transport infrastructure driving down cost-competitiveness
- Growing nationalism & anti-competitive trade behaviours pressuring global free trade architecture

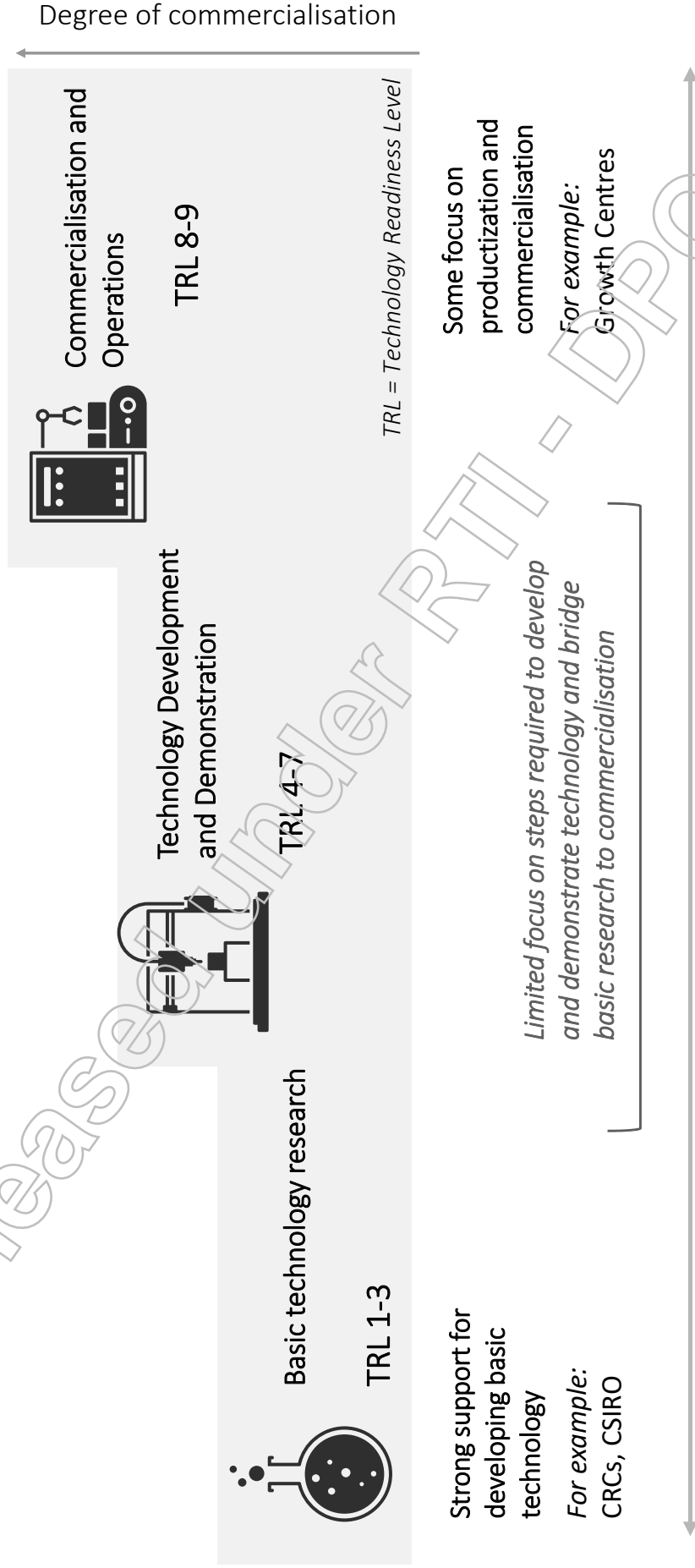
**Predominance of short-term solutions**  
rather than long term, stable strategies

**Misalignment of incentives**  
between industry, academia and government

**Misperceptions of manufacturing careers**  
and opportunities for workers at all stages of the value chain

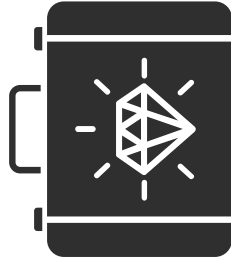
**Fragmented investment efforts**  
spread thinly and with insufficient focus on areas of competitive advantage

# Fragmentation and misalignment resulting in weaker commercialisation of technologies



# Lasting impact requires focus on implementation

The taskforce has focused on three areas of recommendation



- ✓ Take a longer term view to create more value from our investments



- ✓ Drive rigorous implementation and measurement of impact



- ✓ Support with structural reforms, starting with skills



# Our strengths allow us to compete globally

We can build on existing competitive advantages ...

... And add value through human capital

... To realise opportunities in domestic and global markets

## Fertilizers & Explosives

- 8th largest natural gas production globally; Strong opportunity to boost global cost competitiveness with cheaper domestic pricing and availability

## Cement

- Produce 9 of 10 raw components of lithium ion batteries; largest global producer of Bauxite, Alumina

## Metals

- Strong existing IP & data holdings; research & clinical capabilities

## Space & Defence

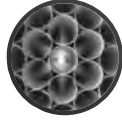
- 2nd largest producer of rare-earth minerals; 3rd largest uranium producer

## Food & Agritech

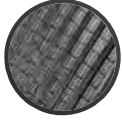
- 6th largest arable land-mass globally; among most efficient producers



**Food & AgriTech:** Brand Australia quality and reputation attracts premium pricing for value-added foods



**Advanced Building materials:** Growing global demand for lighter, stronger, less emissions intensive materials



**Energy & Renewables:** Rich and diverse geography enabling strong global growth in renewable energy



**MedTech:** Biotech successes (e.g. Cochlear, CSL) show pathway for successful research/industry collaboration



**MinTech & Rare Earths** unique breadth of raw minerals and capabilities for precision engineering and minerals processing



**Space:** Unique southern hemisphere location for design & build of international space & defence facilities



**Defence:** Use niche technologies to build globally competitive capabilities

• Enhance production efficiency through automation, digitisation and artificial intelligence

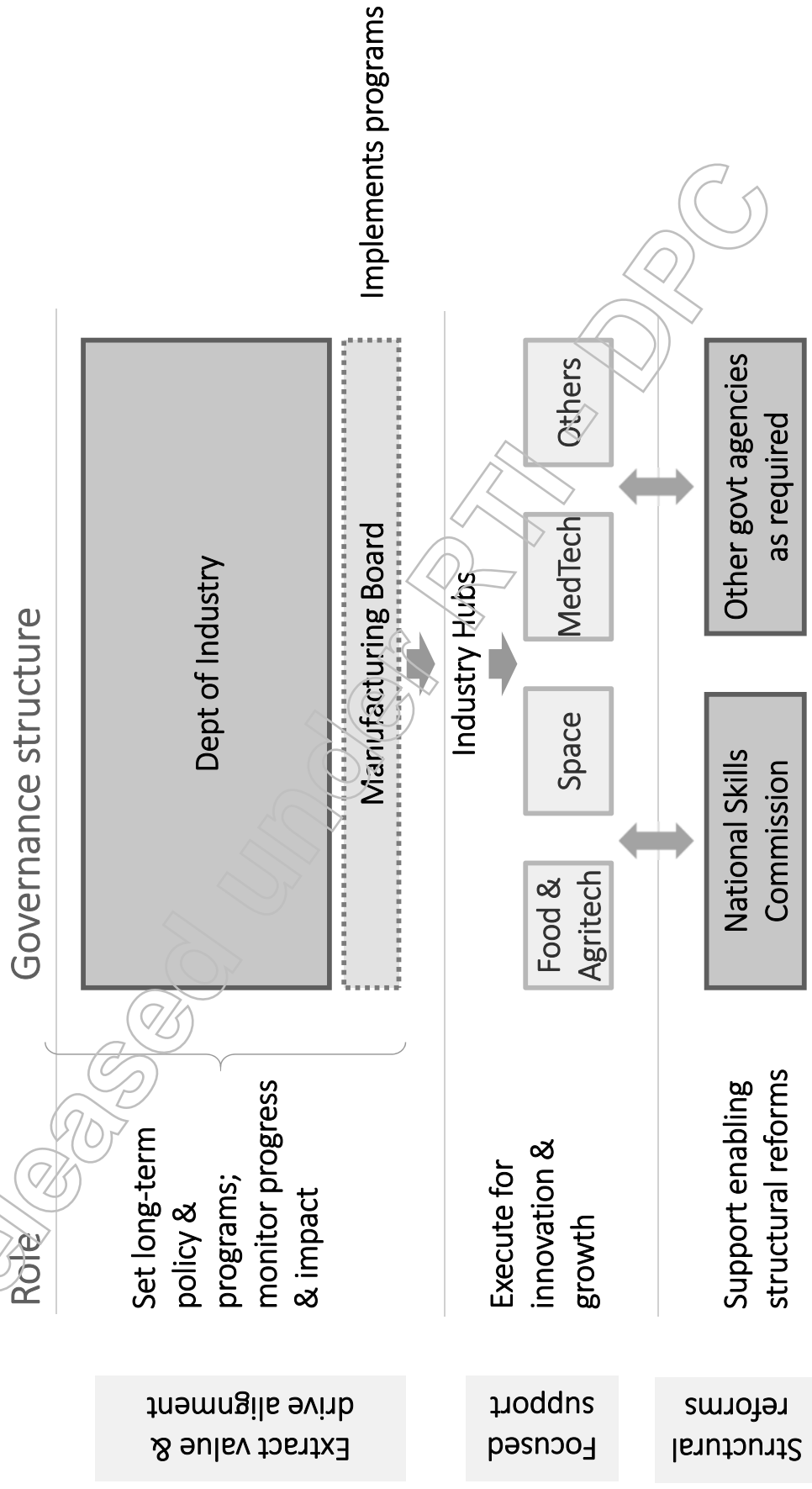
• Generate cross sector solutions to production challenges (e.g., remote mine management expertise has applications for factories)



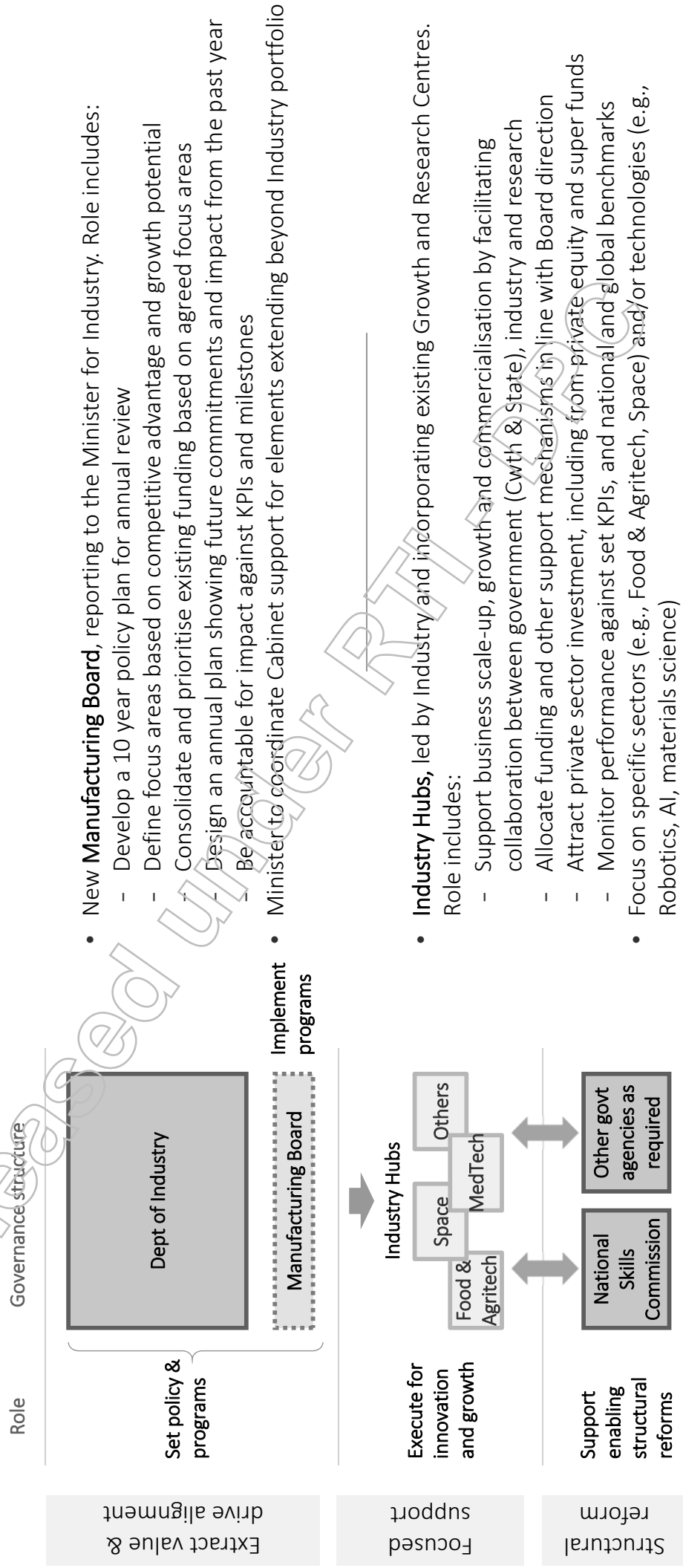
# Principles of a governance structure to create more value and drive execution

- Embed a long-term, 10 year policy view, with clear accountability for impact against agreed KPIs
- Redeploy existing funds, efforts and other tools to reduce the risk of scaling
- Accelerate approval processes for projects and removal of red tape
- Focus investments and support on tightly-defined areas of competitive advantage
- Leverage existing Australian structures and exemplars where possible, and draw on global evidence base


# Conceptual structure



# Detailed view: Potential structure to increase impact of investment



# Focus support in areas of competitive advantage

Image	Food & Agritech	MinTech & Rare Earths	Energy & Renewables	Adv. Building Materials	Healthcare & BioTech	Space	Defence
	<ul style="list-style-type: none"> <li>• Among world's most efficient ag-sectors</li> <li>• Brand Australia quality reputation</li> <li>• Innovation in, All livestock mgmt. &amp; food design</li> </ul>	<ul style="list-style-type: none"> <li>• Largest global producer of Bauxite and alumina</li> <li>• Largest non-Chinese controlled "critical minerals" resources</li> <li>• 3<sup>rd</sup> largest uranium production</li> </ul>	<ul style="list-style-type: none"> <li>• Produce 9/10 raw materials of lithium ion batteries</li> <li>• 5<sup>th</sup> largest solar power capacity in the world</li> </ul>	<ul style="list-style-type: none"> <li>• Lighter, stronger &amp; emission efficient materials (e.g. lightweight bricks, pre-fabricated walling)</li> </ul>	<ul style="list-style-type: none"> <li>• Existing MedTech successes (e.g., Cochlear)</li> <li>• Strong existing IP &amp; data holdings; Research &amp; clinical capabilities</li> </ul>	<ul style="list-style-type: none"> <li>• Pivotal southern hemisphere location</li> <li>• Highly educated workforce</li> <li>• Already in NASA's supply chains</li> </ul>	<ul style="list-style-type: none"> <li>• Core sovereign need</li> <li>• Delivering world class products from expertise developed through Defence technology and growing manufacturing capability</li> </ul>

# Structural reforms are an essential input

Build the talent pipeline with essential vocational reforms

- Work with National Skills Commission and TAFEs to **implement vocational education reforms** and broader skills initiatives
  - Improve **quality and relevance of training**
  - Analyse **future skill needs** for advanced manufacturing
  - Implement **nationally consistent qualifications and curricula**
  - Accelerate **qualification completion times**
  - **Engage industry and employee representatives** more closely in curriculum design and delivery
  - Improve **apprentice retention**

Encourage productivity increases

- Work with National Skills Commission and TAFEs to identify **priorities for upskilling and retraining initiatives**
  - Support today's workforce with development of skills to meet Industry 4.0 opportunities
  - Offer pathways for mid-career redeployment into the manufacturing sector
- Scale up existing programs to **support entrepreneurship, innovation, technological development and leadership in SMEs**, to ensure businesses have access to skills required to shift towards higher value and higher productivity manufacturing

Other reforms are required, for example

- Focus **R&D tax incentives** on activity with benefits for the whole economy (rather than individual firm benefits); ideally focused on defined areas of competitive advantage
- Introduce stronger **open data access and knowledge sharing** for Commonwealth, State and federally-funded university research; ensure balance of IP protection and commercialisation opportunity
- Update **Intellectual property laws** in line with Productivity Commission recommendations to balance access, innovation, competitiveness and international trade obligations



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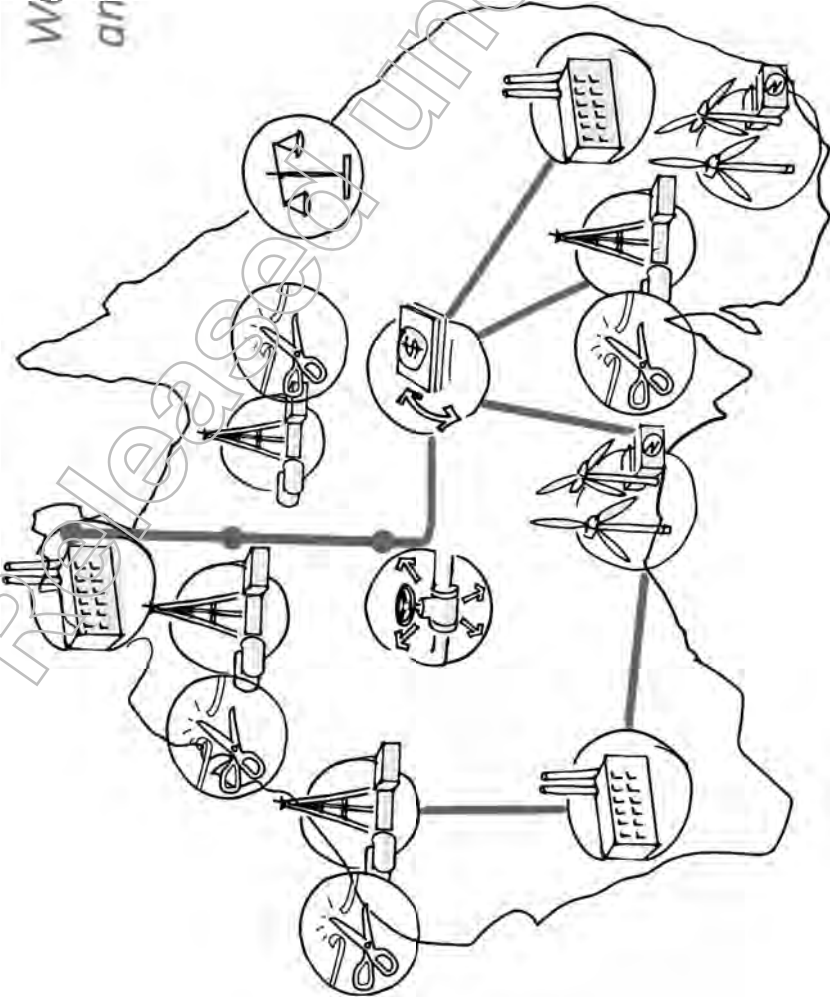
# Creating a competitive domestic gas market



Creating a competitive domestic gas market

# Our recommendations will create a globally competitive domestic gas market for Australians

*We will create hundreds of thousands of high paying jobs, and lift GDP by \$10-20B+ via our recommendations:*



- ✓ Remove barriers to supply
- ✓ Build the bridge of supply in the near-term
- ✓ Create the market by underwriting a bookbuild
- ✓ Lower the cost of pipelines
- ✓ Complete the network of pipelines to markets
- ✓ Scale & win in the medium-term

Historical experience suggest that unlocking supply is critical for supporting future demand growth



New manufacturing



New field



Liquid hub



More interconnecting pipelines



Renewable gen with gas firming



Supply and Demand balance



Less red and green tape



# Recommendations are a three phase journey towards sustained lower prices

~\$6/GJ

Goal: ~\$4/GJ



## Remove barriers to supply

- Lift the moratorium in New South Wales, and the remaining moratoria in Victoria
- Initiate a rapid 'red & green tape' reduction
- Establish a global best practice gas development regulatory framework in the Northern Territory

## Build the bridge in the near-term

- Enforce 'use it or lose it' provisions
- Provide support, such as low cost capital, to existing small and mid-cap market participants
- Establish a forward-looking gas reservation policy for Northern Territory and East Coast developments
- Consider accelerated developments for highly prospective opportunities – e.g., Beetaloo, Bowen, Perth Basin
- Coordinate with hydrogen development to ensure long-term demand potential (incl. avoiding demand destruction)

## Create the market

- Underwrite supply at priority supply-hubs, to 'create the market'
- Compel price disclosure and reporting of differentials

## Lower the cost of pipelines

- Revisit pipeline rates of return
- Reduce excessive duplication cost of infrastructure, including through improved access

## Complete the network of pipelines to markets

- Take active, participatory role in strategic pipeline developments
- Consider tax incentives for priority infrastructure

## Scale & Win in the medium-term

- Proactively attract foreign-direct investment on demand side
- Provide policy stability that enables market to thrive
- Establish an 'evergreen' taskforce between AEMO and ACCC to manage implementation and send clear market signals via aligned basin and pipeline prioritisation, published and refreshed regularly
- Work with financial service providers to create a liquid futures market
- Continue to coordinate with hydrogen

\* Note: GPG = Gas Powered Generation, C&I = Commercial & Industrial, ISP = Integrated Systems Plan; MLP = Master Limited Partnerships (US infrastructure taxation model)  
Source: Expert interviews and analysis

# Need to act now to start creating the certainty that will deliver the growth

Underwriting new supply with government balance sheets ...



...allows upstream producers to invest with confidence



...and new pipelines to be built to get the gas to markets

Creating a hub with sufficient volume and price transparency...



...allows end-users to contract the volumes they need with greater certainty



...which enables existing industry to thrive and reinvest in productivity

Removing barriers to supply by lifting moratoria, enforcing 'use it or lose it', and introducing reservations...



...ensures the next waves of volumes enter the market, creating a stable new price environment, with scale



...which enables new investment decisions to be made, adding additional demand (industrial, power gen)

# Precedents in today's energy markets show how government underwriting can work well

Significant history of major gas pipeline projects requiring government support ...

- 1970s: The State Energy Commission of WA funded the development of Dampier Bunbury Pipeline and entered into a foundation contract with developers to purchase fixed volumes of gas over the long term, privatized in 1998
- 1990s: Moomba to Sydney Ethane Pipeline initially supported by TPA (fed gov pipeline authority), but once de-risked sold to AGL

... Renewable projects also recently underwritten by governments, providing price certainty


- Victoria and QLD state governments have supported renewable investment by implementing reverse auction contract-for-difference (swaps) schemes, guaranteeing stable renewable prices for ~15 years
- Gov agrees to purchase a certain amount of electricity and asks for bids of projects to bring capacity onto grid, incentivising generators to bid at the lowest possible cost
- Victorian scheme (VRET) has supported over \$1.15B capital investment in the past 2 years

Federal government agreed to underwrite two gas-fired power stations under UNGI program in 2018

**Federal government backs new gas power projects in Qld, Vic**  
**apo project selected for government power scheme**

Quinbrook Infrastructure Partners has proposed a 132MW gas generator in Gatton to provide new capacity to help meet peak periods in Queensland and NSW.

Program provides generators certainty ...

 A number of market participants are constrained in their ability to support new investment due to being unable to commit to long term contracts ... they are often prepared to commit to shorter contracts, say five years, but that is typically insufficient ... the government should operate a program under which it will enter into low fixed priced energy offtake agreements for later years (years 6-15)

- ACCC, Retail Electricity Pricing Inquiry 2018

... And operates through various mechanisms

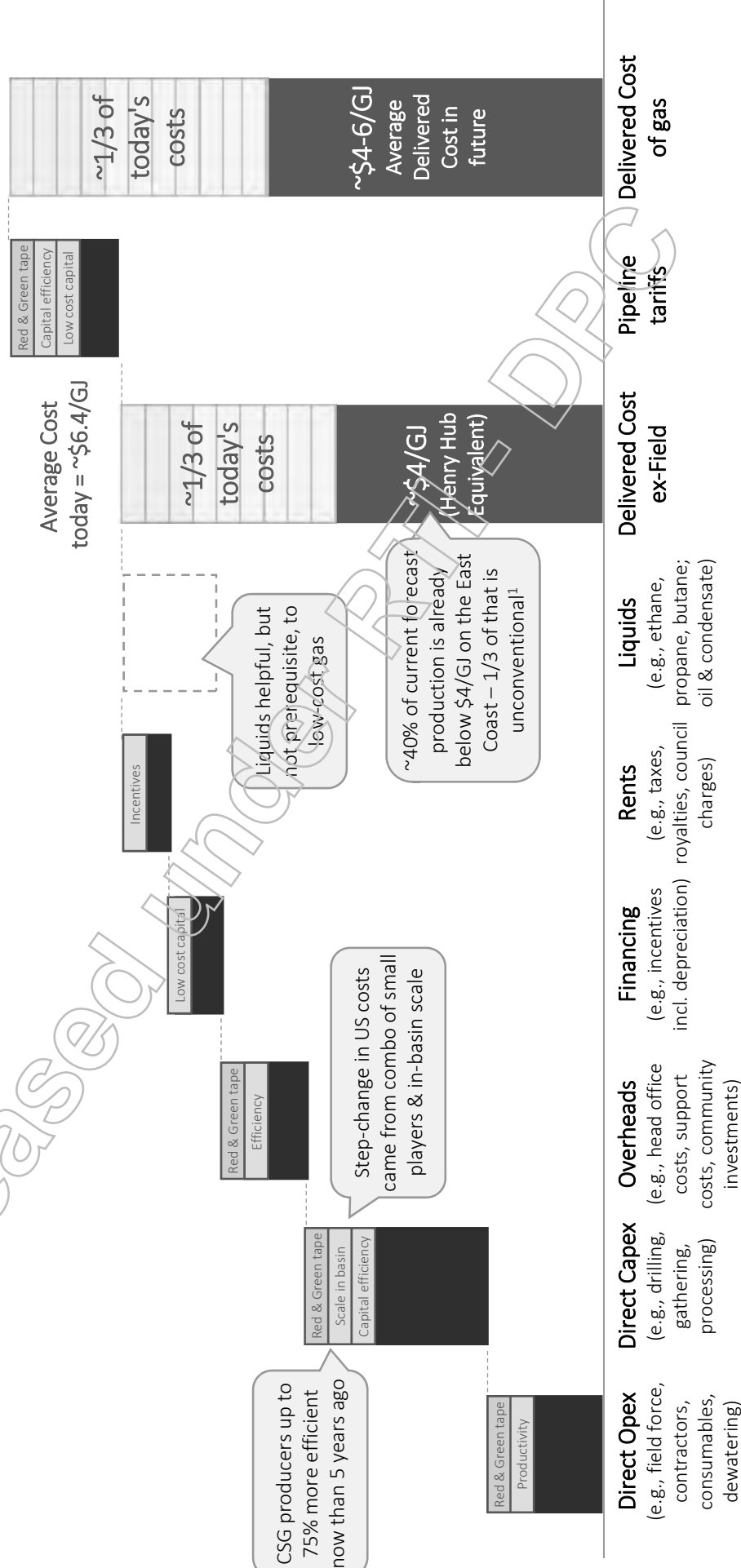


Floor price, post year 5  
 Small grants and loans  
 Contract for difference  
 Cap and floor contracts  
 Underwriting cap contracts



# Our recommendations put us on a pathway towards \$4/GJ gas supply

Indicative changes to cost structure of gas developments under proposed solutions



1. Rystad production forecast, 2020-2029. 2. Includes gas fields and gas condensate fields that had production in 2019; includes all cash flows across the lifetime of an asset (i.e., exploration, development, production and abandonment). Source: Rystad Energy, Industry experience, Expert interviews





# Realising \$4-6/GJ gas is a realistic goal



40%

Gas from the East Coast forecasted to cost less than \$4 per GJ (~8K PJ's in next 10 yrs)

20%

Gas from Western Australia forecasted to cost less than \$4 per GJ (~8K PJ's in next 10 yrs)

63%

Drop in Henry Hub pricing due to US shale market growth from 2000 to 2010, 78% drop from 2000 to 2015 (32% dry gas and 68% wet gas)<sup>2</sup>

1. Based on 2020-29 Australian gas supply curves from Rystad. 2. Dry vs wet gas split based on US gas and gas-condensate fields that has production in 2019, total production ~30.8K PJ's (12.3K PJ's dry gas and 20.5K PJ's wet gas). Source: Rystad Energy, Bloomberg



# Australia's business context is not competitive due to onerous red and green tape

East coast states not competitive against peers for new investment

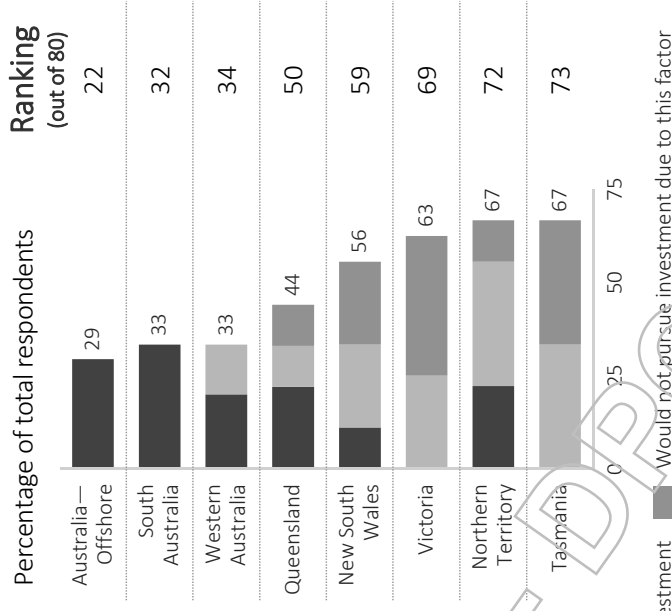
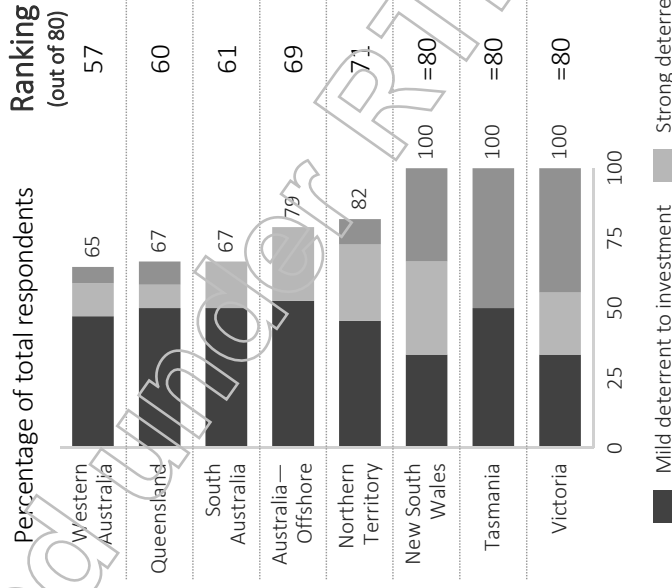
Largely driven by onerous environmental restrictions ...

... and unpredictable and often duplicative legal rules

## Impact of environmental regulations

## Impact of reg duplication and inconsistency

Ranking <sup>1</sup> Region	Policy Perception Index Score
1 Texas	100
2 Oklahoma	96.35
3 Kansas	92.04
4 Wyoming	91.67
5 North Dakota	91.35
6 Alabama*	89.92
7 Montana	86.98
8 US Offshore—Gulf of Mexico	86.49
9 United Kingdom—North Sea	84.84
10 Louisiana	84.76
11 Mississippi	84.61
12 Oman	82.34
13 United Kingdom—Other Offshore (except North Sea)	82.20
14 Norway—North Sea*	82.17
15 Norway—Other Offshore (except North Sea)	82.01
20 South Australia	78.17
35 Western Australia	71.96
39 Australia—Offshore	69.86
50 Queensland	62.60
68 Northern Territory	51.35
73 New South Wales	40.37
77 Victoria	31.52
78 Tasmania	26.11



- Top quartile
- 2nd quartile
- 3rd quartile
- Bottom quartile

Reducing red and green tape does not mean compromising on environmental outcomes — it is about bringing Australia in line with other leading global jurisdictions

1. Survey evaluated 80 jurisdictions; 256 total respondents across jurisdictions; included jurisdictions account for 53% proved global oil and gas reserves and 68% total global production. Source: Fraser Institute, Global Petroleum Survey 2018, Expert analysis

Note: Northern Territory currently does not have a gas development regulatory policy in place — Commonwealth is in a good position to influence this



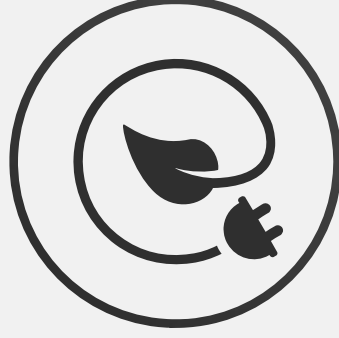
# Lower cost gas will have significant benefits ...



