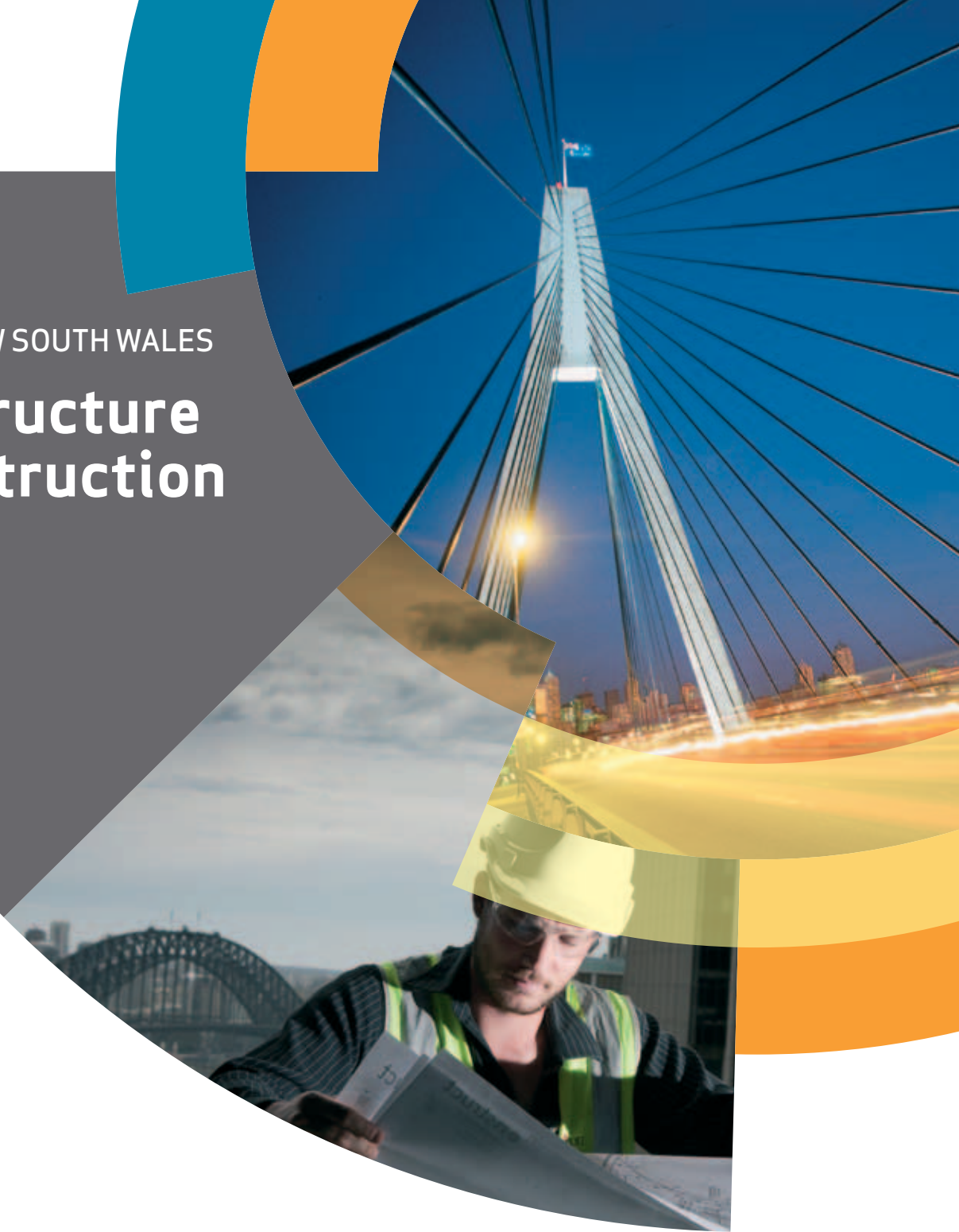


SYDNEY & NEW SOUTH WALES

Infrastructure & Construction





FOUNDATIONS FOR GROWTH

An introduction to the infrastructure and construction industries in New South Wales.

Right now, right here in New South Wales, we're building something big. We're building large-scale infrastructure projects.

