
Cleantech in Queensland

Gold Coast Sustainability Workshop
15 October 2010

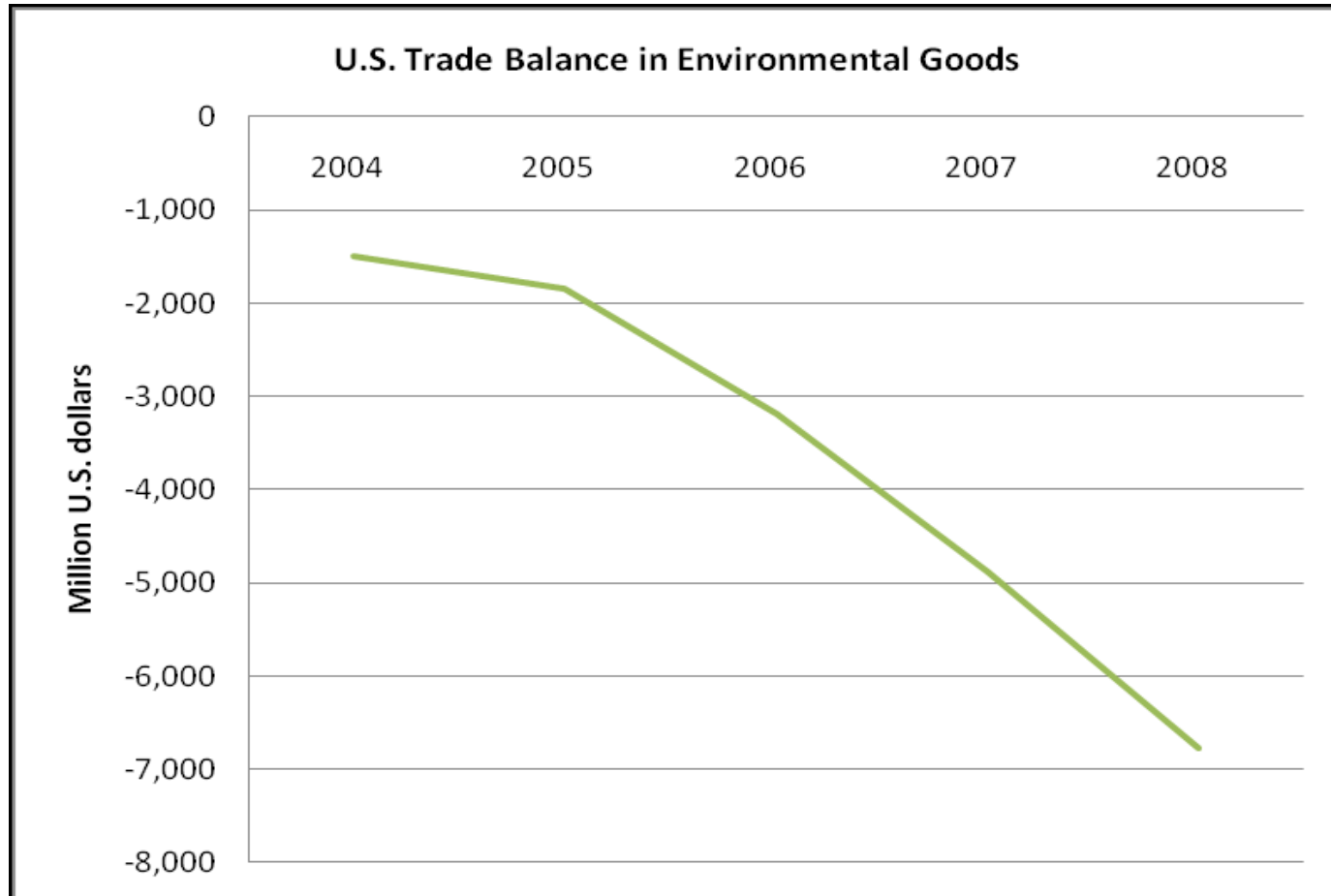
GOLD Coast
based company
Eco-kinetics has
won a contract to
build a \$300
million renewable
energy farm in
Thailand



DEEDI's Role

- The Department of Employment, Economic Development and Innovation (DEEDI) brings together specialist knowledge, networks and services to work with significant businesses and industry sectors. In this way it will help deliver an economy and way of life to benefit all Queenslanders.
 - Improving job opportunities for individuals is a DEEDI priority, as is assisting businesses to start-up, expand and respond to challenges like climate change and carbon trading.
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What's keeping Ron Wyden up at Night



What is cleantech?