Support the sustained competitiveness of existing energy intensive industry through lower gas & electricity prices



Attract and grow new, globally competitive value chains where Australia has a natural advantage



Support cost-efficient energy transition through both firming and base-load capacity that supports growth in renewable generation



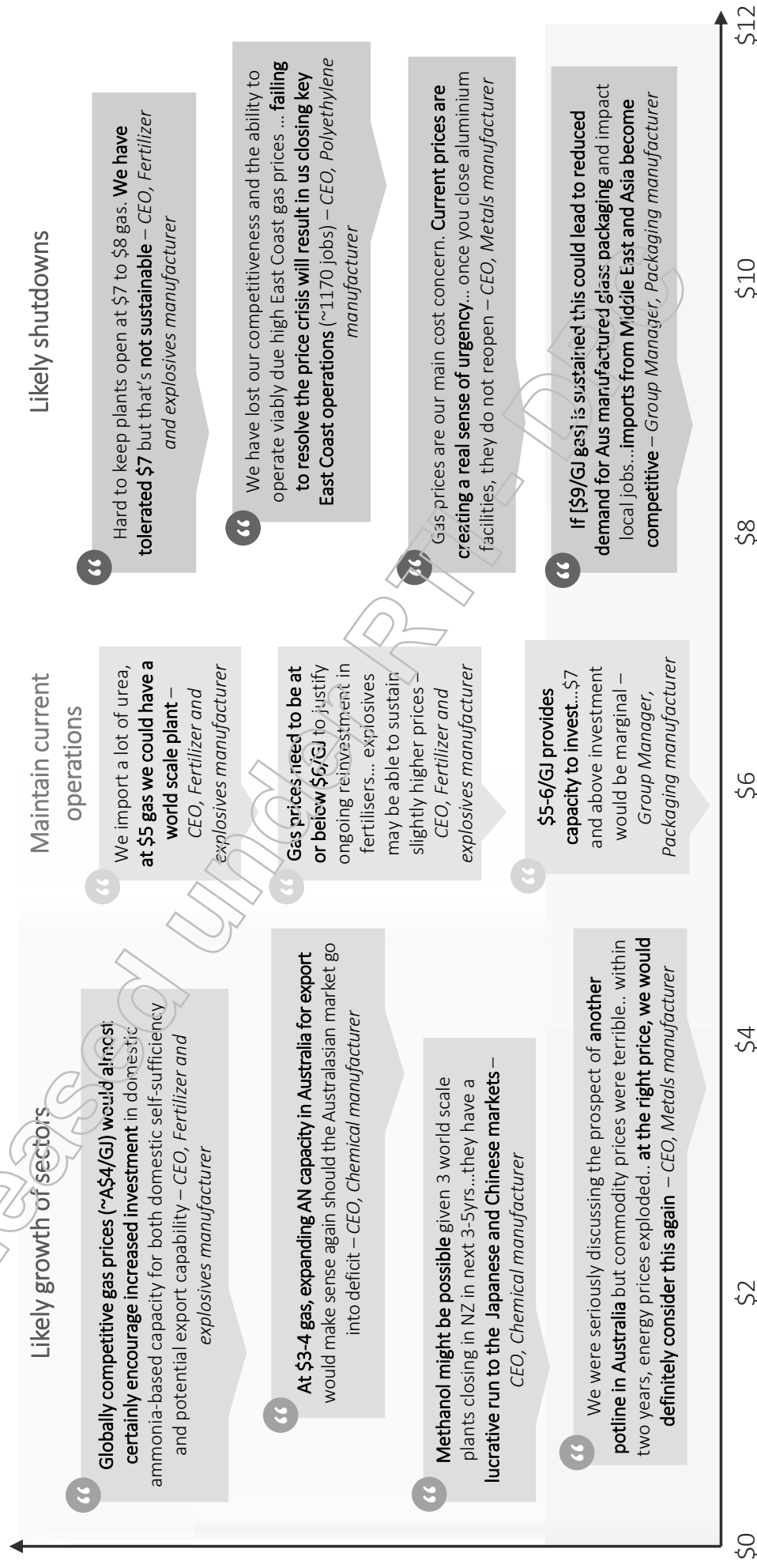
Provide a foundation for Australia to become a world leader in green and blue hydrogen at export scale



Making the equivalent of just 3% of the current LNG export volumes available domestically will unlock hundreds of thousands of high paying jobs for Australians

# Without action = significant closures... ...with action = growth of our domestic industry

Impact of gas prices on long term viability of key manufacturing sectors





# Lower gas prices support lower electricity prices in Australia

With lower gas prices we will...

- ✓ Lower electricity prices\* by \$7.2/MWh for every \$1/GJ reduction – if we were able to reset from over \$10/GJ to \$4/GJ, that translates to ~\$5-7B in annual savings

- ✓ Maintain and grow our existing industrial base, providing job security for existing manufacturing jobs and conservatively adding 85,000-170,000 new, high paying jobs – many of those in regional areas

**\*\*\*Does not include jobs from lower electricity prices**

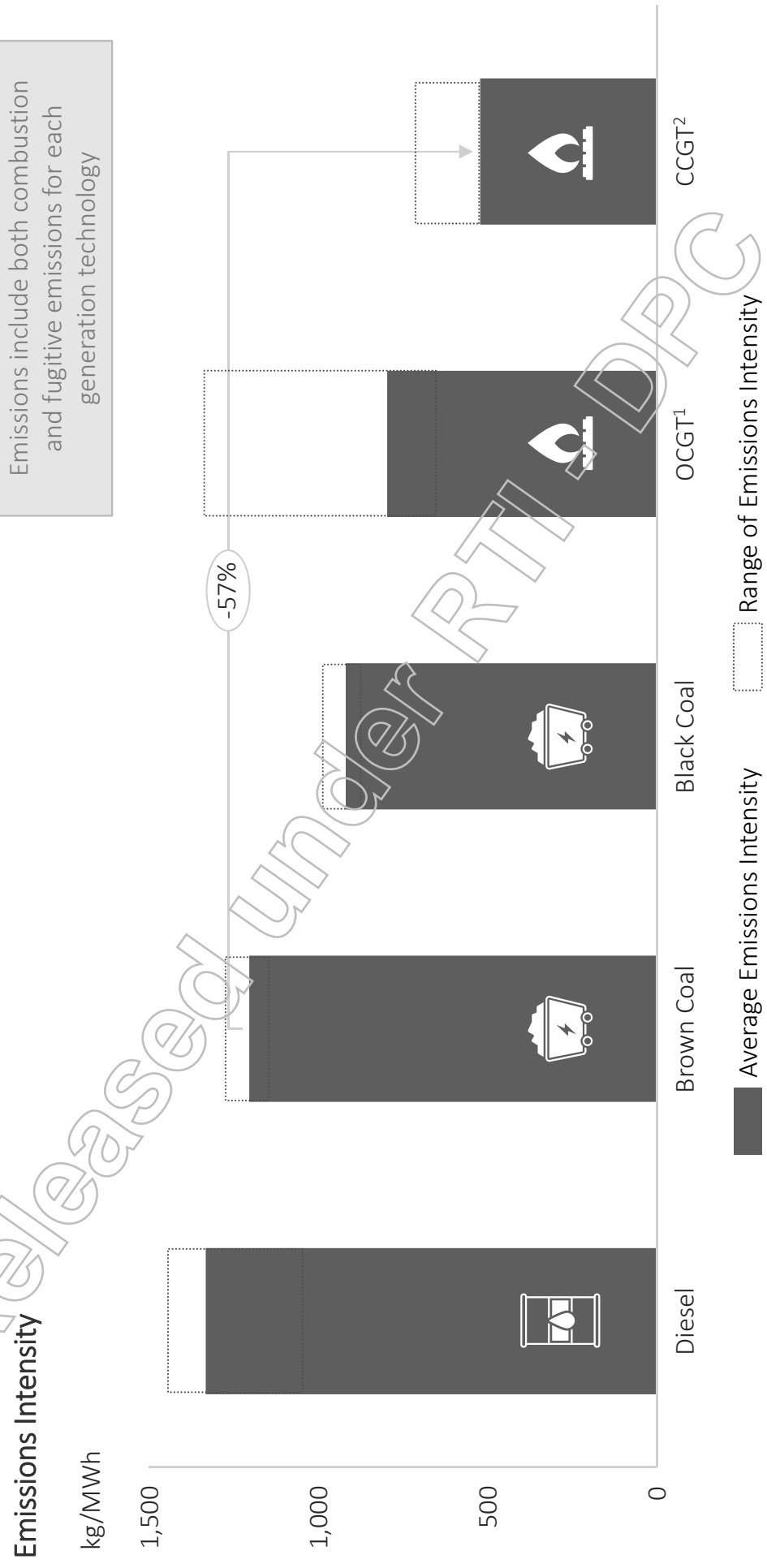
Without lower gas prices we will...

- ✗ Allow gas to continue to set a high benchmark price, resulting in a less efficient renewables sector, and higher prices for all consumers
- ✗ See major closures and declines in our existing industrial sector and deteriorating productivity, resulting in job losses and precluding us from becoming a world leader in hydrogen exports in 15-20 years time

\*When CCGT is the last step in the merit order – assuming 50% CCGT efficiency, a 30-40% capacity factor and approx. 1.5x average demand during the periods where CCGT is price setting; looking only at the NEM

# A higher quantity of cheap gas would drive a greener Australian future

Emissions include both combustion and fugitive emissions for each generation technology



1. Open Cycle Gas Turbine 2. Closed Cycle Gas Turbine  
Source: AEMO ISP



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# Recap and conclusions

85-170,000+ well paid direct jobs in energy-enabled industries, and 3-5X indirect jobs in associated industries (an additional 255-850,000 jobs)<sup>1</sup>

*\*\*\*top down estimates may be conservative – bottom up view is 5x higher*

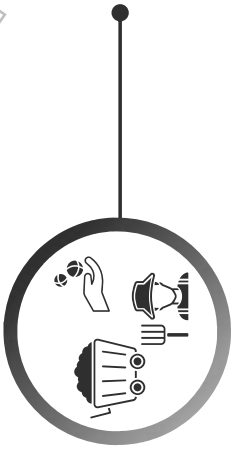
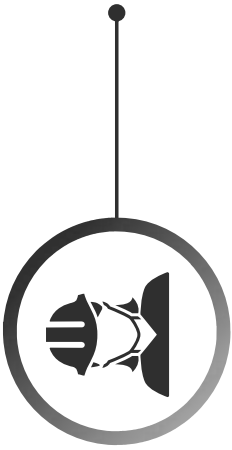
Underpin growth and prosperity through \$10-20B+ in direct GDP, with up to an 8x multiplier effect on the broader economy<sup>1</sup>

*\*\*\*Does not yet include any GDP estimates for advanced manufacturing, or from lower electricity prices*

Support the reskilling of many of those affected by current pandemic

Build an ecosystem that supports high value skills, engages Australia’s raw materials and agriculture

Improve resilience of the Australian economy by diversification



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# Manufacturing can deliver jobs and growth

Note: GDP and jobs estimates assume 10-20% growth in overall manufacturing sector – does not include any new positions or GDP contributions from advanced manufacturing – further work required to estimate those values; additional uplift may be possible as further conversations pursued (e.g., potential for growth in steel sector). 1. Based on US experience. Source: Department of Industry (Manufacturing Performance Report, 2019), Expert interviews and analysis.



## Growing advanced manufacturing

✓ Take a longer term view to create more value from our investments



Drive rigorous implementation and measurement of impact



Support with structural reforms, starting with skills



## Creating a competitive domestic gas market



Remove barriers to supply



Build the bridge of supply in the near-term



Create the market by underwriting a bookbuild



Lower the cost of pipelines



Complete the network of pipelines to markets



Scale & win in the medium-term

## Overview of our recommendations

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# Additional reference material - challenges and opportunities

# We face a difficult environment

Domestically, there are substantial impacts across the economy

69%

demand for goods & services<sup>1</sup>



Globally, we can no longer assume favourable trends



Supply chain uncertainty



Decreased demand for Australian exports



Rising trade protectionism



Stalling international labour flows



Growing digitisation

Recovery offers opportunity to reposition for resilience

Grow and diversify economy

Create new, skilled jobs

Build new export markets

Close the gap on sovereign capabilities

Support regional areas against impacts of lost seasonal labour and growing automation

10%

unemployment projection



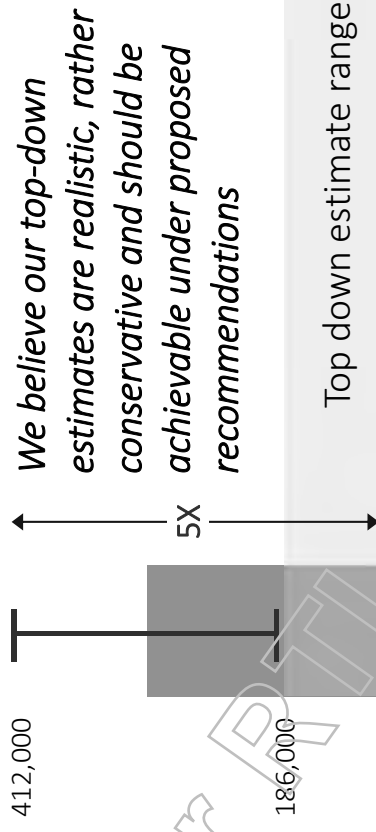
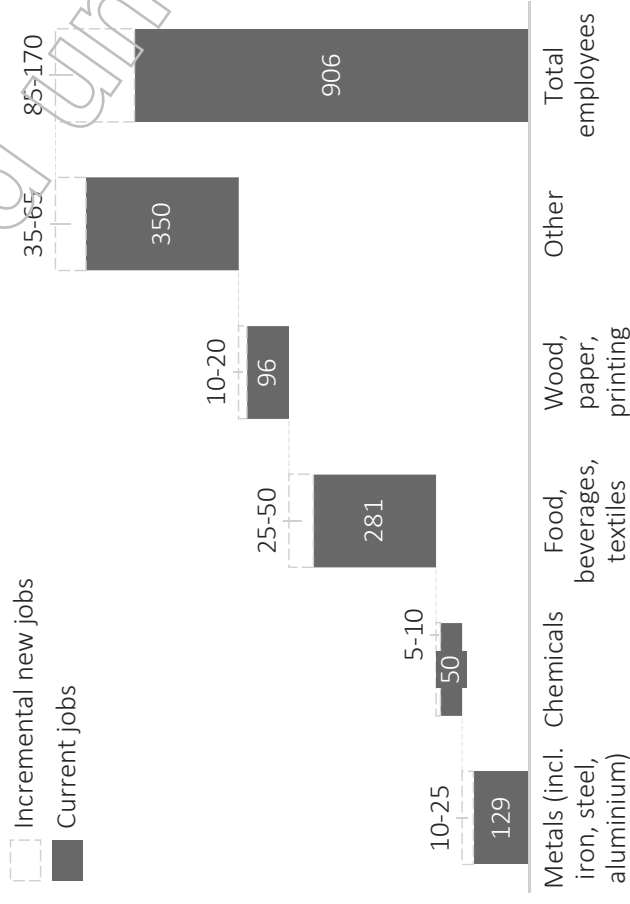
1. Businesses reporting reduced demand for their goods and services in the Australian Bureau of Statistics Business Impacts of COVID-19 survey (April 2020)  
Source: Australian Bureau of Statistics; Treasury; Expert interviews and analysis

# We took both a 'top down' and 'bottom-up' view to jobs estimates

Top down: Potential for ~85-170,000 new jobs if manufacturing industry grows 10-20%<sup>1</sup>

Bottom-up: Over 186-412,000 total direct job creation potential according to industry estimates

Number of employees by manufacturing sector, '000



Additional detail on bottom-up estimate on next slide

1. Incremental jobs illustrative only, assumes 10-20% growth in manufacturing jobs spread evenly across all industries. Source: Department of Industry (Manufacturing Performance Report 2019), Expert interviews.



# Bottom up estimates detail job growth by sector

Industry estimates show combined sector growth of 186-412,000 direct new jobs by 2030

- 10-15,000 direct jobs from blue steel manufacturing, most jobs expected to be created in rural QLD and NSW due to proximity to critical infrastructure<sup>5</sup>
- ~100,000 direct jobs in MinTech and Rare Earths (e.g., wholesale adoption of automation technology in resources sector to create up to 80K jobs)<sup>9</sup>
- 15-25,000 direct jobs from petrochemicals complex (e.g., Saudi equivalent for Ethylene created 25K jobs and ~\$10B in revenues)<sup>6</sup>
- 22-44,000 direct jobs from urea and ammonia manufacturing<sup>7</sup>
- 22-147,000 direct jobs from Food & Agritech, industry estimates ~70% jobs created in regional Australia<sup>8</sup>
- 5-7,000 direct jobs from advanced building materials (e.g., potential 7K new apprenticeships created by Industry 4.0 adoption in construction)<sup>3</sup>
- 7-21,000 direct jobs from health (e.g., 16K jobs added since 2016 after creation of MTPConnect, Australia's MedTech and Pharma growth centre)<sup>4</sup>
- 2.5-25,000 direct jobs from defence (shipbuilding) and space (e.g., Joint Strike Fighter program created 2.4K jobs; 20K anticipated civil space jobs)<sup>1</sup>
- 3-28,000 direct jobs from energy and renewables (e.g., 6K new jobs following wind and solar power boom in 2018-2019)<sup>2</sup>



**186–412,000 total direct job creation potential** according to industry estimates (3-5X indirect jobs in associated industries, an additional 550,000-2.1M jobs)<sup>10</sup>

“ *With competitive gas pricing (~\$4/GJ), additional investment in urea manufacturing is viable creating tens of thousands of jobs and requiring 40PJ of additional natural gas each year... under the status quo large east-coast domestic users will remain unable to secure competitive natural gas. This will result in the closure of [ammonia manufacturing plants] that directly employ more than 2,000 people and using ACIL Allen figures result in 30,000 jobs lost*

- CEO, Fertiliser and explosives manufacturer

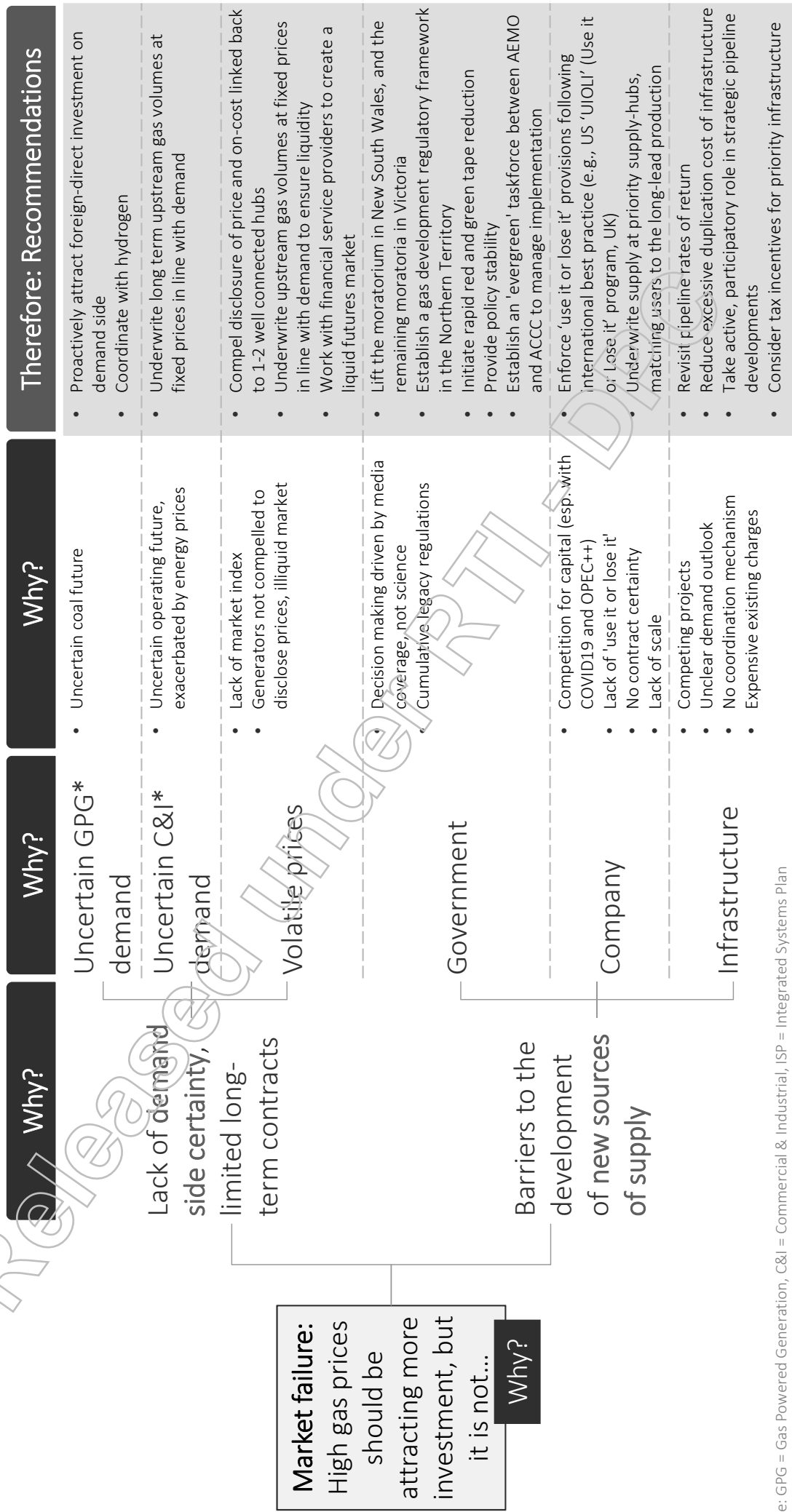
1. Low ABS Australian Industry 2018 (81550D0003) x10%, High Defence Industry Capability Plan, Australian Civil Space Strategy 2030 2. Low ABS as prev, High Climate Council Australia, ABS employment data 3. Low ABS as prev, High Green Building Council of Australia 4. Low and High MTPConnect 5. Based on Grattan Institute estimates of “Green Steel jobs”; Does not account for short term jobs created (e.g., in construction) or potential loss of carbon reliant workers as the economy transitions to renewables (e.g., coal miners) 6. Based on submission from Inctec Pivot Limited (analysis from Allen Chemical Industry Analysis 2019, assuming gas prices of ~\$4/GJ) 7. Aramco 8. Low ABS as prev, High Food Innovation Australia 9. METS Ignited 10. Based on US experience

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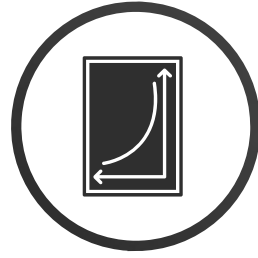
# Additional reference material - gas market

# Proposed recommendations will address the fundamental market failure holding us back today



\*Note: GPG = Gas Powered Generation, C&I = Commercial & Industrial, ISP = Integrated Systems Plan  
Source: Expert interviews and analysis

# Generation investments are supported under the UNGI program through several mechanisms



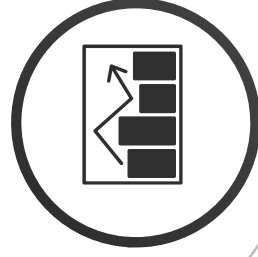
## Floor price

Floor set on electricity price received by project proponent, aim to ensure they recover debt from investment  
Government makes payments to proponent where project's avg price drops below floor



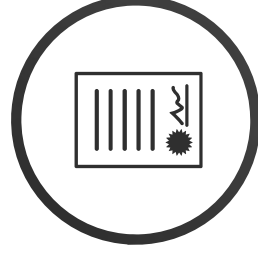
## Small grants and loans

Loans include upfront capital for projects and receive return over agreed period  
Small grants largely target existing facilities (e.g., upgrades)



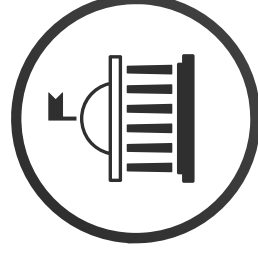
## Contract for difference

Agreed strike price enacted after year 5 of project, aimed only at capacity that is firm or is firmed  
Government pays proponent difference where spot price < strike price, proponent pays government difference where spot price > strike price



## Cap and floor (collar) contracts

Agreed cap and floor prices enacted after year three of project  
Government pays proponent difference where spot price < floor, proponent pays government difference where cap < spot price



## Underwriting cap contracts

Aim is to reduce financial risks for generators offering cap contracts, usually sold by peaking generators



# Australia is one of the few jurisdictions that does not enforce 'use it or lose it' provisions

Illustrative examples from other major gas regions



## Federal and private leases have specific time limits to ensure production

Use it or lose it (UIOLI) Act (2011): Federal lease holders must ensure timely production from the field in 5 yrs – or pay \$4/acre annually after if no production occurring

Land privately held such as Permian primary term of lease can be 3-5yrs –

- Mature areas operator often required to produce well in time, or pay "shut-in" royalties to hold the lease
- Exploratory areas operator often subject to continuous drilling clauses



The 5-year rule under UIOLI led to significant write-downs of oil and gas assets impossible to profitably extract under current prices after 2014 oil downturn



## Canada has government auctions to ensure effective use of developments

- Provincial governments own a vast majority of mineral rights for oil & gas developments and auction to highest bidders with set time limits (3-10yrs)
- Within time period, operator must take action to prove that they are "sufficiently" moving forward with drilling – or risk losing the lease
- Action could include surveying, applying for permits, exploratory drilling, etc



Regulator has significant discretion to determine what is "sufficient" and **standard may differ depending on attractiveness of acreage**, as province goal is to earn royalties from production



## The UK Fallow Block initiative is a policy launched in 2003

- Encourages activity in 'fallow' fields on the UK Continental Shelf
- The act asks lease holders to ensure timely production from the field



Fallow discoveries are given two years to be developed. If no acceptable activity is agreed, the block is relinquished and offered for re-licensing in the next open acreage round



# Other jurisdictions show how fiscal changes can be managed to stimulate upstream activity



## UK stimulates investment by keeping headline tax rate flat and adding options for late-life deals

In the 2019 budget, the UK government made several decisions:

- Keep headline oil and gas tax rates flat – favouring legislative stability over short term windfalls from price volatility
- Support operators in their asset divestment through:
  - Transferable Tax History (TTH): help buyer realise the full value of decommissioning tax relief
  - Petroleum Revenue Tax (PRT) refunds: enabling buyers and sellers access to PRTs when making deals (e.g., Majors that are looking to divest large proportion of mature fields)



- Expands the range of options available to companies to address the issue of large decommissioning costs when making deals
- Provides certainty and potential offsets of the large costs associated with decommissioning



## Norway stimulated exploration by new entrants by providing them accelerated tax relief

Introduced exploration cost refund to level playing field for new explorers – up to 78% of E&A costs refunded

Previously, new explorers required to pay full cost of exploration and can only recover it from future income – unequal playing field with existing producers who could consolidate their upstream activities for tax purposes (i.e., deducting E&A costs and depreciation associated with new projects)

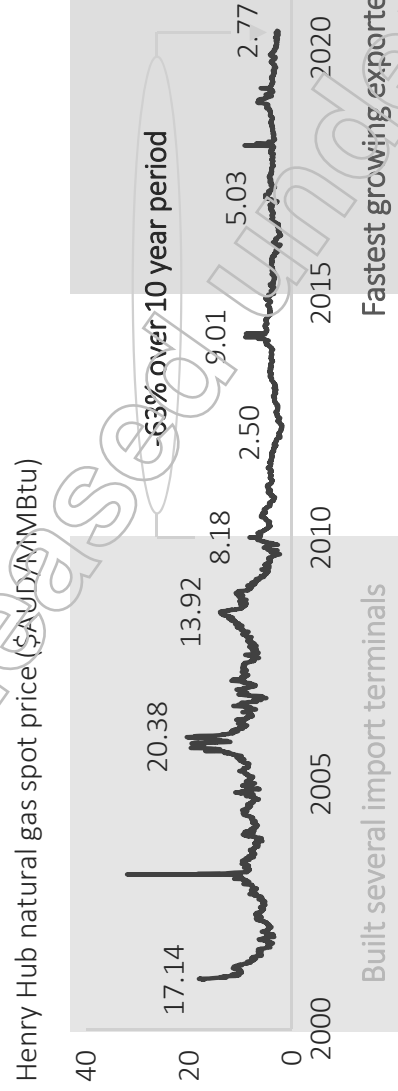


- Equalised net cost of exploration resulting in:
- Number of companies holding licenses has more than doubled from 25 to 55 (driven mainly by small and medium-sized companies)
  - Exploration activity between 2005 and 2017 yielded more than 10 billion new barrels across 204 new fields, adding \$310M to Norway's upstream sector

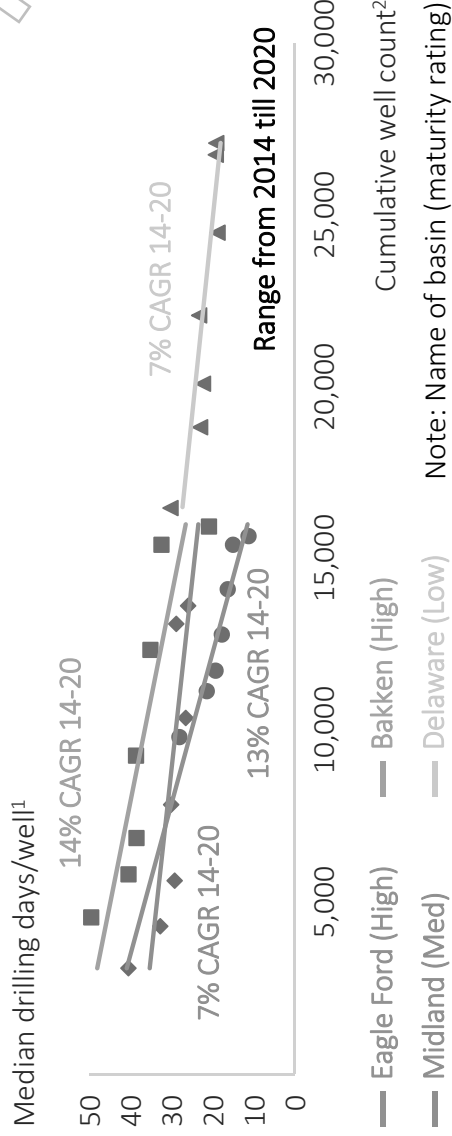


# US shale gas market: In-basin scale helped lower costs by rapidly accelerating experience curve

Henry Hub pricing dropped significantly due to US shale growth



Operational learning curve yield more benefit as basins mature



Conversely Australia currently lacks scale and strong OFS providers



Active onshore rigs: 523 (US) vs 26 (Australia)

