



Queensland – Europe & United Kingdom

Trade and Investment Strategy
2025-2028



TIO TRADE +
INVESTMENT
QUEENSLAND

Mission statement

Advance Queensland's strategic engagement with Europe and the United Kingdom (UK) by leveraging shared democratic values, legal and cultural ties, and mutual trade and investment interests to drive economic growth and support regional security.



Minister's foreword

Queensland has always been a state of outward ambition—bold, globally connected and driven by opportunity. Our historic links with Europe and the UK form the bedrock of some of our most enduring partnerships, and today those ties are more relevant than ever.

As Europe and the UK navigate new global challenges—from energy security and defence resilience to advanced manufacturing and digital transformation—Queensland is uniquely positioned to be part of the solution. Our research capabilities, rich natural resources and trusted record of innovation give Queensland a compelling advantage.

The Queensland-Europe & UK Trade and Investment Strategy 2025-2028 outlines our plan to build on these strengths, elevate Queensland's presence and forge new pathways for trade and investment. It recognises that Europe and the UK are valuable partners in shaping the future—economically, strategically and culturally.

Whether it's expanding our defence industries and aerospace footprint, driving collaboration in critical minerals, or creating new research linkages in quantum and medical science, this strategy sets a clear vision for how Queensland will engage with confidence and purpose.

This strategy affirms Queensland's commitment to high-quality, high-trust partnerships with nations that share our values and ambitions.

Together with our European and UK partners, Queensland will turn global partnerships into outcomes—strengthening our industries, supporting innovation and delivering a more prosperous future for Queenslanders.

The Hon. Ros Bates MP
Minister for Finance, Trade, Employment and Training

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The Europe and the UK opportunity

From Queen Victoria approving the establishment of Queensland as a self-governing colony in 1859¹, through to the role of Italian migrants in brewing up the famous ‘flat white’ coffee², the Queensland story is intrinsically linked to Europe and the UK.

These longstanding partnerships are anchored by shared commitments to democracy and free and open trade, enriched through deep social, economic and people-to-people bonds, and driven by a sophisticated and modern trade and investment relationship.

¹ [Creation of a state | About Queensland and its government | Queensland Government](#)

² [Who invented the flat white? Italian sugar farmers from regional Queensland likely played a big role](#)

Why Europe and the UK?

Queensland's ties with Europe are long-standing, rooted in early 20th-century migration and shared industrial and geopolitical interests. European communities have significantly shaped Queensland's development—from German and Italian contributions to agriculture in the 19th century, to the cultural and economic influence of French, Greek, Dutch, Spanish and other European groups. These connections have enriched Queensland's social fabric and economic growth, reinforcing the importance of sustained engagement.

In 2021, Queensland opened an office in Germany, marking an important milestone in the state's trade and investment engagement with Europe. In 2023, Queensland expanded its footprint in Europe with the appointment of a representative in Paris. The European business community in Queensland continues to grow, fostering deeper cooperation and connections. A trade agreement between Australia and the European Union (EU) will provide further opportunities for Queensland trade and investment engagement with the European region.

Queensland's relationship with the UK is deeply rooted in shared history, governance and migration. Since becoming a separate British colony in 1859, the UK has remained a major trading partner. Queensland has been officially represented in the UK by the Agent-General for Queensland since 1860, initially focused on promoting migration and now driving economic growth through trade and investment. The Queensland–UK connection was further enhanced by the establishment of Queensland House in 1966, which is now the Trade and Investment Queensland (TIQ) office.

British migration played a pivotal role in developing Queensland's agriculture, infrastructure and institutions. Today, many Queenslanders have British ancestry, and the UK continues to be a key source of tourists and skilled migrants. The opening of Queensland House solidified Queensland's presence in the UK market and remains a symbol of enduring ties.

Economic ties have recently deepened with the Australia–UK Free Trade Agreement (A-UKFTA), signed in December 2021 and effective from May 2023. This agreement enhances trade, investment and mobility between the two regions. Beyond economics, Queensland and the UK share strong institutional and strategic links, including defence cooperation through Five Eyes and Australia–United Kingdom–United States security partnership (AUKUS), and common legal and political systems.

As Europe and the UK recalibrate their priorities in energy, defence, manufacturing and digital innovation, Queensland's longstanding reputation as a trusted partner uniquely positions it to leverage its geographic advantages and competitive strengths to expand its footprint in Europe.



Europe – a global powerhouse

Queensland recognises the strategic importance of the broader European region, with its diverse economies, innovation ecosystems and strong alignment with our state’s trade and investment priorities.

This strategy highlights European markets where TIQ maintains an active presence. However, TIQ is cognisant of the broader potential the region presents and is committed to responding swiftly and effectively as new prospects emerge that offer value to Queensland.

Economically, Europe remains one of the most advanced and interconnected regions in the world. Europe alone accounts for a significant share of global Gross Domestic Product (GDP) and is a leader in trade, innovation and regulatory influence. Its internal market of over 450 million people is a magnet for global investment, and its standards—from data protection to sustainability—often become global norms.

In 2025, of the top 20 countries by nominal GDP based on International Monetary Fund (IMF) estimates, seven are from Europe. According to IMF estimates, six European nations feature in the top 10 global GDP per capita rankings for 2025, occupying the top three spots.

As global fragmentation reshapes international priorities, Europe is accelerating strategic partnerships based on shared values in key sectors—energy, defence, digital infrastructure, and finance—to enhance resilience, competitiveness, and strategic autonomy.

This shift opens a significant window of opportunity for Queensland and presents strong potential for collaboration on shared challenges and co-investment in future-focused industries.

Queensland’s expanding defence industry, advanced manufacturing expertise, and innovation in aerospace technologies position it as a valuable partner in Europe’s efforts to strengthen regional security and technological integration.

With a diverse energy portfolio and rich natural resources, Queensland is well-placed to support Europe’s ambitions for clean energy transformation and supply chain resilience. The state offers attractive opportunities for European capital and expertise to accelerate progress in this domain.

Europe’s leadership in biomedical research and its robust biopharmaceutical sector can play a pivotal role in advancing Queensland’s growing health innovation ecosystem, fostering joint development and commercialisation of cutting-edge solutions.

Europe accounted for over a third of global foreign direct investment (FDI) in 2024 – and Queensland is ready for a large slice of that FDI.

