

International
Olympic
Committee

IOC FEASIBILITY ASSESSMENT - OLYMPIC GAMES

BRISBANE

February 2021





INTRODUCTION

FUTURE HOST COMMISSION

- The role of the Future Host Commission is to monitor interest in the Olympic Games and make strategic recommendations to the IOC Executive Board
- As a result, the Commission engaged with a number of Interested Parties while at the same time analysing the post COVID-19 general outlook



INTRODUCTION

INTERESTED PARTIES

- The Commission has been in contact with a number of Interested Parties / NOCs
- During Continuous Dialogue the Future Host Commission gave the opportunity to the Interested Parties for a presentation and a discussion which resulted in meetings 3, 8 and 9 February 2021
- The Commission has also engaged with other NOCs that have chosen not to be in Continuous Dialogue at this time



INTRODUCTION

POST COVID 19 OUTLOOK

- A number of global financial and risk management experts have reported:
 - World economy is going through an unprecedented crisis and we are experiencing the deepest and fastest recession since World War II
 - Current health crisis will have wide global repercussions, especially with respect to the labour market and a risk of increased inequality
 - In response to the crisis, governments around the world have incurred debts equivalent to 11% of global GDP in 2020, adding to existing public deficits
 - While the impact of the crisis can already be witnessed now, experts forecast that the world economy is likely to be most affected over the next five years
 - Against this backdrop, the Interested Parties emphasise that Olympic Games are part of the solution and remain involved
 - The Future Host Commission considers there is momentum for the Olympic Games and for the IOC to seize an opportunity



INTRODUCTION

IOC EXECUTIVE BOARD (EB)

- The Future Host Commission updated the EB on the interest in future Olympic Games in December 2020.
- In the context of the post COVID 19 outlook , the Commission was asked to report back to the EB on the further developments of the Continuous Dialogue.



IOC FEASIBILITY ASSESSMENT - BRISBANE

Part 1: Strategic Assessment

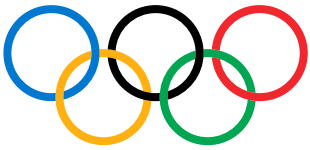
Part 2: Technical Assessment



CRITERIA FOR TARGETED DIALOGUE

Recommendation by Future Host Commission to invite an Interested Party to join Targeted Dialogue is based on:

- ▶ Positive feasibility assessment
- ▶ Extensive independent third party sources
- ▶ Global context (socio-economic / geopolitical factors)
- ▶ Alignment with Olympic Agenda 2020
- ▶ Public support and public consultation process



SOURCES

Documentation from Interested Party	<ul style="list-style-type: none">• Brisbane Master plan and Transport plan (September 2020)• Brisbane Value Proposition Assessment (January 2020)• Brisbane Comprehensive Feasibility Study (February 2019)
IOC & IOC advisors	<ul style="list-style-type: none">• IOC Olympic Games Department• IOC Sports Department• IOC Security Department• IOC Venue, Transport and Accommodation Advisors• Videoconference on Games optimisation measures• Videoconference on Venue Masterplan• Videoconference on Games Budget Optimisation / New Norm
Third-party independent expertise	<ul style="list-style-type: none">• Coface• International Energy Agency (IEA)• International Labor Organisation (ILO)• International Telecommunication Union (ITU)• International Monetary Fund (IMF)• Moody's• Organisation for Economic Co-operation and Development (OECD)• Office of the United Nations High Commissioner for Human Rights (OHCHR)• Publicis Sport & Entertainment• Rapid Extreme Heat Assessment, Center for Climate Systems Research (NASA and Columbia University, 2020)• United Nations Development Programme (UNDP)• World Economic Forum (WEF)• World Intellectual Property Organisation (WIPO)• World Bank• Worldometers.info• World Meteorological Organisation• weather-atlas.com



PART 1: STRATEGIC ASSESSMENT

- Vision and Priorities
- Political Context
- Human Development and Sustainability Context
- Economic Context
- COVID-19 and socio-economic impact

PART 1: STRATEGIC ASSESSMENT



Demographic data (Source: [UNDP](#) / [UN Population](#))

Population	25.4 million (Australia) 5.2 million (Queensland)
% of population < 20 % of population > 65	~ 25% ~ 16%
Life Expectancy at Birth	83.4
Urban Population	86.1%



VISION AND PRIORITIES

BRISBANE'S WHY

- Queensland is the fastest growing state in Australia. **Hosting the Games in 2032 would align with South East Queensland's long-term strategy to improve local transport infrastructure, to absorb demographic change and to promote economic growth** ("SEQ City Deal", Feb 2019).
- Games to further **position Queensland as a tourism hub** in the Asia Pacific region. Region benefits from direct connections to areas in the world with the fastest-growing middle class (Hong-Kong, Shanghai, Singapore etc.).
- Games to help promote all Olympic and Paralympic sports, **develop a healthier lifestyle and increase sports participation.**
- Games seen as an opportunity to **attract and secure major sports events in Queensland** that would grow Queensland's economy and support job creation.

→ Initiated in 2015, Games project fully aligned with South East Queensland long-term development plans



POLITICAL CONTEXT

Stable political context with all three levels of government supporting the project, which is seen as a catalyst for economic and social development in the region:

- 8 February 2021: All three levels of government confirmed their full support for the project to the Future Host Commission
- 11 December 2020: Letters reiterating support from Premier of Queensland and Southeast Queensland Council of Mayors sent to the IOC
- 17 November 2020: Prime Minister Morrison met with IOC President in Japan and reiterated the complete support from the federal government for the Brisbane project
- 31 October 2020: Queensland Premiership election: Incumbent Premier Anastasia Palaszczuk, strong supporter of Olympic project, re-elected for a third term. Her Labour government obtained the majority of seats and will govern without a coalition



HUMAN DEVELOPMENT & SUSTAINABILITY CONTEXT



Key Human Development Indicators

Human Development Index UNDP	0.944 (ranked 8/189)
Sustainable Development Goals Index Score	74.87/100 (ranked 37/193)
Human Rights Treaties Ratification - OHCHR	Australia has ratified 14 out of 18 Human Rights treaties
ILO Core Conventions Ratifications - ILO	Australia has ratified 7 out of 8 ILO Core Conventions
Rule of Law Indicator – World Bank	93/100 – Rule of law is strong
World Gender Gap - WEF	0.731 / 1.000 (1.000 = parity) - ranked 44/153
Poverty Index – World Bank	Less than 1 % of the population living in moderate poverty (< USD 3.20 / Day)

Environmental Indicators

Environmental Performance - Index score	74.9 (ranked 13/180)
Share of renewables in power generation – International Energy Agency	20%

→ High scores on human development and sustainability indices

ECONOMIC CONTEXT



- Geographic proximity to large economies in Asia
 - Australia signed the Regional Comprehensive Economic Partnership, a Free Trade Agreement, in November 2020 (Agreement between 15 Asia-Pacific countries covering 30% of global GDP)
- Mid-sized but highly-developed sponsorship market

Rating Source: [Moody's](#) (January 2020)

Australia	Aaa (minimal credit risk)
Queensland	Aa1 (very low credit risk)

Key Economic data

- GDP: USD 1,393 bn (nominal) – 14th economy in the world (World Bank)
- GDP per capita of USD 56,240 (Coface)
- GDP growth: -3% in 2020 (forecast – Coface)
- Inflation (yearly average): 2.0 in 2020 (forecast– Coface)
- Public debt (% GDP): 60% in 2020 (estimate – IMF)
- Unemployment rate: 6.8% (November 2020 – OECD)
- Skilled labour force (% of labour force): 78.9% (UNDP)
- Ranked 22nd in [Global Innovation Index of WIPO](#)
- Ranked 14th in [Information & Communication Technology Index of ITU](#)

COVID-19 AND SOCIO-ECONOMIC IMPACT



- Total COVID-19 cases*: 28,871
- Total COVID-19 deaths*: 909
- **Several aid packages** were voted by Federal Government for a total economic response to COVID-19 estimated at AUD 257 billion (source: [KPNG](#))
- **Australia's borders are closed.** Only Australian citizens, residents and immediate family members can travel to Australia
- End May 2020: Professional leagues resumed their activity gradually with restricted capacity (Rugby, football, etc).