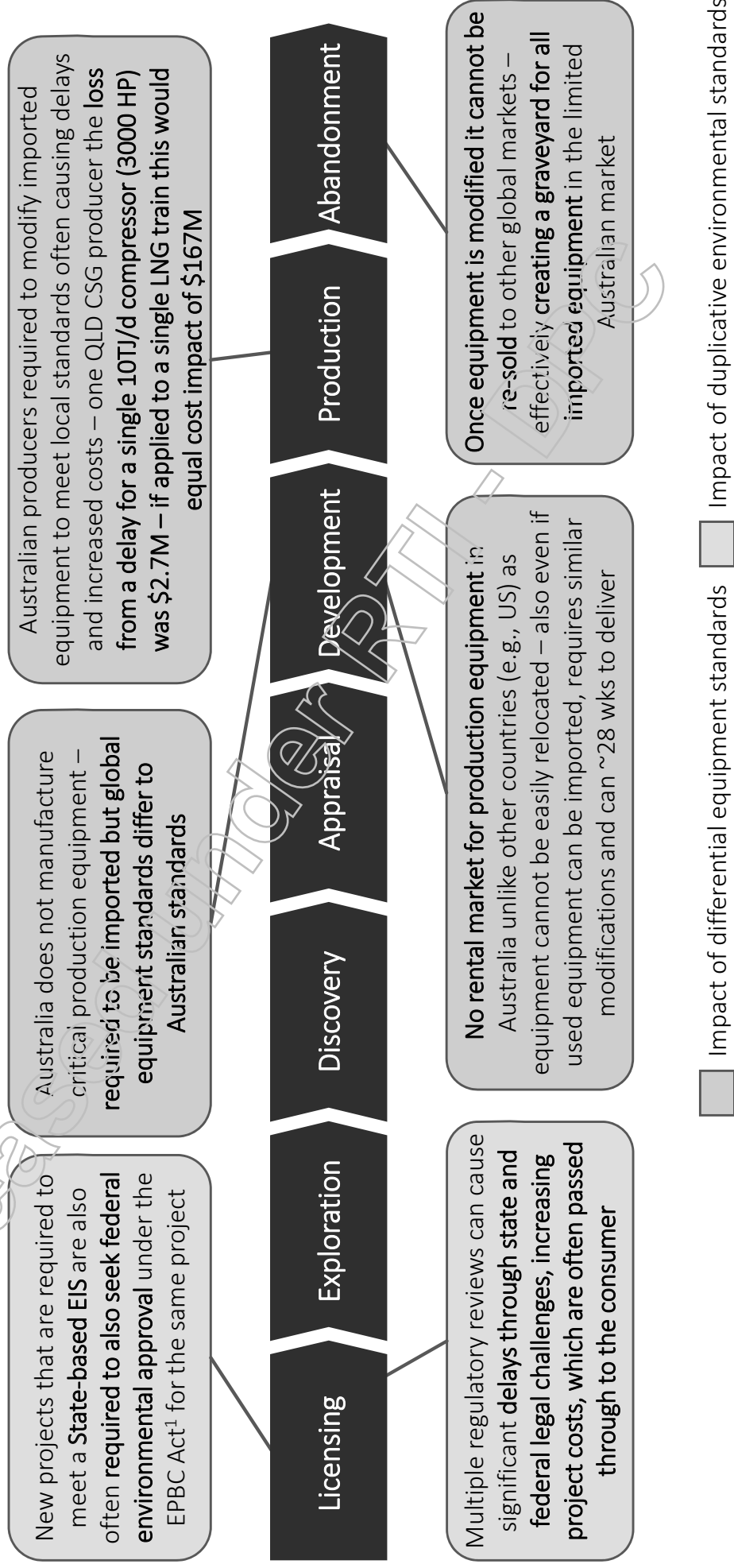
YTD 2020 production (Tfce): 37 (US) vs 1.44 (Australia)

Total OFS companies<sup>3</sup>: ~5,000 (US) vs 480 (Australia)

1. Normalized to 20,000' well. 2. Horizontal wells drilled from 2010 onwards. 3. Includes all "O&G drilling", "O&G equipment and services" and O&G exploration services" companies on Capital IQ. Source: Capital IQ, Baker Hughes (Australian active rigs data as at 30 March 2020), Bloomberg, Expert analysis

# Onerous red and green tape impacts all steps of the gas production value chain

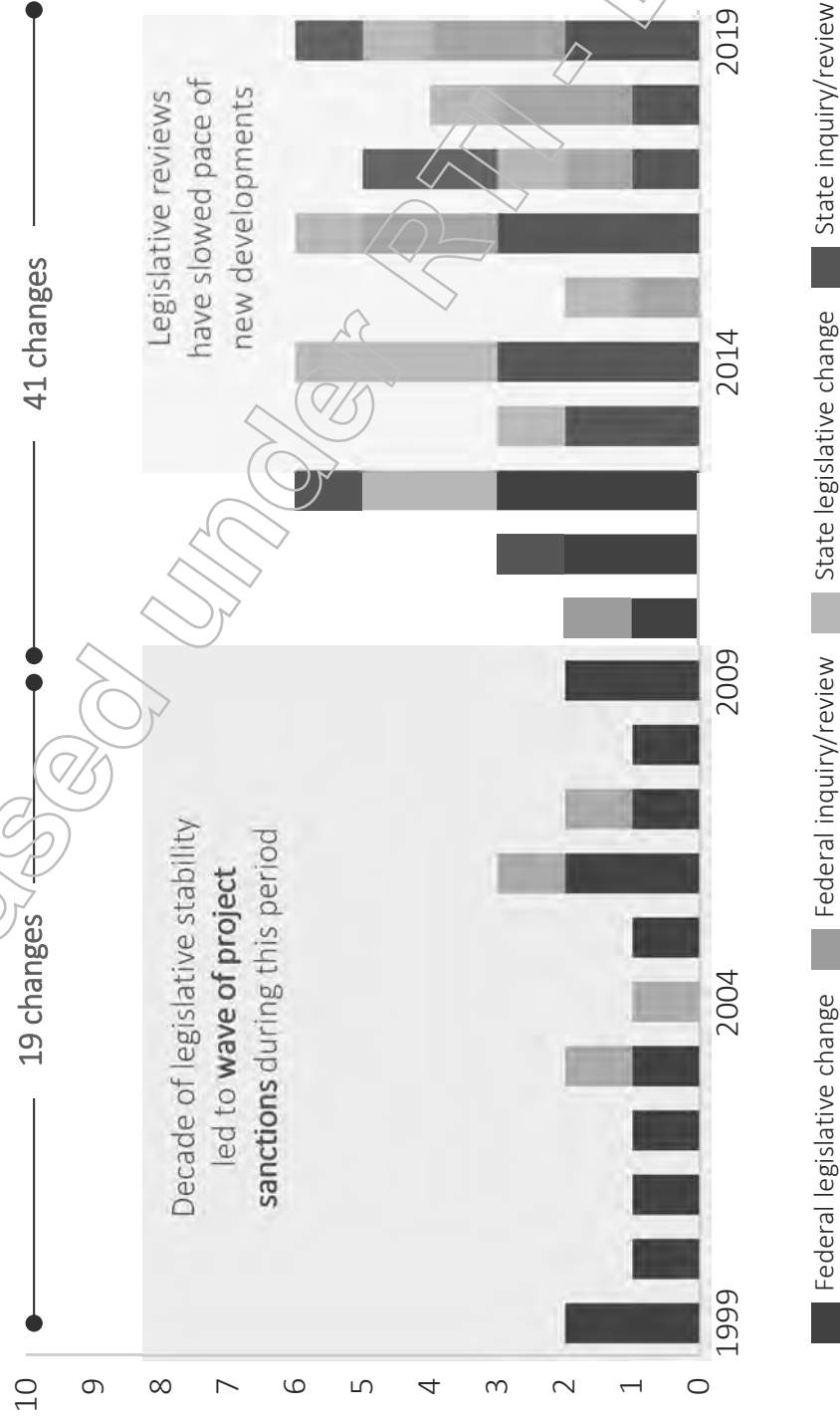
Key impacts of onerous equipment and environmental standards



1. Environment Protection and Biodiversity Conservation Act (EPBC). Source: Worley, Expert interviews

# In recent years, legislative environment has added to overall investment uncertainty

Number of Australian state and federal legislative changes, inquiries and reviews into LNG exploration and development, 1999-2019



Lack of legislative stability along with emergence of new gas investment destinations such as North America and East Africa, means Australia's global competitiveness has decreased in the past decade

Reducing the volume of fiscal and regulatory change is key to Australia attracting upstream investment

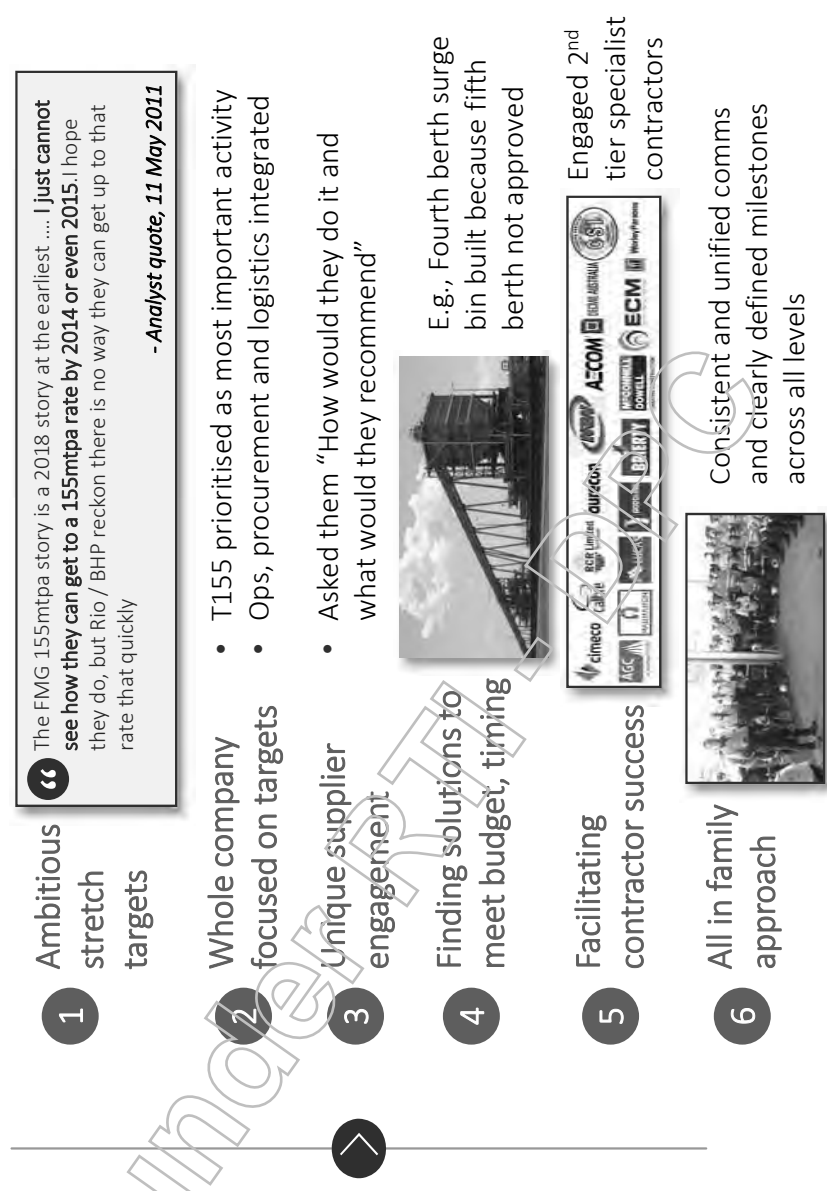
# There is precedent for achieving capital efficiency in the Australian context

Worley indicate need to base delivery of new pipeline infrastructure on following principles

Create a “must achieve the objective” culture by

- Setting an **ambitious fixed objective**
- Tapping into the **capability and expertise** of proven partners and organisations
- **Contracting for performance first**, risk mitigation second
- Focusing on the impact this project can have on Australia to **inspire every worker and participant**
- Ensuring **safety**
- Instituting a **flat and highly accountable** project structure
- **Reacting quickly** when things go wrong

Fortescue's 2014 FMG 155mtpa project shows how these principles can be used to deliver critical infrastructure



# To successfully bring costs down, we must also address capex and labour productivity

Despite 6.4% increase in labour inputs in energy in past year labour productivity reduced -4.5%<sup>1</sup>, MFP down -1.7%

Annual change in key productivity statistics, 2017-18

	Labour Inputs	Capital inputs	Labour productivity	Multi-factor productivity
Electricity, gas, water and waste	+6.4	+2.4	-4.5	-1.7
Mining	+3.2	+1.6	-0.4	+0.9
Construction	+7.4	+2.0	-2.4	-0.8
Mfg	-0.7	-0.8	+3.7	+3.7

The next wave of capex and opex efficiency will have a strong component of workforce productivity, including the adoption of digital and new ways of working

New capital development requires certainty of investment to be supported

Therefore, improved labour and capex productivity key to ensuring future of gas and energy developments

1. Labour productivity growth is the growth in output less the growth in labour inputs; labour inputs refers to the number of hours worked per industry; multi-factor productivity compares amount of output from sector vs. total amount of inputs needed. Source: Productivity Commission (PC Productivity Bulletin, May 2019), Expert interviews

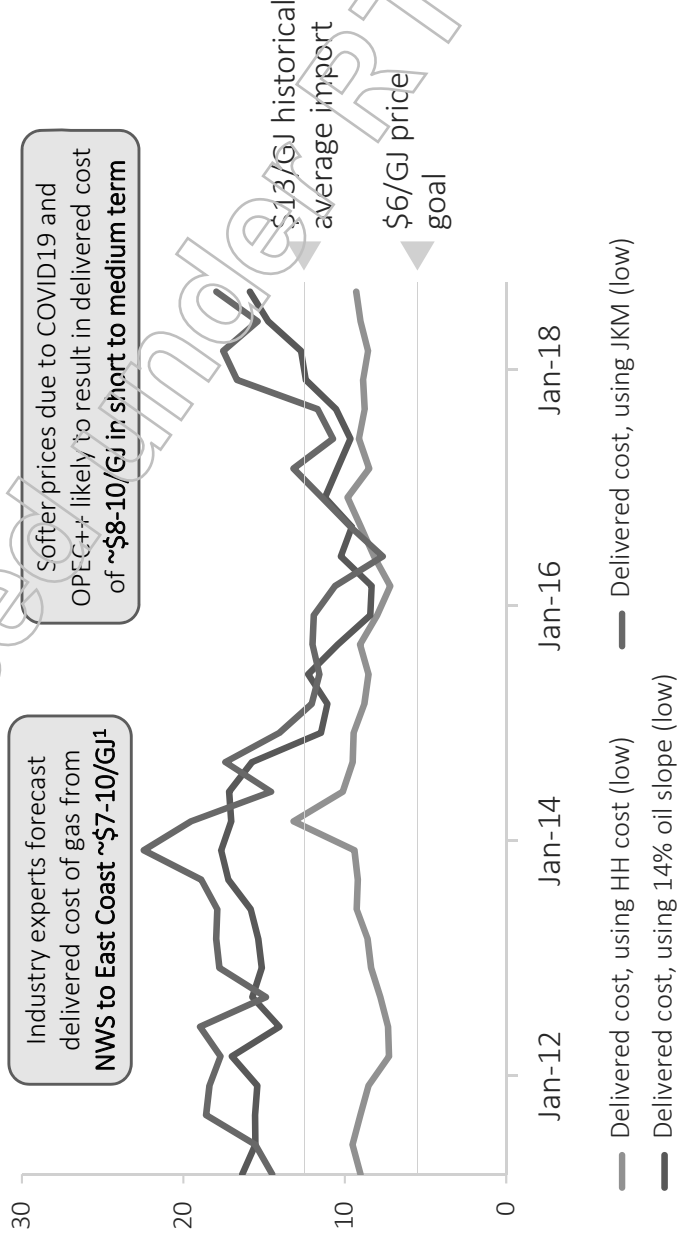


# Import terminals may actually be counter productive to creating viable gas market

Delivered cost of gas from import terminal frequently higher than \$10/GJ AUD based on historical estimated landed-cost

May be counter productive because...

Estimated delivered gas cost from global markets to East Coast<sup>2</sup> (\$AUD/GJ)



1 The actual price linkage is to JKM, not HH – which has historically been higher and more volatile

2 The delivered cost prices that underpin the contracts on offer today are at \$8-10/GJ, which manufacturing players have rejected out of hand

3 Does not promote the long term goal of creating a competitive price environment in the East Coast – i.e., importing higher cost higher cost molecules would crowd out investment in indigenous supply

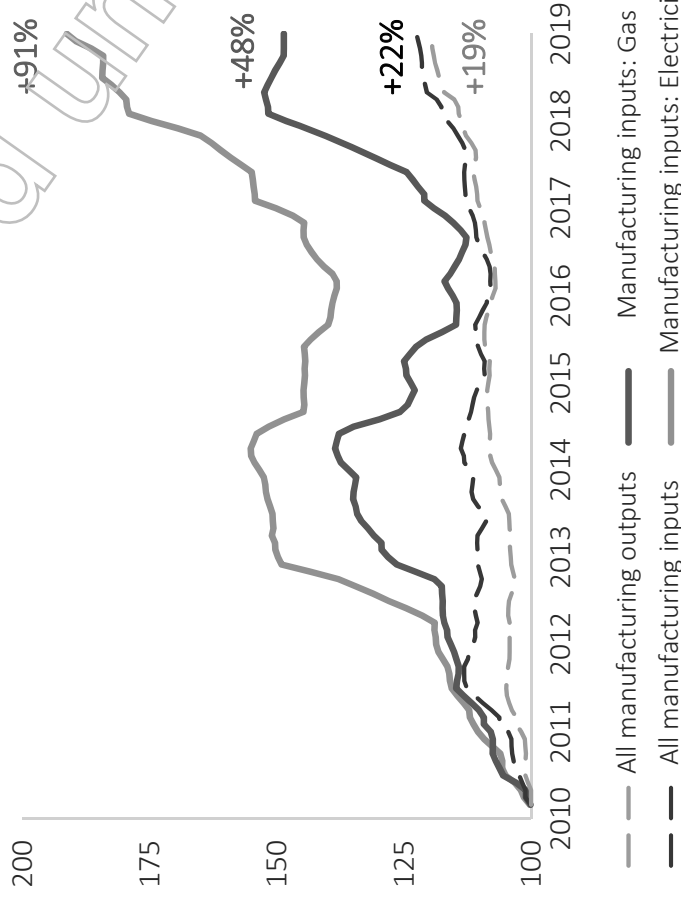
Note: Delivered costs does not account for transportation costs from LNG import terminal to demand centre. 1. Assumes LNG price of \$4-5.50/GJ, shipping costs of \$1-1.50/GJ, regasification costs of \$1.30-1.50/GJ, per expert interviews. 2. Global delivered cost estimates calculated using cost plus method; HH assume 15% tariff to transport to West Coast USA, \$2-4/GJ shipping to Aus, \$1.5-2.50/GJ liquefaction, \$1.30-1.50/GJ regas; Oil slope estimate assumes \$1.30-1.50 regas; JKM estimate \$1.1-2.3 shipping, \$1.30-1.50 regas. Source: Bloomberg, AEMO, Bloomberg, Expert interviews and analysis  
 Note: Used low end of range in all estimates; does not take into account potential challenges in transporting any Australian-sourced cargoes between two Australian ports due to maritime legislation



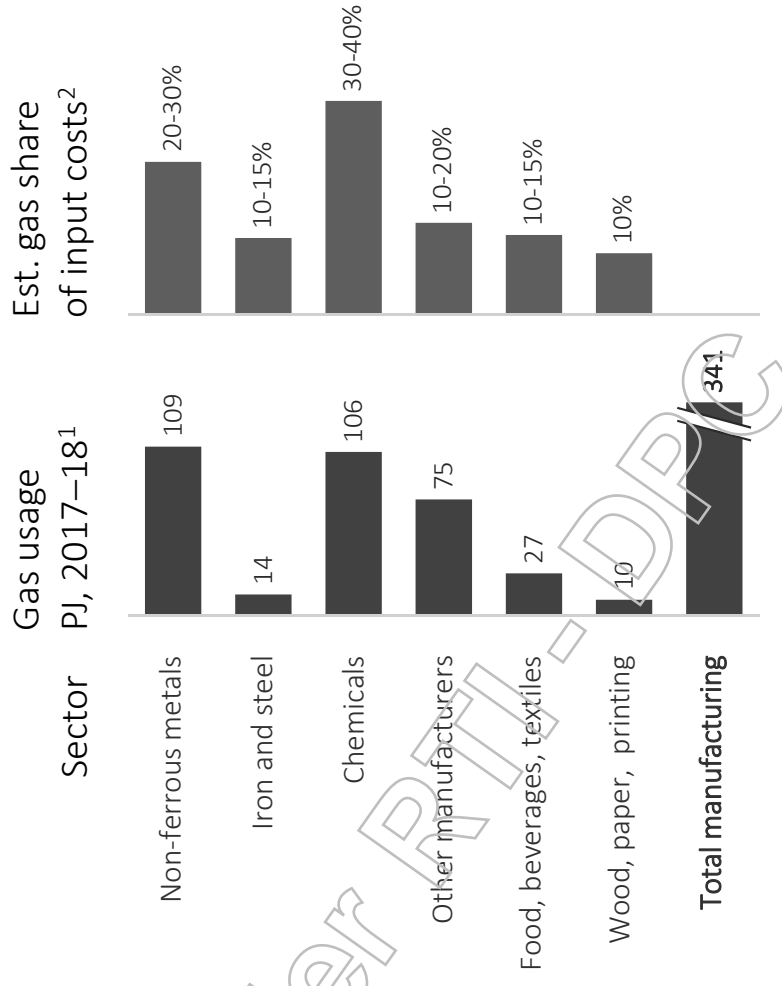
# Manufacturing sector was already under threat due to rising costs of gas and power

Rising gas and electricity prices are the main drivers for increases in manufacturing costs

Manufacturing gas and electricity price indexes, cumulative change (Indexed to Mar 2010 = 100), 2010-19

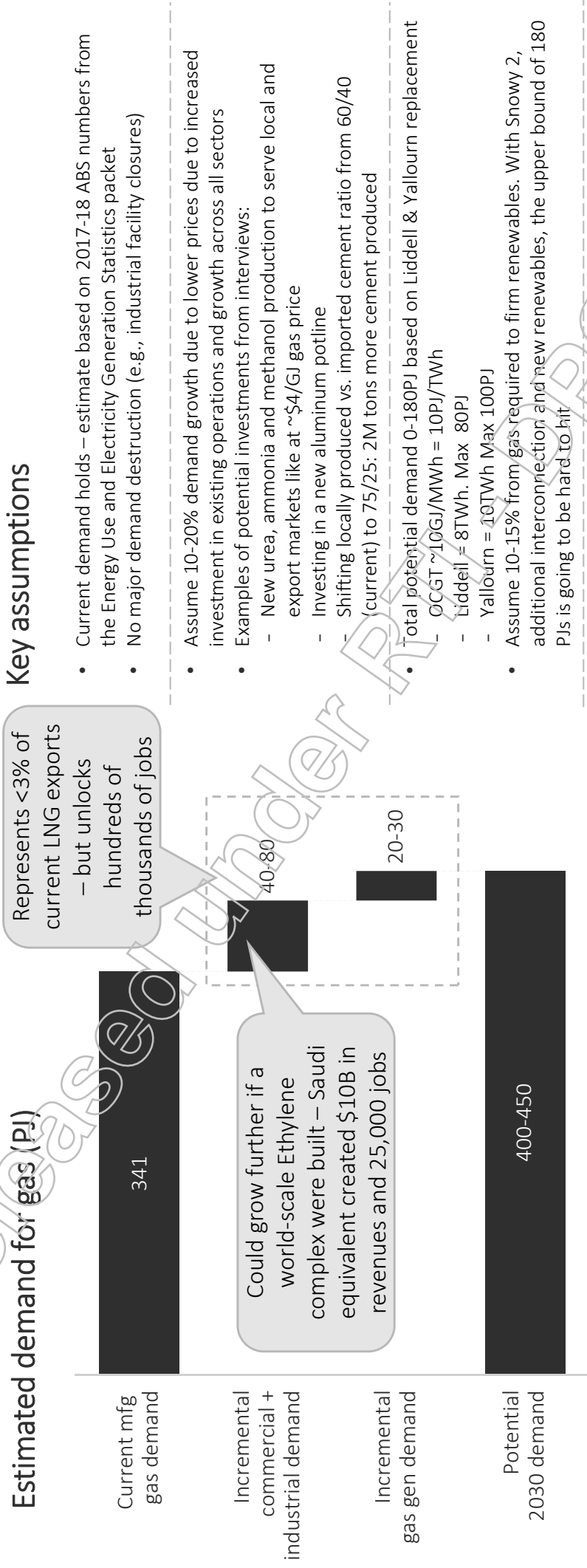


Manufacturers exposure to changing gas prices varies by sector



1. Sector gas usages number estimated using ABS total manufacturing estimate split by sector using APPEA 2016 Australian Energy Statistics.2. Ranges indicative only, based on interviews with industry experts and global benchmarks. Source: ABS (Energy Use and Electricity Generation Statistics packet, 2017-18), AEMO, ACCC gas inquiry (July 2019 and Jan 2020 Interim Reports) AI Group, ABS (Producer Price Index, Mar 2019), Expert interviews and analysis.

# Incremental supply required represents less than 3% of exports, but unlocks significant jobs



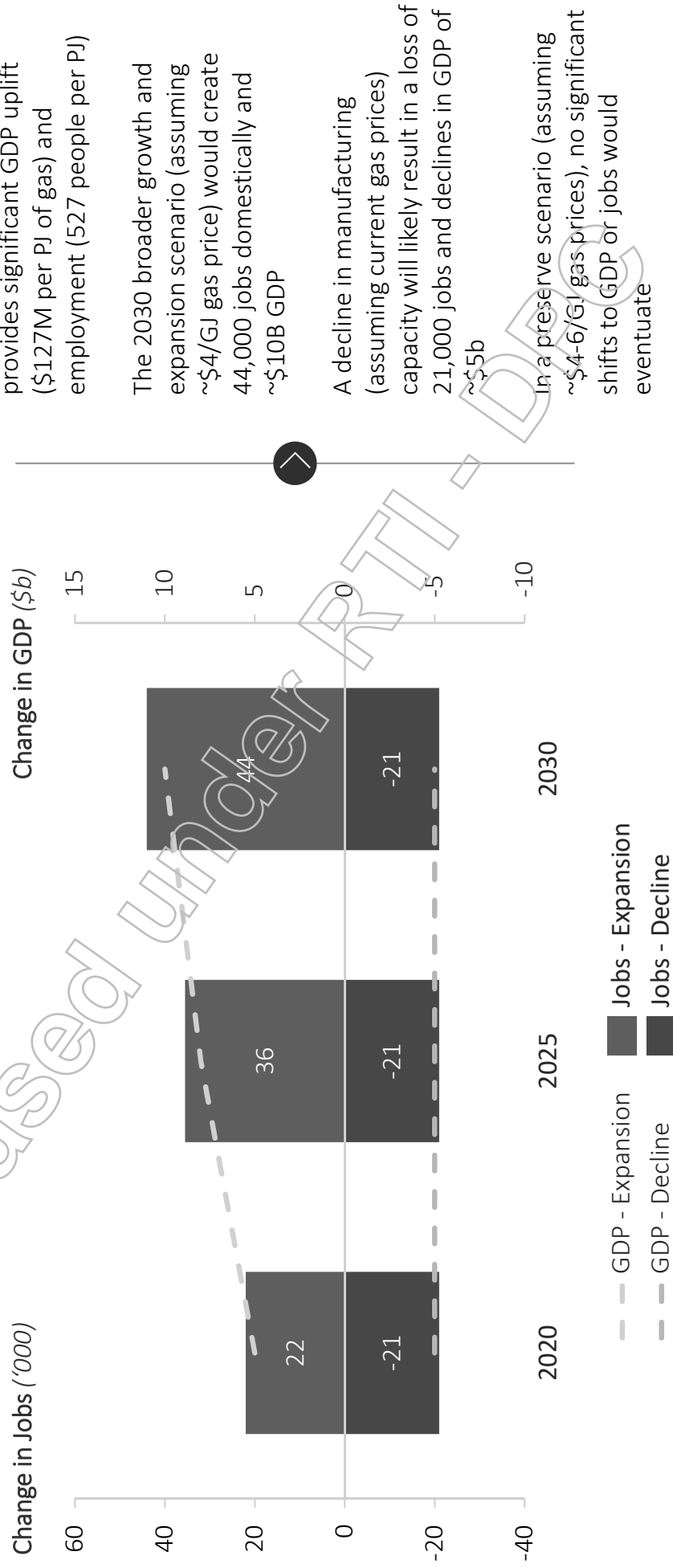
The estimates above on Commercial & Industrial have been built top-down, and then validated bottom up via input from industry – strong indications that they may be very conservative estimates

Note: Incremental C&I demand does not include potential new downstream demand from lower electricity prices (e.g., new petrochemicals development)  
Source: ABS, AMEO, Expert interviews and analysis



# Chemicals sector alone could deliver 44,000 new jobs, ~\$10B GDP uplift with \$4/GJ gas prices

Forecasted impact of gas price scenarios on jobs/GDP for gas feedstock chemicals sector (e.g., fertilizer, explosives)



Gas-based chemical manufacturing provides significant GDP uplift (\$127M per PJ of gas) and employment (527 people per PJ)

The 2030 broader growth and expansion scenario (assuming ~\$4/GJ gas price) would create 44,000 jobs domestically and ~\$10B GDP

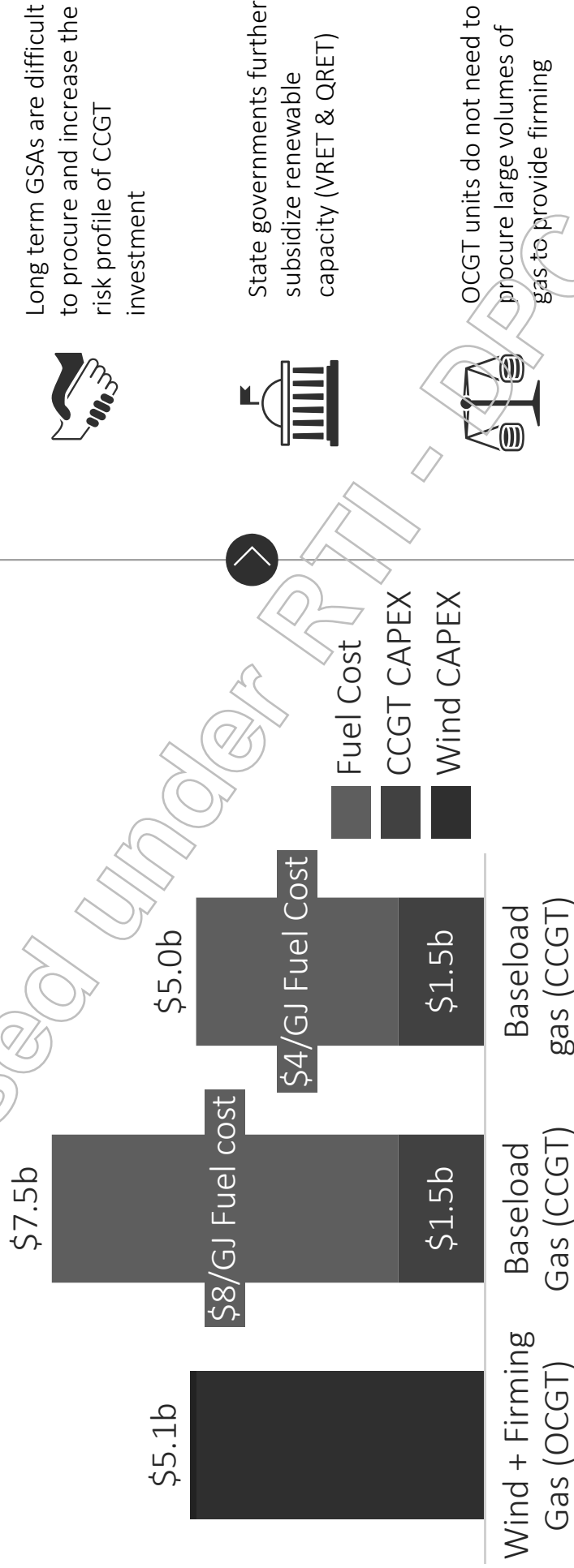
A decline in manufacturing (assuming current gas prices) capacity will likely result in a loss of 21,000 jobs and declines in GDP of ~\$5b

In a preserve scenario (assuming ~\$4-6/GJ gas prices), no significant shifts to GDP or jobs would eventuate

# New base gas generators will not be built unless long term gas prices fall to ~\$4/GJ

Current gas prices are not going to incentivise new baseload generation to replace 1GW of coal capacity<sup>1</sup>