More than the EU and UK

In 2024, Europe collectively imported over \$7.24 billion worth of goods from Queensland, surpassing the combined export value to the United States, Canada, and New Zealand (source: QGSO)



Europe



The EU is the world's **third-largest economy** (one-sixth of global GDP)

EU members include **three of the world's 10 largest economies** – Germany, France & Italy



Three of the largest individual sources of Australia's **FDI inflows** (Germany, France, Netherlands)

Large European economies outside of the EU – **Türkiye, Switzerland, Norway**



Ranks among the **top three largest consumer markets** globally³

The world's **largest network of trade agreements** – 76 in total – covering 44% of its total trade⁴



³ Households and NPISHs Final consumption expenditure (current US\$), World Bank, 2023
⁴ Trade - European Commission

UK



Closely **aligned legal and parliamentary systems**

191,731 Queenslanders born in the UK (second largest after NZ)⁵



Australia's **third largest source of FDI** (\$156bn during 2024)⁶

Favourable UK market access afforded through the A-UKFTA



Defence and security opportunities through AUKUS, UK-Australia Space Bridge

A\$820 million worth of Queensland exports to the UK during 2024

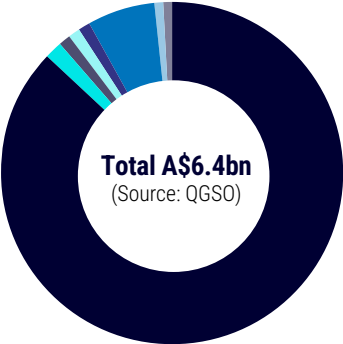


⁵ 2021 People in Queensland who were born in the United Kingdom, Australian Bureau of Statistics
⁶ International Investment Position, Australia: Supplementary Statistics, 2024 | Australian Bureau of Statistics

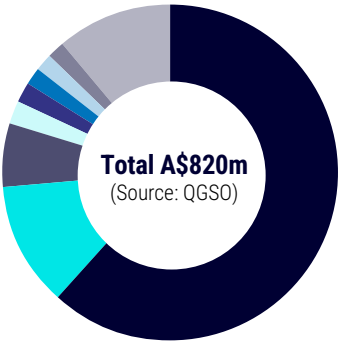
Market snapshot

	EU	UK
Population ⁷	452 million (April 2025)	69.9 million (April 2025)
GDP per capita ⁸	US\$44,220 (April 2025)	US\$54,950 (April 2025)
Queensland Exports to EU and UK ⁹	A\$6.4 billion – including, coal, manufactured articles, meat, ore, and base metals excluding iron and medical and pharmaceutical products (2024)	A\$0.8 billion – including, lead, coal, meat, vegetables and heating and cooling equipment (2024)
Queensland imports from EU and UK ¹⁰	A\$8.5 billion – including road vehicles and transport equipment, industrial machinery and equipment (general, specialised and electrical), scientific instruments and medical and pharmaceutical products (2024)	A\$0.95 billion – including machinery and transport equipment, manufacturing articles, scientific instruments and electrical and power generating machinery (2024)
Foreign investment to Australia ¹¹	A\$869.3 billion (2024)	A\$839.0 billion (2024)
International students	8,608 (2024) ¹²	918 (2024) ¹³
International visitors ¹⁴	699,000 (2024)	211,000 (March 2025)

7 World Economic Outlook (April 2025) - Population
8 World Economic Outlook (April 2025) - GDP per capita, current prices
9 Monthly Trade Data - Power BI
10 Monthly Trade Data - Power BI
11 ABS- International Investment Position, Australia: Supplementary Statistics, 2024
12 Queensland Trade Profiles (Queensland Government Statistician's Office, Queensland Treasury)
13 Department of Education
14 International Tourism SnapShot - March 2025.pdf



Queensland exports to EU 2024



Queensland exports to UK 2024

Note - All data is from QGSO and ABS unless otherwise specified.

European Union

Australia-European Union Free Trade Agreement (under negotiation)¹⁵

The Australia-EU FTA is a proposed free trade deal to boost trade, investment and market access between Australia and EU countries.

Negotiations began in June 2018, with no official conclusion date confirmed.

Framework Agreement between the European Union and Australia¹⁶

The Framework Agreement between Australia and the EU seeks to strengthen partnerships and enhance cooperation on foreign and security policy, sustainable development, climate change and economic and trade.

The Framework Agreement entered into force on 21 October 2022.

European Union – Australia Memorandum of Understanding on Critical and Strategic Minerals¹⁷

This memorandum of understand (MoU) details the EU and Australia’s establishment of a partnership to build critical and strategic minerals supply chains that are secure, stable, ethical and sustainable.

The MoU was signed in Brussels on 28 May 2024.

15 Australia-European Union Free Trade Agreement | Australian Government Department of Foreign Affairs and Trade
16 Framework Agreement between the European Union and Australia | Australian Government Department of Foreign Affairs and Trade
17 Memorandum of understanding between the European Union and Australia on strategic partnership on a sustainable critical and strategic minerals | Department of Industry Science and Resources

Market dynamics

Europe and the UK amid global realignment

In a world marked by growing uncertainty, Europe and the UK serve as stabilising forces, anchored by strong institutions and a commitment to open trade, democratic governance and the rule of law.

Europe's geostrategic landscape is shaped by several key undercurrents, including Russia's invasion of Ukraine, the rise of global unilateralism, and the United Kingdom's evolving post-Brexit trajectory. Each of these shifts has come against the backdrop of domestic challenges including voter discontent, political fragmentation and economic stagnation.

The invasion of Ukraine increased United States (US) unilateralism, and rising tariff barriers have recalibrated priorities, prompting boosts in defence spending. North Atlantic Treaty Organisation (NATO) allies have committed, by 2035, to investing 5% of GDP on core defence requirements and defence and security-related spending.



- A. UK/Europe passport line
- B. European Central Bank, Frankfurt
- C. Banque de France, Paris
- D. London financial district, UK

A resilient and reforming economic landscape

Europe’s macroeconomic outlook remains cautious, but steady. The Euro area is expected to grow 1.0% in 2025, supported by fiscal measures, recovering consumption, and easing inflation. Encouragingly, consumer sentiment has stabilised in major economies like Germany, France and the Netherlands, supported by falling energy costs and resilient employment levels.

Across the continent, governments are ramping up public investment to support industrial renewal and long-term competitiveness. Nonetheless, structural challenges remain. Ageing demographics, elevated public debt and global trade uncertainties continue to constrain long-term growth. Domestic political dynamics—including the rise of populist parties—are also hindering economic reforms efforts across several European states.