	2019	2020
GDP Growth**	1.8%	-3.0%
Unemployment rate***	5%	6.6%
Public Debt (% of GDP)**	46%	60%

*worldometers.info, as per 10/02/2021

**COFACE

***OECD

→ Health impact of pandemic has been limited due to strict travel policies (35 deaths per 1 million population)

STRATEGIC OPPORTUNITIES AND POTENTIAL CHALLENGES



Opportunities

- Games vision aligned with South East Queensland's long-term development plans in context of economic and demographic growth
- Tourism growth potential in Queensland
- Support from all three levels of government
- Stable economy with high scores in human development indices
- Health impact of pandemic has been limited due to strict travel policies
- First Games in Oceania in over 30 years

Potential Challenges

- Mid-sized but highly developed sponsorship market



PART 2:

TECHNICAL ASSESSMENT



PART 2: TECHNICAL ASSESSMENT



2.1 Venue Masterplan and Strategic Alignment

- a. Venue Masterplan assessment
- b. Strategic alignment with long-term development plans
- c. Envisaged Legacy Impacts

2.2 Support and Funding Strategy

- a. Political Support
- b. Public Support
- c. Funding Strategy: Sources of funding

2.3 Games Delivery

- a. Sport/Event Expertise
- b. Meteorological Data
- c. Transport (incl. airport) infrastructure
- d. Accommodation capacity
- e. Safety & Security



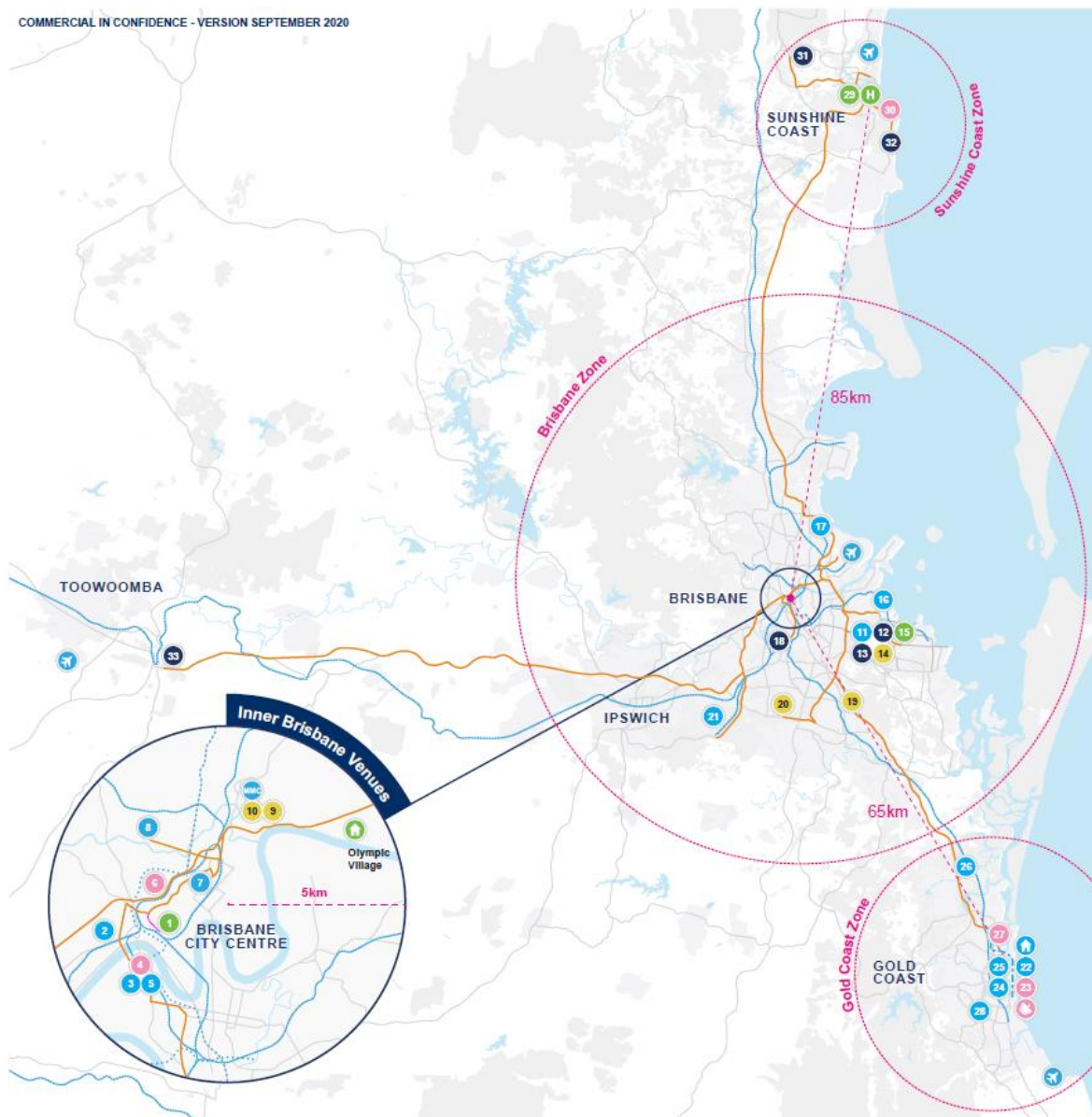
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VENUE MASTERPLAN AND STRATEGIC ALIGNMENT



VENUE MASTERPLAN

(September 2020)