CCGT is also facing other political and economic challenges



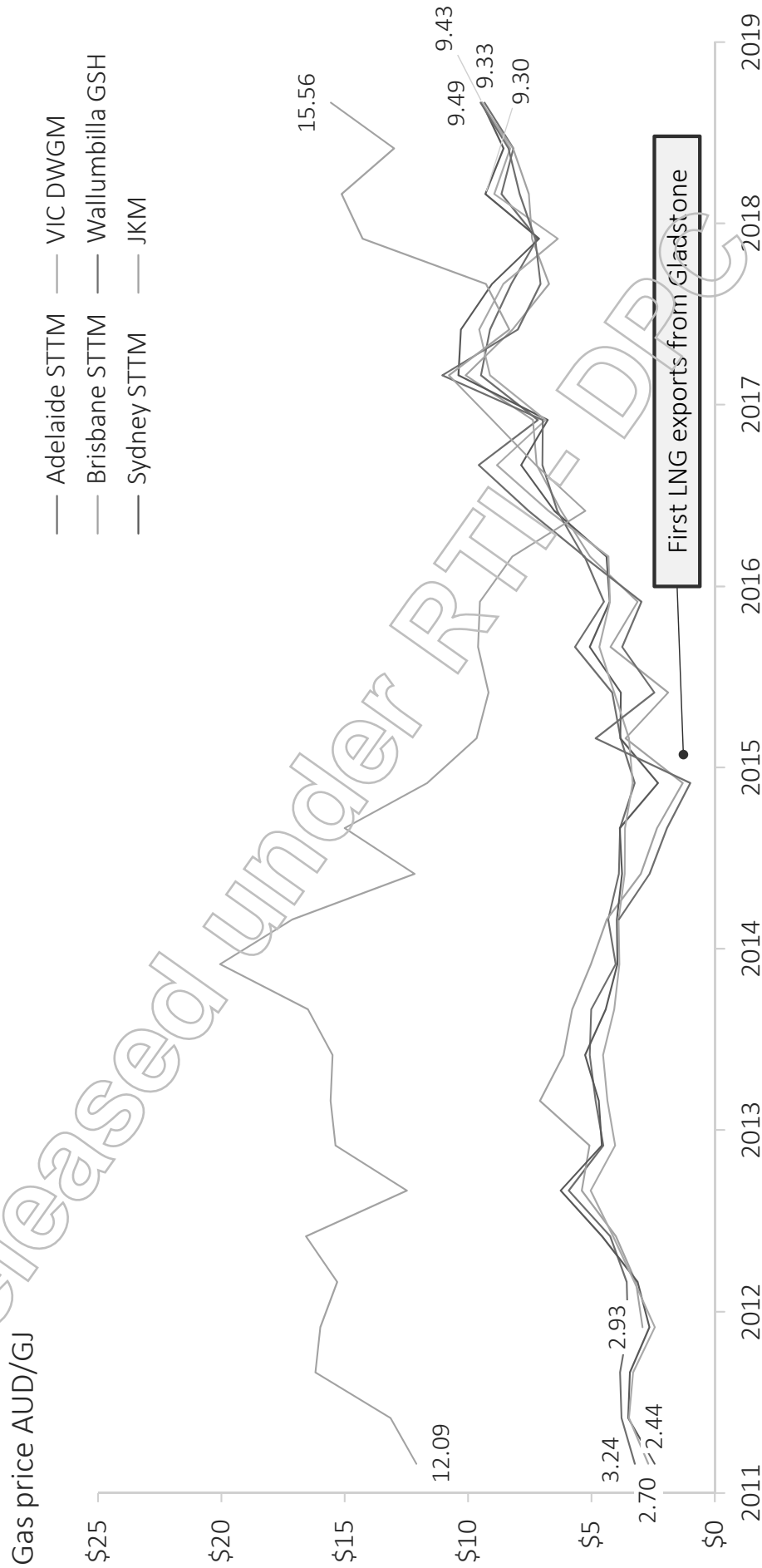
1. Coal replacement assumes 80% capacity factor or ~7TWh of energy  
 Note: Wind assumed to be 2.5GW at a ~32% capacity factor with 100MW OCGT firming. OCGT capex assumption of ~\$100M. CCGT capex based on 1GW plant running at 80% capacity factor.  
 Source: AEMO, Expert analysis

# Majority of Australian gas goes to export



Source: Australian Energy Update 2019 (Sep 2019, Australian Government)

# LNG export markets have linked East Coast gas to global prices, tripling prices in since 2014

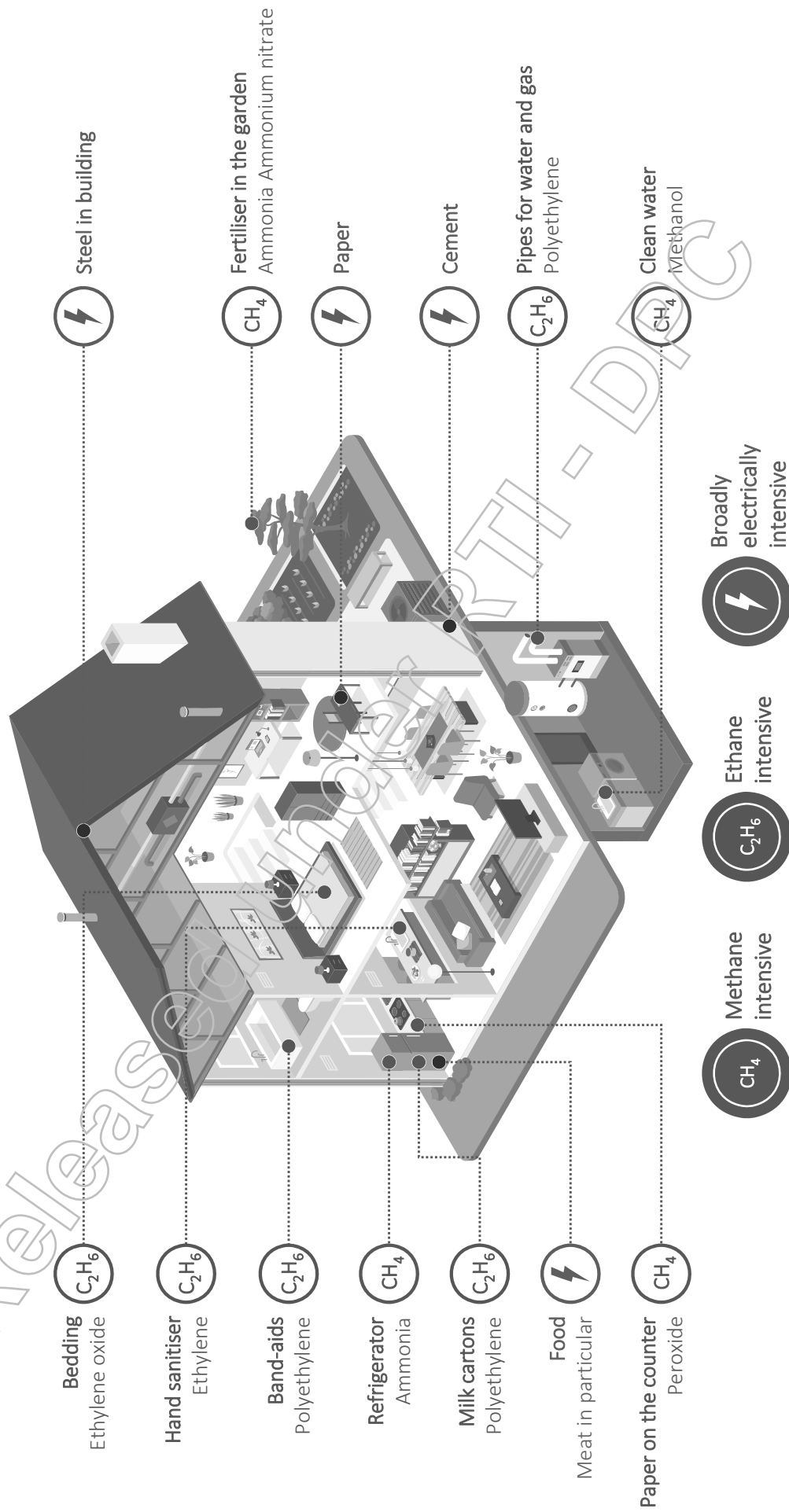


Source: AEMO, ACCC gas inquiry (July 2019 and Jan 2020 Interim Reports) AI Group, ABS (Producer Price Index, Mar 2019)





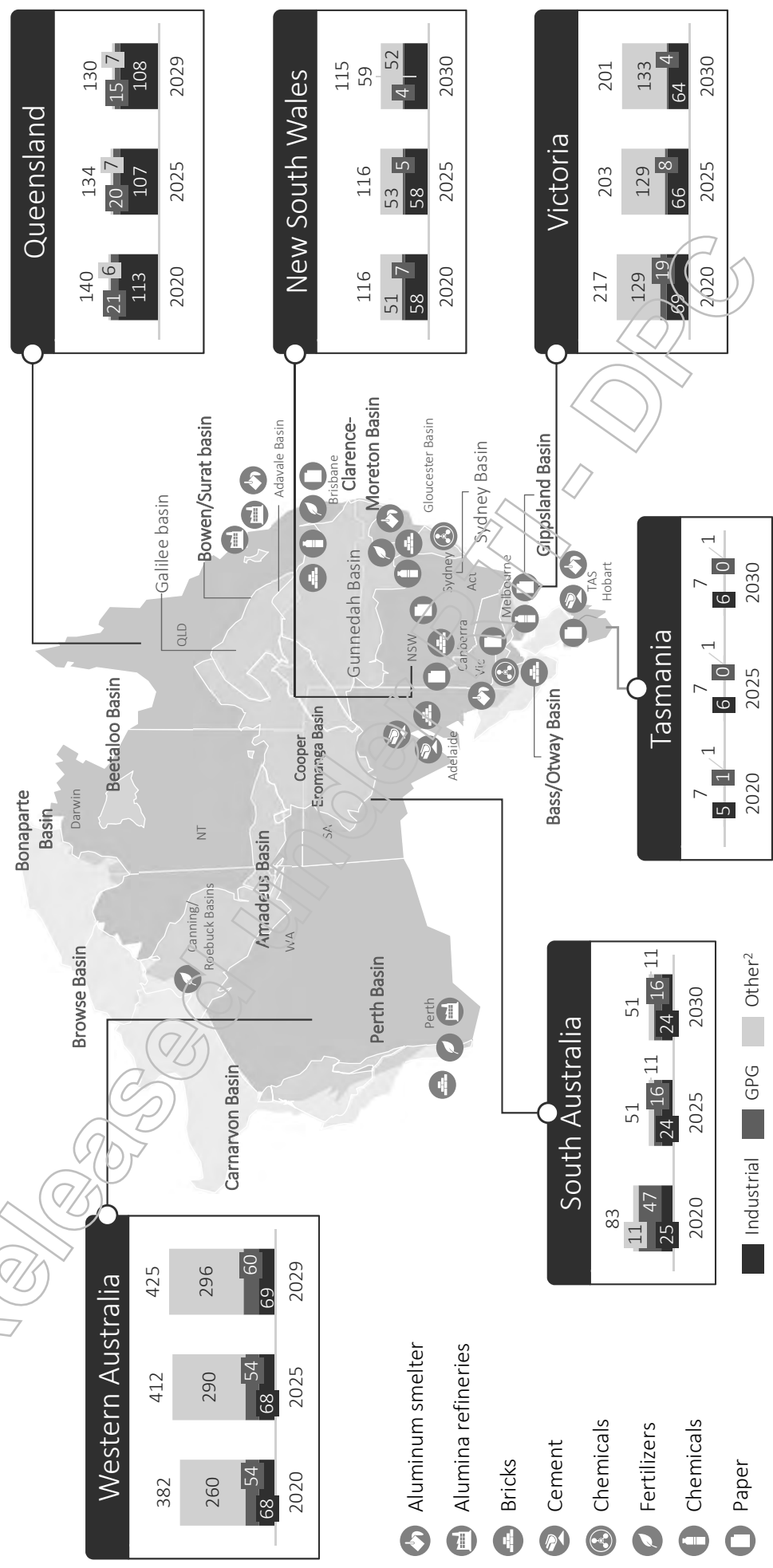
# Gas feedstock is critical to chemical mfg and the creation of many everyday items



Source: United States Studies Centre, "It does not have to be this way: Australia's energy crisis, America's surplus" (12 December 2018)

# Current demand largely concentrated in East

Current forecasted domestic gas demand (PJs) and map of mfg clusters heavily reliant on gas<sup>1</sup>



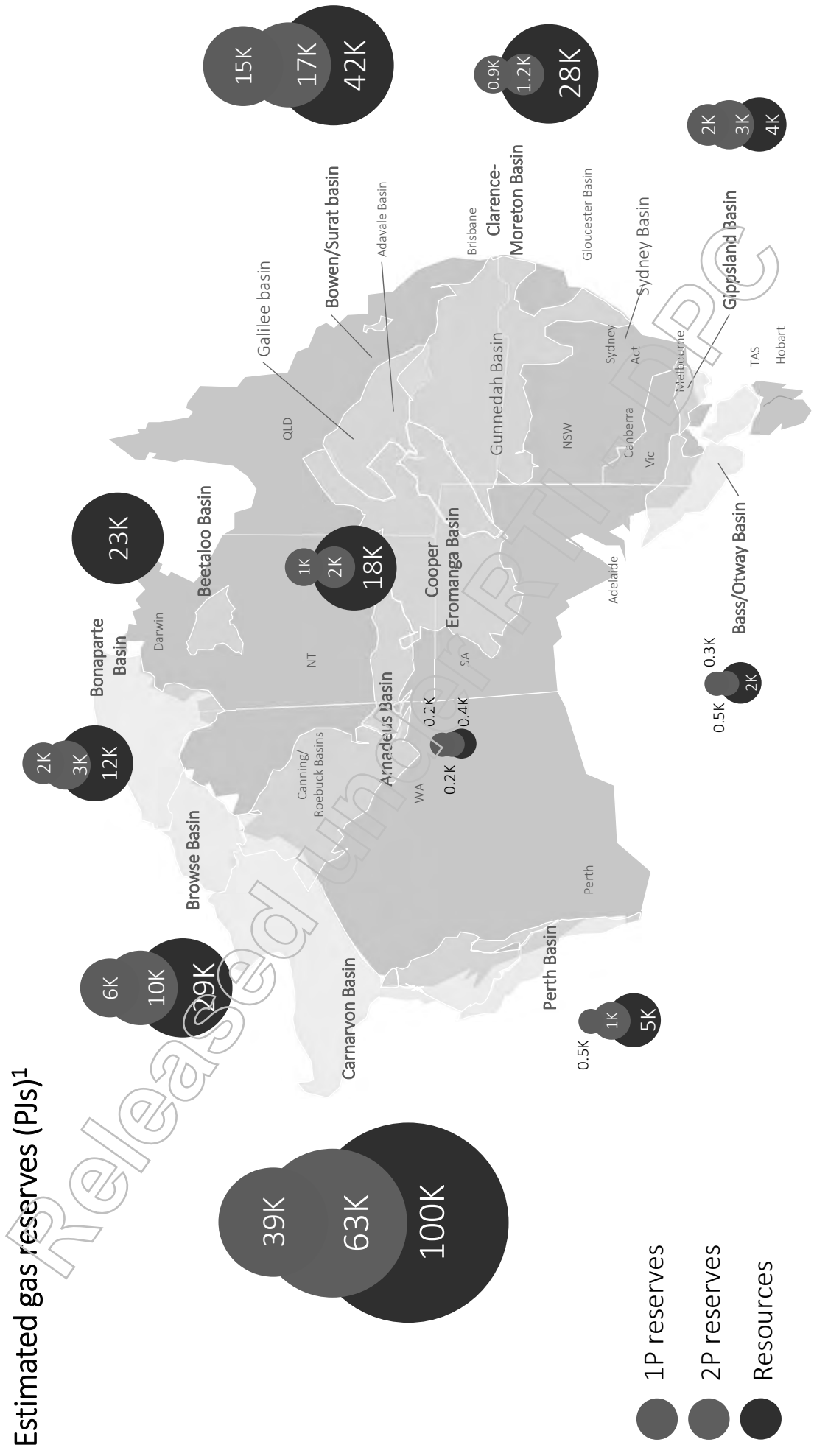
Note: Forecast includes current AEMO demand forecasts, does not account for potential demand creation due to lower gas prices. 1. Mfg clusters based on APPEA report in December 2016. 2. East coast other includes residential and commercial, Western Australia other includes mining, mineral processing and distribution. Source: AEMO GSOO 2020, AEMO WA GSOO 2019, APPEA



Creating a competitive domestic gas market

DRAFT

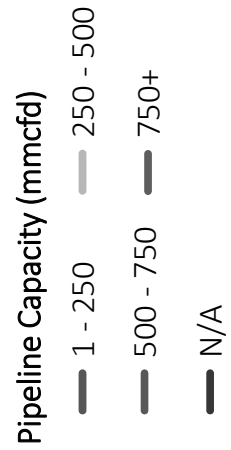
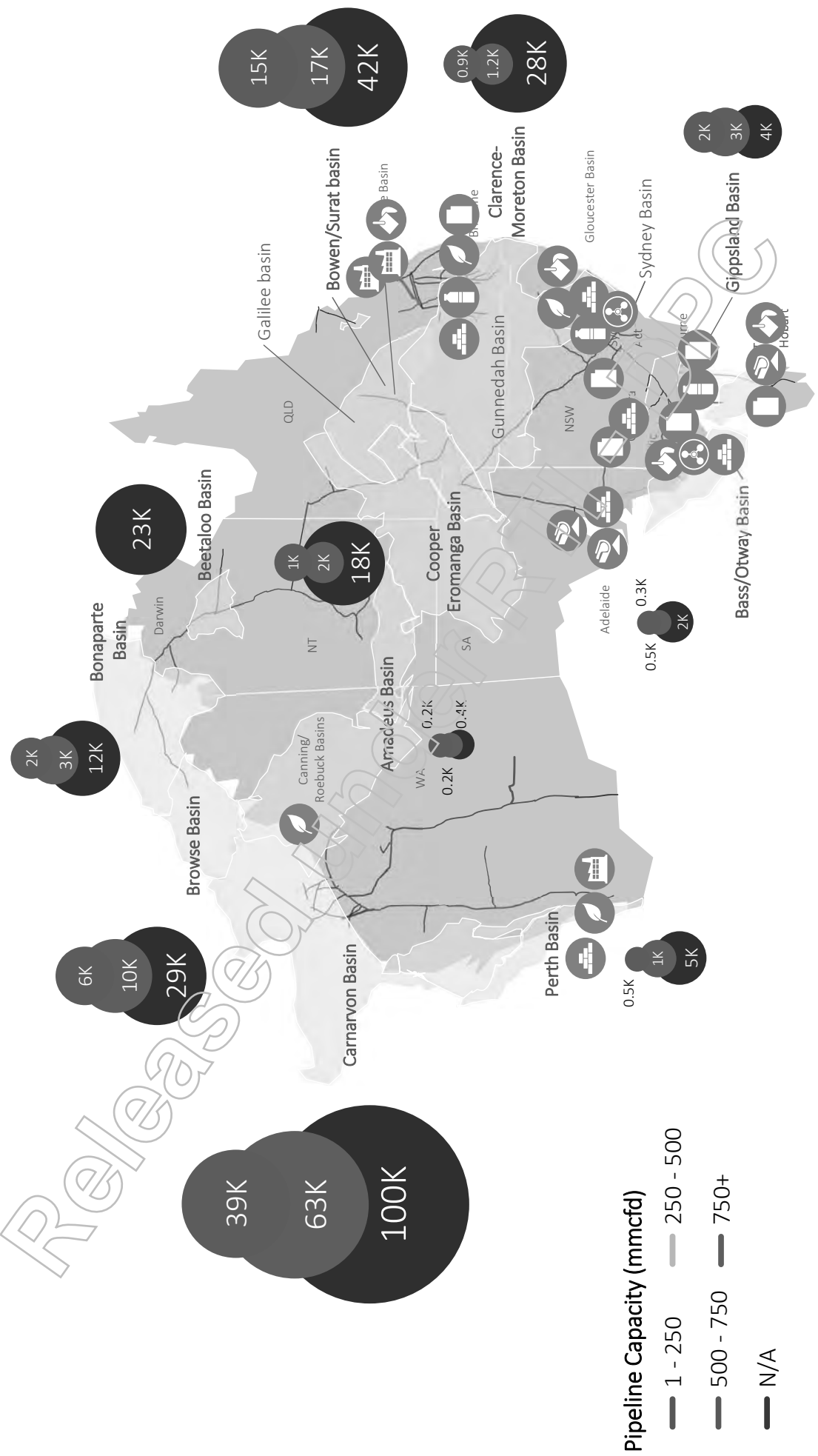
# Current view of reserves and resources



Note: Major basins only. 1. Supply estimates from Rystad Energy as at 1 Jan 2020, only includes gas not condensate or NGL; rounded to nearest 1000  
Source: Rystad energy, Expert analysis

# Current pipeline proximity to supply and demand

Estimated gas reserves (PJs)<sup>1</sup> and mfg clusters heavily reliant on gas<sup>2</sup>



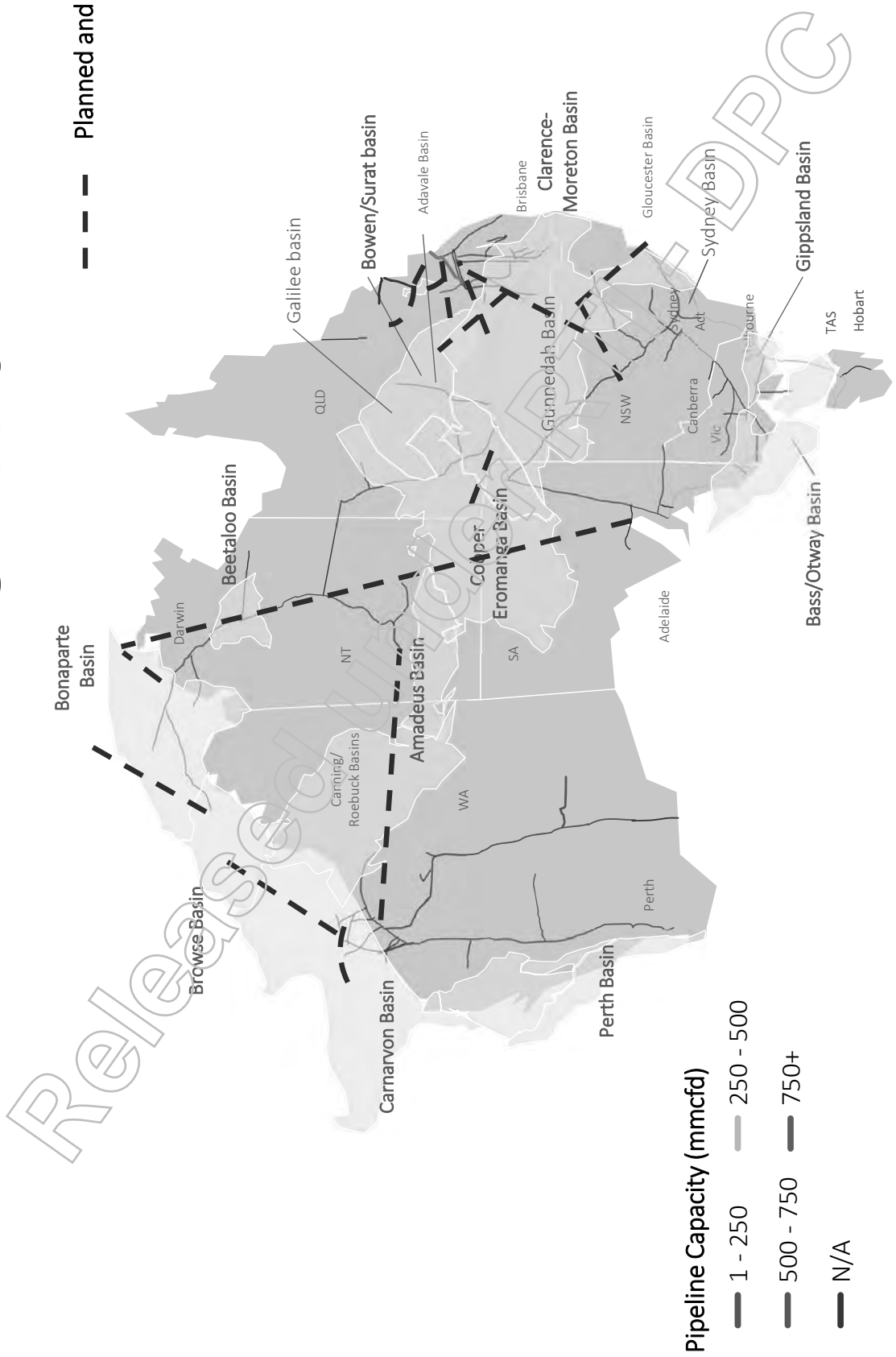
Note: Major basins only. 1. Supply estimates from Rystad Energy as at 1 Jan 2020, only includes gas not condensate or NGL; rounded to nearest 1000.  
 2. Mfg clusters based on APPEA report in December 2016. Source: APPEA, AEMC Gas Pipeline Register, GlobalData, Rystad energy, Expert analysis



Creating a competitive domestic gas market

DRAFT

# Potential solution pathway for national pipeline infrastructure connecting supply and demand

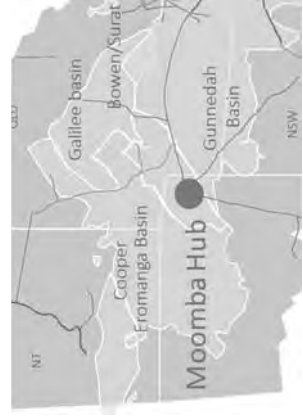


Source: AEMC Gas Pipeline Register, GlobalData (as at 16 October 2019)

# Overview of candidates for proposed market hub



**1** Wallumbilla gas supply hub

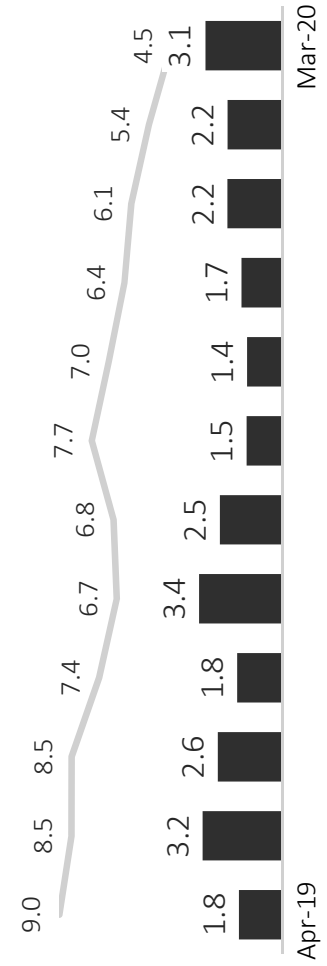


**2** Moomba gas supply hub

## Gas transmission pipelines

- Roma–Brisbane\*
- South West Qld (WAL to Ballera)\*
- Queensland (WAL to Rockhampton)\*
- Wallumbilla–Comet Ridge (WAL to Narrabri, loop to Fairview)
- Reedy Creek Wallumbilla (WAL to Reedy Creek)
- Berwyndale–Wallumbilla (Berwyndale to WAL)
- Silver Springs (Silver springs to WAL)
- Kincora–Wallumbilla (Kincora to WAL)

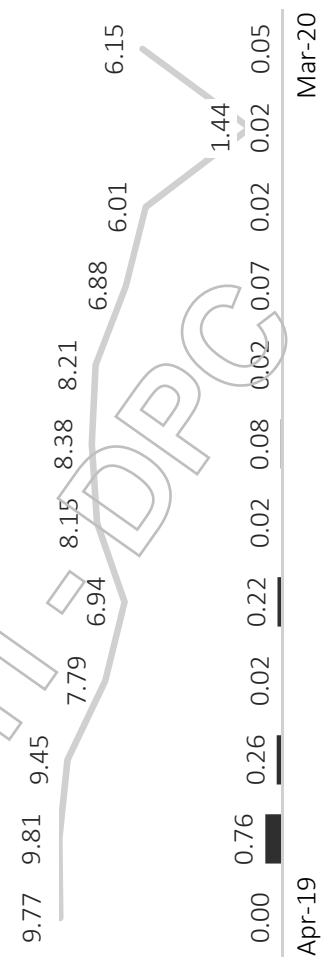
## Traded volume and average price



## Gas transmission pipelines

- Moomba–Adelaide (Moomba South to Adelaide)\*
- Moomba–Sydney (Coopers Creek to Wilton)\*
- South West QLD–QSN3 Expansion (Ballera to Moomba)

## Traded volume and average price

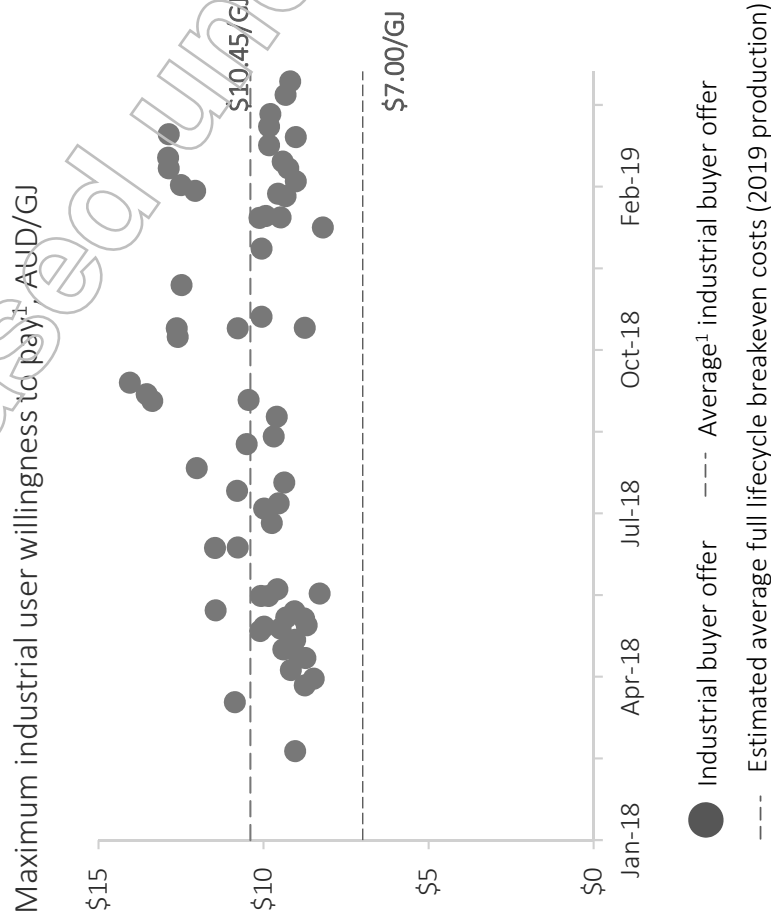


\* Significant gas pipelines that allow trades through AEMO. Source: ACCC, AEMO, GlobalData (Pipeline data as at 16 October 2019)



# Current East Coast pricing is not transparent, and attempts at creating a Hub have struggled

East Coast industrial buyer offers are above the marginal cost of supply today



Attempt at Hub creation at Wallumbilla lacked teeth & volumes to be effective to-date

### Timeline of key events

- **Mar 2014:** AEMO implemented a gas supply hub (GSH) in Wallumbilla - participants trade standardised, short-term physical gas products at 3 pipelines connecting at the hub
- **June 2016:** Trading location in Moomba established for participants in Southern states
- **Q1 2020:**
  - 8 PJs traded through GSHs (~2% of total east coast demand of 429 PJ
  - Prices roughly consistent with bilateral supply contract but not yet converged
- Pre-conditions to create an effective gas supply hub (e.g., strong infrastructure connections, high liquidity, market making) not yet met, impacting effectiveness

“ It is important to note that the gas price traded at Wallumbilla represents a small proportion of domestic gas sales and is not yet accompanied by the range and diversity of financial products and hedging opportunities that is seen at somewhere like the Henry Hub