- **Energy:** renewable energy generation, energy efficiency and energy storage technologies
- **Environmental services:** environmental and sustainability consultants, efficient agricultural products, land management services
- **Green building and materials:** planners, designers, builders and suppliers to the green building market, manufacturing/industrial efficiency technologies, products and services, bio-based materials
- **Recycling and Waste:** recyclers, solid and liquid waste collectors, waste management consultants and equipment suppliers
- **Transportation:** environmentally friendly transportation/logistic systems and products, vehicle emission reduction and fuel efficiency technologies
- **Water and Wastewater:** water and wastewater handling, treatment, efficiency and recycling equipment, system designers, constructors and operators.

A Growth Industry

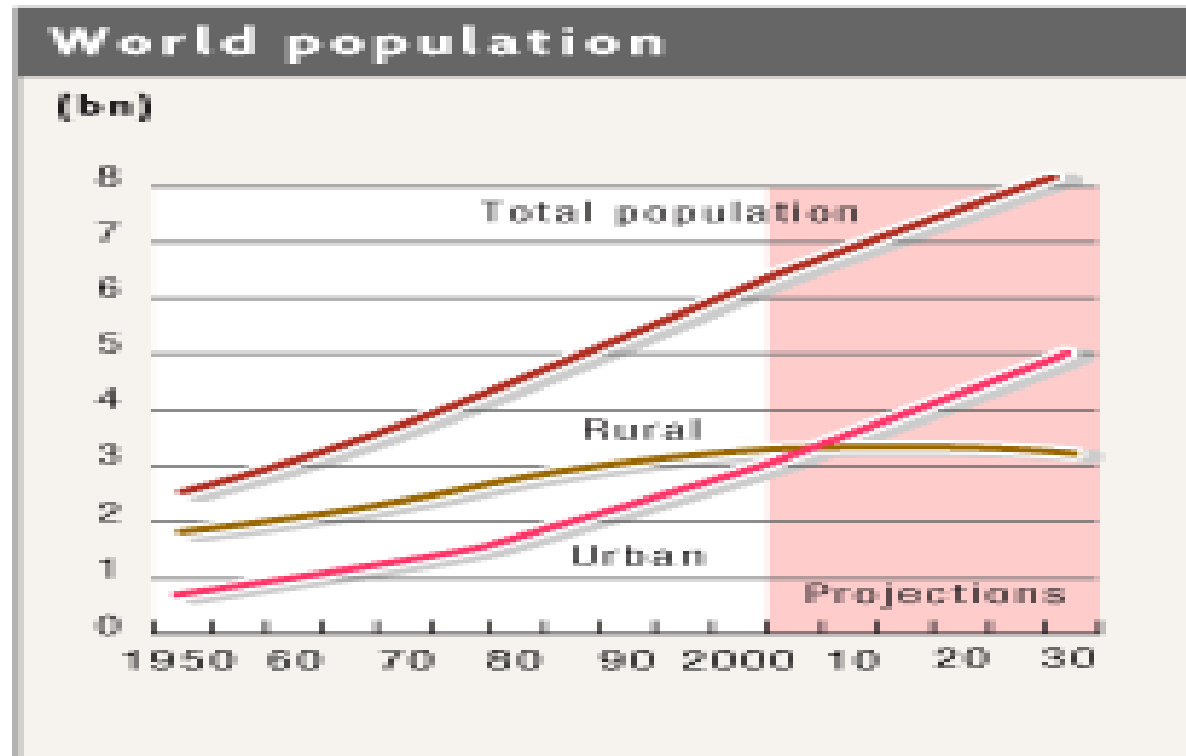
- The global market estimated at US\$1,370B in 2008 - to double to US\$2,740B by 2020.
 - More than US\$463B on green stimulus investments during the Global Financial Crisis.
 - 3rd quarter of 2009, venture capital investments in cleantech = US\$1.59B overtaking those of biotechnology and ICT.
 - 2nd quarter of 2010 over \$US 2B worldwide - preliminary data from Deloitte .
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Drivers of Growth