These realities are pushing both Europe and the UK to retool and reform their economies, focusing on openness, competitiveness, climate transition and digital innovation. While regulatory complexity can be a challenge, it also provides a competitive edge for high-quality, sustainable exporters in Queensland, which meet high standards in food, energy and environmental traceability.

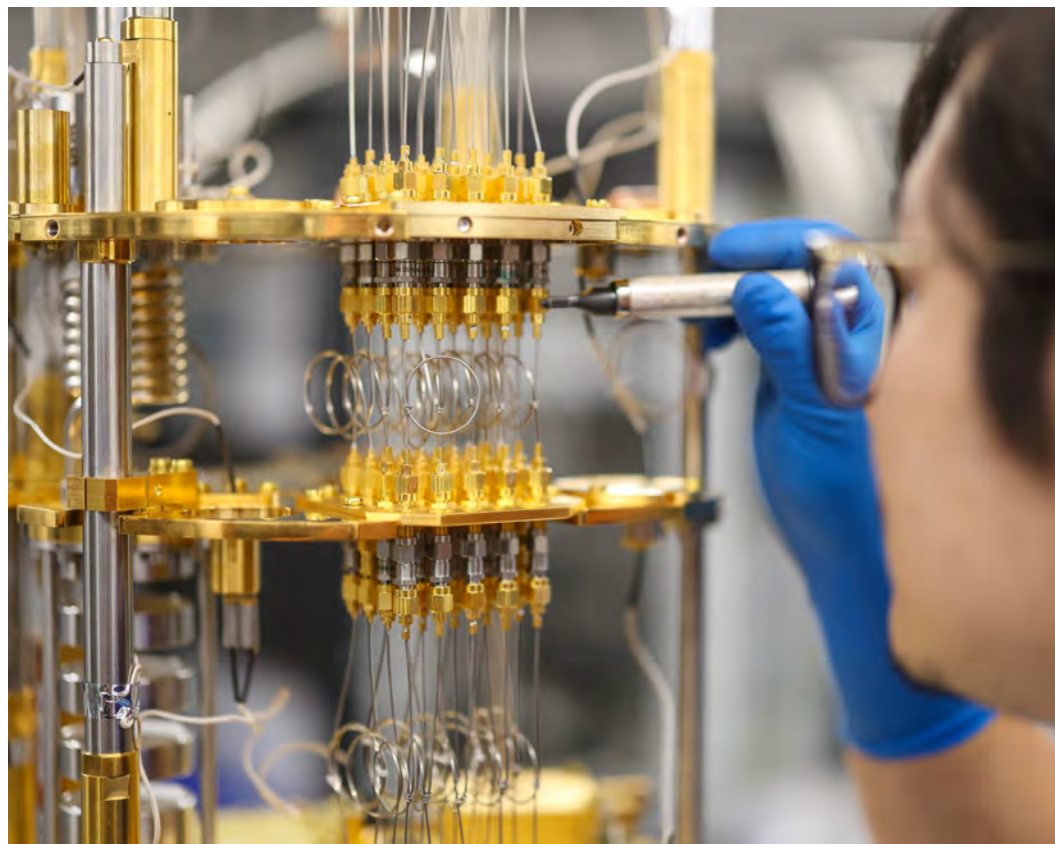
Europe is a global front-runner in digital regulation and artificial intelligence (AI) governance. The EU AI Act 2024—the world’s first comprehensive legal framework for AI, reflects Europe’s ambition to lead on tech ethics, transparency and human-centered innovation.

For external partners, this creates both regulatory complexity and a clear signal of future market direction. It also presents opportunities for collaboration with Europe’s innovation ecosystems in areas such as AI assurance, responsible design, and cross-border research.



A. Brandenburg Gate, Berlin
B. Busy pedestrian street, Lisbon, Portugal
C. City cyclist, Riga, Latvia
D. London, UK

Aviation hangar, UK



University of Queensland quantum technology laboratory, Brisbane

Future outlook

Europe and the UK are undergoing a strategic industrial transformation, prioritising energy resilience, sovereign capability, advanced manufacturing, defence capabilities and secure supply chains. This shift is driven by ambitious net-zero targets and regulatory initiatives such as the EU's Critical Raw Materials Act and Green Deal Industrial Plan.

Queensland is well-positioned to contribute meaningfully to this transformation. With shared priorities and complementary strengths in resources, energy, science and research innovation, Queensland can support Europe and the UK's long-term industrial strategies—particularly in securing reliable, values-aligned supply chains. As global priorities evolve in response to geopolitical tensions and defence modernisation, Queensland's reputation for quality, reliability and strategic foresight offers a trusted partnership beyond commodity exports.

The accelerating momentum in digital and enabling technologies across Europe and the UK presents a significant opportunity for Queensland, whose rapidly advancing capabilities in quantum computing, compound semiconductors, and other frontier technologies position it as a compelling partner in global innovation.

Momentum in Australia-EU Free Trade Agreement negotiations further enhances this outlook. The agreement promises improved market access, reduced tariffs and streamlined regulations— all of which are poised to benefit SMEs in particular. It will also foster innovation, digital trade and sustainability, delivering broader consumer benefits through increased product diversity and competitive pricing.

Opportunities and challenges for Queensland

Opportunities

- Europe’s economic, energy and national security needs in an uncertain world.
- High-trust, rules-based markets are aligned with Queensland’s values.
- Strong demand for critical minerals, renewable energy inputs, and decarbonisation technology.
- Favourable market access through FTAs.
- High demand for trusted partners in defence, infrastructure and advanced manufacturing.
- Investment driving opportunities in research collaboration and commercialisation.
- Europe’s leadership in digital regulation creates new opportunities for Queensland’s innovation sector.
- Post-Brexit repositioning and renewed Australia-UK bilateral momentum.
- Tariff and non-tariff barriers from other markets could create openings for Queensland exports.
- Queensland as an investment gateway into Asia-Pacific.
- The UK as a ‘bridge’ into Europe for Queensland companies.

Challenges

- Ongoing geopolitical risks and supply chain disruptions.
- Delays in Australia-EU FTA negotiations constraining new opportunities in agriculture.
- Compliance with stringent European regulatory standards.
- Slow economic growth and soft consumer confidence in some markets.
- Strong competition from European and global suppliers, particularly in high-value sectors.



The UK is a stabilising force,
anchored by strong institutions and a
commitment to open trade, democratic
governance and rule of law.



UK

Queensland and the UK share a long-standing and multifaceted economic partnership, built on common institutions, strong people-to-people connections and shared priorities in defence, security, new technologies, services and resources sectors.