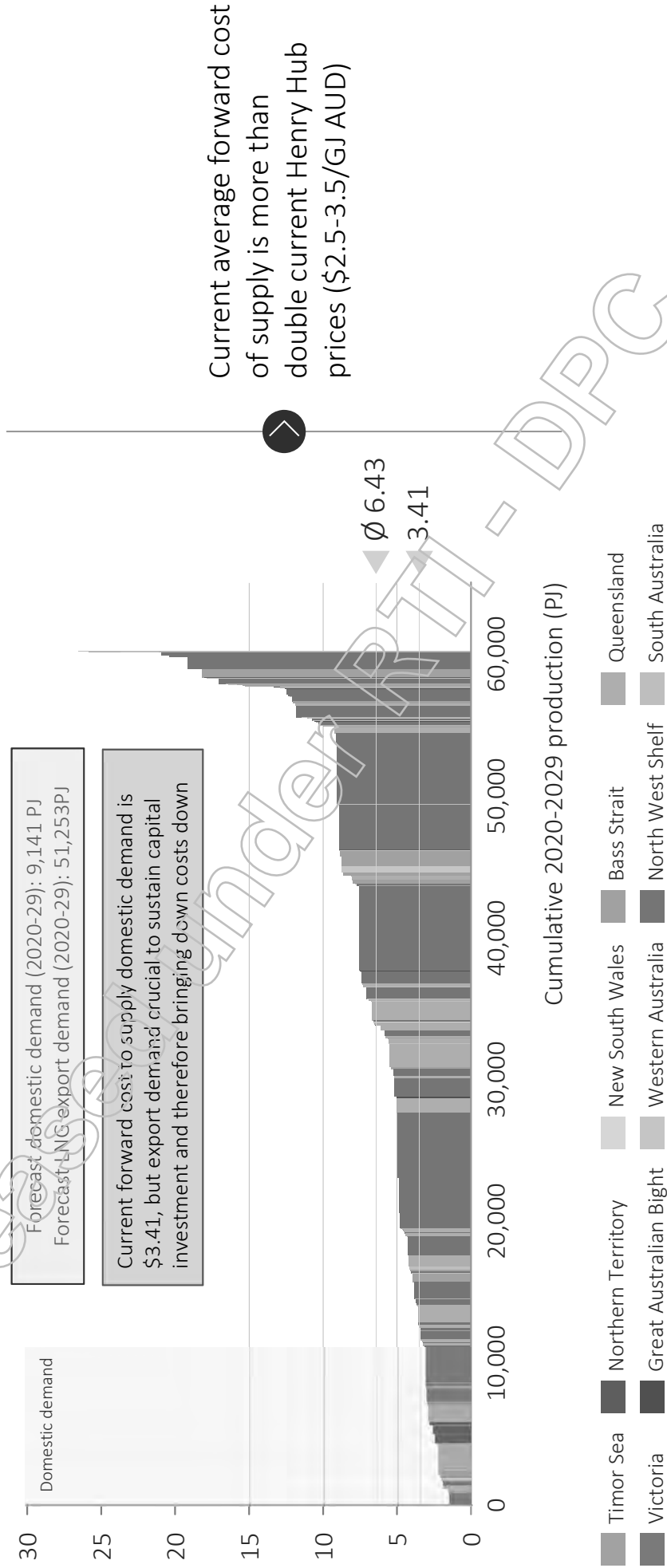
- Department of Industry, Review of ADGSM (Jan 2020)

Source: AEMO, ACCC Gas Inquiry (July 2019 Interim Report), Rystad Energy, Department of Industry



# Our average cost of gas is over \$6/GJ today, roughly double current Henry Hub prices

### Full cycle BE (\$AUD/GJ)

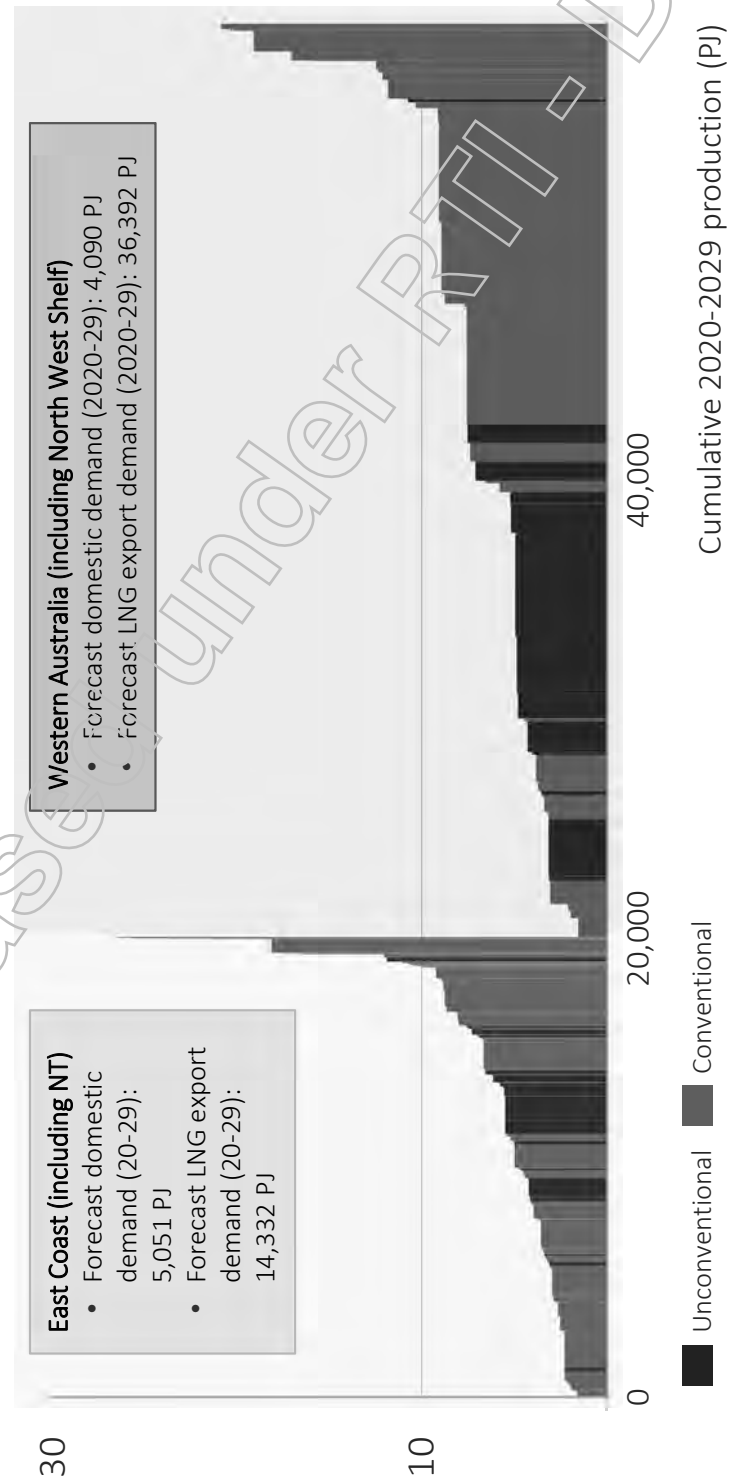


Note: Includes Gas fields and Gas-Condensate fields, which had production in 2019; includes all cash flows along the whole lifetime of the asset (exploration, development, production and abandonment); Excludes outliers with BE value >\$30AUD (e.g., fields with an award year in 1940-60s meaning nominal present day value distorted by inflation rate). Source: Rystad Energy, AEMO GSOO 2020, AEMO WA GSOO 2019, Expert analysis



# Cost profile of both East and West Coast production forecasts are similar

Full cycle BE (\$AUD/GJ)



Not a large production cost differential between markets, but large size differential

Indicates potential for a nationally integrated view (e.g., the development of an ISP for the gas market similar to electricity)

Note: Includes Gas fields and Gas-Condensate fields, which had production in 2019; Includes all cash flows along the whole lifetime of the asset (exploration, development, production and abandonment); Excludes outliers with BE value >\$30AUD (e.g., fields with an award year in 1940-60s meaning nominal present day value distorted by inflation rate). Source: Rystad Energy, AEMO GSOO 2020, AEMO WA GSOO 2019, Expert analysis

# LCOE of gas fueled power gen comparable with firming variable renewable gen

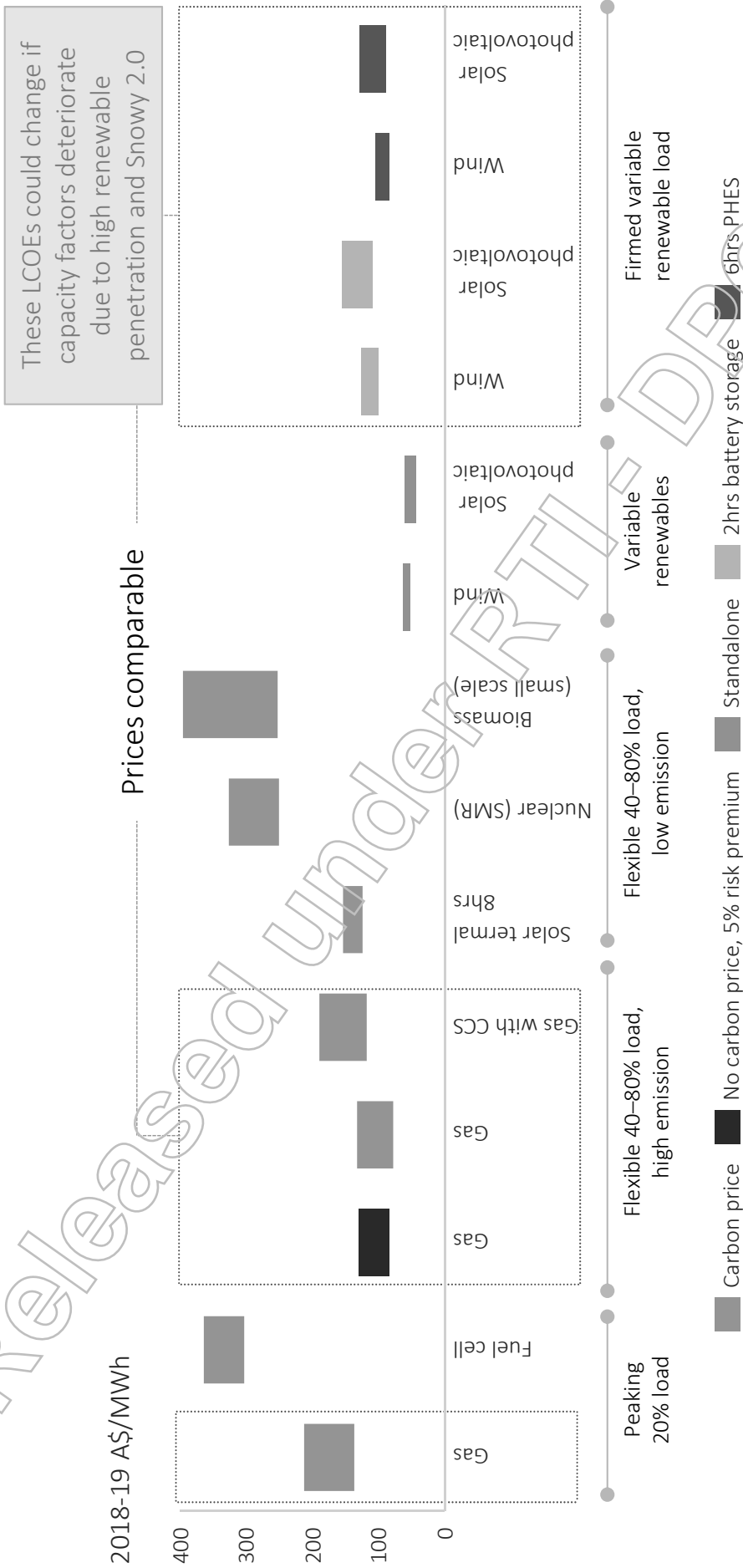


Figure 4-2 CSIRO GenCost 2018: Calculated LCOE by technology and category for 2020.  
 Notes: These LCOEs could change if capacity factors deteriorate due to high renewable penetration and Snowy 2.0.  
 Ranges are primarily based on differences in carbon prices, capital costs, fuel costs and capacity factors (see Apx Table B.2 in Appendix B). PHES is pumped hydro energy storage; CCS is carbon capture and storage; SMR is small scale modular reactor. The gas peaking technology is an open cycle turbine, other flexible gas refers to a combined cycle gas turbine. Flexible coal refers to a supercritical pulverized fuel plant.

Released under RTI - DPC



**NCCC**

National COVID-19  
Coordination Commission

## Sarah Partosh

---

**From:** DCLO Admin  
**Sent:** Wednesday, 10 June 2020 2:28 PM  
**To:** Jackie Hughes; Sharyn Durston; Tim Linley; Jim Murphy; Mathew Cooper; Brett Murphy; 'Maddy West'; Premiers Briefing Material; premiers.media@ministerial.qld.gov.au; Angela Holden; Zoe Bos (Ministerial); Kay Swanston  
**Cc:** DCLO Admin; Glenys Jenkin; @ODG Requests  
**Subject:** TF/20/11711 - \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC  
**Attachments:** PREMIER MEETING BRIEF - Premier virtually meeting with Mr Andrew Liveris AO - 11 June 2020.DOCX; Attachment 1 - Talking Points - Premier virtually meeting with Mr Andrew Liveris AO - 11 June 2020.DOCX; Attachment 2 - NCCC Manufacturing Taskforce - interim Draft Report presentation.PDF

**Importance:** High

**Categories:** Sharni

Hi Jackie and Tim

Please find attached the approved brief and associated documents for the Premier's virtual meeting with Mr Andrew Liveris AO, Special Adviser to the Federal Government's National Covid-19 Coordination Commission (NCCC), tomorrow, Thursday 11 June 2020. Time is yet to be confirmed.

Dave Stewart, Director-General, will attend as the departmental representative for this event.

Kind regards



**Queensland  
Government**

**Sharni Sawyer**  
Assistant Departmental & Customer Liaison Officer  
Departmental and Customer Liaison Office

**Office of the Director-General - Department of the Premier and Cabinet**

P 07 3003 9424 M [REDACTED]  
Level 40, 1 William Street, Brisbane QLD 4000  
PO Box 15185, City East, QLD 4002

*I acknowledge Aboriginal and Torres Strait Islander peoples  
as the Traditional Owners and Custodians of this Country  
and recognise their connection to land, sea and community.*

*I pay my respect to them, their cultures, and to their Elders,  
past, present and emerging.*



Pages 75 through 146 redacted for the following reasons:

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DUPLICATE DOCUMENT - Premier's Meeting Briefing Note  
DUPLICATE DOCUMENT - Report  
DUPLICATE DOCUMENT - Talking Points

Released under RTI - DPC

## Sarah Partosh

---

**From:** Dave Stewart  
**Sent:** Wednesday, 10 June 2020 1:57 PM  
**To:** Julia Sheedy  
**Cc:** Madison Cann  
**Subject:** Re: TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Approved. Thanks.

Dave Stewart  
Director-General  
Office of the Director-General  
Department of Premier and Cabinet  
07 3003 9387  
David.stewart@premiers.qld.gov.au

---

**From:** Julia Sheedy <julia.sheedy@premiers.qld.gov.au>  
**Sent:** Wednesday, June 10, 2020 1:51:56 PM  
**To:** Dave Stewart <david.stewart@premiers.qld.gov.au>  
**Cc:** Madison Cann <Madison.Cann@premiers.qld.gov.au>  
**Subject:** FW: TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Hi Dave

For your approval.

Thanks  
Julia

---

**From:** Correspondence DG (DPC) <CorrespondenceDG.DPC@premiers.qld.gov.au>  
**Sent:** Wednesday, 10 June 2020 12:01 PM  
**To:** Julia Sheedy <julia.sheedy@premiers.qld.gov.au>  
**Subject:** TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Hey Julia.

Please find attached TF/20/11711, \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC for your review.



**Queensland  
Government**

**Madison Cann**

Senior Administration Officer

**Office of the Director-General**

Department of the Premier and Cabinet

P 07 3003 9476 M [REDACTED] E [Madison.cann@premiers.qld.gov.au](mailto:Madison.cann@premiers.qld.gov.au)

Level 40, 1 William Street, Brisbane QLD 4000 PO Box 15185, City East, QLD 4002

## Sarah Partosh

---

**From:** Mark Cridland  
**Sent:** Tuesday, 9 June 2020 5:39 PM  
**To:** Rob Lloyd-Jones  
**Cc:** Joe Begley; Sharlene Larsen  
**Subject:** RE: TRIM FOR APPROVAL - TF/20/11711 - Andrew Liveris

Approved thanks



**Mark Cridland**  
Deputy Director-General  
Policy Division  
Department of the Premier and Cabinet  
P 07 3003 9408 M [REDACTED]  
Level 30, 1 William Street, Brisbane QLD 4000  
PO Box 15185, City East, QLD 4002

---

**From:** Rob Lloyd-Jones <rob.lloyd-jones@premiers.qld.gov.au>  
**Sent:** Tuesday, 9 June 2020 3:34 PM  
**To:** Mark Cridland <mark.cridland@premiers.qld.gov.au>  
**Cc:** Joe Begley <joe.begley@premiers.qld.gov.au>; Sharlene Larsen <Sharlene.Larsen@premiers.qld.gov.au>  
**Subject:** TRIM FOR APPROVAL - TF/20/11711 - Andrew Liveris  
**Importance:** High

Hi Mark

Meeting brief and attachments for Premier's virtual meeting with Andrew Liveris AO, Special Adviser to the National COVID-19 Coordination Commission, for your approval.

This is due to PO by 5pm.

I have reviewed.

Thanks

Rob



**Rob Lloyd Jones**  
Director  
Policy Division  
Department of the Premier and Cabinet  
P 07 3003 9281 M [REDACTED]  
Level 30, 1WS, Brisbane Qld 4000  
PO Box 15185, City East, QLD 4002

## Sarah Partosh

---

**From:** Elizabeth Philipson  
**Sent:** Monday, 8 June 2020 4:04 PM  
**To:** Jude Mannix  
**Cc:** Lauren Pearce; Naomi Quirk  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Jude

As discussed, please see below some additional dot points following the release of a [media statement](#) from Minister Fentiman this afternoon:

- The Queensland Government has recently partnered with GO1, an online training company based in Logan that offers a 'Netflix for training' style platform.
- Thanks to this partnership more than 400 free training courses will be available to small businesses and employees impacted by COVID-19, including on the topics 'Digital Skills and Adapting to Change' and 'Programming and IT'.

Many thanks  
Beth

---

**From:** Elizabeth Philipson  
**Sent:** Monday, 8 June 2020 12:07 PM  
**To:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Cc:** Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>; Naomi Quirk <naomi.quirk@premiers.qld.gov.au>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Jude

Please see attached with changes tracked in.

Happy to discuss anything we've added. And please feel free to cut back if the section is too long.

Many thanks  
Beth



**Beth Philipson**  
Senior Policy Officer  
**Economic Policy**  
Department of the Premier and Cabinet  
P 3003 9320 M [REDACTED]  
Level 30, 1 William Street, Brisbane QLD 4000  
PO Box 15135, City East, QLD 4002

---

**From:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 10:13 AM  
**To:** Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>; Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Perfect! Thank you 😊

---

**From:** Elizabeth Philipson <[elizabeth.philipson@premiers.qld.gov.au](mailto:elizabeth.philipson@premiers.qld.gov.au)>  
**Sent:** Monday, 8 June 2020 10:12 AM  
**To:** Jude Mannix <[jude.mannix@premiers.qld.gov.au](mailto:jude.mannix@premiers.qld.gov.au)>; Lauren Pearce <[Lauren.Pearce@premiers.qld.gov.au](mailto:Lauren.Pearce@premiers.qld.gov.au)>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Thanks very much, Jude.

I think the DRDM material provided covers most of it, but am adding in a couple of dot points in relation to the Queensland Government's COVID-19 response and free online training being offered.

I'll also check in with Naomi from a schooling perspective.

Many thanks  
Beth

---

**From:** Jude Mannix <[jude.mannix@premiers.qld.gov.au](mailto:jude.mannix@premiers.qld.gov.au)>  
**Sent:** Monday, 8 June 2020 10:11 AM  
**To:** Lauren Pearce <[Lauren.Pearce@premiers.qld.gov.au](mailto:Lauren.Pearce@premiers.qld.gov.au)>; Elizabeth Philipson <[elizabeth.philipson@premiers.qld.gov.au](mailto:elizabeth.philipson@premiers.qld.gov.au)>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Beth and Lauren

The article from the Australian is below, and the chair of the NCCC made a statement on 4 June:  
<https://www.pmc.gov.au/nccc/news/statement-chair-senate-select-committee-covid-19>, which includes reference to what Mr Liveris' focus will be.

It doesn't specifically mention education, but the article below does flag it.

Thank you both for your assistance.

Regards  
Jude

# 'New-collar jobs' to shape future

## EMPLOYMENT

GLENDIA KORPORAAL

Former leading industrialist Andrew Liveris says Australians should stop thinking in terms of creating white-collar or blue-collar jobs and recognise that future manufacturing employment will be seen as "new-collar" jobs.

"As supply chains and factories become digital, as both existing factories get modernised and new modern factories get built, the skills to operate and build and deliver products and services to the consumer will be higher in techno-

logy content, and geared to a human/machine interface," he said. "These jobs will no longer be categorised as white-collar or blue-collar, but as new-collar jobs. They will be higher quality, less physical and more interesting. They will be available to high school or university graduates. Education will need to be modified to allow access to all for these skills."

Mr Liveris is the former CEO and chairman of the Dow Chemical Company and was recently appointed an adviser to the National COVID-19 Co-ordination Commission which is charged with reporting to the federal government

about building a new manufacturing sector.

In The Deal, Mr Liveris says the 21st-century roles will be "quality jobs, not quantity jobs". They would be highly paid and in high-margin sectors. He identified skills in design, programming, project management and product development as key to Australia's future employment growth.

Crucial areas for future jobs would include biomed and health products, food and agribusiness processing, mining technology and services, and advanced building materials.

THE DEAL P39, 40

**From:** Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 9:17 AM  
**To:** Jude Mannix <jude.mannix@premiers.qld.gov.au>; Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>  
**Subject:** FW: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Jude,

Happy to help with this.

Beth, can you please assist Jude with some content on skills, noting the section in the attached on the Skills Implementation Plan for Advanced Manufacturing.

In my quick search I found reference to a report by the Australian on 'new-collar jobs', but unfortunately couldn't access it due to the pay wall – there may be others out there.



Queensland  
Government

**Lauren Pearce**

A/Director

**Economic Policy**

Department of the Premier and Cabinet

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Level 30, 1 William Street, Brisbane QLD 4000

PO Box 15185, City East, QLD 4002

**From:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 8:42 AM  
**To:** Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Subject:** FW: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Importance:** High

Hi Lauren

We have a super urgent event pack (due to ECU 9 June) to prepare related to manufacturing/economic recovery in Queensland (TF/20/11711).



I have reviewed the attached material from DRDM and note they have a small section on skills development, however, as there has been some media over the weekend indicating Mr Liveris will be focussing on 'new collar' jobs for future manufacturing employment, and that this will require modification in the education system, I thought it prudent to see if your team has any content you would like me to include in the response.

You may also find the below email helpful in providing some context.

Mr Liveris has been appointed as an adviser to the National COVID-19 Co-ordination Commission.

Happy to discuss.

Regards  
Jude

---

**From:** [REDACTED]@dragomanglobal.com>  
**Sent:** Thursday, 4 June 2020 12:32 PM  
**To:** Jim Murphy <Jim.Murphy@ministerial.qld.gov.au>  
**Subject:** Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Dear Jim,

I hope my note finds you well.

I am writing on behalf of Andrew Liveris AO. Mr Liveris is Special Adviser to the Commonwealth's National Covid-19 Coordination Commission (NCCC) where he is leading the Manufacturing Taskforce reporting to Nev Power. The Taskforce is focused on growing Australian manufacturing industry in the post virus economy.

Andrew would appreciate a half hour meeting (virtual) to get the Premier's views and discuss the recommendations of the taskforce.

Thank you and I look forward to receiving your reply.

With kind regards

[REDACTED]

[REDACTED]

**Dragoman**

Tel: [REDACTED] | Mobile: [REDACTED]  
Email: [REDACTED]@dragomanglobal.com  
Level 41, 55 Collins Street  
Melbourne VIC 3000 Australia

## Sarah Partosh

---

**From:** Ben Gordon  
**Sent:** Monday, 8 June 2020 11:13 AM  
**To:** DPCCovid19\_Response and Recovery Taskforce; Jude Mannix  
**Cc:** Kayla Webster; Pauline Elliott  
**Subject:** RE: HPE Content Manager Tracking File : TF/20/11711 : \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Sorry Jude - nil from us.

Regards  
Ben

Ben Gordon  
Senior Director  
Economic Policy  
Department of the Premier and Cabinet

---

P 07 3003 9338 M [REDACTED]  
Level 30, 1 William Street, Brisbane QLD 4000 PO Box 15185, City East, QLD 4002

-----Original Message-----

From: DPCCovid19\_Response and Recovery Taskforce <dpccovid19\_rrt@premiers.qld.gov.au>  
Sent: Monday, 8 June 2020 11:12 AM  
To: Jude Mannix <jude.mannix@premiers.qld.gov.au>  
Cc: DPCCovid19\_Response and Recovery Taskforce <dpccovid19\_rrt@premiers.qld.gov.au>; Kayla Webster <kayla.webster@oqpc.qld.gov.au>; Pauline Elliott <pauline.elliott@premiers.qld.gov.au>; Ben Gordon <Ben.Gordon@premiers.qld.gov.au>  
Subject: RE: HPE Content Manager Tracking File : TF/20/11711 : \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Hi Jude,

Will get advice back to you as soon as practicable today (nil or otherwise).

Kayla - please respond to Jude directly once content/nil response is endorsed.

Thanks,  
Michael

Michael Murray  
Project Manager  
COVID-19 Response and Recovery Taskforce Department of the Premier and Cabinet

---

P (07) 300 39205 M [REDACTED] | E michael.murray@premiers.qld.gov.au  
Level 16, 1 William Street, Brisbane QLD 4000 PO Box 15185, City East, QLD 4002

-----Original Message-----

From: Jude Mannix <jude.mannix@premiers.qld.gov.au>  
Sent: Monday, 8 June 2020 11:05 AM  
To: DPCCovid19\_Response and Recovery Taskforce <dpccovid19\_rrt@premiers.qld.gov.au>

Subject: FW: HPE Content Manager Tracking File : TF/20/11711 : \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC  
Importance: High

Good morning

Please see below email sent to the Taskforce recovery planning contacts. Please urgently advise if the taskforce wish to provide input for this brief.

Please note the ECU deadline is 10 am Tuesday 9 June.

Regards  
Jude

-----Original Message-----

From: Jude Mannix  
Sent: Friday, 5 June 2020 2:49 PM  
To: Pauline Elliott <pauline.elliott@premiers.qld.gov.au>; Ben Gordon <Ben.Gordon@premiers.qld.gov.au>  
Cc: Glenn Case <Glenn.Case@premiers.qld.gov.au>  
Subject: HPE Content Manager Tracking File : TF/20/11711 : \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Good Afternoon

Economic Policy are to prepare a super urgent external meeting brief (including a briefing note and talking points). The brief is to include information regarding the manufacturing industry in QLD and Commonwealth proposals to boost manufacturing investment.

In line with ODDG Policy advice, I am informing you of this request and also seeking any input you may wish to include. I have not included the Taskforce contact for PPE (Kerry Petersen) as I have assumed the focus of this information will be on Recovery Planning, including the Queensland Government's recently announced PPE manufacturing fund (\$50 million).

I have requested information from DSDTI/DRDM which is due on Monday morning, and intend to complete this briefing material by early Monday afternoon to meet the ECU deadline of COB 9 June.

Happy to discuss.

Regards  
Jude

-----< HPE Content Manager record Information >-----

Record Number : TF/20/11711  
Title : \*\*SUPER URGENT EXTERNAL MEETING BRIEF\*\* | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

## Sarah Partosh

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**From:** DSD DLO <dlo@dsmip.qld.gov.au>  
**Sent:** Monday, 8 June 2020 3:29 PM  
**To:** Jude Mannix  
**Cc:** DSD DLO  
**Subject:** Additional information is requested by DLO- Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Attachments:** Premiers meeting - Andrew Liveris.docx  
**Importance:** High

Hey Jude

Please see updated info with a new par from IFP.

Gil



**Queensland  
Government**

Gillian Tyrrell  
Departmental Liaison Officer  
Department of State Development,  
Tourism and Innovation

P 07 3452 7027 M [REDACTED]  
Microsoft Teams – meet now  
Level 38, 1 William Street, Brisbane QLD  
4000  
PO Box 15009, City East QLD 4002  
[www.dsmip.qld.gov.au](http://www.dsmip.qld.gov.au)

LET'S CONNECT



*The Department of State Development,  
Tourism and Innovation acknowledges the  
traditional custodians of the lands and waters  
of Queensland. We pay respect to elders past  
and present as we work together for a shared  
vision of reconciliation.*

---

**From:** Investment Facilitation and Partnerships <ifpcorrespondence@dsmip.qld.gov.au>  
**Sent:** Monday, 8 June 2020 11:48 AM  
**To:** Anne Neil <Anne.Neil@dsmip.qld.gov.au>  
**Cc:** Siobhan Speak <Siobhan.Speak@dsmip.qld.gov.au>; Loraine Edwards <Loraine.Edwards@dsmip.qld.gov.au>; Investment Facilitation and Partnerships <ifpcorrespondence@dsmip.qld.gov.au>; DSD DLO <dlo@dsmip.qld.gov.au>  
**Subject:** Additional information is requested by DLO- Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Importance:** High

Good morning Anne

Referring to the request below can you please review and advise if I can contribute any information in regards to AQIAF and JRGF?

Jude Mannix from Premiers advised the following:

From: Jude Mannix <jude.mannix@premiers.qld.gov.au>  
Sent: Monday, 8 June 2020 8:22 AM  
To: DSD DLO <dlo@dsmip.qld.gov.au>  
Subject: RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Gillian

I have reviewed the document provided over the weekend and think it would be helpful to ask for input from both the Investment Facilitation and Partnerships business area, particularly Policy and Recovery team within DSDTI.

I'm happy to call and discuss with relevant people but want to run this past you first.

If I haven't heard from you by about 10 am I'll give you a call to follow up.

Regards  
Jude

Your assistance is greatly appreciated.

Kind Regards



**Queensland  
Government**

Teresa Lindsay  
Correspondence Officer  
Investment Facilitation and Partnerships  
Department of State Development, Tourism and Innovation

P 07 3452 7774  
Level 16, 1 William Street, Brisbane QLD 4000  
PO Box 15009, City East QLD 4002  
[www.dsdmip.qld.gov.au](http://www.dsdmip.qld.gov.au)

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**From:** DSD DLO  
<dlo@dsmip.qld.gov.au>  
**Sent:** Monday, 8 June 2020  
10:25 AM  
**To:** Investment Facilitation  
and Partnerships

<ifpcorrespondence@dsmip.qld.gov.au>

**Subject:** Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi

I have another request for you. On Friday DPC requested information about manufacturing in Queensland and the recovery of the industry in a post COVID-19 world.

The Manufacturing area provided a very detailed response (attached), however this morning DPC have come back and asked specifically if IFP could add anything to the request.

Are you able to take a look at the document and the below request and let me know if you have anything you want to add? If you could let me know asap if you have content that would be great.

Gil



Gillian Tyrrell  
Departmental Liaison Officer  
Department of State Development,  
Tourism and Innovation

P 07 3452 7027 M [REDACTED]  
Microsoft Teams – meet now  
Level 38, 1 William Street, Brisbane QLD  
4000  
PO Box 15009, City East QLD 4002  
[www.dsdmip.qld.gov.au](http://www.dsdmip.qld.gov.au)

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**From:** Jude Mannix <[jude.mannix@premiers.qld.gov.au](mailto:jude.mannix@premiers.qld.gov.au)>  
**Sent:** Monday, 8 June 2020 8:22 AM  
**To:** DSD DLO <[dlo@dsdmip.qld.gov.au](mailto:dlo@dsdmip.qld.gov.au)>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Gillian

I have reviewed the document provided over the weekend and think it would helpful to ask for input from both the Investment Facilitation and Partnerships business area, particularly Karen Wiik's team (AQIAF and JRGF) ) and OD-G Economic Policy and Recovery team within DSDTI.