We're building multinational construction companies. We're building demand. And we're building a tertiary education system that produces highly skilled workers. We're in the middle of making this State, and our capital city of Sydney, one of the landmark destinations for construction and infrastructure in the world. And that means we're building some outstanding opportunities for your construction business too.

For any company looking to build their interests in the Asia Pacific, New South Wales (NSW) is an excellent place to start. We offer Australia's largest economy, with Sydney established as the business and financial hub of the country. We have a deep pool of skilled workers, the lion's share of Australia's architecture and building-related university students, and a streamlined planning system that ensures new projects are constantly being produced.



THE ONLY WAY IS UP

Already the construction and infrastructure sector accounts for a considerable chunk of the NSW economy. In fact, in 2009–10 the NSW construction sector:

- was estimated to represent \$24.5 billion, or 7.5 per cent of the total industry value for NSW¹
- employed an average of 292,600 people in NSW, which accounted for 8.5 per cent of the State's total employment.²

These figures are only set to increase. A 2010 report by Access Economics predicted that in the next 10 years, construction will move from the fourth to the second most valuable industry in NSW. And as we continue to grow this burgeoning industry, a host of new businesses will grow with us. We certainly hope yours is among them.

BUILD YOUR BUSINESS

Reasons to choose NSW for infrastructure and construction.

NSW is attracting construction companies both domestically and internationally in record numbers.

And already, we have the highest concentration of construction and infrastructure companies in Australia. With numbers like the ones below, it's easy to see why our State is so attractive to major players in the industry.

IT'S ALL HERE

- It's estimated that 30 per cent of all Australian construction companies are located in NSW.³
- Seven of the top 10 construction firms (by sales revenue) have chosen to base themselves, either globally or nationally, in NSW.
- NSW has everything required to manufacture glass, insulation, cement, aggregates, sandstone, limestone, plasterboard, bricks, cement fibreboard, roof tiles, masonry, timber, metal fabrication/roofing and fibre cement.
- IBISWorld estimates that we have Australia's largest concentration of:
 - architectural services (35 per cent of national total)⁴
 - engineering consultancy services (33.8 per cent)⁵
 - surveying services (31 per cent)⁶
 - property and business services (35.3 per cent)⁷.

THOUSANDS OF SKILLED WORKERS, AND COUNTING

- We boast a large amount of workers with a number of skills, ranging from civil engineers, construction workers, project managers and design consultants.
- In 2008, nearly 7,800 students were studying architecture and building related courses across our universities. With the highest number of students in Australia, this means even more great workers are on their way.⁸
- The NSW Government's 2009 Training Management Guidelines support the creation of 4,000 apprenticeships over four years, opening more opportunities for skilled labour than ever before.
- Approved building and construction apprenticeships in NSW have increased by 45 per cent over the last year to support the growing industry.⁹

A FAST-MOVING SYSTEM

We're speeding up our planning system to keep up with the industry's demands – and the results already speak for themselves. By June 2010, 70 per cent of major projects were finalised within three months, and a further 20 per cent finalised within five months.¹⁰

MUTUALLY BENEFICIAL PARTNERSHIPS

- The NSW Government has been a leader in engaging with industry through Private Public Partnerships (PPPs).
- For the past decade, nearly \$10 billion of new public infrastructure has been delivered as a PPP, and we provide a safe and secure environment for these dealings.
- A recent OECD report on PPPs ranked Australia first by maturity, based on political, economic, financial, legal and regulatory risks.¹¹

A GLOBAL CITY

- Almost half of the entire nation's financial services sector is based in Sydney, clearly marking it as Australia's financial centre.¹²
- Some of the most prominent financial and professional service providers base themselves in Sydney, creating a high volume of construction and infrastructure projects in the city.

EXPORTING OUR EXPERTISE

NSW-based companies are growing, and looking to expand internationally. And there's pleasing demand for our skills and resources – resulting in export avenues including:

- pre-construction services needed to get a project off the ground, including spatial information, architecture, design and engineering
- construction services and project management
- timber, steel, and other essential construction materials
- building security and maintenance systems
- sustainable building design and energy and water efficiency products.

CREATE SOMETHING SPECIAL

Opportunities in NSW infrastructure.

With our fantastic climate, high quality of living, and employment and education opportunities, more and more people are looking to call NSW home.