- Ron Pernick and Clint Wilder
 - scaling up manufacturing and driving down **costs**
 - an influx of **capital** into the development and commercialisation of cleantech products, services and technologies
 - aggressive **competition** between Governments around the world to dominate in the cleantech sector and build the jobs of the future
 - **consumer** demand for cleaner products and services that use resources efficiently, reduce costs, and embrace quality over quantity
 - business response to **climate change**.
 - An additional driver in Queensland is strong population growth in a fragile environment.
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Population growth or the importance of 2007.

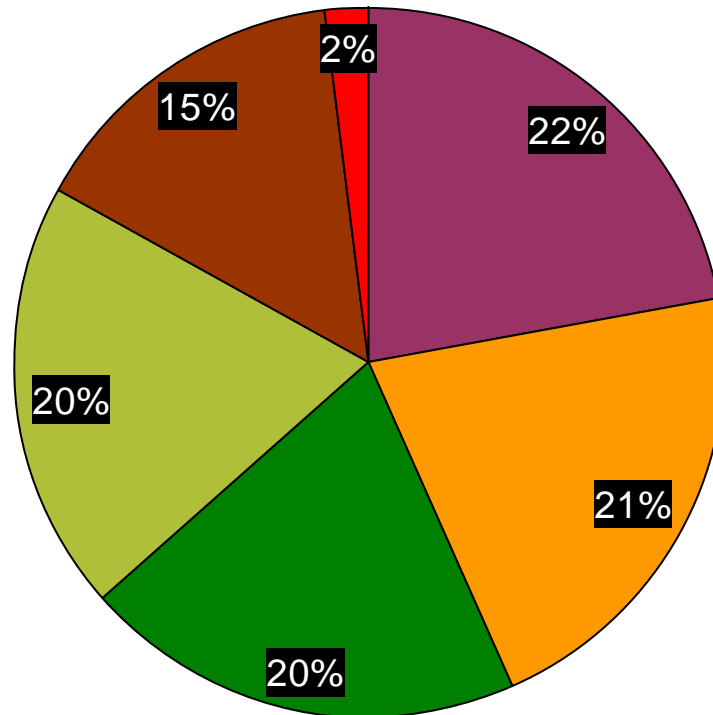