Happy to call and discuss with relevant people but want to run this past you first.

If I haven't heard from you by about 10 am I'll give you a call to follow up.

Regards  
Jude

---

**From:** DSD DLO <[dlo@dsdmip.qld.gov.au](mailto:dlo@dsdmip.qld.gov.au)>  
**Sent:** Friday, 5 June 2020 4:09 PM  
**To:** Jude Mannix <[jude.mannix@premiers.qld.gov.au](mailto:jude.mannix@premiers.qld.gov.au)>  
**Cc:** DSD DLO <[dlo@dsdmip.qld.gov.au](mailto:dlo@dsdmip.qld.gov.au)>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Jude

Please see attached information as requested regarding Manufacturing in Queensland.

Regards





Gillian Tyrrell  
Departmental Liaison Officer  
Department of State Development,  
Tourism and Innovation

P 07 3452 7027 M [REDACTED]  
Microsoft Teams – meet now  
Level 38, 1 William Street, Brisbane QLD  
4000  
PO Box 15009, City East QLD 4002  
[www.dsdmip.qld.gov.au](http://www.dsdmip.qld.gov.au)

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and present as we work together for a shared  
vision of reconciliation.*



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**From:** Jude Mannix <[jude.mannix@premiers.qld.gov.au](mailto:jude.mannix@premiers.qld.gov.au)>  
**Sent:** Friday, 5 June 2020 12:54 PM  
**To:** DSD DLO <[dlo@dsdmip.qld.gov.au](mailto:dlo@dsdmip.qld.gov.au)>  
**Subject:** FW: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Importance:** High

Hello again

You may find the below email helpful in providing some context to my request **SUPER URGENT - due 3pm today**  
- **please advise.**

Regards  
Jude

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**From:** [REDACTED] <[\[REDACTED\]@dragomanglobal.com](mailto:[REDACTED]@dragomanglobal.com)>  
**Sent:** Thursday, 4 June 2020 12:32 PM  
**To:** Jim Murphy <[Jim.Murphy@ministerial.qld.gov.au](mailto:Jim.Murphy@ministerial.qld.gov.au)>  
**Subject:** Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Dear Jim,

I hope my note finds you well.

I am writing on behalf of Andrew Liveris AO. Mr Liveris is Special Adviser to the Commonwealth's National Covid-19 Coordination Commission (NCCC) where he is leading the Manufacturing Taskforce reporting to Nev Power. The Taskforce is focused on growing Australian manufacturing industry in the post virus economy.

Andrew would appreciate a half hour meeting (virtual) to get the Premier's views and discuss the recommendations of the taskforce.

Thank you and I look forward to receiving your reply.

With kind regards

**Dragoman**

Tel: [REDACTED] | Mobile: [REDACTED]  
Email: [REDACTED]@dragomanglobal.com  
Level 41, 55 Collins Street  
Melbourne VIC 3000 Australia

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## Request for information

# Department of Regional Development and Manufacturing

Source: xxxxxx

**SUBJECT: Premier’s meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission on Thursday 11 June 2020.**

### Key/contentious issues

- DPC sent through a request for information to support the Premier’s attendance at a meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission. The request was received on Friday 5 June and is due at 3pm.

### Current status

#### Queensland Government COVID-19 Response

- The COVID-19 global pandemic exposed the fragility of global supply chains for Personal Protective Equipment (PPE) and other essential products and revealed limited local manufacturing of these products. A lack of secure supply chains meant there was a risk in healthcare workers having insufficient supply of equipment.
- Part of the Queensland Government’s response to COVID-19 was to support Queensland companies to produce PPE and essential products to address critical supply chain issues and to build self-reliance against the possibility of future epidemics. Examples include:
  - Launching the #MakingItForQLD marketing campaign in April 2020 to showcase the work in the manufacturing sector and its capabilities in Queensland. This campaign has been viewed approximately over 5 million times (<https://www.facebook.com/growingqld/>);
  - Working with manufacturing companies to pivot their existing capabilities to manufacture PPE and other essential products, including:
    - o Evolve Group and [redacted] have retooled, to pivot their manufacturing to make P2 and surgical masks respectively at Level 2 and 3 for hospitals.
    - o Sacha Drake, a Queensland clothing manufacture, manufacturing fabric reusable gowns for Queensland Health.
    - o Distilleries such as Bundaberg Rum, Beenleigh Rum and Saleyards Distillery switched to producing and supplying ethanol to support the production of hand sanitiser. Companies have been supplied with this ethanol, like the beard grooming company, The Bearded Chap, and have pivoted to make hand sanitiser and have shored up the supply of this product for critical health care workers.
    - o Triple Eight Motor Race Engineering retooled to manufacture emergency ventilator prototype.
  - A dedicated Queensland Government website landing page was established to match manufacturers to products they needed to keep operating, with over 400 enquiries from industry and 330 connections from businesses to potential suppliers since the Manufacturing Supply Matching webpage was launched in March 2020.
  - Our manufacturers have joined with government to do everything they can to supply locally made products such as face masks, face shields and hand sanitisers to assist our healthcare and other frontline workers to have the protection they need.

Approved by ED: Insert name only Business Group: Telephone:	Approved by DDG: Insert name only Business Group: Telephone:	Approved by Director-General: Frankie Carroll ...../...../ 2020
---	--	---

- This great work is also supporting the government's focus on building self-reliance against future epidemics, with DRDM now drafting a Manufacturing PPE Directions Statement, scheduled for Cabinet consideration in the near future.

## Manufacturing in Queensland

- Queensland's manufacturing industry is important to the state's economy contributing around \$20 billion to the state economy and employs over 165,000 people.
- Small and medium enterprises are major employers in the manufacturing industry. Of the 16,600 Queensland manufacturing businesses, 47 per cent (7,800) are non-employing, 46 per cent (7,600) employ between 1 and 19 workers, 7 per cent (1,200) employ between 20 and 199 workers, and 1 per cent (85) employ over 200 workers.
- The number of manufacturing businesses as a percentage of total businesses in Queensland is 3.9 per cent, which is greater than New South Wales (3.7 per cent), and relatively consistent with the nation-wide average (4.0 per cent).
- Almost 50 per cent of all Queensland manufacturing businesses are greater than ten years old, and over eight per cent are exporters.
- Based on ABS four quarter average data to March 2020, Queensland's manufacturing industry employed 165,200 persons which represents around seven per cent of the state's total workforce.
- Within the Queensland manufacturing industry, 76 per cent (125,000) of employment is located in South East Queensland, while the remaining 24 per cent (40,000) is located in regional areas.
- Queensland's manufacturing employment increased by 2,400 persons or 1.5 per cent in the four quarters to March 2020 compared to the four quarters to December 2019.
- The manufacturing industry is Queensland's seventh-largest employing industry, which is consistent with New South Wales (seventh), and the nation-wide ranking (seventh).
- The largest employing subsector in the Queensland manufacturing industry is the food product subsector, which employs approximately 35,500 persons (22 per cent of total manufacturing employment in Queensland).
- The manufacturing industry currently contributes 6.2 per cent towards Queensland's total GVA and has remained the fifth largest contributing industry for the past three consecutive years.
- Regions outside of South-East Queensland contribute a total of approximately \$6.2 billion (29 per cent) to Queensland's total GVA.
- As at June 2019, Queensland's manufacturing industry had an overseas export value of \$17.2 billion (9 per cent above the previous year).
- The food product and primary metal and metal product manufacturing subsectors are the leading contributors to Queensland's manufacturing overseas exports, contributing \$7.4 billion and \$5.0 billion respectively.
- Queensland has had the highest average manufacturing export value per capita for five consecutive years to June 2019 (averaging \$3,227 per capita), compared to New South Wales (\$2,414 per capita) and Victoria (\$3,034 per capita).
- Manufacturing exports in Queensland have increased by 34 per cent over the ten-year period from June 2014 to June 2019, which is greater than the national average of 23 per cent.

## Advanced Manufacturing 10-Year Roadmap and Action Plan

- The Queensland Government is invested in the future of our manufacturing industry and its ongoing transformation as it transitions to advanced manufacturing.
- The Advanced Manufacturing Roadmap and Action Plan was launched in December 2016 and an updated second edition of the Roadmap was released in November 2018.
- The Advanced Manufacturing Roadmap highlights the importance for industry to embrace advanced manufacturing – also known as Industry 4.0.
- The Roadmap provides the framework for accelerating the adoption of robotics and autonomous systems by Queensland manufacturers.
- It contains 17 actions that target 4 key areas to position Queensland as a leader in advanced manufacturing technologies, products, systems and services.
- On 19 April 2020, Queensland was recognised as a World Advanced Manufacturing Hub by the World Economic Forum, which will continue to open doors internationally bringing more business and opportunities to Queensland.

## Made in Queensland

- The Queensland Government's \$46 million Made in Queensland (MiQ) initiative is helping small-to-medium-sized business to adopt innovative processes and technology, expand operations and hire more Queenslanders.
- Since 2017, the Queensland Government has supported 75 projects across Queensland through the program. 32 of these projects are in regional Queensland.
- 61 projects have been completed totalling \$22.3 million in grant funding.
- The manufacturers who implemented these projects have reported that more than 3,400 existing jobs have been protected, more than 340 new jobs created, and more than \$59 million in private sector investment generated.
- 26 of the 61 completed projects are in regional Queensland totalling over \$7 million in grant funding. This has protected over 1,600 existing regional jobs, created over 90 new jobs and generated more than \$22 million in private sector investment.
- MIQ Round 3 fund recipients are yet to be announced.
- Made in Queensland is an initiative of the Advanced Manufacturing 10-Year Roadmap and Action Plan

## Manufacturing Ministerial Council

- To ensure the Queensland manufacturing sector continues to grow and becomes globally competitive, the Queensland Government has broadened engagement on the future direction of advanced manufacturing through a Manufacturing Ministerial Council.
- The council's first meeting in 2020 was held online on Thursday 21 May.

- The council supports Queensland's diverse manufacturing industry to:
  - focus on innovation, business transformation and workforce development to build supply chain capability
  - address challenges and harness new opportunities facing the industry
  - strengthen ties between industry and all levels of government to ensure Queensland remains internationally competitive.
  - The role of the Manufacturing Ministerial Council is to identify and provide strategic advice to government, through the Minister for Regional Development and Manufacturing, on:
    - emerging trends and issues that could potentially impact on the sustainability and future development of industry and manufacturing in Queensland
    - ways to grow and promote the state's industry and manufacturing capabilities and expertise
    - the development and implementation of government initiatives, such as the Queensland Advanced Manufacturing 10-Year Roadmap and Action Plan, reshoring of manufacturing, and the establishment and operation of the manufacturing hubs.

### Queensland Hackerspaces Grant Program

- The Queensland Government has delivered two rounds of the Hackerspace Grants Program that delivers more spaces where Queenslanders can develop new skills and collaborate on the design and manufacture of new products.
- In Round Two announced in February 2020, 13 groups from Cairns to the Gold Coast will share in funding totaling almost \$220,000.
- Round Two will assist five new hackerspaces to open and eight existing facilities to expand, fueling manufacturing innovation in our State.
- Ten recipients were successful in Round One receiving grants totaling \$170,000.
- Round One helped set up seven new hackerspaces and enabled three to expand.
- The Queensland Hackerspaces Grant program forms part of the Advanced Manufacturing 10-Year Roadmap and Action Plan.

### Manufacturing Hubs

- The manufacturing industry is a key contributor to the state's economy, regions and local communities.
- To support the growth of regional manufacturers, \$30 million has been invested into regional Manufacturing Hubs in Cairns, Townsville and Rockhampton.
- Each hub will provide a place for local manufacturing businesses to receive expert advice and support to transition to advanced manufacturing through world-leading technologies.
- The Hubs have strong links with local universities, schools and TAFE Queensland to develop a workforce with strong skills in science, technology, engineering and maths.
- The Hubs are part of the Advanced Manufacturing 10-Year Roadmap and Action Plan to grow manufacturing productivity and innovation across Queensland.

### Manufacturing Hubs Grant Program



- The Queensland Government has made available \$13.5 million through the Manufacturing Hubs Grant Program (MHGP) to assist eligible businesses.
- Up to \$4.5 million is available for each manufacturing hub to invest in and help to build the advanced manufacturing capability in the Cairns, Townsville and Rockhampton regions.
- This is an opportunity for manufacturers to become more productive and create the jobs of the future through:
  - technology adoption
  - skills and training
  - business development
  - advance robotic manufacturing hub services.

### **Townsville Manufacturing Hub**

- The Townsville Manufacturing Hub, located at the TAFE Queensland Bohle campus, was officially opened on 9 September 2019, delivering a 2017 election promise.
- Through this Hub, manufacturers will gain access to advice and support, including business development and training programs, and tailored workforce skills to improve their productivity and international competitiveness.
- The Hub will promote collaboration between industry with vocational, tertiary and secondary education providers such as Tec-NQ, to ensure Queensland's next generation workforce has strong skills in science, technology, engineering, arts and maths.
- It will provide a catalyst for promoting and delivering world-leading technologies, processes and practices. This includes the Internet of Things, automation and robotics, to boost manufacturing productivity and drive innovation.
- A local reference group has been established to identify and ensure the needs of regional manufacturers are met.
- The facility will harness advances in food technology to reduce food waste in the vegetable supply chain. This will be done by converting locally grown fruit and vegetables into value-added products such as snacks, liquids and powders for health supplements and nutraceuticals.

### **Cairns Manufacturing Hub**

- The Cairns Manufacturing Hub, located at TAFE Queensland's Cairns Campus, was officially opened on 17 December 2019.
- The Cairns manufacturing sector contributed \$787 million to the Queensland economy in 2017-18 and employed 6300 people locally (as at September quarter 2019).
- The Cairns Manufacturing Hub will initially focus on growing the marine, aviation and food production sectors, and it's already delivering results.
- The Hub will specifically achieve:
  - Developments towards an advanced fibre composites maintenance and repair facility with access to 3D printing technologies for aviation, defence and superyachts

- The delivery of advanced welding (ISO9606) training which will support the marine sector, particularly for future defence and commercial sustainment work
- Funding of \$650,000 over three years to support the FNQ Food Incubator, a group of local food experts collaborating to support early-stage food processors in FNQ to commercialise and scale-up their products.

### **Rockhampton Manufacturing Hub**

- The Rockhampton Manufacturing Hub, located at Central Queensland University's North Rockhampton campus, was officially opened on 11 February 2020.
- Manufacturing in Central Queensland is already thriving, employing more than 5000 people and the Hub will be a centre of expertise for advanced manufacturing innovation and skills.
- This Hub will further strengthen the sector, in turn attracting private sector investment and creating jobs.
- Local manufacturers will gain access to business development programs, skills and training and equipment through the Central Queensland University campus.
- By focusing on Central Queensland's key manufacturing strengths of rail, metal production and food innovation, the hub is ensuring it's full steam ahead for local industry.

### **Advanced Robotics for Manufacturing (ARM) Hub**

- The Queensland Government has invested more than \$7.7 million to help establish Queensland's first Advanced Robotics for Manufacturing (ARM) Hub at Northgate.
- The ARM Hub is a collaborative facility for the local manufacturing sector, led by the Queensland Government and delivered in partnership with QUT and Urban Art Projects (UAP).
- The ARM Hub will allow Queensland industry to collaborate with research institutions on a very practical level to build the capability that will enable manufacturers to be more competitive, reshore manufacturing activity and generate jobs.
- Our support for the \$18 million robotics hub will help Queensland businesses to keep pace with global developments in robotics and drive the international competitiveness of the state's manufacturing industry.
- Through the ARM Hub, businesses across Queensland will have access to practical research and support to assist the transition to advanced manufacturing.
- UAP a leading-edge global company, recognised for their early adoption of robotics and Industry 4.0; and QUT have taken a leading role in the development of the ARM Hub.
- The Hub brings together private industry, international robotics expertise and government to accelerate the adoption of advanced manufacturing and drive Industry 4.0, through the application of robotics and design-led manufacturing.
- ARM Hub services will be available to all manufacturing firms in sectors as diverse as aerospace, biomedical, METS, defence, rail manufacture, beef and food processing, and space.
- While the Hub is located in Brisbane, its services will be delivered across the state.

- Regional manufacturers will have the opportunity to access these services through the Manufacturing Hubs in Cairns, Townsville and Rockhampton and the Defence Hubs in Townsville and Ipswich.

## **Craft Brewing**

- Craft beer production in Queensland is estimated to be worth more than \$62 million per year, with the local industry employing more than 1700 people.
- The Queensland Government has acknowledged the significant potential and scope the independent craft brewing industry has to expand locally, nationally and internationally.
- By supporting the craft brewing industry, we're creating more high-skill manufacturing jobs.
- A working group has been established comprising local craft brewers, the Independent Brewers Association and Government to identify the opportunities and challenges for the industry.
- The Queensland Craft Brewing Strategy has three targeted priority areas, investing in people and infrastructure; improving access to markets; and appropriate regulation and planning.
- Specific key actions include the establishment of a 'brewlab' facility in Queensland, providing a space for brewers to develop and test new products.
- Our craft brewers can visit Queensland BrewLab to get access to quality testing, a panel of expert tasters and a pilot plant to trial their new recipes.
- Well-trained brewers are essential and we are working with TAFE Queensland to develop a formal training course for craft brewers.
- Our craft brewers are producing increased volumes of beer to keep up with demand, and consequently are buying more ingredients including hops and barley. We'll work to further opportunities to develop closer links between our craft brewers and agricultural suppliers.
- A range of services are available, delivered through Trade and Investment Queensland, including workshops, where we can assist local craft brewers in developing and enhancing their export skills and opening their customer base internationally.
- We're also prioritising 'Buy Queensland first' and looking to support craft brewers in being able to access new opportunities throughout Queensland.
- The craft brewing industry presents challenges in terms of regulations and planning, and we have been active in understanding how we can assist by investigating streamlining processes.
- We will work with the Independent Brewers Association to develop workshops and supporting material such as guides to assist craft brewers understand the licensing and development assessment processes, access tourism networks and connect with industry development programs.

## **Skills Implementation Plan for Advanced Manufacturing**

- The Queensland Government is supporting the technological transformation of our manufacturing industry and looking ahead to attract, develop and retain world-class talent and skills.
- We want Queenslanders to take advantage of the rewarding opportunities a career in manufacturing offers and we want managers and leaders to invest in their people to help develop the manufacturers, engineers, scientists and technicians of tomorrow.

- The Skills Implementation Plan for Advanced Manufacturing has been developed to support manufacturers in their transition to advanced manufacturing and create high-skilled workforces.
- The Skills Plan was announced on 17 December 2019 by Minister Cameron Dick and Minister Shannon Fentimann at the opening of the Cairns Manufacturing Hub.
- The Skills Plan also addresses the 10 Priority Action Areas in Jobs Queensland's Advancing Manufacturing Skills strategy and builds on the Queensland Government's overarching strategy for skills, Skills for Queensland – Great training for quality jobs.
- A highly-skilled workforce is vital to manufacturing's future growth and diversifying Queensland's economy.
- The use of robotics, leading-edge technologies, autonomous systems and new processes requires knowledge and skills in complex problem solving, design-led thinking and the use of knowledge and skills in the areas of Science, Technology, Engineering and Mathematics (STEM).

Exempt Sch.3(2)(1)(b) Cabinet considerations

- Queensland has a long and proud history of building and maintaining rail infrastructure across the State. We have been building trains since 1873.
- Queensland's rail manufacturing industry currently contributes \$600 million to the state's economy and provides 3,700 direct jobs.
- There is a major revival in rail transport around the world including light rail, metro, heavy rail and high-speed rail.

- There are significant opportunities for Queensland rail manufacturers to participate in major projects, in Queensland and nationwide.
- The national pipeline of rail infrastructure projects in 2019 is estimated to be around \$115 billion. Of this, around \$25 billion relates to projects in Queensland, including:
  - \$5.4 billion committed to the transformational Cross River Rail project
  - Melbourne to Brisbane Inland Rail project \$9.3 billion total, with substantial Queensland component
  - \$634 million European Train Control System - Inner City implementation
  - \$550 million commitment towards the Beerburrum to Nambour rail line project
  - \$725 million in other rail upgrade projects in the 2019-20 State Budget.

- Advanced manufacturing technologies that will support the transformation of the sector include robotics, autonomous systems, digital design, sensors and big data analytics.
- Regions such as Ipswich, Maryborough, Rockhampton, and Townsville have concentrations of rail manufacturing expertise.
- Queensland has Australia's largest heavy vehicle manufacturing precinct between Ipswich and Brisbane.

### Previous announcements

- <http://statements.qld.gov.au/Statement/2020/4/5/mighty-manufacturers-makingitforqld>
- <http://statements.qld.gov.au/Statement/2020/4/11/supplier-registrations-surge-in-response-to-covid19>
- <http://statements.qld.gov.au/Statement/2020/5/1/advanced-robotics-hub-extending-helping-hand-to-manufa><http://statements.qld.gov.au/Statement/2019/11/28/32-million-boost-to-manufacturing-in-the-darling-downs>
- <http://statements.qld.gov.au/Statement/2019/11/28/more-than-23-million-in-funding-fuels-manufacturing-on-brisbanes-northside>
- <http://statements.qld.gov.au/Statement/2019/6/18/made-in-queensland-funding-a-bottler-for-bundaberg-softdrink-iconcturers-in-need>
- <http://statements.qld.gov.au/Statement/2020/2/28/state-investment-in-hackerspaces-to-fuel-innovation-and-creation>
- <http://statements.qld.gov.au/Statement/2019/10/17/hackerspace-funding-to-help-harness-ideas-of-manufacturing-creatives>
- <http://statements.qld.gov.au/Statement/2018/5/23/state-grants-back-regional-innovation-hubs>

### Contact:

John Lewis [REDACTED]  
Deputy Director-General  
Department of Regional Development and Manufacturing

### Date:

05.06.2020

**Notes (delete after preparing)**

- keep the information succinct
- provide attachments if additional or background information is required (D18/50977)
- spell all acronyms in the first instance
- use plain English
- consult with other business units as necessary
- do not alter this template.

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Pages 170 through 232 redacted for the following reasons:

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DUPLICATE DOCUMENT - Report

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## Sarah Partosh

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**From:** Elizabeth Philipson  
**Sent:** Monday, 8 June 2020 12:07 PM  
**To:** Jude Mannix  
**Cc:** Lauren Pearce; Naomi Quirk  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Attachments:** Premiers meeting - Andrew Liveris\_track changes.docx

Hi Jude

Please see attached with changes tracked in.

Happy to discuss anything we've added. And please feel free to cut back if the section is too long.

Many thanks  
Beth



**Beth Philipson**  
Senior Policy Officer  
**Economic Policy**  
Department of the Premier and Cabinet  
P 3003 9320 M [REDACTED]  
Level 30, 1 William Street, Brisbane QLD 4000  
PO Box 15185, City East, QLD 4002

---

**From:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 10:13 AM  
**To:** Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>; Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Perfect! Thank you 😊

---

**From:** Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 10:12 AM  
**To:** Jude Mannix <jude.mannix@premiers.qld.gov.au>; Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Thanks very much, Jude.

I think the DRDM material provided covers most of it, but am adding in a couple of dot points in relation to the Queensland Government's COVID-19 response and free online training being offered.

I'll also check in with Naomi from a schooling perspective.

Many thanks  
Beth

---

**From:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 10:11 AM

To: Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>; Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>

Subject: RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Beth and Lauren

The article from the Australian is below, and the chair of the NCCC made a statement on 4 June: <https://www.pmc.gov.au/nccc/news/statement-chair-senate-select-committee-covid-19>, which includes reference to what Mr Liveris' focus will be.

It doesn't specifically mention education, but the article below does flag it.

Thank you both for your assistance.

Regards  
Jude



From: Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>

Sent: Monday, 8 June 2020 9:17 AM

To: Jude Mannix <jude.mannix@premiers.qld.gov.au>; Elizabeth Philipson <elizabeth.philipson@premiers.qld.gov.au>

Subject: FW: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Hi Jude,

Happy to help with this.

Beth, can you please assist Jude with some content on skills, noting the section in the attached on the Skills Implementation Plan for Advanced Manufacturing.

In my quick search I found reference to a [report by the Australian](#) on 'new-collar jobs', but unfortunately couldn't access it due to the pay wall – there may be others out there.



**Lauren Pearce**

A/Director

**Economic Policy**

Department of the Premier and Cabinet

P 07 3003 9373 M [REDACTED]

Level 30, 1 William Street, Brisbane QLD 4000

PO Box 15185, City East, QLD 4002

---

**From:** Jude Mannix <jude.mannix@premiers.qld.gov.au>  
**Sent:** Monday, 8 June 2020 8:42 AM  
**To:** Lauren Pearce <Lauren.Pearce@premiers.qld.gov.au>  
**Subject:** FW: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Importance:** High

Hi Lauren

We have a super urgent event pack (due to ECU 9 June) to prepare related to manufacturing/economic recovery in Queensland (TF/20/11711).

I have reviewed the attached material from DRDM and note they have a small section on skills development, however, as there has been some media over the weekend indicating Mr Liveris will be focussing on 'new collar' jobs for future manufacturing employment, and that this will require modification in the education system, I thought it prudent to see if your team has any content you would like me to include in the response.

You may also find the below email helpful in providing some context.

Mr Liveris has been appointed as an adviser to the National COVID-19 Co-ordination Commission.

Happy to discuss.

Regards  
Jude

---

**From:** [REDACTED] <[REDACTED]@dragomanglobal.com>  
**Sent:** Thursday, 4 June 2020 12:32 PM  
**To:** Jim Murphy <Jim.Murphy@ministerial.qld.gov.au>  
**Subject:** Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Dear Jim,

I hope my note finds you well.

I am writing on behalf of Andrew Liveris AO. Mr Liveris is Special Adviser to the Commonwealth's National Covid-19 Coordination Commission (NCCC) where he is leading the Manufacturing Taskforce reporting to Nev Power. The Taskforce is focused on growing Australian manufacturing industry in the post virus economy.

Andrew would appreciate a half hour meeting (virtual) to get the Premier's views and discuss the recommendations of the taskforce.

Thank you and I look forward to receiving your reply.

With kind regards

██████████

██

# Dragoman

Tel: ██████████ | Mobile: ██████████  
Email: ██████████ dragomanglobal.com  
Level 41, 55 Collins Street  
Melbourne VIC 3000 Australia

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**Request for information**

**Department of Regional Development and Manufacturing**

**SUBJECT: Premier’s meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission on Thursday 11 June 2020.**

**Key/contentious issues**

- DPC sent through a request for information to support the Premier’s attendance at a meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission.
- The request was received on Friday 5 June and is due at 3pm.

**Current status**

**Queensland Government COVID-19 Response**

- The COVID-19 global pandemic exposed the fragility of global supply chains for Personal Protective Equipment (PPE) and other essential products and revealed limited local manufacturing of these products. A lack of secure supply chains meant there was a risk in healthcare workers having insufficient supply of equipment.
- Part of the Queensland Government’s response to COVID-19 was to support Queensland companies to produce PPE and essential products to address critical supply chain issues and to build self-reliance against the possibility of future epidemics.
- Examples include:
  - Launching the #MakingItForQLD marketing campaign in April 2020 to showcase the work in the manufacturing sector and its capabilities in Queensland. This campaign has been viewed approximately over 5 million times (<https://www.facebook.com/growingqld/>);
  - Working with manufacturing companies to pivot their existing capabilities to manufacture PPE and other essential products, including:
    - o Evolve Group and ██████████ to pivot their manufacturing to make P2 and surgical masks respectively at Level 2 and 3 for hospitals.
    - o Sacha Drake, a Queensland clothing manufacture, producing fabric reusable gowns for Queensland Health.
    - o Distilleries such as Bundaberg Rum, Beenleigh Rum and Saleyards Distillery switched to producing and supplying ethanol to support the production of hand sanitiser.
    - o Triple Eight Motor Race Engineering retooled to manufacture emergency ventilator prototype.
  - A dedicated Queensland Government website landing page was established to match manufacturers to products they needed to keep operating, with over 400 enquiries from industry, and 330 connections from businesses to potential suppliers since the Manufacturing Supply Matching webpage was launched in March 2020.

Approved by ED: Insert name only Business Group: Telephone:	Approved by DDG: Insert name only Business Group: Telephone:	Approved by Director-General: Frankie Carroll ...../...../2020
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- Our manufacturers have joined with government to do everything they can to supply locally made products such as face masks, face shields and hand sanitisers to assist our healthcare and other frontline workers to have the protection they require.
- This great work is also supporting the government's focus on building self-reliance against future epidemics, with DRDM now drafting a *Manufacturing PPE Directions Statement*, scheduled for Cabinet consideration in the near future.
- A range of manufacturing programs have been initiated by the Queensland Government. These are at **Attachment One**.

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## ATTACHMENT ONE:

### QUEENSLAND GOVERNMENT MANUFACTURING PROGRAMS

#### Manufacturing in Queensland

- Queensland's manufacturing industry is important to the state's economy contributing around \$20 billion to the state economy and employs over 165,000 people.
- Based on ABS four quarter average data to March 2020, Queensland's manufacturing industry employed 165,200 persons which represents around seven per cent of the state's total workforce.
- Within the Queensland manufacturing industry, 76 per cent (125,000) of employment is located in South East Queensland, while the remaining 24 per cent (40,000) is located in regional areas.
- The largest employing subsector in the Queensland manufacturing industry is the food product subsector, which employs approximately 35,500 persons (22 per cent of total manufacturing employment in Queensland).
- As at June 2019, Queensland's manufacturing industry had an overseas export value of \$17.2 billion (9 per cent above the previous year).

#### Advanced Manufacturing 10-Year Roadmap and Action Plan

- The [Advanced Manufacturing Roadmap and Action Plan](#) was launched in December 2016 and an updated second edition of the Roadmap was released in November 2018.
- The Advanced Manufacturing Roadmap highlights the importance for industry to embrace advanced manufacturing – also known as *Industry 4.0*. The Roadmap provides the framework for accelerating the adoption of robotics and autonomous systems by Queensland manufacturers.
- It contains 17 actions that target 4 key areas to position Queensland as a leader in advanced manufacturing technologies, products, systems and services.

#### Made in Queensland

- The Queensland Government's \$46 million [Made in Queensland](#) (MiQ) initiative is helping small-to-medium-sized business to adopt innovative processes and technology, expand operations and hire more Queenslanders.
- Since 2017, the Queensland Government has supported 75 projects across Queensland through the program. 32 of these projects are in regional Queensland.
- 61 projects have been completed totalling \$22.3 million in grant funding.

#### Queensland Hackerspaces Grant Program

- The Queensland Government has delivered two rounds of the [Hackerspace Grants Program](#) that delivers more spaces where Queenslanders can develop new skills and collaborate on the design and manufacture of new products.
- In Round Two announced in February 2020, 13 groups from Cairns to the Gold Coast will share in funding totaling almost \$220,000.
- Round Two will assist five new hackerspaces to open and eight existing facilities to expand, fueling manufacturing innovation in our State.

- Ten recipients were successful in Round One receiving grants totaling \$170,000.
- Round One helped set up seven new hackerspaces and enabled three to expand.
- The Queensland Hackerspaces Grant program forms part of the Advanced Manufacturing 10-Year Roadmap and Action Plan.

#### **Manufacturing Hubs**

- The manufacturing industry is a key contributor to the state's economy, regions and local communities.
- To support the growth of regional manufacturers, \$30 million has been invested into regional Manufacturing Hubs in Cairns, Townsville and Rockhampton.
- Each hub will provide a place for local manufacturing businesses to receive expert advice and support to transition to advanced manufacturing through world-leading technologies.
- The Hubs have strong links with local universities, schools and TAFE Queensland to develop a workforce with strong skills in science, technology, engineering and maths.
- The Hubs are part of the Advanced Manufacturing 10-Year Roadmap and Action Plan to grow manufacturing productivity and innovation across Queensland.

#### **Manufacturing Hubs Grant Program**

- The Queensland Government has made available \$13.5 million through the Manufacturing Hubs Grant Program (MHGP) to assist eligible businesses.
- Up to \$4.5 million is available for each manufacturing hub to invest in and help to build the advanced manufacturing capability in the Cairns, Townsville and Rockhampton regions.
- This is an opportunity for manufacturers to become more productive and create the jobs of the future through:
  - technology adoption
  - skills and training
  - business development
  - advance robotic manufacturing hub services.