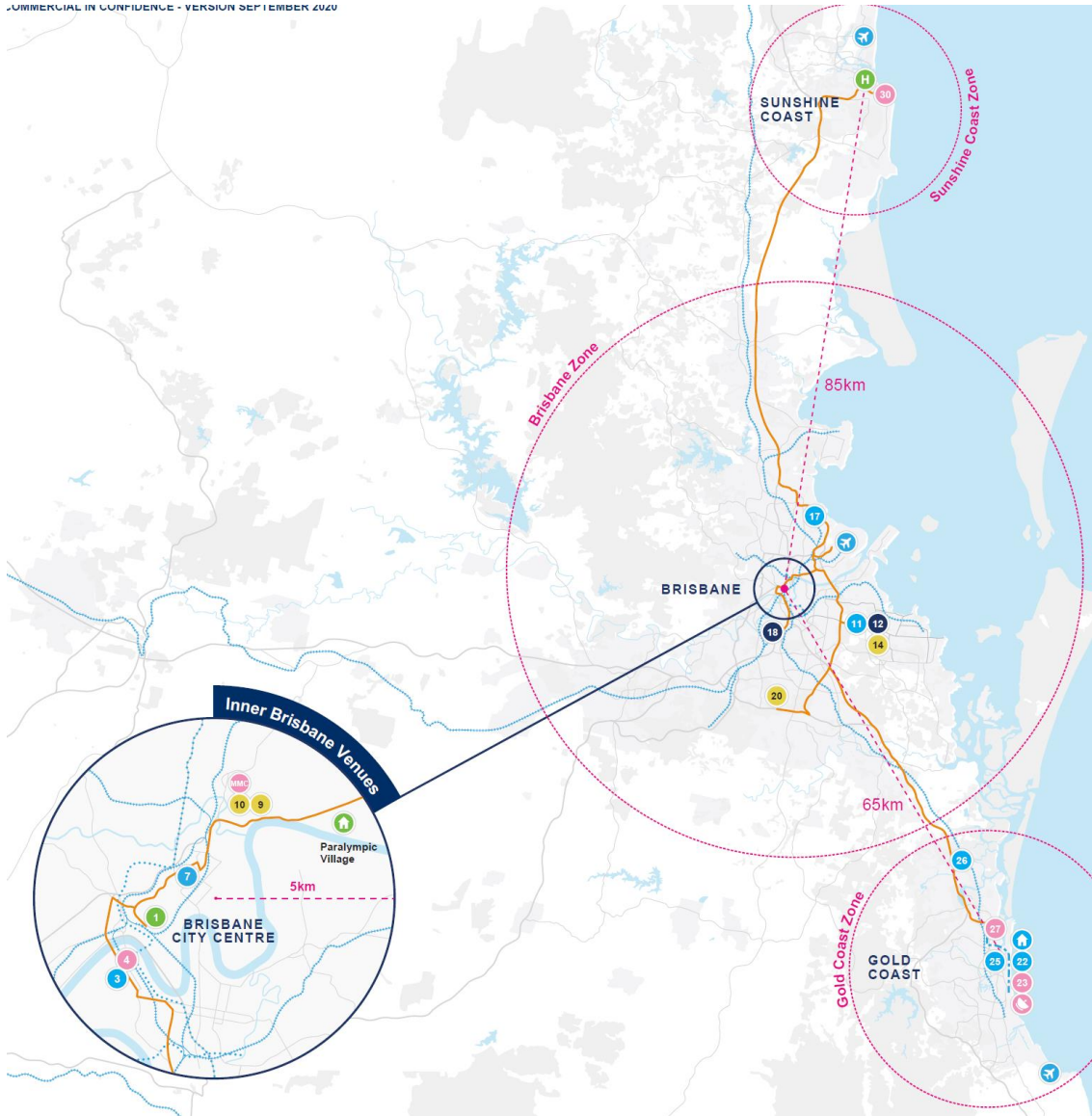
- Polycentric concept across 3 main clusters:
 - **Brisbane** (main cluster with 21 venues)
 - **Gold Coast** (6 venues* - 65km from Brisbane)
 - **Sunshine Coast** (3 venues* - 85km from Brisbane)
- 2 Olympic Villages in Brisbane (planned development) and Gold Coast (existing hotels)
- 7 new venues with potential to reduce to 2 new venues through venue masterplan optimisation
- Masterplan already discussed with International Federations
- **Proposed dates of the Games: 23 July to 8 August 2032** (based on weather conditions and school holidays)

*excluding football preliminary venues



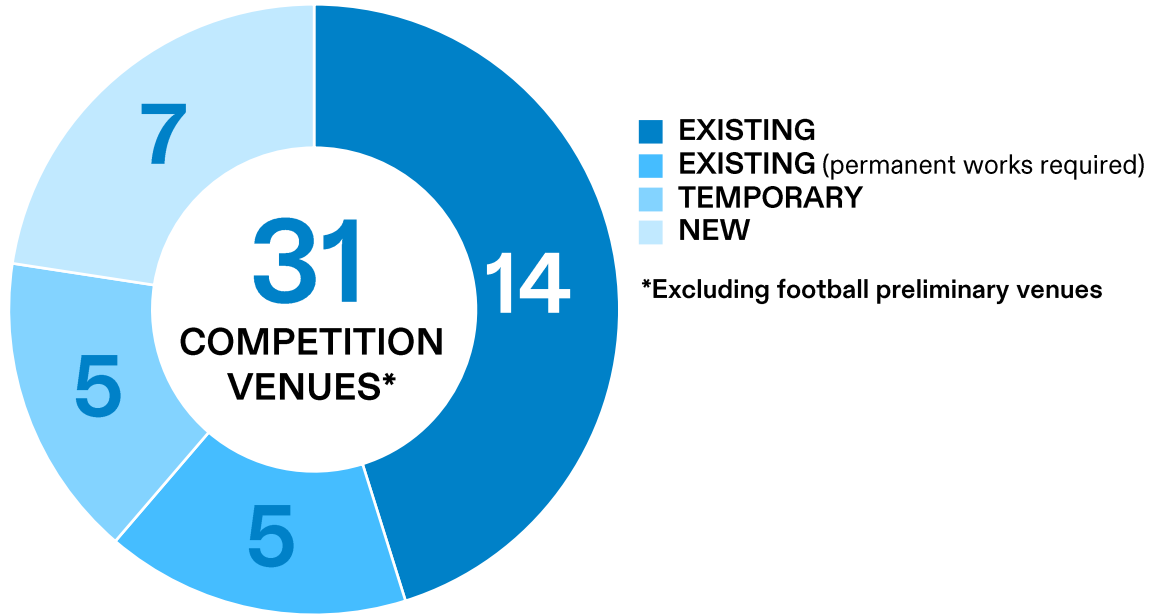
PARALYMPIC GAMES – VENUE MASTERPLAN

(September 2020)



- Polycentric concept across 3 main clusters:
 - **Brisbane** (main cluster with 12 venues)
 - **Gold Coast** (5 venues)
 - **Sunshine Coast** (1 venue)
- Paralympic Games to re-use Olympic Games venues
- 2 Olympic Villages in Brisbane (planned development) and Gold Coast (existing hotels)
- **Proposed dates of Paralympic Games:**
24 August to 5 September 2032

VENUE MASTERPLAN - ALIGNMENT WITH OLYMPIC AGENDA 2020



2 OLYMPIC VILLAGES

- Brisbane (14,000 beds): Planned development in line with long-term plans
- Gold Coast (2,000 beds): Existing hotels

~80% OF COMPETITION VENUES
EXISTING OR TEMPORARY



IBC/MPC

Temporary Main Media Centre in
Albion/Brisbane

Potentially increasing to over 90% of existing and temporary venues with masterplan optimisation

VENUE ZONE – BRISBANE CENTRE



Brisbane centre

- 14 competition venues
- Olympic Village
- MMC
- Opening and Closing Ceremonies



* Planned / Additional

BRISBANE ZONE



VENUE MASTERPLAN – BRISBANE CENTRE (14 VENUES)



Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Athletics / Ceremonies	Track and Field	Brisbane Olympic Stadium	New	50,000	<ul style="list-style-type: none"> - Consider using existing Carrara Stadium (40,000) in Gold Coast for Athletics - Consider using The Gabba (40,000) for Ceremonies
Aquatics	Swimming, Water Polo	Brisbane Arena	New	15,000	- Consider using Gold Coast Commonwealth Games 2018 Optus Aquatics Centre instead
Aquatics	Diving, Artistic Swimming, Water Polo	Brisbane Aquatics Centre	Existing (permanent works required)	4,300	
Archery		South Bank Cultural Forecourt	Temporary	4,000	
Basketball		Brisbane Indoor Sports Center	New	15,000	- If Optus Aquatics Centre is used for swimming, could use planned Brisbane Arena for Basketball
Basketball	3x3	South Bank Piazzzy	Existing	4,500	
Cycling	Track, BMX Racing	Anna Meares Velodrome	Existing (permanent works required)	4,000 5,000	- Venue used for Commonwealth Games 2018