Strategic drivers

In the wake of Brexit and amid growing global uncertainty, the UK is actively strengthening ties with trusted, like-minded partners. The AUKUS partnership and the Australia-UK FTA are central to deepening Queensland’s strategic relationship with the UK. The UK’s current strategic economic drivers are shaped by its Invest 2035: The UK’s Modern Industrial Strategy, a 10-year plan aimed at boosting productivity, innovation, and sustainable growth. Sectors that align with Queensland’s interests include:

Defence

The UK has announced its most significant increase in defence spending since the Cold War, committing to raise expenditure to 2.5% of GDP by 2027, with a longer-term ambition of reaching 3% during the next Parliament (2029-2034). The UK, as a NATO member state, has also agreed to investing 5% of GDP annually on core defence requirements and defence and security-related spending by 2035.

Under AUKUS Pillar II, Queensland is well-placed to support and benefit from key capability areas including quantum, AI and autonomy, cyber, undersea warfare, hypersonics, electronic warfare, innovation, and secure information sharing.

Digital and enabling technologies

The UK is investing in future industries through initiatives like the National Quantum Strategy (2023) and the National Semiconductor Strategy (2023) aiming to bolster national security and grow the economy.

Queensland’s world-renowned quantum, compound semiconductor and advanced technology capabilities make it a natural partner for the UK in these strategic areas.

Advanced manufacturing

Queensland’s rich endowments in critical and rare earths make it an attractive investment proposition for the UK to fulfil the priority outlined in the UK’s Critical Minerals Strategy (2022), to secure sustainable supply chains for essential resources.

Economic outlook

As the world’s sixth-largest economy, the UK remains a global services powerhouse, with services contributing over 80% of Gross Value Added (GVA). However, its economic trajectory has been tempered by structural challenges, including low productivity growth, Brexit, the COVID-19 pandemic, and geopolitical disruptions such as Russia’s war on Ukraine.

Despite these headwinds, the IMF forecasts modest recovery, with projected growth of 1.1% in 2025, rising to 1.4% in 2026, supported by stabilising trade conditions and targeted policy reforms.

Prospects for Queensland

Queensland’s defence industry capabilities are strongly aligned with both AUKUS Pillar II and the UK’s Strategic Defence Review (SDR), enabling the state to make a significant contribution to joint capability development, workforce skilling and defence innovation.

The Australia-UK FTA provides a strong foundation for further expansion of trade, investment, and research collaboration.

Queensland’s critical mineral reserves and advanced research capabilities align directly with the UK’s industrial strategies.

Queensland’s leading-edge quantum, semiconductor and advanced technologies ecosystem, is anchored by a mix of innovative companies, advanced manufacturing and world-class research facilities. Partnerships between the UK and Queensland will enhance sovereign capabilities and strengthen secure, critical supply chains through complementary strengths and shared innovation.

The 2032 Olympic and Paralympic Games can draw valuable lessons from the London 2012 Olympics, which is widely regarded as a benchmark for delivering a successful and enduring Olympic legacy.



Creative industries: a growing opportunity for Queensland

Valued at over £125 billion and contributing nearly 6% of GDP, the UK’s creative industries are a global leader in entertainment, design, and the arts. Queensland’s creative sector—including gaming, design, screen production, and the visual and performing arts—is well-placed to seize this opportunity.



A. Hypersonix Launch Systems
B. British Academy of Film and Television Arts



Cane farm, Mackay, Queensland



Opening doors for Queensland agribusiness

The Australia–UK FTA has removed tariffs on 99% of Australian goods entering the UK, creating significant new opportunities for Queensland’s food, beverage and agricultural industries. This improved market access positions Queensland producers to expand exports of high-quality, trusted products to one of the world’s most dynamic consumer markets.

Regional agreements – UK

Australia-UK Free Trade Agreement (A-UKFTA)¹⁸	<p>The A-UKFTA is a bilateral FTA which entered into force on 3 May 2023 and removes tariffs on over 99% of Australian exports to the UK and enhances professional mobility between nations.</p> <p>This comprehensive bilateral FTA promotes trade, professional mobility and deepens economic integration between Australia and the UK.</p>
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)¹⁹	<p>The CPTPP is a Free Trade Agreement covering countries representing approximately 14% of global GDP.</p> <p>The CPTPP entered into force on 30 December 2018 for Australia, Canada, Japan, Mexico, New Zealand and Singapore. Vietnam followed on 14 January 2019, with Peru, Malaysia, Chile and Brunei joining progressively through to July 2023.</p> <p>In 2023, the UK signed its accession protocol, becoming the first non-Pacific nation to join, pending ratification.</p>
UK-Australia Space Bridge²⁰	<p>The Space Bridge is a collaborative arrangement between Australia and the UK to grow each nations’ space sectors.</p> <p>The UK-Australia Space Bridge arrangement was enacted in February 2021.</p> <p>This arrangement boosts export and investment opportunities and research and development (R&D) collaborations between nations.</p>
AUKUS²¹	<p>AUKUS is a trilateral security partnership between Australia, the UK and the US to enhance defence ties and jointly develop advanced defence technologies to promote Indo-Pacific stability.</p> <p>AUKUS was jointly announced on 15 September 2021 by Australian, UK and US leaders.²²</p>

18 [Australia-United Kingdom Free Trade Agreement](#) | Australian Government Department of Foreign Affairs and Trade
19 [Comprehensive and Progressive Agreement for Trans-Pacific Partnership \(CPTPP\)](#) | Australian Government Department of Foreign Affairs and Trade
20 [UK-Australia Space Bridge celebrates three years in orbit](#) | Austrade
21 [Factsheet: Implementation of the Australia – United Kingdom – United States Partnership \(AUKUS\)](#)
22 [AUKUS nuclear-powered submarine pathway](#) | Defence Ministers

Germany is driving a comprehensive national strategy focused on industrial renewal, energy security and defence modernisation.

Germany

Germany and Queensland share robust economic and trade ties, driven by Germany’s demand for Queensland coal, manufactured goods and pharmaceuticals. This relationship is further strengthened by shared interests in critical minerals, biotechnology, and innovation.

Strategic priorities

Germany is driving a comprehensive national strategy focused on industrial renewal, energy security and defence modernisation. This agenda is designed to restore economic resilience, secure critical supply chains and reinforce national and European security.

Critical minerals

Germany has committed €1 billion to develop domestic mining projects, forge international resource partnerships, and establish a dedicated Raw Materials Fund to ensure long-term access to essential inputs for energy and manufacturing.