#### **Townsville Manufacturing Hub**

- The Townsville Manufacturing Hub, located at the TAFE Queensland Bohle campus, was officially opened on 9 September 2019, delivering a 2017 election promise.
- Through this Hub, manufacturers will gain access to advice and support, including business development and training programs, and tailored workforce skills to improve their productivity and international competitiveness.
- The Hub will promote collaboration between industry with vocational, tertiary and secondary education providers such as Tec-NO, to ensure Queensland's next generation workforce has strong skills in science, technology, engineering, arts and maths.
- It will provide a catalyst for promoting and delivering world-leading technologies, processes and practices. This includes the Internet of Things, automation and robotics, to boost manufacturing productivity and drive innovation.

- A local reference group has been established to identify and ensure the needs of regional manufacturers are met.

#### **Cairns Manufacturing Hub**

- The Cairns Manufacturing Hub, located at TAFE Queensland's Cairns Campus, was officially opened on 17 December 2019.
- The Cairns manufacturing sector contributed \$787 million to the Queensland economy in 2017-18 and employed 6300 people locally (as at September quarter 2019).
- The Cairns Manufacturing Hub will initially focus on growing the marine, aviation and food production sectors, and it's already delivering results.
- The Hub will specifically achieve:
  - Developments towards an advanced fibre composites maintenance and repair facility with access to 3D printing technologies for aviation, defence and superyachts
  - The delivery of advanced welding (ISO9606) training which will support the marine sector, particularly for future defence and commercial sustainment work
  - Funding of \$650,000 over three years to support the FNQ Food Incubator, a group of local food experts collaborating to support early-stage food processors in FNQ to commercialise and scale-up their products.

#### **Rockhampton Manufacturing Hub**

- The Rockhampton Manufacturing Hub, located at Central Queensland University's North Rockhampton campus, was officially opened on 11 February 2020.
- Manufacturing in Central Queensland is already thriving, employing more than 5000 people and the Hub will be a centre of expertise for advanced manufacturing innovation and skills.
- This Hub will further strengthen the sector, in turn attracting private sector investment and creating jobs.
- Local manufacturers will gain access to business development programs, skills and training and equipment through the Central Queensland University campus.

#### **Advanced Robotics for Manufacturing (ARM) Hub**

- The Queensland Government has invested more than \$7.7 million to help establish Queensland's first Advanced Robotics for Manufacturing (ARM) Hub at Northgate.
- The ARM Hub is a collaborative facility for the local manufacturing sector, led by the Queensland Government and delivered in partnership with QUT and Urban Art Projects (UAP).
- The ARM Hub will allow Queensland industry to collaborate with research institutions on a very practical level to build the capability that will enable manufacturers to be more competitive, reshore manufacturing activity and generate jobs.
- Our support for the \$18 million robotics hub will help Queensland businesses to keep pace with global developments in robotics and drive the international competitiveness of the state's manufacturing industry.
- Through the ARM Hub, businesses across Queensland will have access to practical research and support to assist the transition to advanced manufacturing.

- UAP a leading-edge global company, recognised for their early adoption of robotics and Industry 4.0; and QUT have taken a leading role in the development of the ARM Hub.
- The Hub brings together private industry, international robotics expertise and government to accelerate the adoption of advanced manufacturing and drive Industry 4.0, through the application of robotics and design-led manufacturing.
- ARM Hub services will be available to all manufacturing firms in sectors as diverse as aerospace, biomedical, METS, defence, rail manufacture, beef and food processing, and space.
- While the Hub is located in Brisbane, its services will be delivered across the state.
- Regional manufacturers will have the opportunity to access these services through the Manufacturing Hubs in Cairns, Townsville and Rockhampton and the Defence Hubs in Townsville and Ipswich.

### Craft Brewing

- Craft beer production in Queensland is estimated to be worth more than \$62 million per year, with the local industry employing more than 1700 people.
- A working group has been established comprising local craft brewers, the Independent Brewers Association and Government to identify the opportunities and challenges for the industry.
- The [Queensland Craft Brewing Strategy](#) has three targeted priority areas, investing in people and infrastructure; improving access to markets; and appropriate regulation and planning.
- Specific key actions include the establishment of a ['brewlab' facility in Queensland](#), providing a space for brewers to develop and test new products.
- A range of services are available, delivered through Trade and Investment Queensland, including workshops, where we can assist local craft brewers in developing and enhancing their export skills and opening their customer base internationally.
- We're also prioritising 'Buy Queensland first' and looking to support craft brewers in being able to access new opportunities throughout Queensland.
- Queensland will work with the Independent Brewers Association to develop workshops and supporting material such as guides to assist craft brewers understand the licensing and development assessment processes, access tourism networks and connect with industry development programs.

### Skills Implementation Plan for Advanced Manufacturing

- An article titled *Coronavirus: 'new-collar jobs' to shape future of work* published in The Australian on 5 June 2020 quoted Mr Liveris stating that new manufacturing jobs "will no longer be categorised as white-collar or blue-collar, but as new-collar jobs. They will be higher quality, less physical and more interesting. They will be available to high school or university graduates. Education will need to be modified to allow access to all for these skills."
- The Queensland Government is supporting the technological transformation of our manufacturing industry and looking ahead to attract, develop and retain world-class talent and skills.
- The [Skills Implementation Plan for Advanced Manufacturing](#) has been developed to support manufacturers in their transition to advanced manufacturing and create high-skilled workforces.
- The Skills Plan was [announced](#) on 17 December 2019 by Minister Cameron Dick and Minister Shannon Fentimann at the opening of the Cairns Manufacturing Hub.

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• The Skills Plan also addresses the 10 Priority Action Areas in Jobs Queensland's Advancing Manufacturing Skills strategy and builds on the Queensland Government's overarching strategy for skills, Skills for Queensland – Great training for quality jobs.

•

• A highly-skilled workforce is vital to manufacturing's future growth and diversifying Queensland's economy.

• The use of robotics, leading-edge technologies, autonomous systems and new processes requires knowledge and skills in complex problem solving, design-led thinking and the use of knowledge and skills in the areas of Science, Technology, Engineering and Mathematics (STEM).

• The Queensland Government understands that Queensland students need a strong foundation in STEM. That is why the Queensland Government is implementing a range of initiatives that support STEM education in Queensland state schools. This includes the \$81.3 million *Advancing STEM in Queensland state primary schools* initiative, which is enabling schools to access the resources, expertise and partnerships they need to increase engagement and student outcomes in STEM. Key aspects of the initiative focus on:

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- o building teacher capability to transform STEM learning
- o increasing student engagement in STEM learning
- o achieving excellence in STEM learning.

• As part of its response to COVID-19, the Queensland Government launched a new online Jobs Finder Queensland portal to connect Queenslanders who have lost their jobs with new job opportunities, and to also facilitate access to free online training courses through TAFE Queensland and Central Queensland University. There are six micro-credentials available, all of which are focused on digital skills:

- o Digital Literacy Essentials
- o Cyber Security Essentials
- o Communication Technologies for Business Success
- o Digital Data Essentials
- o Data Security Essentials
- o Data Analysis Essentials.

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#### **STEM in schools**

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As STEM touches every aspect of our lives, from our smartphones to the technologies that enable us to explore the world around us, the Queensland Government understands that Queensland students need a strong foundation in STEM.

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That is why the Queensland Government is implementing a range of initiatives that support STEM education in Queensland state schools. This includes the \$81.3 million *Advancing STEM in Queensland state primary schools* initiative, which is enabling schools to access the resources, expertise and partnerships they need to increase engagement and student outcomes in STEM.

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Key aspects of the initiative focus on:

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building teacher capability to transform STEM learning

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~~increasing student engagement in STEM learning~~

- ~~• achieving excellence in STEM learning.~~

Exempt Sch.3(2)(1)(b) Cabinet considerations

- Queensland's rail manufacturing industry currently contributes \$600 million to the state's economy and provides 3,700 direct jobs.

- The national pipeline of rail infrastructure projects in 2019 is estimated to be around \$115 billion. Of this, around \$25 billion relates to projects in Queensland, including:
  - \$5.4 billion committed to the transformational Cross River Rail project
  - Melbourne to Brisbane Inland Rail project \$9.3 billion total, with substantial Queensland component
  - \$634 million European Train Control System - Inner City implementation
  - \$550 million commitment towards the Beerburum to Nambour rail line project
  - \$725 million in other rail upgrade projects in the 2019-20 State Budget.
- For Queensland to win a greater share of the national pipeline, local manufacturers need to build on their current capabilities.
- Advanced manufacturing technologies that will support the transformation of the sector include robotics, autonomous systems, digital design, sensors and big data analytics.

**Contact:**

John Lewis  
Deputy Director-General  
Department of Regional Development and Manufacturing

**Date:**

05.06.2020

## Sarah Partosh

---

**From:** Justin Carpenter  
**Sent:** Monday, 8 June 2020 11:17 AM  
**To:** Jude Mannix  
**Subject:** FW: Request for information  
**Attachments:** Attachment 1 NCCC-Manufacturing-Taskforce-Interim Draft Report.pdf; Attachment 2 - Further analysis of claims in the NCCC Manufacturing Taskforce draft interim report at 1130.docx; DPC Dot points on gas.docx

Hi Jude,

There's a bit to wade through here.

I'm in the midst of my own event pack joy at the moment (for an event in Rocky tomorrow) so haven't reviewed. Happy to discuss later and/or review what you propose out of this.

Regards



**Justin Carpenter**

Director (Environment Policy)

**Policy Division**

Department of the Premier and Cabinet

E [justin.carpenter@premiers.qld.gov.au](mailto:justin.carpenter@premiers.qld.gov.au) P 07 3003 9316 M: [REDACTED]

Level 30, 1 William Street, Brisbane QLD 4000

PO Box 15185, City East, QLD 4002

---

**From:** LLOYD Kahil <[Kahil.Lloyd@dnrme.qld.gov.au](mailto:Kahil.Lloyd@dnrme.qld.gov.au)>

**Sent:** Monday, 8 June 2020 11:09 AM

**To:** SHAW Chris <[Chris.Shaw@dnrme.qld.gov.au](mailto:Chris.Shaw@dnrme.qld.gov.au)>; Justin Carpenter <[justin.carpenter@premiers.qld.gov.au](mailto:justin.carpenter@premiers.qld.gov.au)>

**Subject:** RE: Request for information

Hi Justin,

Here is some dots.

Happy to discuss.

Kahil



**Kahil Lloyd**

A/Director

**Georesources Policy | Policy Division**

Department of Natural Resources, Mines and Energy

P: 3199 7247 M: [REDACTED]

E: [Kahil.Lloyd@dnrme.qld.gov.au](mailto:Kahil.Lloyd@dnrme.qld.gov.au)

A: 1 William St, Brisbane QLD 4000 | PO BOX 15216, CITY EAST, QLD 4002

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**From:** SHAW Chris <[Chris.Shaw@dnrme.qld.gov.au](mailto:Chris.Shaw@dnrme.qld.gov.au)>  
**Sent:** Monday, 8 June 2020 9:28 AM  
**To:** justin.carpenter; LLOYD Kahil  
**Subject:** RE: Request for information

Thanks Justin – we're on it. Kahil is leading amongst my team, should have something together before midday.

Cheers



**Chris Shaw**  
Executive Director  
**Georesources Policy | Policy Division**  
Department of Natural Resources, Mines and Energy

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**P:** (07) 3199 7391 M [REDACTED]  
**E:** [chris.shaw@dnrme.qld.gov.au](mailto:chris.shaw@dnrme.qld.gov.au)  
**A:** 1 William Street, Brisbane QLD 4000  
**W:** [www.dnrme.qld.gov.au](http://www.dnrme.qld.gov.au)

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**From:** justin.carpenter <[justin.carpenter@premiers.qld.gov.au](mailto:justin.carpenter@premiers.qld.gov.au)>  
**Sent:** Monday, 8 June 2020 8:51 AM  
**To:** SHAW Chris  
**Subject:** Request for information

Hi Chris,

Colleagues of mine are developing briefing material for a possible meeting between the Premier and Mr Andrew Liveris AO, in his role as Special Adviser to the Commonwealth's National Covid-19 Coordination Commission.

I understand the main focus will be in regards to proposals to boost manufacturing opportunities.

I have been asked for info on domestic gas reserves as part of this and would appreciate anything relevant by midday today please.

My apologies for the timeframe.

Happy to discuss as well.

Regards



**Justin Carpenter**  
Director (Environment Policy)  
**Policy Division**  
Department of the Premier and Cabinet

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Pages 248 through 310 redacted for the following reasons:

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DUPLICATE DOCUMENT - Report

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## Gas claims in the NCCC Manufacturing Taskforce draft interim report 26 May 2020

### Purpose

1. Georesources Policy is preparing a brief for the Minister, and has asked for advice on two claims in the National Covid-19 Coordination Commission's (NCCC's) Manufacturing Taskforce draft interim report (the Draft Report).
2. This document considers the claims at a high level, noting that there was limited time for analysis.

### Claim 1: Gas production costs

3. The Draft Report claims (see slides 21 and 22 in Appendix A) that its recommendations put the east coast "on a pathway towards \$4/GJ gas supply". It also claims that "40% of current forecast production is already below \$4/GJ on the East Coast – 1/3 of that is unconventional".

### Current costs (excluding pipeline costs)

4. AEMO's 2020 Gas Statement of Opportunities (GSOO)<sup>1</sup> includes production cost estimates for different gas fields in the east coast. AEMO estimates that the marginal cost of extracting 'developed' 2P reserves (i.e. those with existing wells and processing infrastructure) is under \$4/GJ for all of the east coast's major projects.
5. However, the marginal cost is much higher for undeveloped 2P reserves (i.e. those with wells yet to be drilled). AEMO places these between \$4.48/GJ and \$6.74/GJ (with the upper and lower bounds both being Queensland projects). AEMO's costs for 2C resources range from \$7.00/GJ to \$9.44/GJ for Queensland projects.
6. Note that AEMO's estimates are marginal, so do not include costs for existing infrastructure.

### Future costs

7. EnergyQuest's 2020 East Coast Gas Outlook to 2040 estimates the cost of production for each of Queensland's major projects out to 2040. The estimates are before tax, royalties and financing.
8. Costs vary widely from field to field. However, the following table summarises EnergyQuest's estimates for average production costs out to 2040 for each major joint venture. Note that there is some variation throughout the document (e.g. at a different point, EnergyQuest estimates that the average GLNG costs are actually \$5.46/GJ).

**Table 1 Queensland CSG cost of production**

OPERATOR	Average cost of production (A\$/GJ)		
	High	Low	Average
GLNG	7.35	3.45	4.42
APLNG	5.07	2.84	3.60
QCLNG	5.42	3.95	4.46
Arrow	12.46	7.50	8.22

9. The Draft Report's claim of a potential \$4/GJ gas is based on a range of cost reductions that the NCCC say add up to ~one third of the existing cost stack. It is impossible to assess this claim with the detail available, but it seems very unlikely.

<sup>1</sup> <https://aemo.com.au/en/energy-systems/gas/gas-forecasting-and-planning/gas-statement-of-opportunities-gsoo>



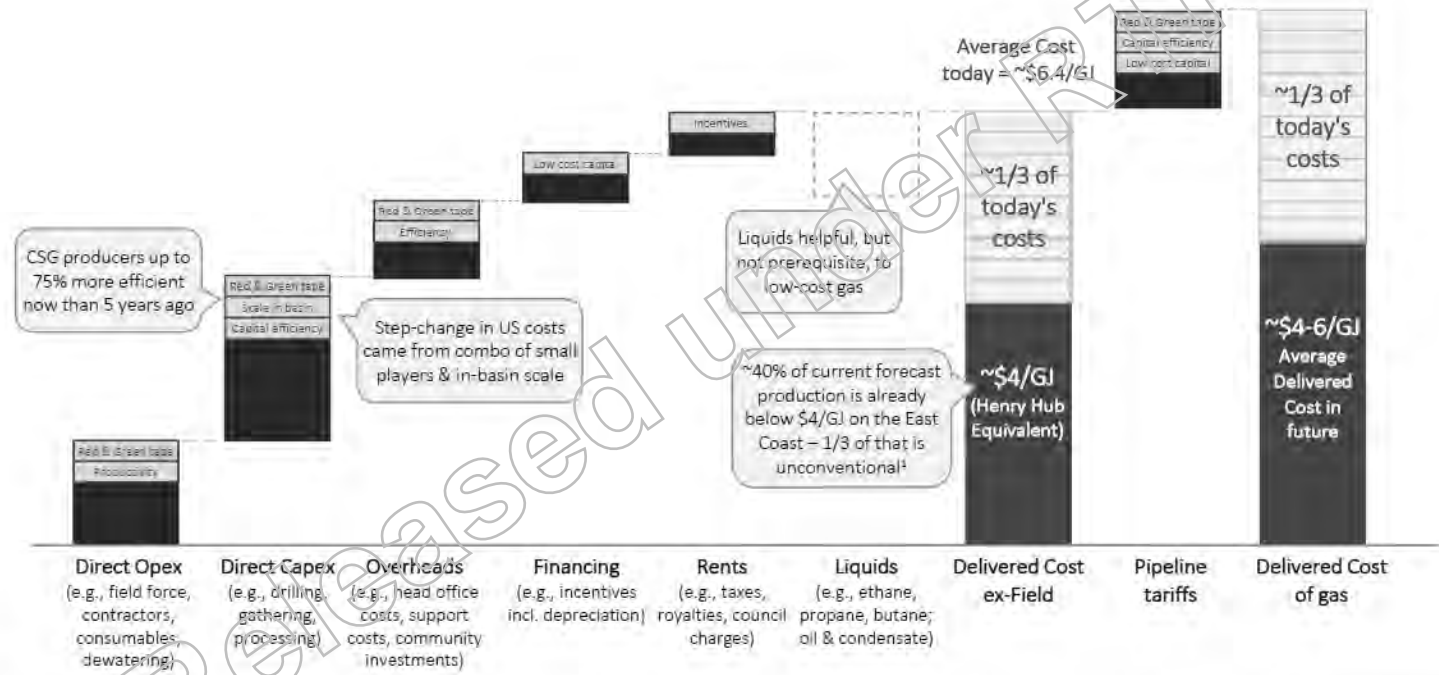
Claim 2: Exports

10. Slide 47 of the Draft Report (see Appendix A) states that “incremental supply required represents less than 3% of exports”.
11. This claim is based on 60-110 PJ incremental increase in demand from C+I consumers and the electricity sector. Strategic Economics has not analysed whether this is a reasonable expectation. However, the NCCC’s claim is based on a range of questionable assumptions, including a \$4/GJ price.
12. In 2019, the Queensland LNG projects consumed 1325 PJ. The 60-100 PJ incremental increase in demand is between 4.5 and 8.3 % of this.

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# Our recommendations put us on a pathway towards \$4/GJ gas supply

*Indicative changes to cost structure of gas developments under proposed solutions*



1. Rystad production forecast, 2020-2029. 2. Includes gas fields and gas condensate fields that had production in 2019; includes all cash flows across the lifetime of an asset (i.e., exploration, development, production and abandonment). Source: Rystad Energy, industry experience, Expert interviews

## Realising \$4-6/GJ gas is a realistic goal

Current production forecasts indicate potential for low cost gas in Australia<sup>1</sup>      Significant operational improvement potential

40%

Gas from the East Coast forecasted to cost less than \$4 per GJ (~8K PJ's in next 10 yrs)

20%

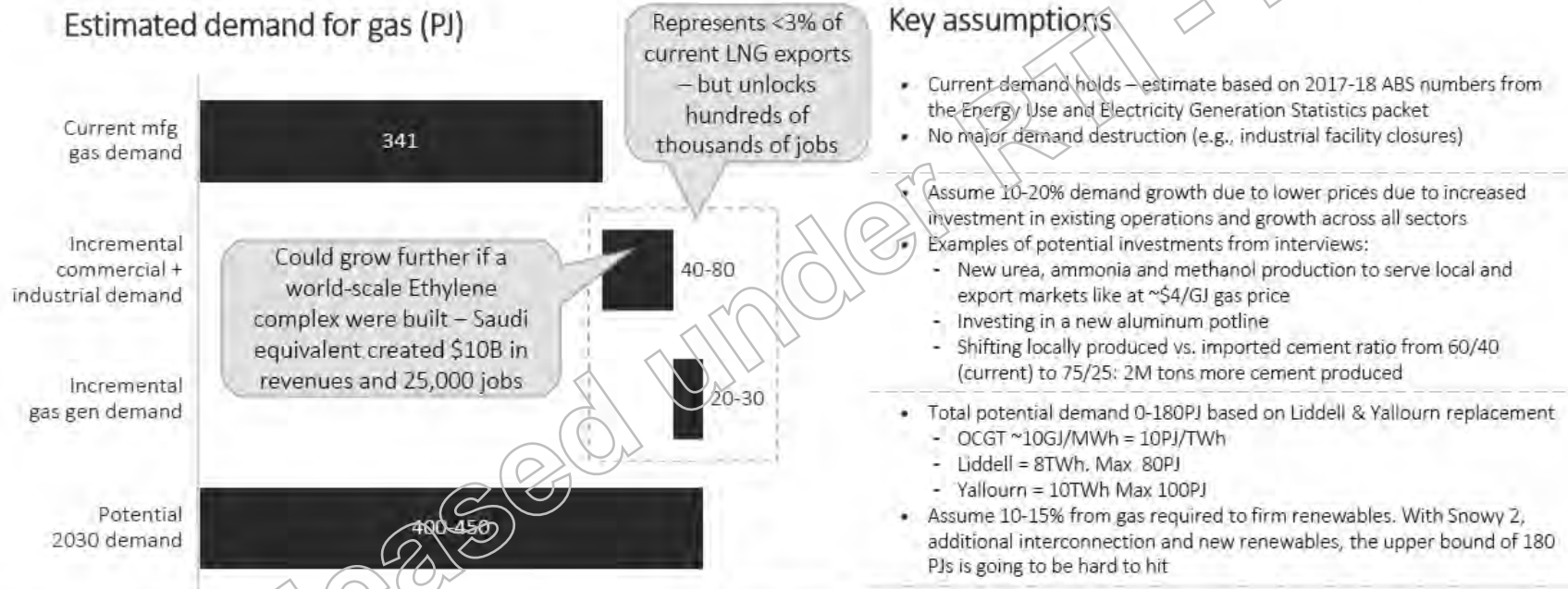
Gas from Western Australia forecasted to cost less than \$4 per GJ (~8K PJ's in next 10 yrs)

63%

Drop in Henry Hub pricing due to US shale market growth from 2000 to 2010, 78% drop from 2000 to 2015 (32% dry gas and 68% wet gas)<sup>2</sup>

1. Based on 2020-29 Australian gas supply curves from Rystad. 2. Dry vs wet gas split based on US gas and gas-condensate fields that has production in 2019; total production ~30.8K PJ's (12.3K PJ's dry gas and 20.5K PJ's wet gas). Source: Rystad Energy, Bloomberg

# Incremental supply required represents less than 3% of exports, but unlocks significant jobs



The estimates above on Commercial & Industrial have been built top-down, and then validated bottom up via input from industry – strong indications that they may be very conservative estimates

Note: Incremental C&I demand does not include potential new downstream demand from lower electricity prices (e.g., new petrochemicals development)  
 Source: ABS, AMEO, Expert interviews and analysis



DEPARTMENT OF NATURAL RESOURCES, MINES AND ENERGY  
 RESPONSE TO MINISTER'S OFFICE/DEPARTMENTAL LIAISON OFFICER REQUEST

<b>CTS No.</b>	N/A
<b>DUE DATE</b> <i>By DLO/Minister's Office</i>	8 June 2020
<b>ISSUE</b>	Advice to DPC to inform Premier's meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth's National Covid-19 Coordination Commission.
<b>NAME OF CONSTITUENT OR MEMBER OF PUBLIC</b> <i>If applicable</i>	
<b>RESPONDING OFFICER</b> <i>Author</i>	Kahil Lloyd, A/Director Georesources Policy
<b>FINAL APPROVAL</b> <i>DG/DDG/ED</i>	Chris Shaw, ED Georesources Policy

**INFORMATION/ADVICE:**

- The Department of Natural Resources, Mines and Energy (DNRME) understands that Mr Andrew Liveris wishes to discuss proposals to boost manufacturing opportunities in Australian.

**National COVID-19 Coordination Commission's draft Manufacturing Taskforce's Draft Interim Report ('draft report')**

- A presentation about the Manufacturing Taskforce's draft report was leaked online in May 2020, with many media organisations reporting on it (available at **Attachment 1**). The written and approved draft report has not been released.
- The draft report has two key areas of focus: (1) growing advanced manufacturing; and (2) creating a competitive domestic gas market.
- The two areas are linked, as increased and affordable gas will support the expansion and development of advanced manufacturing in Australia.
- DNRME has not been formally consulted by the Manufacturing Taskforce on its report, and first learned of the draft report's recommendations and findings through media reports. DNRME met with officers from the NCCC who advised that the leaked report does not represent the NCCC's final view; rather represents views of a person engaged by the NCCC.
- DNRME has a number of significant concerns about the direction of the Manufacturing Taskforce's report, in particular its unrealistic predictions for a domestic gas price of \$4/GJ which cannot be realised without significant government subsidies and implications of supporting a domestic reservation policy (see paras 27-34 and Attachment 2).
- Further, the report appears to have little focus on supporting Queensland projects, other than a brief mention of the Bowen Basin pipeline. Queensland is a significant contributor to the East Coast Gas market, and Federal Government investment in Queensland to support the gas sector is warranted.

**Growing advanced manufacturing**

- The first area of the draft report focuses on the Taskforce's draft recommendations to grow advanced manufacturing.
- These recommendations focus on the following three matters:
  - Take a longer term view to create more value from investments. This will include:
    - Embedding a long-term, 10 year policy view with clear accountability for impact against KPIs;
    - Redeploying existing funds and resources to reduce the risk of scaling;
    - Accelerating approval processes for projects and removing red tape;
    - Focusing investment and support on tightly defined areas of competitive advantage (such as minerals for batteries and gas for fertilisers); and
    - Leveraging existing Australian structures and exemplars where possible.
  - Drive rigorous implementation and measurement of impact. This will include:
    - Establishing a Manufacturing Board that will report to the Federal Minister for Industry; the Board will have responsibility for developing the 10 year policy plan;
    - Creating industry hubs and incorporate existing Growth and Research Centres. These hubs will support business scale up, growth and commercialisation by facilitating collaboration between

government, industry and research. The hubs will also allocate funding and attract private investment.

- c. Support with structural reforms, starting with skills. This will include:
- Working with the National Skills Commission and TAFEs to implement vocational education reforms and broader skills initiatives. Some initiatives would include: improving quality and relevance of training; analysing future skill needs for advanced manufacturing; implementing nationally consistent qualifications and curricula;
  - Working with the National Skills Commission and TAFEs to identify priorities for upskilling and retraining initiatives, to support the workforce to meet Industry 4.0 opportunities (automation) and offer pathways for mid-career redeployment.
  - Focus R&D tax incentives on activity with benefits for the whole economy (rather than individual firm benefits);
  - Introduce stronger open data access and knowledge sharing for Commonwealth, State and federally funded university research; and
  - Update Intellectual property laws in line with Productivity Commission recommendations to balance access, innovation, competitiveness and international trade obligations.
10. The proposed recommendations seem logical and would be a good basis for further conversations with the Federal Government on how Queensland can leverage opportunities in the manufacturing sector to grow the State's economy and create new jobs.

#### Creating a competitive domestic gas market

11. The second key area of focus in the draft report is on the domestic gas market and increasing supply into the future.
12. The draft report suggests that if the recommendations proposed (and discussed below) are implemented, there would be a significant increase in jobs and a lift to gross domestic product (GDP) of between \$10-\$20 billion. The evidence for these conclusions is somewhat lacking and the rational used to arrive at this figure should be made public.
13. The draft report makes a number of recommendations, which it proposes would be implemented over three phases – phases A, B and C.

#### Phase A

14. There are two recommendations under Phase A: (1) Remove barriers to supply; and, (2) Build the bridge in the near-term.
15. The draft report recommends, under the remove barriers to supply recommendation, that the moratoriums in New South Wales and Victoria be lifted, that red and green tape be reduced, and that a best practice gas development framework in the Northern Territory be established.
16. Queensland has been calling on the Southern States (New South Wales and Victoria) to lift their moratorium for some time, so this recommendation would be supported.
17. On red and green tape reduction, industry are welcome to raise issues with the regulatory framework with DNRME. The report focuses on apparent duplication between State and Federal environmental approvals, and suggests that duplication should be removed (what form that would take is unclear, but previous discussions would indicate that it would be the State taking over the matter). If that is the case, a change in the Queensland Government policy that the Federal Government has responsibility for managing impacts on matters of national environmental significance would be required.
18. Where efficiencies and duplication in regulation can be found, whilst maintaining strong environmental standards, the Queensland Government may wish to pursue and encourage these changes. An area of potential reform is the use of steel casing in horizontal wells, which has been a key point of discussion with industry over the last few years.
19. On the build the bridge of supply in the near term recommendation, the draft report recommends:
- Enforcing 'a use it or lose it' provision –DNRME has powers under the Act to ensure active management of the tenure, through the requirement for development plans on petroleum leases. The merits of adopting a 'use it or lose it' position during the COVID-19 pandemic, where international demand for gas has somewhat reduced and some companies may be scaling back operations in the short to medium term seems questionable.
  - Providing support, such as low cost capital, to existing small and mid-cap market participants – DNRME could investigate the feasibility of this recommendation, however it is unclear whether it would be grants, loans or an equity stake that would be provided. A robust cost-benefit analysis would be needed to justify this initiative.
  - Establish a forward-looking gas reservation policy for Northern Territory and East Coast

developments – Queensland has prospective regions (Bowen, Galilee, Cooper and Eromanga basins), Federal Government support for pipelines into these regions would be critical to bringing these basins to the East Coast Gas Market.

- Consider accelerated developments for highly prospective opportunities – e.g., Beetaloo, Bowen, Perth Basin – Federal Government funding for a feasibility study into the Bowen Basin pipeline could be sought to prove up the investment.
- Coordinate with hydrogen development to ensure long-term demand potential (incl. avoiding demand destruction) – this is a logical approach and links with the Queensland Government’s overarching direction of transitioning to a renewable energy future.

#### Phase B

20. Under the Phase B initiatives, the draft report suggests that a price of approximately \$6/GJ would be achievable. This phase has three overarching recommendations: (1) create the market; (2) lower the cost of pipelines; and (3) complete the network of pipelines to market.
21. Under the create the market recommendation, the draft report recommends that governments underwrite supply at priority supply hubs and compel price disclosure and reporting of differentials.
22. The draft report also recommends, as part of the lower the cost of pipelines recommendation, that the pipeline rates of return be revisited and that excessive duplication cost of infrastructure be reduced, including through improved access.
23. Under the complete the network of pipelines to markets recommendation, the draft report suggests that government take active, participatory role in strategic pipeline developments and consider tax incentives for priority infrastructure. Queensland could leverage this recommendation to ensure that consideration of priority pipelines – particularly to the Bowen Basin – be evaluated. Tax incentives or other financial incentives from government can be important aspects to encourage private sector investment.
24. These initiatives, if progressed by the Federal Government with significant commitments to funding, could be beneficial to Queensland and Queensland’s resources sector.

#### Phase C

25. Under phase C, the draft report suggests that a price of approximately \$4/GJ would be achievable. The following initiatives relating to scale and win in the medium term are proposed:
  - Proactively attract foreign direct investment on demand side;
  - Provide policy stability that enables market to thrive;
  - Establish an 'evergreen' taskforce between AEMO and ACCC to manage implementation and send clear market signals via aligned basin and pipeline prioritisation, published and refreshed regularly;
  - Work with financial service providers to create a liquid futures market; and
  - Continue to coordinate with hydrogen.
26. These initiatives seem to be positive, but it’s unclear how they will be implemented.