VENUE MASTERPLAN – BRISBANE CENTRE (14 VENUES)



Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Cycling / Equestrian	BMX Freestyle / Cross Country	Victoria Park	Temporary	5,000 25,000	
Equestrian		Brisbane Showgrounds	Existing	15,000	
Football finals / Rugby		Lang Park	Existing	52,000	<ul style="list-style-type: none"> - Stadium regularly hosts rugby and football matches - Venue will host several matches for the 2023 FIFA Women's World Cup
Gymnastics		Chandler Indoor Sports Centre	New	10,000	
Hockey		Ballymore Stadium	Existing (permanent works required)	10,000 5,000	<ul style="list-style-type: none"> - Consider using existing hockey venue in Gold Coast as alternative option
Shooting		Brisbane International Shooting Centre	Existing	2,000	<ul style="list-style-type: none"> - Venue used for Commonwealth Games 2018
Table Tennis / Fencing, Taekwondo / Badminton		Brisbane Convention & Exhibition Centre	Existing	6,000 (Hall 1) 6,500 (Hall 2) 6,000 (Hall 4)	

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Proposed new venue



Aquatics (Swimming, Water Polo)

Brisbane Arena

Status	New venue
Future Works	Agreement to build to be made in first half of 2021
Capacity	15,000
Owner	Private (TBC)
Operator	Private (TBC)
Experience	<ul style="list-style-type: none"> N/A

Alternative existing option



Aquatics (Swimming, Water Polo)

Gold Coast Aquatic Centre

Status	Existing
Construction	1960, redeveloped in 2014
Future Works	N/A
Capacity	10,000 seats (including temporary seating)
Owner	Public (City of Gold Coast)
Operator	Public (City of Gold Coast)
Experience	<ul style="list-style-type: none"> 2018 Commonwealth Games

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Proposed new venue



Athletics (Track and Field), Ceremonies

Brisbane Olympic Stadium

Status	New venue
Future Works	Business case under consideration as part of long-term development plan of the neighbourhood
Capacity	50,000
Owner	Public (TBC)
Operator	TBC
Experience	<ul style="list-style-type: none"> N/A

Alternative existing option



Athletics (Track and Field)*

Carrara Stadium (Gold Coast)

Status	Existing
Construction	1986, redeveloped in 2011
Future Works	N/A
Capacity	40,000 seats (including temporary seating)
Owner	Public (Stadiums Queensland)
Operator	Public (Stadiums Queensland)
Experience	<ul style="list-style-type: none"> 2018 Commonwealth Games

*Ceremonies could be held at Gabba Stadium in Brisbane

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Proposed venue



Hockey

Ballymore Stadium

Status	Existing with permanent work
Future Works	Planned redevelopment to build permanent grandstand of 3000 seats
Capacity	15,000 (including temporary seating)
Owner	Public
Operator	Queensland Rugby Union
Experience	<ul style="list-style-type: none"> N/A

Alternative option



Hockey

Gold Coast Hockey Centre

Status	Existing
Construction	2017
Future Works	N/A
Capacity	15,000 (including temporary seating)
Owner	Public
Operator	Gold Coast Hockey Management Group
Experience	<ul style="list-style-type: none"> 2018 Commonwealth Games

VENUE MASTERPLAN – BRISBANE (7 STAND-ALONE VENUES)



Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Boxing		State Netball Centre	Existing	6,000	
Canoe	Slalom	Redland Whitewater Centre	New	8,000	- Consider using existing Sydney 2000 legacy venue
Handball		Brisbane Entertainment Centre	Existing	11,000	
Modern Pentathlon		Ipswich Stadium	Existing	20,000	
Rowing / Canoe	Sprint	Larapinta Flatwater Centre	New	14,000	- Consider using existing Sydney 2000 legacy venue
Sailing		Royal Queensland Yacht Squadron	Existing	10,000	
Tennis		Queensland Tennis Centre	Existing (permanent works required)	6,000 (Centre Court) 4,000 (Match Court 1) 2,000 (Match Court 2)	- Established WTA/ATP Tennis Tournament Venue

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Proposed new venue



Canoe (Slalom)

Redland Whitewater Centre

Status	New venue
Future Works	Business case under consideration
Capacity	8,000
Owner	TBC
Operator	TBC
Experience	<ul style="list-style-type: none"> N/A

Alternative existing option



Canoe (Slalom)

Penrith Whitewater Stadium

Status	Existing
Future Works	TBC
Capacity	12,500 (Sydney 2000 capacity)
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> Olympic Games Sydney 2000 2005 ICF World Championships

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Proposed new venue



Rowing, Canoe Sprint

Larapinta Flatwater Centre

Status	New venue
Future Works	Business case under consideration
Capacity	14,000
Owner	Public
Operator	Queensland Rowing
Experience	<ul style="list-style-type: none"> N/A

Alternative existing option



Rowing, Canoe Sprint

Sydney International Regatta Centre

Status	Existing
Future Works	TBC
Capacity	20,000 (Sydney 2000 capacity)
Owner	Public
Operator	Public
Experience	<ul style="list-style-type: none"> Olympic Games Sydney 2000 11 editions of Australian Rowing Championships, including from 2013-2019

VENUE ZONE – GOLD COAST



Gold Coast

- 6 competition venues
- Olympic Village
- RHB Studio Hub



GOLD COAST ZONE



VENUE MASTERPLAN – GOLD COAST (6 VENUES)