Defence investment

Defence spending is set to more than double, reaching €162 billion annually by 2029 (3.5% of GDP). A total of €649 billion will be invested over five years to modernise military capabilities and strengthen European defence infrastructure.

Strategic infrastructure investment

Supported by fiscal reforms, Germany will launch a €500 billion multi-year public investment program—the largest in a generation—targeting climate action, energy transition, infrastructure upgrades, and national resilience.

Economic outlook

Germany remains the third-largest economy globally and the economic engine of the European Union, contributing nearly 25% of EU GDP and over 25% of its industrial output.

Despite its scale, Germany’s growth has been constrained by rising energy costs, increased manufacturing competition, global tariff uncertainty, and labour and demographic challenges.

The IMF projects that Germany’s economic growth will remain flat in 2025, with a modest rebound to 1% in 2026. This recovery is expected to be driven by structural changes in the country’s trade dynamics. One major shift is Germany’s dramatic decrease in dependence on Russian energy, dropping from 30% in 2017 to just 1% by 2023. Simultaneously, Germany’s export profile is undergoing transformation, with the United States recently overtaking China as its top export destination. These strategic adjustments are redefining Germany’s global trade relationships and its role in the international economy.

Prospects for Queensland

Queensland is well-positioned to align with Germany’s transformation agenda through its strengths in resources, innovation and advanced manufacturing.

Queensland’s rich resource base and mining expertise directly support Germany’s €1 billion investment in critical minerals and rare earths—offering a clear pathway for trade and investment.

Queensland’s established defence manufacturing ties with Germany can be leveraged to support scalable, high-tech production aligned with Germany’s defence modernisation goals.

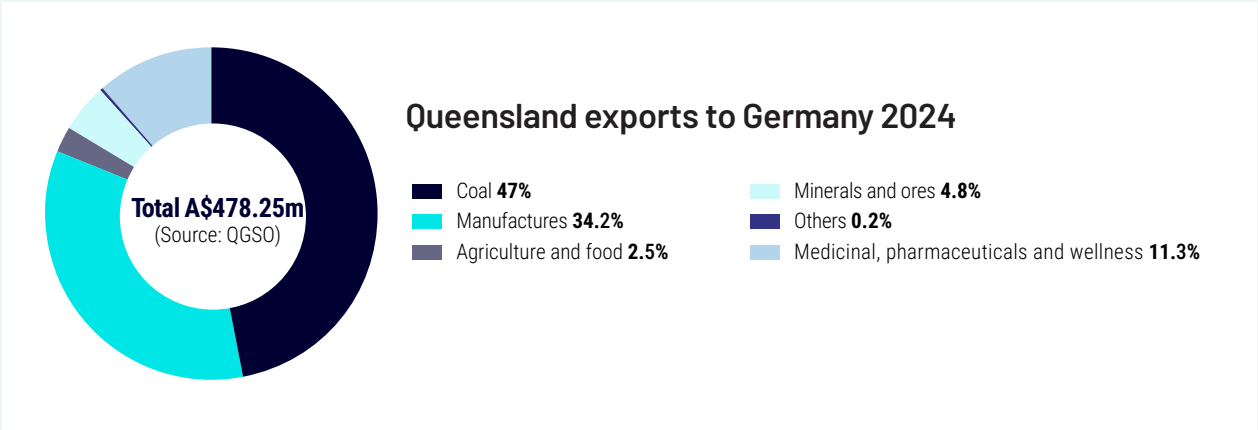
Germany’s reshoring strategy and industrial renewal efforts open new opportunities for Queensland firms in clean tech, biotech and advanced engineering.

Queensland’s globally recognised research and innovation ecosystem presents strong potential for joint R&D initiatives and collaboration in emerging technologies.

Regional agreements – Germany

Berlin-Queensland Joint Declaration of Intent on Cooperation in the Area of Health	The 2018 Joint Declaration of Intent (DoI) between the Land of Berlin ²³ and State of Queensland strengthens the cooperation between the two partners in health and medical research and in delivering better health outcomes and enhanced economic and commercial opportunities arising from health and medical innovation.
Bavaria-Queensland Declaration of Intent	<p>The 2023 DoI signed between the German state of Bavaria and Queensland establishes partnerships and cooperation across clean energy, cleantech, emissions reduction technologies, artificial intelligence, quantum, life sciences, medical and bioeconomy, aerospace and additive manufacturing.</p> <p>Joint project agreements under the DoI are driving research and innovation.</p>
Hessen-Queensland Memoranda of Understanding	<p>Since 2004, several Memoranda of Understanding have promoted student exchanges and joint research partnerships between 14 Hessen and nine Queensland universities.</p> <p>A flagship research partnership between Queensland and a German institution located in Hessen is the A\$15 million International Research Training Group (IRTG) funded by the German Research Foundation in association with the University of Queensland and involving Justus Liebig University in Hessen, Germany. Announced in December 2022, key research collaboration areas for this partnership are crop genetic selection and predictive breeding, gene editing and improving stress tolerance.</p>
Enhanced Strategic Partnership between Australia and Germany	Signed in 2021, the Enhanced Strategic Partnership establishes a foundation for strategic cooperation in the Indo Pacific, and stronger economic cooperation in the areas of renewable energy, energy efficiency, low emissions technology and the supply of critical minerals.

²³ Berlin is a city-state and one of the sixteen federated states of the Federal Republic of Germany.



France is advancing a multifaceted strategic agenda in response to evolving global challenges, with a strong focus on defence, resource security, infrastructure excellence, and innovation.



France

Queensland and France maintain a broad and strategically aligned partnership across key sectors such as aerospace, energy and defence. This relationship is further strengthened by shared interests in the Indo-Pacific and the unique connection between Brisbane and Paris as Olympic host cities.

Strategic drivers

France is advancing a multifaceted strategic agenda in response to evolving global challenges, with a strong focus on defence, resource security, infrastructure excellence and innovation.

Defence investment

France is significantly increasing its defence budget, committing €6.5 billion over the next two years to enhance military capabilities. This investment is supported by deepening defence industry cooperation with Australia, guided by the Australia-France Roadmap 2023.

Critical minerals partnership

In October 2023, France and Australia formalised a Critical Minerals Agreement to strengthen supply chain resilience and support the development of clean energy and high-tech industries through strategic resource collaboration.

Infrastructure leadership

France continues to lead in infrastructure design and delivery. The Paris 2024 Olympic Games showcase its capabilities in sustainable urban development, advanced transport systems, and strategic planning—offering valuable insights for global partners.