#### Other claims in the report about the domestic gas market

27. The draft report makes a number of claims about the current domestic gas market and prices.
28. These claims include that “~40% of current forecast production is already below \$4/GJ on the East Coast – 1/3 of that is unconventional.
29. AEMO’s 2020 Gas Statement of Opportunities (GSOO) includes production cost estimates for different gas fields in the east coast. AEMO estimates that that the marginal cost of extracting ‘developed’ 2P reserves (i.e. those with existing wells and processing infrastructure) is under \$4/GJ for all of the east coast’s major projects.
30. However, the marginal cost is much higher for undeveloped 2P reserves (i.e. those with wells yet to be drilled). AEMO places these between \$4.48/GJ and \$6.74/GJ (with the upper and lower bounds both being Queensland projects). AEMO’s costs for 2C resources range from \$7.00/GJ to \$9.44/GJ for Queensland projects.
31. It is important to note that AEMO’s estimates are marginal, so do not include costs for existing infrastructure.
32. This claim is based on 60-110 PJ incremental increase in demand from C+I consumers and the electricity sector. Strategic Economics, within DNRME, has not analysed whether this is a reasonable expectation. However, the draft report’s claim is based on a range of questionable assumptions, including a \$4/GJ price.
33. In 2019, the Queensland LNG projects consumed 1325 PJ. The 60-100 PJ incremental increase in demand is between 4.5 and 8.3 % of this.
34. For further of these claims, please see **Attachment 2**.



## **East coast gas market – overall summary**

35. Supply from existing and committed gas developments will be sufficient to meet forecast gas demand across eastern and south-eastern Australia until at least 2023.
36. Southern supply from existing and committed gas developments will reduce by more than 35% (163 petajoules [PJ]) over the next five years.
37. Any delays in this new electricity transmission investment or a further decline in availability of coal-fired generation will significantly increase gas demand through increased reliance on both existing and new Gas Powered Generation.
38. The Victorian government has lifted the ban on onshore conventional gas exploration and development from July 2021, although by retaining a ban on fracking, there is little likelihood of a significant amount of gas production.
39. The ACCC in its February 2020 Report noted that there is no evidence that producers are seeking to withhold supply, it remains concerned that larger producers and LNG producers in particular may have the ability to delay the development of much needed new sources of supply to suit their commercial priorities at the expense of the domestic market. The ACCC intends to monitor this closely.

## **Review of the Australian Market Supply Condition**

40. Queensland has supported the continued supply of gas to the domestic market.
41. Queensland released land for gas development with the Supply Condition for the first time in February 2017, as market analysts were projecting an undersupply of gas from 2019-21.
42. Under the Supply Condition (largely set out in Chapter 2, Part 2A of the *Petroleum and Gas (Production and Safety) Act 2004* (P&G Act)), the gas produced must be supplied and used in Australia.
43. Since 2017, the Queensland Government has released 11 areas with the Supply Condition, totalling over 8500 square kilometres of land.
44. As a result, seven tenures had been granted to which the Supply Condition applies, five of which are authorities to prospect and two petroleum leases (Senex's Project Atlas in the Surat Basin granted straight to petroleum lease, and the Australian Pacific LNG and Armour Energy joint venture released as an authority to prospect with the petroleum lease granted 9 March 2020)
45. Aurecon was commissioned by DNRME on 21 October 2019 to undertake a review of the Australian Market Supply Condition (Supply Condition), and investigate and report on:
  - The extent to which the domestic supply condition is meeting the government's objectives; and
  - Any modifications or alternative policy options that might deliver a better result.
46. As part of the review, Aurecon undertook in-depth research and analysis of current gas supply and demand market issues, and interviewed gas industry stakeholders, including explorers and producers, industrial gas users and peak bodies APPEA and QRC.
47. In the Report, Aurecon's interviews with gas industry stakeholders found that overall the Supply Condition has not hindered investment and is generally accepted by the gas industry and industrial gas users.
48. Issues raised by gas explorers and producers and industrial gas users were primarily:
  - The lack of transparency in the land release process and decision-making process for when/how the Supply Condition is applied; and
  - The legislative framework is too rigid.
49. Aurecon has made 11 recommendations in the Report, which are grouped under the following three themes:
  - a. Adaptable framework for a dynamic gas market:
  - b. Increase efficiency and transparency in the administration of the Supply Condition; and
  - c. Informed market participants.
50. DNRME supports each of the recommendations and an implementation plan has been developed to progress the recommendations.
51. A range of recommendations will result in improvements to the development of future iterations of the Queensland Exploration Program (QEP), which will be addressed as part of a broader program of review and improvement for the QEP and associated tendering process.
52. Three of the Report recommendations require amendments to the P&G Act in the longer term. In the interim, the Operational Policy for Complying with the Australian Market Supply Condition (Operational Policy) clarifies what DNRME will accept as meeting the Supply Condition and broader requirements of the P&G Act.
53. Due to the guidance provided by the Operational Policy, any required legislative amendments are not considered to be a priority and are proposed to be progressed as part of DNRME's suite of future

amendments planned for the P&G Act.

**Exploration tender areas for domestic only gas supply**

54. Since 2015, the Palaszczuk Government has released more than 79 000 km<sup>2</sup> of land for petroleum and gas exploration. These releases have included 20 212 km<sup>2</sup> released on the condition that any gas produced must be supplied to the Australian domestic market.
55. To date, 12 separate areas across a total of 8752 km<sup>2</sup> have been awarded for domestic only gas supply.
56. Senex's Project Atlas, the first domestic supply conditioned tenure, commenced production in January 2020. Gas sales have commenced to domestic users including building products manufacturer, CSR Limited; packaging company Orora; and glass manufacturer O-I.
57. In March 2019 gas tenure was awarded to an Australia Pacific LNG-Armour Energy joint venture with a condition that any future gas produced from the area must be supplied exclusively to the Australian manufacturing sector. In March 2020 a petroleum lease was granted for this area. Australia Pacific LNG has announced sales agreements with manufacturers Orica, Orora and Incitec Pivot.
58. In August 2018, Central Petroleum was granted tenure over a domestic only supply area. Shortly after grant, Central Petroleum entered into a joint venture agreement with Incitec Pivot to provide \$20 million funding for the work program.
59. A further six exploration permits have been granted to: Comet Ridge, Denison Gas, Central Petroleum, Armour Energy, Chi Oil and Gas and a Shell/Santos joint venture, allowing these tenure holders to actively explore for gas.
60. DNRME is working with remaining companies who have been awarded land to have their exploration authority applications decided, so they can also begin actively exploring for gas for the domestic market.
61. Under the 2020 Queensland Exploration Program (QEP) a tender for petroleum and gas exploration was opened on 14 May 2020. This tender release comprises over 6,700 km<sup>2</sup> for gas exploration, and includes five domestic supply areas totalling 872 km<sup>2</sup>. Tenders close on 9 July 2020.

**Attachments:**

Attachment 1: National COVID-19 Coordination Commission Manufacturing Taskforce's Draft Interim Report.

Attachment 2: Further analysis of claims in the report.

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RTI Act 2009

## Sarah Partosh

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**From:** Courtney Jarrett  
**Sent:** Monday, 8 June 2020 8:54 AM  
**To:** Brief Premier; DCLO Admin; Jackie Hughes  
**Cc:** Glenys Jenkin; @ODG Requests; Danielle McAllister; Glenn Case; Graham Marshall; Sharlene Larsen; Rob Lloyd-Jones  
**Subject:** DEP REP ADVICE: \*\*SUPER URGENT\*\* EXTERNAL MEETING BRIEF | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC

Good morning

Dave Stewart, Director-General, will attend as the Departmental Representative for this teleconference meeting.

This email will be saved into TRIM and a note will be added to the tracking folder.

Regards  
Courtney



**Courtney Jarrett**  
Executive Support Officer  
**Office of the Director-General**  
Department of the Premier and Cabinet  
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**From:** DCLO Admin <[dcloadmin@premiers.qld.gov.au](mailto:dcloadmin@premiers.qld.gov.au)>  
**Sent:** Friday, 5 June 2020 12:43 PM  
**To:** Danielle McAllister <[danielle.mcallister@premiers.qld.gov.au](mailto:danielle.mcallister@premiers.qld.gov.au)>; Glenn Case <[Glenn.Case@premiers.qld.gov.au](mailto:Glenn.Case@premiers.qld.gov.au)>; Graham Marshall <[Graham.Marshall@premiers.qld.gov.au](mailto:Graham.Marshall@premiers.qld.gov.au)>; Sharlene Larsen <[Sharlene.Larsen@premiers.qld.gov.au](mailto:Sharlene.Larsen@premiers.qld.gov.au)>; Rob Lloyd-Jones <[rob.lloyd-jones@premiers.qld.gov.au](mailto:rob.lloyd-jones@premiers.qld.gov.au)>  
**Cc:** DCLO Admin <[dcloadmin@premiers.qld.gov.au](mailto:dcloadmin@premiers.qld.gov.au)>; Brief Premier <[Brief.Premier@premiers.qld.gov.au](mailto:Brief.Premier@premiers.qld.gov.au)>; Glenys Jenkin <[Glenys.Jenkin@premiers.qld.gov.au](mailto:Glenys.Jenkin@premiers.qld.gov.au)>; @ODG Requests <[ODGRequests@premiers.qld.gov.au](mailto:ODGRequests@premiers.qld.gov.au)>  
**Subject:** TRIM: \*\*SUPER URGENT\*\* EXTERNAL MEETING BRIEF | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC  
**Importance:** High

Hi all

As per the below email, the Premier will be virtually meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth's National Covid-19 Coordination Commission on Thursday, 11 June 2020 – time TBC.

Glenn – can your team please prepare the following:

- Briefing Note including Background information (re manufacturing industry in QLD and Commonwealth proposals to boost manufacturing investment)
- Talking points

ODG - Is the DG available to attend this meeting or if not, can an alternative please be arranged?

ECU – can you please register this request, allocate it to Economic Policy and add it to the watch list.



**Queensland  
Government**

**Office of the Director-General - Department of the Premier and Cabinet**

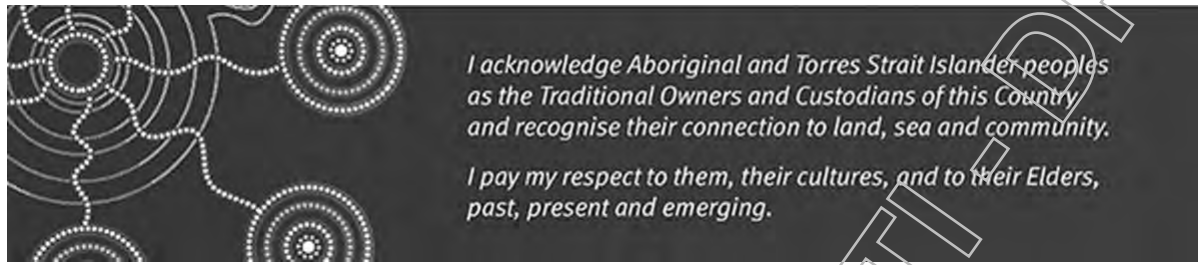
P 07 3003 9424 M [REDACTED]  
Level 40, 1 William Street, Brisbane QLD 4000  
PO Box 15185, City East, QLD 4002

The PO has requested to receive this briefing pack by **5PM TUESDAY 9 JUNE 2020.**

Thank you

**Sharni Sawyer**

Assistant Departmental & Customer Liaison Officer  
Departmental and Customer Liaison Office



**From:** Jackie Hughes <[Jackie.Hughes@ministerial.qld.gov.au](mailto:Jackie.Hughes@ministerial.qld.gov.au)>

**Sent:** Friday, 5 June 2020 12:01 PM

**To:** DCLO Admin <[dcloadmin@premiers.qld.gov.au](mailto:dcloadmin@premiers.qld.gov.au)>

**Cc:** Tim Linley <[Tim.Linley@ministerial.qld.gov.au](mailto:Tim.Linley@ministerial.qld.gov.au)>; Jim Murphy <[Jim.Murphy@ministerial.qld.gov.au](mailto:Jim.Murphy@ministerial.qld.gov.au)>; Jackie Hughes <[Jackie.Hughes@ministerial.qld.gov.au](mailto:Jackie.Hughes@ministerial.qld.gov.au)>

**Subject:** Material Required from the Department

Hi Team

The Premier will be meeting (virtually) with Andrew Liveris (e-mail attached) at a time tbc on Thursday 11 June 2020.

Please organise for the department to prepare the following material for the Premier's consideration:

- Briefing Note including Background information (re manufacturing industry in QLD and Commonwealth proposals to boost manufacturing investment)
- Speech
- Draft media release
- Talking points
- Q & A's
- Run Sheet
- VIP Guest List
- Departmental Representative
- VIP Biographies

The relevant Advisor for any queries regarding content of the materials is: **Tim Linley/Jim Murphy**

Could we please have the documentation in our office by **Tuesday 9 June 2020 5:00pm**

Full complement of the requested materials need to be emailed to the relevant Advisor and CC: [premiersbriefingmaterial@ministerial.qld.gov.au](mailto:premiersbriefingmaterial@ministerial.qld.gov.au)

Speech notes to be emailed to me, Advisor and with cc: [premiers.media@ministerial.qld.gov.au](mailto:premiers.media@ministerial.qld.gov.au)

Kind regards

Jackie



Jacqueline Hughes (C.dec)  
Executive Assistant to the Premier  
Office of the Hon. Anastacia Palaszczuk MP  
Premier of Queensland and Minister for Trade

---

P 07 3719 7000 E [Jackie.hughes@ministerial.qld.gov.au](mailto:Jackie.hughes@ministerial.qld.gov.au)  
1 William Street Brisbane QLD 4000 | PO Box 15185 City East QLD 4002

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Pages 324 through 325 redacted for the following reasons:

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**Request for information**

**Department of Regional Development and Manufacturing**

**SUBJECT: Premier’s meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission on Thursday 11 June 2020.**

**Key/contentious issues**

- DPC sent through a request for information to support the Premier’s attendance at a meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth’s National Covid-19 Coordination Commission.
- The request was received on Friday 5 June and is due at 3pm.

**Current status**

**Queensland Government COVID-19 Response**

- The COVID-19 global pandemic exposed the fragility of global supply chains for Personal Protective Equipment (PPE) and other essential products and revealed limited local manufacturing of these products. A lack of secure supply chains meant there was a risk in healthcare workers having insufficient supply of equipment.
- Part of the Queensland Government’s response to COVID-19 was to support Queensland companies to produce PPE and essential products to address critical supply chain issues and to build self-reliance against the possibility of future epidemics.
- Examples include:
  - Launching the #MakingItForQLD marketing campaign in April 2020 to showcase the work in the manufacturing sector and its capabilities in Queensland. This campaign has been viewed approximately over 5 million times (<https://www.facebook.com/growingqld/>);
  - Working with manufacturing companies to pivot their existing capabilities to manufacture PPE and other essential products, including:
    - o Evolve Group and ██████████ to pivot their manufacturing to make P2 and surgical masks respectively at Level 2 and 3 for hospitals.
    - o Sacha Drake, a Queensland clothing manufacture, producing fabric reusable gowns for Queensland Health.
    - o Distilleries such as Bundaberg Rum, Beenleigh Rum and Saleyards Distillery switched to producing and supplying ethanol to support the production of hand sanitiser.
    - o Triple Eight Motor Race Engineering retooled to manufacture emergency ventilator prototype.
  - A dedicated Queensland Government website landing page was established to match manufacturers to products they needed to keep operating, with over 400 enquiries from industry, and 330 connections from businesses to potential suppliers since the Manufacturing Supply Matching webpage was launched in March 2020.

Approved by ED: Insert name only Business Group: Telephone:	Approved by DDG: Insert name only Business Group: Telephone:	Approved by Director-General: Frankie Carroll ...../...../ 2020
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- Our manufacturers have joined with government to do everything they can to supply locally made products such as face masks, face shields and hand sanitisers to assist our healthcare and other frontline workers to have the protection they require.
- This great work is also supporting the government's focus on building self-reliance against future epidemics, with DRDM now drafting a *Manufacturing PPE Directions Statement*, scheduled for Cabinet consideration in the near future.
- A range of manufacturing programs have been initiated by the Queensland Government. These are at **Attachment One**.

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## ATTACHMENT ONE:

### QUEENSLAND GOVERNMENT MANUFACTURING PROGRAMS

#### Manufacturing in Queensland

- Queensland's manufacturing industry is important to the state's economy contributing around \$20 billion to the state economy and employs over 165,000 people.
- Based on ABS four quarter average data to March 2020, Queensland's manufacturing industry employed 165,200 persons which represents around seven per cent of the state's total workforce.
- Within the Queensland manufacturing industry, 76 per cent (125,000) of employment is located in South East Queensland, while the remaining 24 per cent (40,000) is located in regional areas.
- The largest employing subsector in the Queensland manufacturing industry is the food product subsector, which employs approximately 35,500 persons (22 per cent of total manufacturing employment in Queensland).
- As at June 2019, Queensland's manufacturing industry had an overseas export value of \$17.2 billion (9 per cent above the previous year).

#### Advanced Manufacturing 10-Year Roadmap and Action Plan

- The Advanced Manufacturing Roadmap and Action Plan was launched in December 2016 and an updated second edition of the Roadmap was released in November 2018.
- The Advanced Manufacturing Roadmap highlights the importance for industry to embrace advanced manufacturing – also known as *Industry 4.0*. The Roadmap provides the framework for accelerating the adoption of robotics and autonomous systems by Queensland manufacturers.
- It contains 17 actions that target 4 key areas to position Queensland as a leader in advanced manufacturing technologies, products, systems and services.

#### Made in Queensland

- The Queensland Government's \$46 million Made in Queensland (MiQ) initiative is helping small-to-medium-sized business to adopt innovative processes and technology, expand operations and hire more Queenslanders.
- Since 2017, the Queensland Government has supported 75 projects across Queensland through the program. 32 of these projects are in regional Queensland.
- 61 projects have been completed totalling \$22.3 million in grant funding.

#### Queensland Hackerspaces Grant Program

- The Queensland Government has delivered two rounds of the Hackerspace Grants Program that delivers more spaces where Queenslanders can develop new skills and collaborate on the design and manufacture of new products.
- In Round Two announced in February 2020, 13 groups from Cairns to the Gold Coast will share in funding totaling almost \$220,000.
- Round Two will assist five new hackerspaces to open and eight existing facilities to expand, fueling manufacturing innovation in our State.

- Ten recipients were successful in Round One receiving grants totaling \$170,000.
- Round One helped set up seven new hackerspaces and enabled three to expand.
- The Queensland Hackerspaces Grant program forms part of the Advanced Manufacturing 10-Year Roadmap and Action Plan.

## **Manufacturing Hubs**

- The manufacturing industry is a key contributor to the state's economy, regions and local communities.
- To support the growth of regional manufacturers, \$30 million has been invested into regional Manufacturing Hubs in Cairns, Townsville and Rockhampton.
- Each hub will provide a place for local manufacturing businesses to receive expert advice and support to transition to advanced manufacturing through world-leading technologies.
- The Hubs have strong links with local universities, schools and TAFE Queensland to develop a workforce with strong skills in science, technology, engineering and maths.
- The Hubs are part of the Advanced Manufacturing 10-Year Roadmap and Action Plan to grow manufacturing productivity and innovation across Queensland.

## **Manufacturing Hubs Grant Program**

- The Queensland Government has made available \$13.5 million through the Manufacturing Hubs Grant Program (MHGP) to assist eligible businesses.
- Up to \$4.5 million is available for each manufacturing hub to invest in and help to build the advanced manufacturing capability in the Cairns, Townsville and Rockhampton regions.
- This is an opportunity for manufacturers to become more productive and create the jobs of the future through:
  - technology adoption
  - skills and training
  - business development
  - advance robotic manufacturing hub services.

## **Townsville Manufacturing Hub**

- The Townsville Manufacturing Hub, located at the TAFE Queensland Bohle campus, was officially opened on 9 September 2019, delivering a 2017 election promise.
- Through this Hub, manufacturers will gain access to advice and support, including business development and training programs, and tailored workforce skills to improve their productivity and international competitiveness.
- The Hub will promote collaboration between industry with vocational, tertiary and secondary education providers such as Tec-NQ, to ensure Queensland's next generation workforce has strong skills in science, technology, engineering, arts and maths.
- It will provide a catalyst for promoting and delivering world-leading technologies, processes and practices. This includes the Internet of Things, automation and robotics, to boost manufacturing productivity and drive innovation.

- A local reference group has been established to identify and ensure the needs of regional manufacturers are met.

### **Cairns Manufacturing Hub**

- The Cairns Manufacturing Hub, located at TAFE Queensland's Cairns Campus, was officially opened on 17 December 2019.
- The Cairns manufacturing sector contributed \$787 million to the Queensland economy in 2017-18 and employed 6300 people locally (as at September quarter 2019).
- The Cairns Manufacturing Hub will initially focus on growing the marine, aviation and food production sectors, and it's already delivering results.
- The Hub will specifically achieve:
  - Developments towards an advanced fibre composites maintenance and repair facility with access to 3D printing technologies for aviation, defence and superyachts
  - The delivery of advanced welding (ISO9606) training which will support the marine sector, particularly for future defence and commercial sustainment work
  - Funding of \$650,000 over three years to support the FNQ Food Incubator, a group of local food experts collaborating to support early-stage food processors in FNQ to commercialise and scale-up their products.

### **Rockhampton Manufacturing Hub**

- The Rockhampton Manufacturing Hub, located at Central Queensland University's North Rockhampton campus, was officially opened on 11 February 2020.
- Manufacturing in Central Queensland is already thriving, employing more than 5000 people and the Hub will be a centre of expertise for advanced manufacturing innovation and skills.
- This Hub will further strengthen the sector, in turn attracting private sector investment and creating jobs.
- Local manufacturers will gain access to business development programs, skills and training and equipment through the Central Queensland University campus.

### **Advanced Robotics for Manufacturing (ARM) Hub**

- The Queensland Government has invested more than \$7.7 million to help establish Queensland's first Advanced Robotics for Manufacturing (ARM) Hub at Northgate.
- The ARM Hub is a collaborative facility for the local manufacturing sector, led by the Queensland Government and delivered in partnership with QUT and Urban Art Projects (UAP).
- The ARM Hub will allow Queensland industry to collaborate with research institutions on a very practical level to build the capability that will enable manufacturers to be more competitive, reshore manufacturing activity and generate jobs.
- Our support for the \$18 million robotics hub will help Queensland businesses to keep pace with global developments in robotics and drive the international competitiveness of the state's manufacturing industry.
- Through the ARM Hub, businesses across Queensland will have access to practical research and support to assist the transition to advanced manufacturing.

- UAP a leading-edge global company, recognised for their early adoption of robotics and Industry 4.0; and QUT have taken a leading role in the development of the ARM Hub.
- The Hub brings together private industry, international robotics expertise and government to accelerate the adoption of advanced manufacturing and drive Industry 4.0, through the application of robotics and design-led manufacturing.
- ARM Hub services will be available to all manufacturing firms in sectors as diverse as aerospace, biomedical, METS, defence, rail manufacture, beef and food processing, and space.
- While the Hub is located in Brisbane, its services will be delivered across the state.
- Regional manufacturers will have the opportunity to access these services through the Manufacturing Hubs in Cairns, Townsville and Rockhampton and the Defence Hubs in Townsville and Ipswich.

### **Craft Brewing**

- Craft beer production in Queensland is estimated to be worth more than \$62 million per year, with the local industry employing more than 1700 people.
- A working group has been established comprising local craft brewers, the Independent Brewers Association and Government to identify the opportunities and challenges for the industry.
- The Queensland Craft Brewing Strategy has three targeted priority areas, investing in people and infrastructure; improving access to markets; and appropriate regulation and planning.
- Specific key actions include the establishment of a 'brewlab' facility in Queensland, providing a space for brewers to develop and test new products.
- A range of services are available, delivered through Trade and Investment Queensland, including workshops, where we can assist local craft brewers in developing and enhancing their export skills and opening their customer base internationally.
- We're also prioritising 'Buy Queensland first' and looking to support craft brewers in being able to access new opportunities throughout Queensland.
- Queensland will work with the Independent Brewers Association to develop workshops and supporting material such as guides to assist craft brewers understand the licensing and development assessment processes, access tourism networks and connect with industry development programs.

### **Skills Implementation Plan for Advanced Manufacturing**

- The Queensland Government is supporting the technological transformation of our manufacturing industry and looking ahead to attract, develop and retain world-class talent and skills.
- The Skills Implementation Plan for Advanced Manufacturing has been developed to support manufacturers in their transition to advanced manufacturing and create high-skilled workforces.
- The Skills Plan was announced on 17 December 2019 by Minister Cameron Dick and Minister Shannon Fentimann at the opening of the Cairns Manufacturing Hub.
- The Skills Plan also addresses the 10 Priority Action Areas in Jobs Queensland's Advancing Manufacturing Skills strategy and builds on the Queensland Government's overarching strategy for skills, Skills for Queensland – Great training for quality jobs.



- A highly-skilled workforce is vital to manufacturing's future growth and diversifying Queensland's economy.
- The use of robotics, leading-edge technologies, autonomous systems and new processes requires knowledge and skills in complex problem solving, design-led thinking and the use of knowledge and skills in the areas of Science, Technology, Engineering and Mathematics (STEM).

Exempt Sch.3(2)(1)(b) Cabinet considerations

- Queensland's rail manufacturing industry currently contributes \$600 million to the state's economy and provides 3,700 direct jobs.

- The national pipeline of rail infrastructure projects in 2019 is estimated to be around \$115 billion. Of this, around \$25 billion relates to projects in Queensland, including:
  - \$5.4 billion committed to the transformational Cross River Rail project
  - Melbourne to Brisbane Inland Rail project \$9.3 billion total, with substantial Queensland component
  - \$634 million European Train Control System - Inner City implementation
  - \$550 million commitment towards the Beerburrum to Nambour rail line project
  - \$725 million in other rail upgrade projects in the 2019-20 State Budget.
- For Queensland to win a greater share of the national pipeline, local manufacturers need to build on their current capabilities.
- Advanced manufacturing technologies that will support the transformation of the sector include robotics, autonomous systems, digital design, sensors and big data analytics.

**Contact:**

John Lewis [REDACTED]  
Deputy Director-General  
Department of Regional Development and Manufacturing

**Date:**

05.06.2020

Pages 333 through 341 redacted for the following reasons:

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DUPLICATE DOCUMENT

Released under RTI - DPC

## Sarah Partosh

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**From:** DCLO Admin  
**Sent:** Friday, 5 June 2020 12:43 PM  
**To:** Danielle McAllister; Glenn Case; Graham Marshall; Sharlene Larsen; Rob Lloyd-Jones  
**Cc:** DCLO Admin; Brief Premier; Glenys Jenkin; @ODG Requests  
**Subject:** **\*\*SUPER URGENT\*\* EXTERNAL MEETING BRIEF | Premier virtually meeting with Mr Andrew Liveris AO | Thursday 11 June 2020 - time TBC**  
**Attachments:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris  
**Importance:** High

Hi all

As per the below email, the Premier will be virtually meeting with Mr Andrew Liveris AO, Special Adviser to the Commonwealth's National Covid-19 Coordination Commission on Thursday, 11 June 2020 – time TBC.

Glenn – can your team please prepare the following:

- Briefing Note including Background information (re manufacturing industry in QLD and Commonwealth proposals to boost manufacturing investment)
- Talking points

ODG - Is the DG available to attend this meeting or if not, can an alternative please be arranged?

ECU – can you please register this request, allocate it to Economic Policy and add it to the watch list.

The PO has requested to receive this briefing pack by **5PM TUESDAY 9 JUNE 2020**.

Thank you

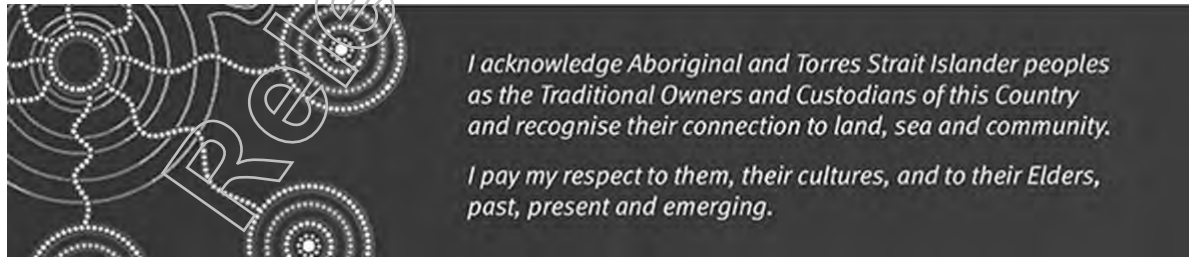


**Queensland  
Government**

**Sharni Sawyer**  
Assistant Departmental & Customer Liaison Officer  
Departmental and Customer Liaison Office

**Office of the Director-General - Department of the Premier and Cabinet**

P 07 3003 9424  
Level 40, 1 William Street, Brisbane QLD 4000  
PO Box 15185, City East, QLD 4002



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**From:** Jackie Hughes <Jackie.Hughes@ministerial.qld.gov.au>  
**Sent:** Friday, 5 June 2020 12:01 PM  
**To:** DCLO Admin <dcladmin@premiers.qld.gov.au>  
**Cc:** Tim Linley <Tim.Linley@ministerial.qld.gov.au>; Jim Murphy <Jim.Murphy@ministerial.qld.gov.au>; Jackie

Hughes <Jackie.Hughes@ministerial.qld.gov.au>  
**Subject:** Material Required from the Department

Hi Team

The Premier will be meeting (virtually) with Andrew Liveris (e-mail attached) at a time tbc on Thursday 11 June 2020.

Please organise for the department to prepare the following material for the Premier's consideration:

- Briefing Note including Background information (re manufacturing industry in QLD and Commonwealth proposals to boost manufacturing investment)
- Speech
- Draft media release
- Talking points
- Q & A's
- Run Sheet
- VIP Guest List
- Departmental Representative
- VIP Biographies

The relevant Advisor for any queries regarding content of the materials is: **Tim Linley/Jim Murphy**

Could we please have the documentation in our office by **Tuesday 9 June 2020 5:00pm**

Full complement of the requested materials need to be emailed to the relevant Advisor and CC: [premiersbriefingmaterial@ministerial.qld.gov.au](mailto:premiersbriefingmaterial@ministerial.qld.gov.au)

Speech notes to be emailed to me, Advisor and with cc: [premiers.media@ministerial.qld.gov.au](mailto:premiers.media@ministerial.qld.gov.au)

Kind regards

Jackie



Jacqueline Hughes (C.dec)  
Executive Assistant to the Premier  
Office of the Hon. Anastacia Palaszczuk MP  
Premier of Queensland and Minister for Trade

P 07 3719 7000 E [Jackie.hughes@ministerial.qld.gov.au](mailto:Jackie.hughes@ministerial.qld.gov.au)  
1 William Street Brisbane QLD 4000 | PO Box 15185 City East QLD 4002

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## Sarah Partosh

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**From:** Jim Murphy <Jim.Murphy@ministerial.qld.gov.au>  
**Sent:** Friday, 5 June 2020 11:37 AM  
**To:** [REDACTED]  
**Cc:** Jackie Hughes  
**Subject:** RE: Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

[REDACTED]

Thank you for your note .

The Premier would be very happy to talk to Mr Liveris.

I have asked the Premier's Executive Assistant Ms Jackie Hughes to liaise with you on a suitable time next week.

Kind Regards

Jim



### Jim Murphy

Chief-of-Staff

**Office of the Hon. Anastacia Palaszczuk MP**  
Premier of Queensland and Minister for Trade

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1 William Street Brisbane QLD 4000

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---

**From:** [REDACTED] <[REDACTED]@dragomanglobal.com>  
**Sent:** Thursday, 4 June 2020 12:32 PM  
**To:** Jim Murphy <Jim.Murphy@ministerial.qld.gov.au>  
**Subject:** Phone call - Premier of QLD Anastacia Palaszczuk and Andrew Liveris

Dear Jim,

I hope my note finds you well.

I am writing on behalf of Andrew Liveris AO. Mr Liveris is Special Adviser to the Commonwealth's National Covid-19 Coordination Commission (NCCC) where he is leading the Manufacturing Taskforce reporting to Nev Power. The Taskforce is focused on growing Australian manufacturing industry in the post virus economy.

Andrew would appreciate a half hour meeting (virtual) to get the Premier's views and discuss the recommendations of the taskforce.

Thank you and I look forward to receiving your reply.

With kind regards

[REDACTED]



# Dragoman

Tel: [redacted] | Mobile: [redacted]

Email [redacted]@dragomanglobal.com

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Melbourne VIC 3000 Australia

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