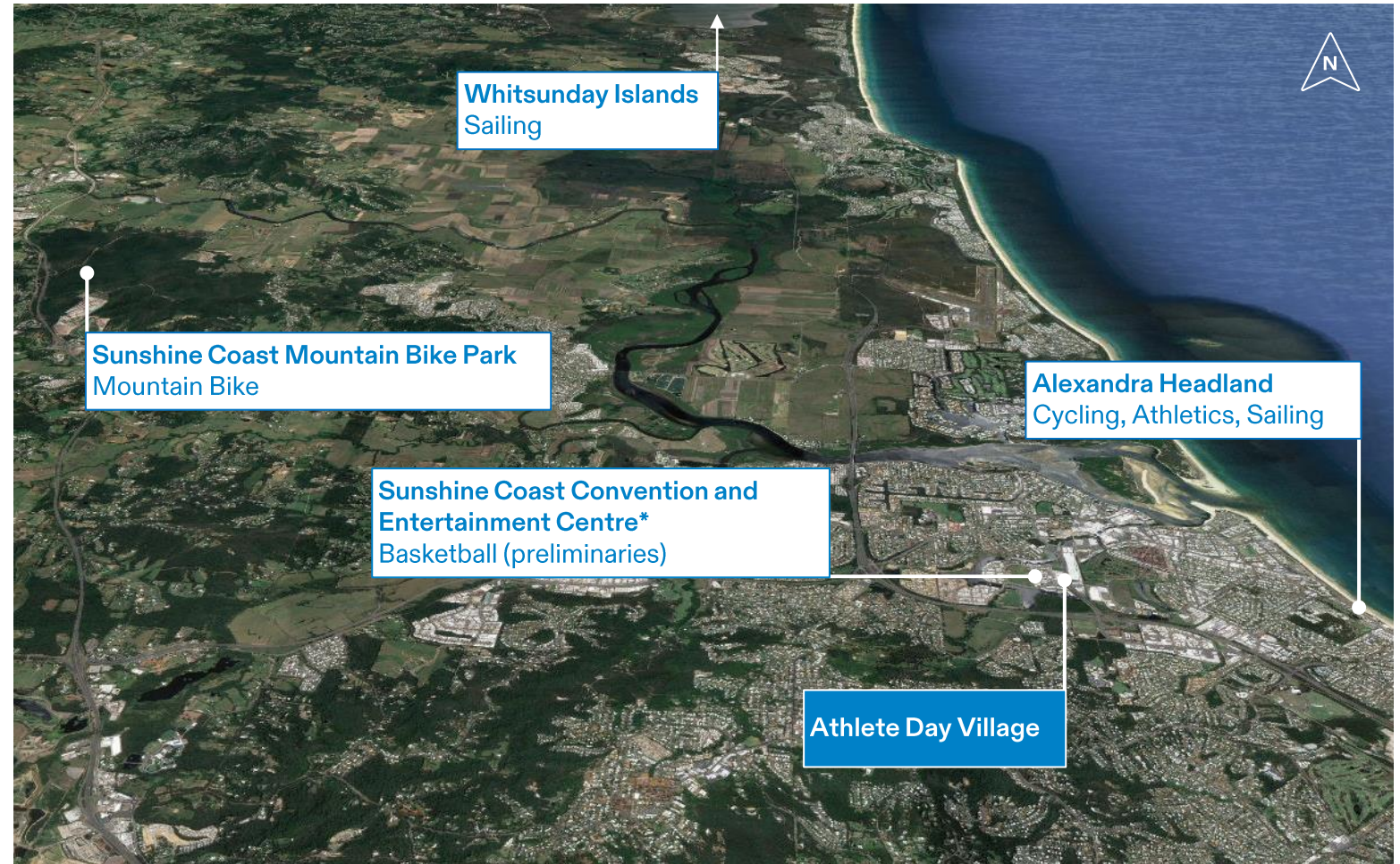
Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Beach Volleyball		Broadbeach Park Stadium	Temporary	12,000	
Golf		Royal Pines Resort	Existing	15,000	
Judo / Wrestling		Gold Coast Sports and Leisure Centre	Existing	7,500	- Venue used for Commonwealth Games 2018
Triathlon / Aquatics	Marathon	Broadwater Parklands	Temporary	5,000	- Venue used for Commonwealth Games 2018
Volleyball		Coomera Indoor Sports Centre	Existing	11,000	- Venue used for Commonwealth Games 2018
Volleyball / Weightlifting	Preliminaries	Gold Coast Convention and Exhibition Centre	Existing	6,000 (Arena) 5,000 (Hall 3)	- Venue used for Commonwealth Games 2018 - Separate venue for Volleyball preliminaries is not needed

VENUE ZONE – SUNSHINE COAST



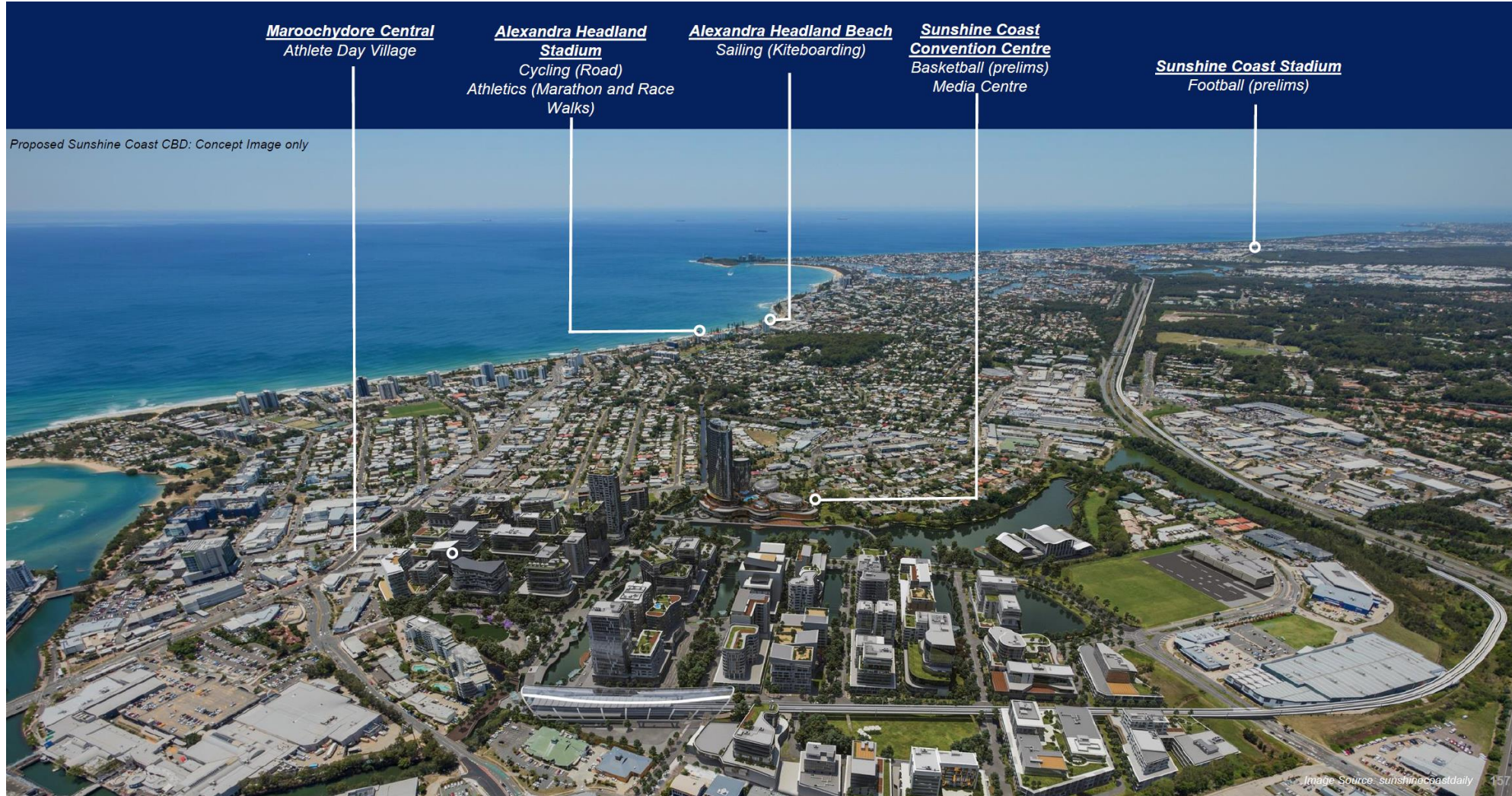
Sunshine Coast

- 4 competition venues
- 1 Satellite Athlete Accommodation



* Planned / Additional

SUNSHINE COAST ZONE



VENUE MASTERPLAN – SUNSHINE COAST (3 VENUES) & WHITSUNDAY ISLANDS (1 VENUE)



Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Basketball	Preliminaries	Sunshine Coast Convention and Entertainment Centre	New	6,000	- Separate venue for preliminary Basketball not needed
Cycling Athletics Sailing	Road Marathon /Race Walk Kiteboarding	Alexandra Headland	Temporary	5,000	
Cycling	Mountain Bike	Sunshine Coast Mountain Bike Park	Existing (permanent works required)	10,000	