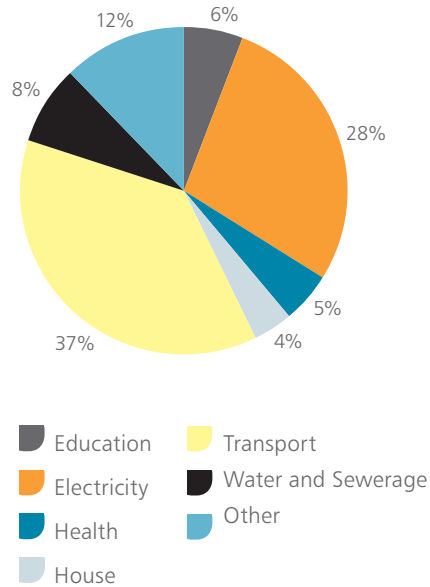
And as our population grows, the need for housing, shops and offices grows with it. Which means big business for the construction and infrastructure industry.

To support this growth, we're investing \$62.2 billion in infrastructure projects over the next four years, providing opportunities for companies from design, to construction, to engineering, project management, and even legal and financial services. Take a look at some of the major things we're doing.

MAJOR INFRASTRUCTURE PROJECTS

- \$10.6 billion to build new and improved roads.
- \$1 billion for maintenance of our 20,000km road network.
- \$3.2 billion to be spent on funding for trains and the rail network.
- \$1 billion expansion at Port Botany for a third container terminal.
- \$2.4 billion for 8,000 new homes.
- \$13.5 billion on electricity distribution systems.¹³

NSW GOVERNMENT INFRASTRUCTURE SPEND



GREEN CREDENTIALS

How we're working for a more sustainable future.

The future of the construction and infrastructure industry not only looks bright, it also looks positively green.

We've made a commitment to environmentally aware construction, and have become a leading light in what's becoming known as 'green building'. We're embracing sustainable designs and technologies so that as construction thrives, the environment does too.

According to the Green Building Council of Australia (GBCA), the green building market in Australia is estimated to be worth \$21 billion. And with over \$6 billion worth of green projects already planned and built, NSW accounts for approximately one-third of green projects in Australia.¹⁴

A great example of what we're achieving is the current development of Barangaroo in Sydney's CBD. It represents one of the world's first climate-positive precincts, and is a global showcase of NSW's green building capabilities. One of the most significant waterfront greening projects anywhere in the world, Barangaroo will create a new public park, a thriving community, and a residential and commercial centre in the heart of Sydney.¹⁵



A SOLID SUPPORT SYSTEM

How we're supporting your move to NSW.

The NSW Government provides business development services and aims to help your company save valuable time and money in making the move to NSW.

We hope to attract businesses that are not only innovative and sustainable, but that will benefit our State through productivity, employment and investment growth. With offices throughout the State, you can also find NSW Government representatives in cities such as Abu Dhabi, Mumbai, Shanghai and Guangzhou.

We can help with...

BUILDING YOUR BUSINESS CASE

We can provide you with reliable, current information on markets, competitors, customers and supplies. By synthesizing this with data on the various costs, we can make investment in NSW an easier option.

FORTIFY YOUR INVESTMENT

Once you've chosen to invest in NSW, we'll facilitate your introduction by bringing together government services on a Federal, State and local level, as well as introducing you to the professional service providers you need to know.

MEETING THE NEIGHBOURS

With our extensive links to the State's major businesses, the NSW Government can put you in touch with the people you need to know to get your company up and running – from financial, to legal, recruitment or property concerns, we know who can help.

HITTING THE SPOT

Whether you're looking to start up your company in the bustling, metropolitan hub of Sydney, or one of the State's regional areas, we'll help you locate the site that's best suited for your particular business needs.

MAJOR CONSTRUCTION COMPANIES BASED IN NSW

Below you'll find a list of the major companies with global or national headquarters in NSW. These cover a wide array of industry associations, architects, project managers, design consultants, developers and construction.