- Key market driver



Findings from OESR Environment Industry Survey 2009

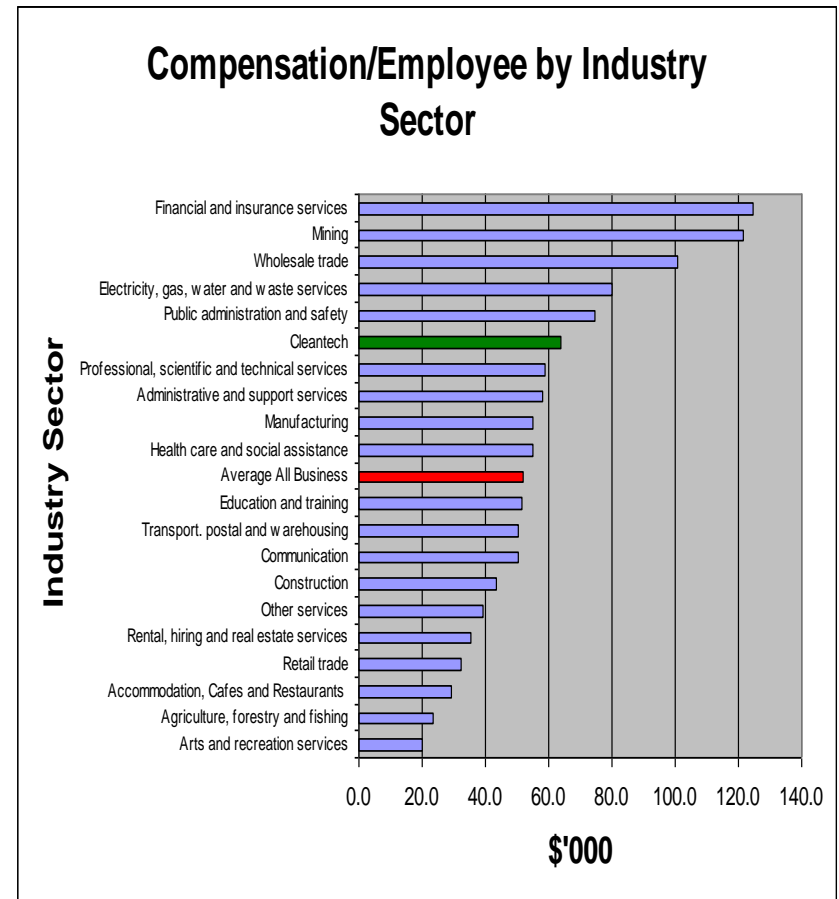
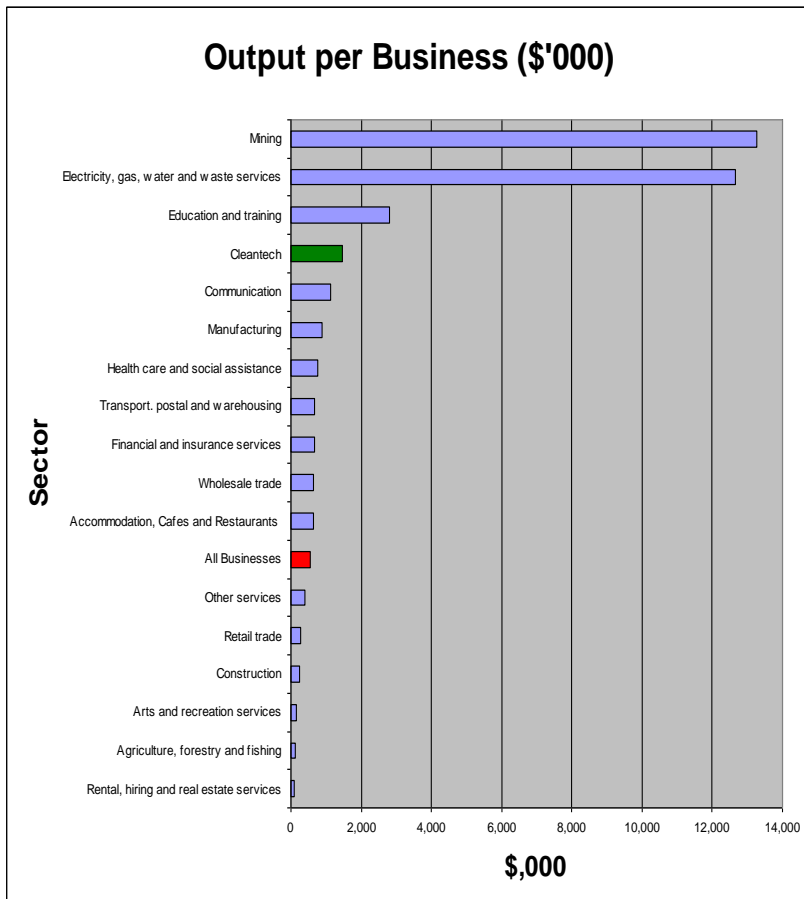
- In the 2008-09 financial year:
 - Over 1200 companies
 - Approximately one quarter established since 2005
 - Over \$3B in gross revenue
 - 11,834 permanent full-time staff + 1,305 part-time/casual staff
 - Gross wages and salaries \$584m
 - EBITDA of \$344m.
 - 39.9% undertook R&D - estimated \$135.2m spent on R&D
 - Exporting over \$240M of products and services - most commonly exported to Papua New Guinea and the South Pacific region (26.7%) and to South East Asia (24.1%)
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Qld Industry Breakdown