Sports / Disciplines		Proposed Competition Venues	Status	Games Capacity	IOC Comments
Sailing	Keelboat start/finish	Whitsunday Islands	Existing	2,000	

VENUE MASTERPLAN: PROPOSED NEW VENUES AND ALTERNATIVE OPTIONS



Basketball (Preliminaries)

Sunshine Coast Convention Centre

Status	New venue
Future Works	Business case under consideration
Capacity	6,000
Owner	TBC (as business case is under consideration)
Operator	TBC (as business case is under consideration)
Experience	<ul style="list-style-type: none"> N/A

Alternative option

A specific venue for Basketball preliminaries is not needed

The basketball tournament (preliminaries and finals) can be held in only one venue


VENUE MASTERPLAN – FOOTBALL PRELIMINARIES



Sports / Disciplines		City	Proposed Competition Venues	Status	Games Capacity
Football	Preliminaries	Brisbane	Ipswich Stadium	Existing	20,000
Football	Preliminaries	Gold Coast	Gold Coast Stadium	Existing	27,400
Football	Preliminaries	Sunshine Coast	Sunshine Coast Stadium	Existing with permanent works	20,000
Football	Preliminaries	Toowoomba	Toowoomba Sports Ground	Existing with permanent works	20,000
Football	Preliminaries	Townsville	North Queensland Stadium	Existing	25,000
Football	Preliminaries	Cairns	Barlow Park	Existing with permanent works	20,000
Football	Preliminaries	Sydney	Sydney Football Stadium	Existing	42,500
Football	Preliminaries	Melbourne	Melbourne Rectangular Stadium	Existing	30,000

VENUE MASTERPLAN: OLYMPIC VILLAGES



Village	Number of beds	Comments	
Village 1: Brisbane	14,000	<ul style="list-style-type: none"> - Queensland's largest waterfront urban renewal project - Village aligned with long-term city and state government plans for a mixed use residential/commercial precinct - 40-50 hectare footprint to accommodate additional temporary facilities 	
Village 2: Gold Coast	2,000	<ul style="list-style-type: none"> - Use of existing hotel cluster in Surfers Paradise - Adjacent hotels for additional team officials 	
Village 3: Sunshine Coast		<ul style="list-style-type: none"> - Planned as Athlete Day Village 	
TOTAL	16,000		



VENUE MASTERPLAN STRATEGIC ALIGNMENT WITH LONG-TERM DEVELOPMENT PLANS



- Games could serve as an accelerator to deliver long-term regional priority plans (“SEQ City Deal”, Feb 2019), resulting in a net economic gain for Queensland as a whole
- Significant urban growth along transportation corridors (population growth 50% by 2041) links the three primary urban centres, creating a north-south ‘lineal city’
- Games as catalyst to create a better connected region

Sources: Queensland’s Value Proposition Assessment (VPA) 2019, Brisbane 2032 Masterplan, 2020

VENUE MASTERPLAN – ENVISAGED LEGACY IMPACTS



Economic Impacts	<ul style="list-style-type: none">- According to an assessment by the State of Queensland, economic benefits for the region are estimated at around AUD 7.4 bn (~USD 5.1bn), with creation of around 130,000 direct jobs and tens of thousands of indirect jobs, including 10,000 indirect jobs in Tourism industry- Games to induce more than AUD 20.2 bn (~USD 13.9bn) in tourism growth between 2020 and 2036 (according to Tourism and Events Queensland)- Games to induce uplift in trade exports of up to AUD 8.63 bn (~USD 5.96bn)
Social & Sport Impacts	<ul style="list-style-type: none">- Games to catalyse development of social and affordable housing to meet the needs of Queensland's growing population- Games to optimise Queensland Government's Activate! Queensland 2019-2029 and the Australian Government's Sport 2030 Plan to deliver benefits including progress toward achieving community healthy weight targets over next ten years- Games to align with Queensland's strategy to be Australia's well-being capital and Games to promote healthy and active lifestyles through an extended platform of engagement with Olympic sports, athletes and programmes- Games to provide significant major event pipeline opportunities, including 45 events across Olympic disciplines that could be proactively pursued for Queensland as part of a strategic programme
Environmental Impacts	<ul style="list-style-type: none">- Games to drive Queensland's sustainability agenda and to provide a focal point for strategies that bring together expertise, industry and the community to address climate change and waste- Games' initiatives to provide a benchmark for Queensland and Australia, supporting long-term sustainability objectives

Sources:

- 2032 Olympic and Paralympic Games Value Proposition Assessment Executive Summary - The State of Queensland - 2019
- Brisbane 2032 Masterplan – September 2020

VENUE MASTERPLAN



Opportunities

- Venue masterplan aligned with Olympic Agenda 2020
- The percentage of existing venues could be increased further by using alternative existing venues for:
 - Athletics (Gold Coast)
 - Aquatics (Gold Coast)
 - Canoe Slalom (Sydney)
 - Rowing/Canoe Sprint (Sydney)
- Basketball and Volleyball venues for preliminaries not needed and could be removed from Masterplan
- Almost all venues have already been discussed with respective International Federations
- A number of venues have hosted Commonwealth Games 2018 or other major international events and provide good event delivery experience
- Games could serve as a catalyst/accelerator to deliver long-term regional priority projects (e.g. transport)
- Games expected to deliver solid economic legacy (AUD 7.4 billion)

Areas for further development

- New competition venues would require detailed and sound legacy business plans



2.2 FUNDING & SUPPORT

POLITICAL SUPPORT

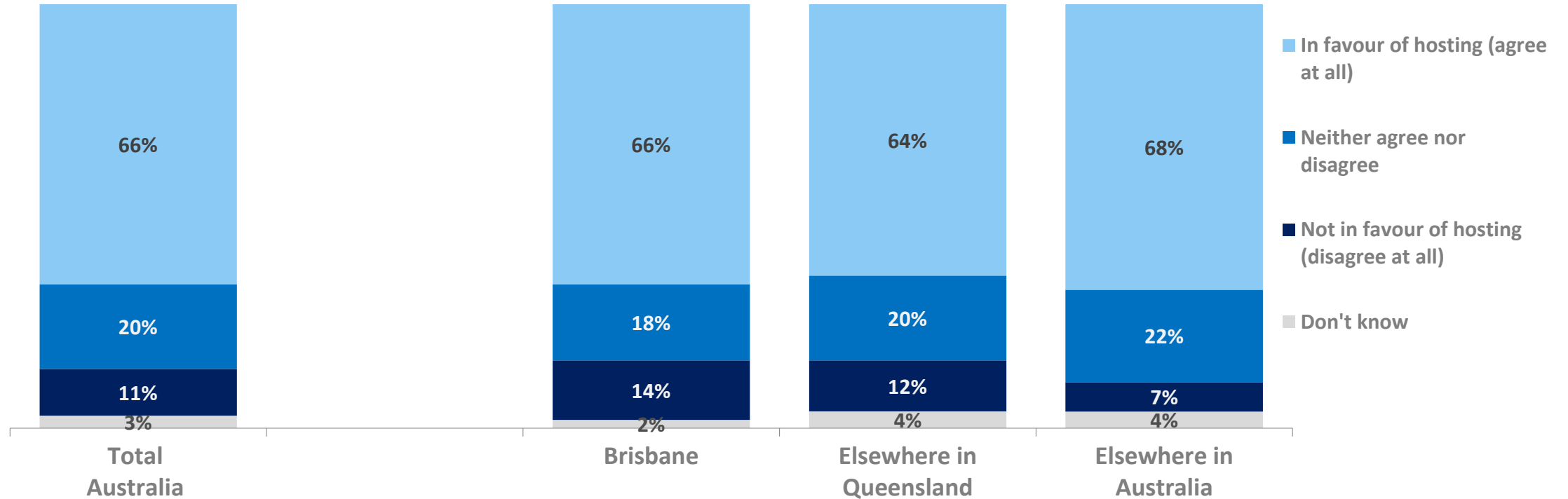


	Political Support	Referendum
City	Support (Decision by South-East Queensland Council of Mayors based on feasibility study, February 2019)	Not required / Not planned
Queensland Government	Support (Decision by Queensland Government based on value proposition assessment, December 2019)	Not required / Not planned
Federal Government	Support (Prime Minister announced the Australian Government's commitment to the 2032 Games in May 2019)	Not required / Not planned
NOC	Support (Official letter January 2020)	-