COMPANY	ACTIVE OVERSEAS
Abigroup (The Lend Lease Group)	
Adco Constructions	
Australand Holdings Ltd	Yes
Australian Constructors Association	
Boulderstone (The Lend Lease Group)	Yes
Conneq (The Lend Lease Group)	Yes
Boral	Yes
Lend Lease Group	Yes
Brookfield Multiplex	Yes
Buildcorp Australia Pty Ltd	
Coffey International Ltd	Yes
Dexus Property	Yes
Downer Group	Yes
Fletcher Building	Yes
Laing O'Rourke	Yes
Leighton Contractors	Yes
Leighton Holdings	Yes
Mirvac	Yes
The Reed Group	
Richard Crookes Construction Pty	
Sekisui House	Yes
St Hilliers	
Stockland	Yes
The Green Building Council of Australia	Yes
Transfield Services	Yes
United Group	Yes
Walker Corporation	Yes
Westfield Design & Construction Pty Ltd	Yes
Worley Parsons	Yes



SUCCESS STORIES

Lilyfield

Housing NSW has recently implemented the Lilyfield redevelopment in Sydney – the first social housing scheme in Australia to be awarded a Green Star rating.

Green Star is a national, voluntary environmental rating system that evaluates the design and construction of buildings based on their sustainability. It is awarded by the Green Building Council of Australia (GBCA), a Sydney based, not-for-profit organisation that is committed to encouraging the adoption of innovative green building practices.

Upon its completion, the Lilyfield redevelopment will stand as a thriving residential project. The development will introduce a number of innovative features to improve environmental sustainability, including:

- Photovoltaic (PV) roof cells providing enough solar power for the majority of the lighting in common areas.
- Solar hot water systems will offset 232 tonnes of CO₂ emissions, and save \$19,000 annually.
- Incorporated natural ventilation and lighting features will reduce electricity needs.
- Windows will be glazed to ensure effective insulation.
- A large rainwater tank installation will be used for toilet flushing, watering gardens, etc.
- No car parking spaces have been provided, considerably reducing construction costs and concrete consumption.
- Ample bicycle storage has been provided, as well as access to public transport.

Sekisui House, Ltd

Sekisui House is a publicly listed Japanese company with annual sales of approximately AU\$20 billion. Established in 1960, Sekisui House has produced over two million dwellings.

In 2009, with assistance the NSW Government, the company selected Sydney to expand its footprint beyond Japan for the first time in its 50 year history. This has involved significant investment in the acquisition of development land, a head office, and manufacturing facilities – generating approximately 450 jobs in NSW during the initial phase alone.

As a global leader in innovation and sustainability, Sekisui House will introduce its world leading manufacturing processes, advanced design practices and unique construction techniques to NSW, including the sale of carbon-neutral houses.

1) Access Economics The NSW Economy in 2020: Foresighting Report 2) ABS, Cat No. 6291.0.55.003, Labour Force Survey, August 2010 – based on average employment data for the August 2009 quarter, November 2009 quarter, February 2010 quarter, and May 2010 quarter. 3) IBISWorld, Construction in Australia, July 2010 4) IBISWorld, Architectural Services in Australia, July 2010 5) IBISWorld, Engineering Consultancy Services Australia, September 2010 6) IBISWorld, Surveying Services in Australia, October 2010 7) IBISWorld, Property and Business Services in Australia, January 2010 8) Australian Government Department of Education, Employment and Workplace Relations, Students 2008: Selected Higher Education Statistics 9) Source: NSW Department of Education & Training, Monthly Apprenticeship Report, July 2010 10) Source: NSW Department of Planning 11) Source: NSW Department of Premiers and Cabinet 12) Source: estimated 44% by Access Economics in 2009–10 13) Source: www.budget.nsw.gov.au/budget_highlights 14) Source: Green Building Council of Australia & BCI Australia report – Year in Review 2009, Green Building in Australia 15) Source: Barangaroo Delivery Authority, BDA, www.barangaroo.com

NSW TRADE AND INVESTMENT

Level 47, MLC Centre, 19 Martin Place, Sydney, NSW 2000
GPO Box 5477, Sydney NSW 2001, Australia
Phone: +61 2 9338 6600 Fax: +61 2 9338 6950
Email: construction@business.nsw.gov.au
www.business.nsw.gov.au

FOR FURTHER INFORMATION AND
INTERNATIONAL OFFICE LOCATIONS
VISIT WWW.SYDNEYAUSTRALIA.COM



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