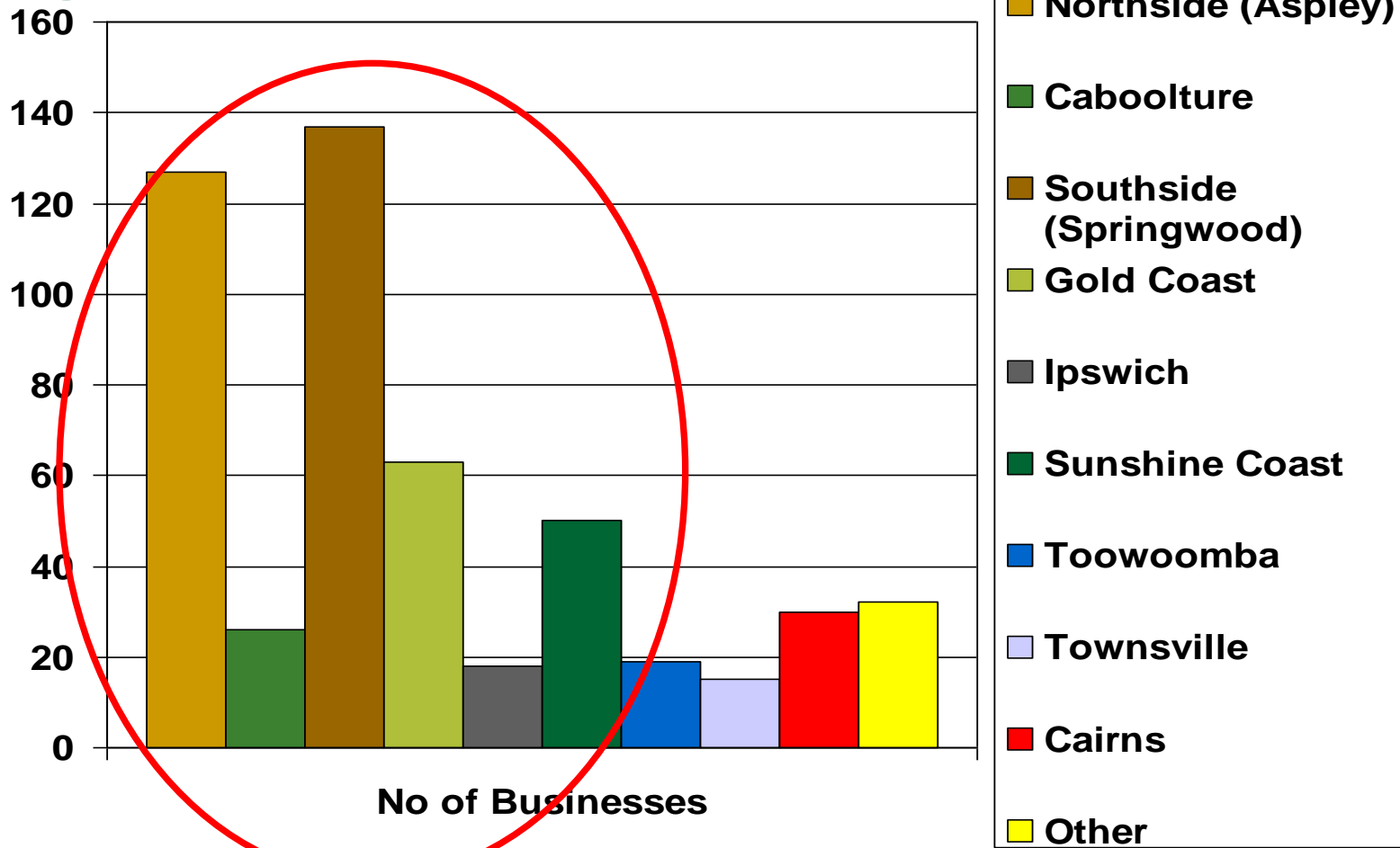


■ Green Building ■ Energy ■ Environmental Services ■ Water ■ Waste ■ Transport

Punching above its Weight



Regional Distribution



Issues for the Industry

- Creating a **vision** to plan for industry development and demonstrate leadership
 - Developing the **right roles for government** to support industry development
 - Using **community education** to help stimulate demand and demand management
 - Providing access to funding and **capital** for new and emerging technologies
 - Planning for adequate **skills and education** to support industry development
 - Creating a **business environment** that supports design, technology and innovation
 - Encouraging the use of **total life cycle costing** methods
 - **Integrating** industry development initiatives across all clean tech sectors
 - Focusing on **encouraging competitiveness** of and opportunities in Queensland.
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