PUBLIC SUPPORT



IOC Opinion Poll (January 2021):





Funding Strategy

Games Organisation Budget

- The Games Organisation Budget is estimated to be balanced at around **AUD 4.45 bn** (= around USD 3.46 bn*) with projected revenues of AUD 4.45 bn
- Olympic Games Organisation Budget is currently foreseen to be **fully privately funded**

Government Support Services

- Public support services (security, medical services, customs and immigration, etc.) will be split between levels of government according to their jurisdictions

Long-term Capital Investment

- The investment in venues including funding for competition and non-competition venues and villages has not been estimated yet
- The split of responsibilities between private and public funding for capital investments has not been addressed at this stage

*exchange rate USD/AUD as of February 2021

FUNDING & SUPPORT



Opportunities

- Full support from all three levels of government
- Strong public support (66% in favour locally and nationally)
- No referendum required
- Privately funded Organisation Budget foreseen

Areas for further development

- The split of responsibilities between private and public funding for capital investments



2.3

GAMES DELIVERY



SPORT EXPERIENCE



- **Australia has a strong Olympic tradition:**
 - Participation in **all modern Olympic Games** editions
 - With 497 medals, **Australia ranks 8th** in the medal table of Olympic Summer Games (and ranks 12th overall Winter/Summer Games combined with 512 medals)
 - **Knowledgeable fans** and experienced venue operators and workforce
- As of 2010, Australia has hosted World Championships, World Cups or major international sport events in **14 out of 28 Olympic summer sports** (including upcoming FIBA Women's World Cup and FIFA Women's World Cup)
- Gold Coast (Queensland) hosted the **2018 Commonwealth Games** (4,426 athletes / 18 sports)

→ Australia has a strong Olympic tradition and very good experience in organising and hosting major international sport events

METEOROLOGY



BRISBANE *	JULY	AUGUST	SEPTEMBER
Mean daily min. temperature (°C)	10.1	10.7	13.7
Mean daily max. temperature (°C)	21.8	23.2	25.6
Mean total monthly precipitation (mm)	23.7	41.2	30.4
Mean number of precipitation days	3.3	3.8	3.8
GOLD COAST **	JULY	AUGUST	SEPTEMBER
Mean daily min. temperature (°C)	10.2	10.6	13.3
Mean daily max. temperature (°C)	20.8	22.2	25.0
Mean total monthly precipitation (mm)	42.6	45.5	32.2
Mean number of precipitation days	4.6	4.1	4.8
SUNSHINE COAST **	JULY	AUGUST	SEPTEMBER
Mean daily min. temperature (°C)	11.3	11.6	14.5
Mean daily max. temperature (°C)	21.3	22.4	24.4
Mean total monthly precipitation (mm)	50.61	71.38	52.22
Mean number of precipitation days	6.3	4.3	5.8

Source: * World Meteorological Organisation (16-year period) / ** Australian Government, Bureau of Meteorology (20-year period)

METEOROLOGY – CLIMATE CHANGE IMPACT



Projected Warming (July / August)

Host	Average max temp 2000s*	Average max temp 2050s (Low Emission Scenario)*	Average max temp 2050s (High Emission Scenario)*	Average Humidity** 2020 July / August
Brisbane	+21.8°C	+23.3°C	+23.7°C	50% / 50%

➔ Moderate average maximum temperatures in July / August until at least the 2050s

*Source: Rapid Extreme Heat Assessment, Center for Climate Systems Research (NASA and Columbia University, 2020)

** Source: weather-atlas.com



ACCOMMODATION

GAMES NEEDS: 42,000 (2-5 STAR) ROOMS FOR GAMES STAKEHOLDERS

HOTEL ACCOMMODATION	EXISTING INVENTORY
Brisbane	20,000 rooms
Gold Coast	20,000 rooms
Sunshine Coast	9,200 rooms
TOTAL	49,200 rooms
Other Accommodation	Brisbane 7,500 Airbnb and Cabins Gold Coast 7,400 Airbnb Sunshine Coast 6,200 Airbnb

Properties of all categories and standards are available in sufficient quantities.

Source: 2020 STR, LLC / STR Global, Ltd. trading as "STR". © CoStar Realty Information, Inc. / Tourism Regions July 2019 - June 2020