Biomedical innovation

France is recognised globally for its biomedical excellence, driven by a vibrant ecosystem of world-class research institutions, strong industry partnerships, and rapid growth in healthtech and biotech sectors.

Economic outlook

France is the world’s seventh-largest economy and the second-largest in the EU after Germany. While services dominate, France is home to global leaders in: aerospace and automotive manufacturing, luxury goods and consumer brands, food, beverages, chemicals and pharmaceuticals.

Despite its strengths, France has experienced prolonged low growth due to inflation, trade disruptions, high public debt and policy uncertainty. The IMF forecasts modest growth of 0.6% in 2025, with gradual recovery expected.

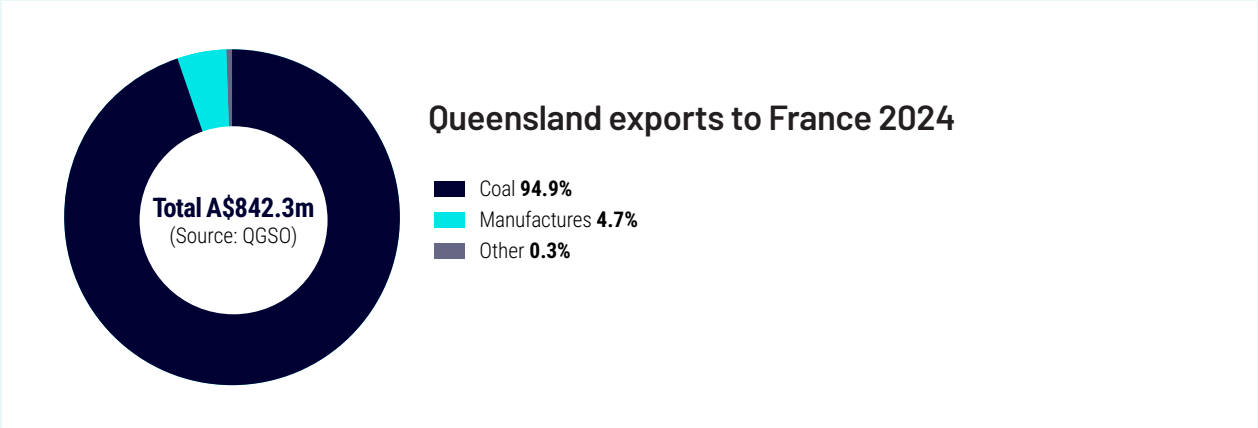
Prospects for Queensland

Queensland is well-positioned to deepen its engagement with France across several high-impact sectors:

- French firms have played a key role in Queensland’s infrastructure development. The success of the Paris 2024 Olympics offers valuable lessons in large-scale project delivery and legacy planning. Queensland companies with complementary expertise can partner on future infrastructure and urban transformation initiatives.
- Queensland’s established ties with France in defence and aerospace provide a strong foundation for expanding advanced manufacturing, maintenance and repair and overhaul (MRO) services.
- Existing collaborations between Queensland and French universities and industry in health research and development offer a platform for future partnerships in biotech, healthtech and clinical innovation.

Regional agreements – France

Australia-France Roadmap – A New Agenda for Bilateral Cooperation	<p>The Roadmap, signed in 2023, establishes a new and ambitious chapter in the Australia-France bilateral relationship, focused on three pillars:</p> <ul style="list-style-type: none">• Defence and security;• Resilience and climate action; and• Education and culture <p>The three pillars aim to advance national and international interests with a key focus on the South Pacific.</p>
Australia-France Bilateral Agreement for Cooperation on Critical Minerals Supply Chains	<p>This agreement, signed in 2023, establishes a framework for Australia and France to work together on a joint study looking at:</p> <ul style="list-style-type: none">• Supporting secure bilateral critical minerals supply chains• Identifying specific opportunities for battery minerals and rare earth elements.





TIQ's strategic priorities

Over the next three years, Queensland's engagement with Europe and the UK will be shaped by five strategic priorities. These priorities are rooted in Queensland's key strengths and closely aligned with the strategic interests of Europe and the UK. Together, they establish a strong foundation for deeper collaboration and shared prosperity, driving a resilient and forward-looking economic partnership.



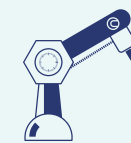
Energy and resources

Progress investment interest into commercial collaborations and outcomes.



Defence and aerospace

Drive strategic partnership opportunities to accelerate industry development.



Digital and enabling technologies

Boost Queensland's innovation in quantum, Software as a Service (SaaS) and advanced technologies.



Infrastructure

Grow participation and investment in Queensland's major infrastructure.



Research and innovation

Pursue new research partnerships to support innovation and commercial outcomes.

Energy and resources

Attract investment from markets such as the UK, Germany, France, Austria, Spain and Italy into Queensland energy and resource projects, and support exports of processed minerals and energy technologies to Europe.

The Queensland advantage


Queensland is well-positioned to partner with Europe in advancing energy diversification, achieving net-zero goals, and strengthening industrial resilience. Its strategic location in the Asia-Pacific, combined with abundant high-quality coal, gas, and critical minerals—including copper, nickel, cobalt, graphite, and rare earths make it an attractive investment destination and a reliable supplier of choice for European industries and green technologies. Amid global uncertainty, Queensland offers secure, well-established supply chains and a stable environment for investment and long-term collaboration.

With over 300 days of sunshine annually, Queensland offers an ideal environment for renewable energy investment. The state boasts diverse renewable resources, a strong track record in regional energy infrastructure development, an integrated transmission and distribution network, and excellent east coast transport links. Its tropical climate, abundant land, and robust agricultural sector also underpin Queensland's growing capabilities in biofuels, including sustainable aviation fuel.

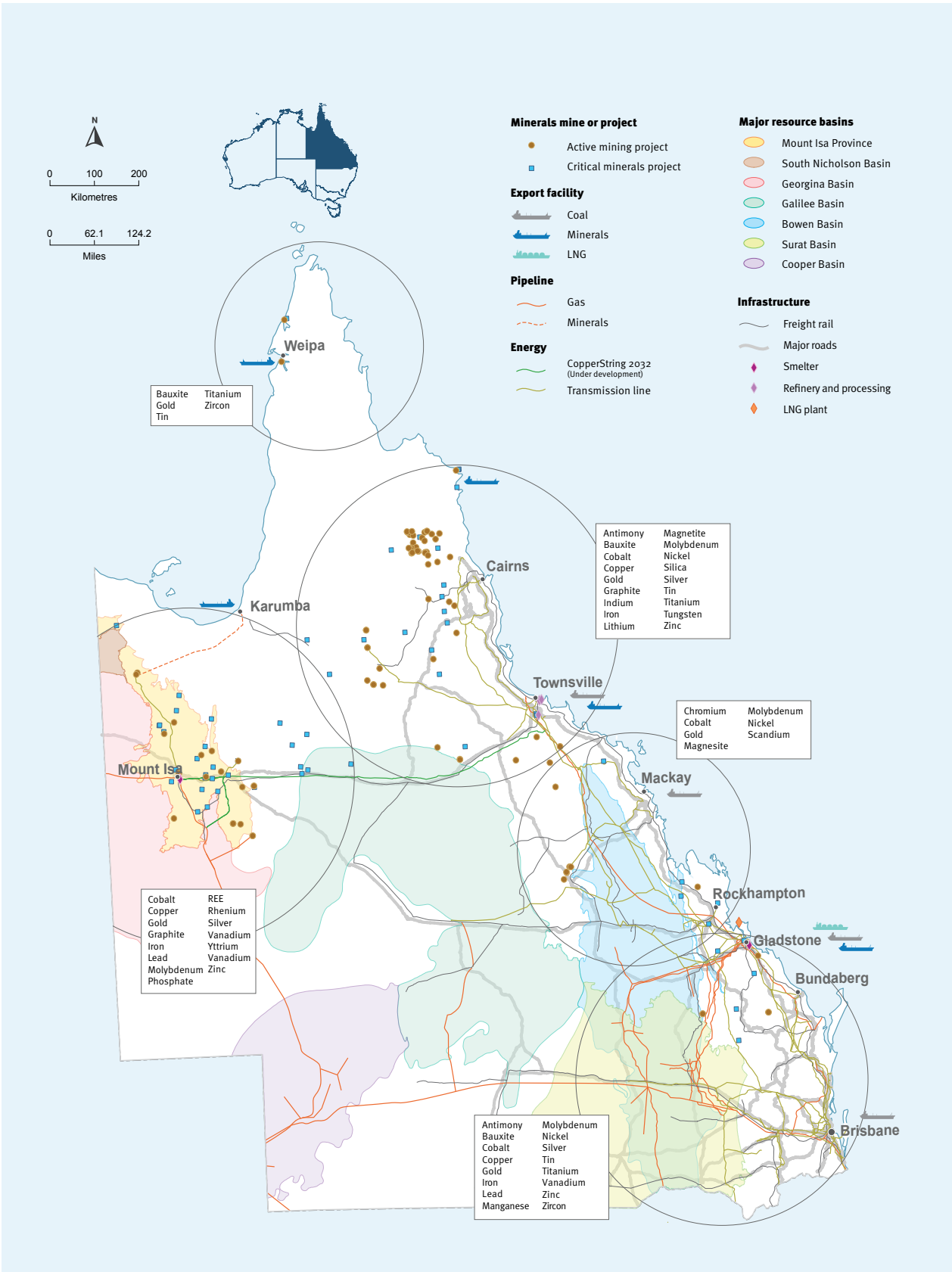
TIQ initiatives

- 1 **Showcase Queensland's energy and resources sectors and promote opportunities for investment** at leading industry events.
- 2 **Attract European investment into Queensland's mineral supply chains** that are important to defence and strategic minerals development, processing and manufacturing.
- 3 **Strengthen European investment in Queensland's renewable energy sector** through targeted engagement activities including investor roundtables, government access and industry connections.
- 4 **Facilitate connections for Queensland renewable technology companies** with the renewable industry in Europe and the UK, when there is mutual benefit in collaborating.

What success looks like in 2028

-  **Strengthened energy and resources investment pipeline** from Europe and the UK.
-  **Increased collaborations** with relevant government agencies and project proponents to globally promote Queensland's resources sector and attract investment.
-  **Increased international alliances** for Queensland renewable and resource related technology companies.

Queensland resources. Information current as at July 2025



Defence and aerospace

Strengthen Queensland's advanced manufacturing sector by attracting new investment and forging partnerships with markets including the UK, France and Germany particularly across defence and aerospace supply chains.

The Queensland advantage

Queensland offers a strategic advantage for advanced manufacturing, particularly in defence industries and aerospace, thanks to its prime location, robust infrastructure, skilled workforce and strong government support. As Australia's gateway to the Asia-Pacific, it is ideally positioned for defence logistics and international collaboration.

The state is a national hub for heavy vehicle manufacturing and sustainment, and MRO services for air, land and sea assets. It also excels in advanced electronics and aerospace engineering, with capabilities in rotary wing systems, autonomous technologies, and uncrewed systems. Queensland also provides diverse test and evaluation environments, offering capabilities across a range of climates and terrains.

TIQ initiatives

- 1 **Partner with Defence Jobs Queensland and Team Defence Australia to promote Queensland's defence capabilities** at key international expos.
- 2 **Attract priority international delegation visits** to Queensland with meeting programs and event support, from key countries such as the UK, France, Spain, Germany and Italy.
- 3 **Facilitate tailored introductions** for Queensland companies seeking international partners.
- 4 **Provide international companies with bespoke services** to locate and invest in Queensland, with a focus on developing Queensland's advanced manufacturing capability.

What success looks like in 2028

-  **Growth in export outcomes** for Queensland defence, space and aerospace.
-  **TIQ's participation and support at key defence and aerospace expos** in Australia and internationally, expanding global recognition of Queensland capabilities and companies.
-  **Investment or partnerships** from Europe and the UK into Queensland's defence, and related industries and aerospace.

- A. Buzzworks, Integrated Soldier Systems
- B. Gilmore Space, Eris rocket
- C. Black Sky Industries, Rocket launch





Digital and enabling technologies

Boost Queensland’s innovation ecosystem in quantum technologies, Software as a Service (SaaS) and advanced tech, particularly in sports and health, by accelerating commercialisation and deepening export partnerships with markets such as the UK, France, and Germany.

The Queensland advantage

- **Quantum** – Queensland is rapidly becoming Australia’s quantum technology hub, anchored by Psi Quantum, which is building the world’s first utility-scale, fault-tolerant quantum computer, supported by world-class universities and strong industry partnerships focused on commercialising research. Its deep-tech strengths include photonics, compound semiconductors and advanced fabrication, forming a robust ecosystem for quantum innovation and development.
- **Health and sport** – Queensland excels globally in sports tech, digital health, medical imaging, assistive devices and biomedical manufacturing. With world-class infrastructure and the upcoming 2032 Olympic and Paralympic Games, Queensland offers strong technology collaboration opportunities in athlete health, diagnostics, and rehabilitation. Key areas of growth include cutting-edge technologies such as exoskeletons, biometric monitoring, AI-driven coaching and virtual training environments.
- **SaaS** – Queensland offers global strength in enterprise and business-to-business SaaS, cybersecurity, fintech, and AI/Machine Learning productivity tools. Its skilled talent pool, cost-effective environment, and export focus make it an ideal base for EU and UK investors to co-develop solutions and access Asia-Pacific markets.