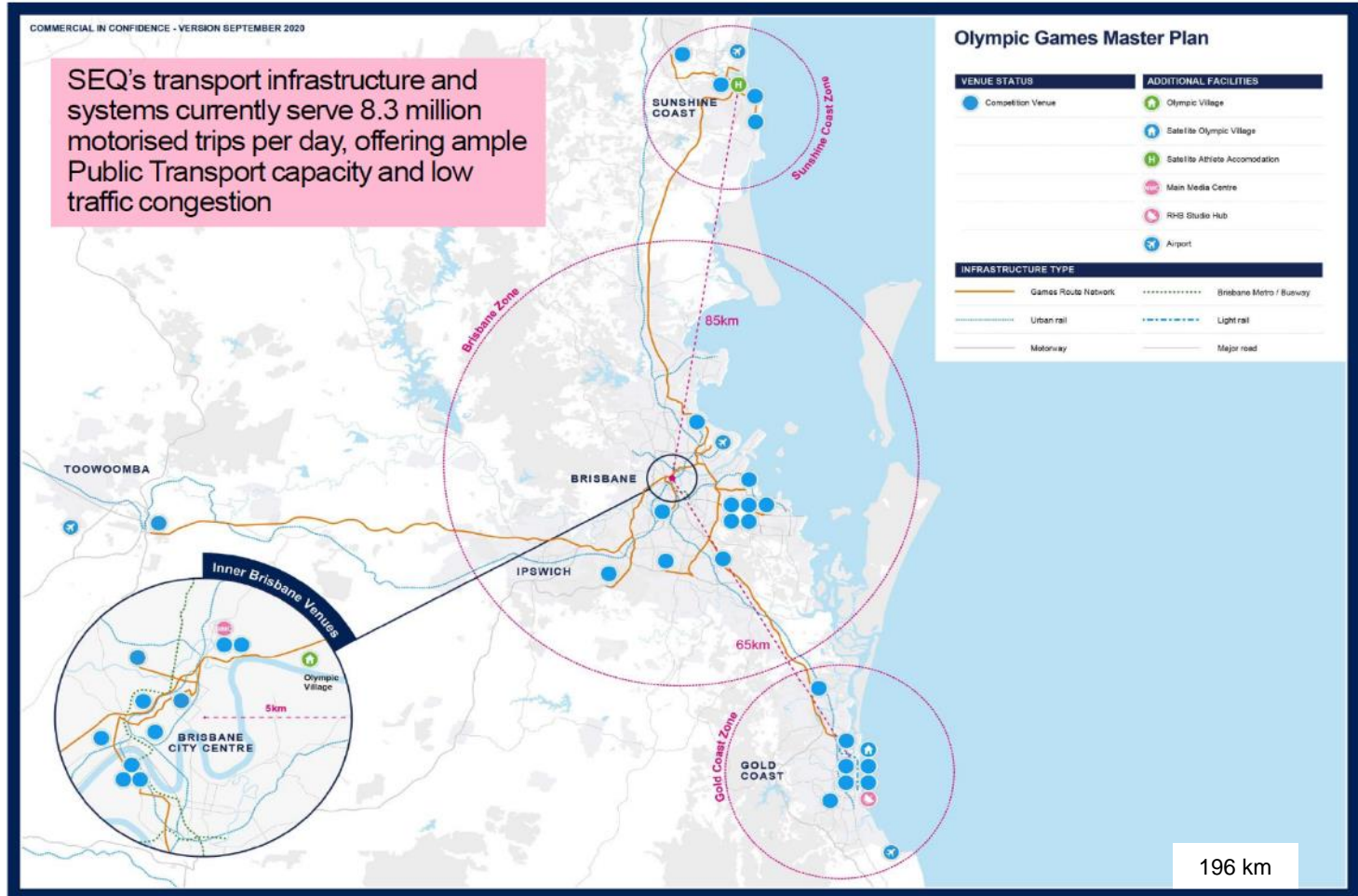
TRANSPORT



The region is served by:

- Suburban and inter-urban **rail network of 377 route -km**, 138 stations - it supports **nine rail services** of 630km total route length
- A system of **dedicated busways (27km)** providing multiple bus services
- A **light rail corridor in the Gold Coast (20km)**
- A mature **network of motorways and urban arterial roads**

Brisbane's TomTom traffic ranking is 212 in the world, indicating low traffic congestion





Transport Concept

Distances and Travel Times

- 85% of venues in one of the three main clusters are within 30 minutes and all venues are within 40 minutes of athlete accommodation (including day village in Sunshine Coast)
- Outside the three main clusters are 3 regional football venues (Toowoomba approx. 90 min by car and Townsville and Cairns approx. 90 min flight time) and the sailing / keelboat venue at Whitsunday Islands. 2 further football venues are proposed in Sydney and Melbourne, 90- and 130-min flight time)

Infrastructure

- Good and mature road, public transport and traffic management infrastructure used for the Commonwealth Games 2018
- As the region is facing strong population growth, major upgrades and the expansion of public transport infrastructure are already planned
- The three venue clusters are connected via the Pacific Highway (M1):
Brisbane - Gold Coast - 65 km | 60 min
Brisbane - Sunshine Coast - 85 km | 75 min
- The Gold Coast cluster has a rail connection to Brisbane and an internal light rail system, while the Sunshine Coast cluster is accessible via bus service. Whitsunday Islands (sailing / keelboat) are accessible via boat from the mainland.



Transport Concept

Airport

- The Brisbane Airport (capacity of 43 million passengers per year and 24,000 per hour) is the main international gateway airport and meets Games needs. Frequent connections to Australian air traffic hubs (Sydney, Melbourne, Perth) from Brisbane.
- Gold Coast airport (current capacity of 6.4 million passengers per year, which will almost double by 2032) and Sunshine Coast airport (capacity of 3.5 million passengers per year by 2032) will support travel of Games stakeholders.

General Strategy

- The Games transport plan is taking advantage of a compact concept offering short distances and travel times as well as a mature and reliable transport infrastructure existing in the region.
- The strategy is offering an adequate Games Route Network comprised of three types of traffic lanes: Exclusive lanes for Games-related vehicles only, lanes shared among Games Family and public transport buses and mixed lanes to be shared by all vehicles, with appropriate traffic measures.
- Spectator and workforce movement fully rely on public transport system and an integrated Active Transport Network, no car access to the venue zones.

GAMES SAFETY AND SECURITY



Stability

- Queensland maintains high levels of stability from a socio-economic perspective, posting the strongest pandemic recovery rate of any Australian state. Rule of law and security remain robust
- Australia enjoys stable relations with its regional neighbours and faces no major international security challenges

Terrorism

- Queensland and Australia have low to medium levels of terrorism.

Crime

- Crime levels in Queensland are moderate and police are generally responsive and effective

Natural Disasters

- Annual bush fires in Queensland but normally limited to the Summer period (December - March), not during Games period

Security Forces

- National and regional security forces are well equipped to mitigate potential threats. Queensland maintains a Special Emergency Response Team (SERT) for counter-terrorism operations and high-value security at major events
- Successfully delivered the Commonwealth Games 2018 and Sydney Olympic Games 2000

Conclusion: If Games security is declared a “high priority” by relevant Government(s) and authorities, Australia is well equipped to ensure safe, secure, and peaceful celebration of the Games.

GAMES DELIVERY

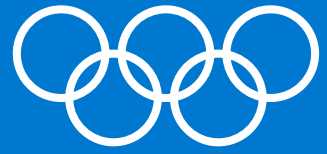


Opportunities

- Good experience in organising and hosting major international sport events
- Good climatic conditions for athletes in July / August
- Sufficient room inventory to meet Games needs
- Great variety of accommodation facilities catering for all kinds of individual needs and budgets
- Strong and established tourism sector with good international reputation
- Good existing and planned transport infrastructure and experience in traffic management can adequately meet the demands of Olympic Games
- Most venues are accessible by public transport; active transport solutions are promoted
- Credible prospect of safe, secure, and peaceful celebration of the Games

Areas for further development

- Hotel inventory sufficient for stakeholders. Some client groups including spectators would also need to rely on alternative accommodation (e.g. Airbnb)
- Public transport services between Brisbane and the Coastal clusters would need to be temporarily increased during Games time (additional rolling stock, increased frequency, etc.)



SUMMARY

MAIN OPPORTUNITIES

- Games align with South-East Queensland's long-term strategy ("SEQ City Deal", Feb 2019) to improve local transport infrastructure, to absorb demographic change and promote economic growth
- Strong support from all three levels of government and the private sector (Official decisions by Queensland Government and South-East Queensland Council of Mayors)
- Strong public support (66% in favour at local and national level, IOC poll – January 2021)
- Very advanced Games concept fully aligned with Olympic Agenda 2020 (80%-90% of existing / temporary venues)
- Venue Masterplan has already been discussed with International Federations / IPC
- Very good experience in hosting major international sports events
- Good climatic conditions for athletes in July / August
- Stable economy (Moody's Aaa rating)
- High scores on human development indices
- Good existing and planned transport infrastructure and experience in traffic management can adequately meet the demands of Olympic Games (successfully implemented at the Commonwealth Games 2018)
- Hotel accommodation inventory (approx. 50,000 rooms) meets Games' needs (42,000 rooms)
- First Games in Oceania in more than 30 years

MAIN AREAS FOR FURTHER DEVELOPMENT



- Further engage with private sector to ensure privately funded Games in a mid-sized but developed sponsorship market
- Further develop sound legacy business plans for new competition venues; keeping in mind:
 - Opportunity to use existing venues in South-East Queensland and Sydney instead of new additional venues and reduce to 2 planned venues (with the potential to increase the use of existing and temporary venues to over 90%)

CREDITS



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