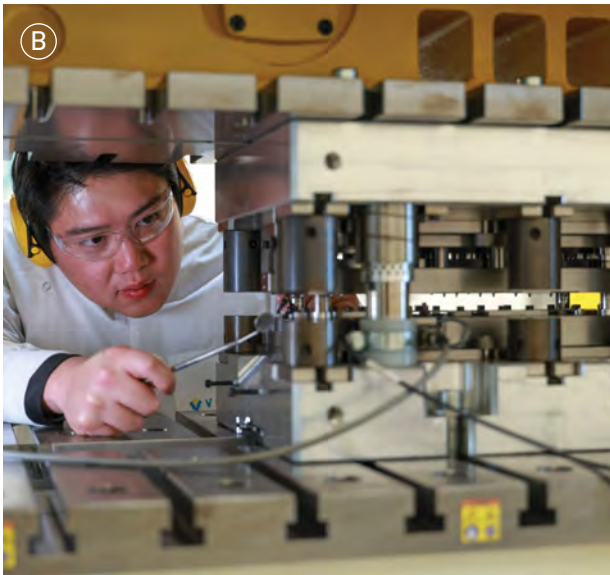
TIQ initiatives

- 1 **Promote and showcase Queensland’s capabilities** in quantum and advanced technologies in areas such as photonics, Microelectronic Mechanical Systems and compound semiconductors to attract international investment and partnerships.
- 2 **Support digital and enabling technology companies** to make relevant market connections to expand exports and attract investment back into Queensland.
- 3 **Provide free landing pad support services** to assist Queensland firms that are either doing business in the UK or looking to enter the market. This includes free office and event space at Queensland House in London, regulatory insights and market intelligence.

What success looks like in 2028

-  **Growth in Queensland’s digital and enabling technology exports.**
-  **Strengthened international collaborations and increased investment** in digital and enabling technologies.
-  **Growth in Queensland companies supported** to establish or expand their business in Europe and UK by accessing the Queensland House Landing Pad services.

- A. Gameloft Studios, Brisbane
- B. Vaxxas needle-free vaccine delivery technology, Brisbane
- C. Queensland XR Hub, Brisbane





Infrastructure

Attract investment and relevant expertise from markets including the UK, Germany, France, Spain, Austria and Italy into Queensland's large infrastructure projects, and facilitate partnerships with Queensland companies to collaboratively deliver.

The Queensland advantage

Queensland's infrastructure needs are rapidly growing due to population expansion and preparations for the Brisbane 2032 Olympic and Paralympic Games. Expertise from the delivery of the Paris 2024 Olympic and Paralympic Games, along with the legacy of London 2012, will help shape Queensland's infrastructure strategy and ensure benefits are shared across the entire state. This creates significant opportunities for collaboration with European and UK firms, which bring world-class expertise in transport, road infrastructure, and sustainable construction and for the delivery of major events.

With many of these companies already established in Queensland, and the state's own globally recognised infrastructure capabilities, there is strong potential for partnerships through consortia or other delivery models to meet rising infrastructure demands effectively.

TIQ initiatives

- 1 **Showcase Queensland's infrastructure pipeline and opportunities for investment** at investor engagement activities and events, such as roundtables and briefings.
- 2 **Attract and support international delegation and investor visits to Queensland** with introductions to government stakeholders and site visits.
- 3 **Promote infrastructure, design, professional services partnerships** and delivery of major events collaboration between European, UK and Queensland companies for the 2032 Olympic and Paralympic Games and other major projects and events.

What success looks like in 2028

-  **Expressions of interest or formal commitments** from European and UK investors into Queensland private and public infrastructure projects.
-  **New alliances developed** between Europe and UK companies building upon brand recognition of Queensland leading up to the 2032 Olympic and Paralympic Games.
-  **Increased interactions** with international delegations and investors to promote Queensland infrastructure opportunities.

- A. 2032 Olympic and Paralympic Games project
- B. Brisbane metro transit system upgrade
- C. The Neville Bonner Bridge, Brisbane





Research and innovation

Establish new research partnerships with the UK, Germany, Switzerland and France to drive innovation, support the commercialisation of research outcomes and accelerate the development of cutting-edge technologies across key sectors.

The Queensland advantage

Queensland's globally recognised research institutions excel in life sciences, biomedical, quantum, health, critical minerals, energy and advanced manufacturing—fields that closely align with European priorities in health innovation, decarbonisation, digital transformation and industrial resilience.

With a renowned innovation ecosystem, stable public funding and a strong focus on the translation of research to support new industries and economic growth, Queensland offers a compelling value proposition as a preferred R&D partner for Europe.

TIQ initiatives


- 1


Promote Queensland's research excellence in key sectors through delivery of in-market events and showcasing Queensland research expertise at international forums.
- 2


Develop new and strengthen existing research partnerships between Queensland universities, research institutions and corporate stakeholders to accelerate the commercialisation of Queensland research.
- 3

Work collaboratively across relevant Queensland Government agencies, universities, research organisations and businesses to attract new investment and scientific talent into Queensland's research sector.

What success looks like in 2028

- 

Queensland research and innovation profile is expanded through increased participation at key events and conferences.
- 

Growth in commercial outcomes achieved through joint Queensland-Europe research and innovation initiatives.
- 

Growth in research and innovation partnerships between Queensland and UK and European corporations and governments.

A. Herston Biofabrication Institute, Brisbane
B. Spinal Injury Project, Gold Coast
C. University of Queensland Extracellular Vesicle Research Program





Global network. Local expertise.

Your trade and investment partner - across Queensland and around the world

At TIQ, we don't just connect you to opportunity—we surround you with it. With offices in the UK, Germany and 18 international markets, our global team offers deep local insight and direct access to Queensland's most dynamic sectors. Backed by eight regional offices across the state, we provide seamless, on-the-ground support wherever your business grows.

TIQ is here to unlock Queensland's full trade and investment potential.

Start the conversation today:

Learn more here – tiq.qld.gov.au/contact





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