

# WORKFORCE ACCOMMODATION SUPPLY & PROJECTED DEMAND

## City of Karratha

Summary Update: March 2019



## SUMMARY

### BACKGROUND

Workforce accommodation (WA) houses a significant proportion of the workforce (namely the Fly-in Fly-out (FIFO) component) associated with both construction and operational phases of resources and other projects in and around the City of Karratha (the City). Often these are temporary camps, although more permanent structures have been built in recent years.

The incorporation of workforce accommodation in a community is a complex issue. Resources companies and their peak bodies (e.g. the Chamber of Minerals and Energy) have a consistent position that access to FIFO labour is an essential element of their business. Local communities would like to have as many workers as possible based locally to contribute to the community and its economy.

The City's Local Planning Strategy summarises the City's position in relation to workforce accommodation:

*'The City accepts the need for WA camps to accommodate short-term construction and maintenance workforces but whereas industry may prefer to use operational FIFO workers it is the City's strong preference for those operations workforces to be accommodated in more permanent forms of town-based accommodation that are well integrated into existing neighbourhoods.'*

A long term aim to minimise the FIFO workforce use and maximise the residential workforce is a consistent approach for policy settings across all tiers of government in most if not all communities that depend on the resources economy. However, there is recognition by the City that some level of FIFO labour will be a feature of life for the City for some while. The current indications are that this will be at a reducing scale over time.

As a port and administrative City with a relatively diverse economy (compared with many other resource industry settlements), Karratha is well placed to provide a high level of amenity to residential workers and their families. With the significant government investment in urban infrastructure over recent years, the City now has

high level health and education facilities and services, good leisure and cultural facilities and good urban amenity, making the City's aspirations for an increasing proportion of residential workers increasingly viable.

### KEY RESOURCE PLAYERS IN THE CITY OF KARRATHA

The Karratha economy is underpinned by the energy and resources industry.

There are three major resource companies operating in the City (Rio Tinto, Woodside Energy Ltd and Citic Pacific Mining). Each company is currently operating or rolling out mining and energy extraction infrastructure investments worth an estimated \$69 billion. The most significant include the Woodside operated North West Shelf Joint Venture, Woodside's Pluto project, Rio Tinto's operations at Dampier and Cape Lambert and Citic Pacific Mining operations at the Cape Preston Mine and Processing centre.

Outside of Karratha, Chevron has two main projects: Wheatstone and Gorgon - Wheatstone's onshore facilities are located 12 kilometres west of Onslow and Gorgon is located on Barrow Island. Karratha is a logistics and servicing base for Chevron projects, particularly the Gorgon project.

There are several medium scale downstream processing works and some small firms with specialised operations.

### PROSPECTIVE PROJECTS

There is a range of projects, generally in the resources, energy and agriculture sectors, that are in various stages of planning and feasibility assessment. Some are by the major companies already in the City and some are by new entrants to the local economy. All rely on the particular location and resource advantages of the City and most build on the City's now well established industrial ecosystem. They range from very large projects to relatively small ones and the timing and probability of each of them varies. Their direct impact on workforce accommodation demand and its timing is difficult to gauge precisely. Larger projects are likely to require a

substantial FIFO construction workforce, but, as new projects, in operations phase might be expected to have a significant proportion (at least 80% and probably more) of workforce as Karratha residents. Smaller projects are likely to have a much higher proportion of Karratha residents both in construction and in operations.

### THE CITY OF KARRATHA FIFO WORKFORCE

For the City of Karratha, the continuation of the Fly-in / Fly-out (FIFO) workforce takes place in the context of the overall size of the economy. The number of local jobs sharply increased to a peak of 20,453 in 2011 and then declined to 14,037 in 2017. With prospects of some increase in economic activity in the medium term this figure could rise again. The 2016 Census shows that around 3,520 workers in Karratha on census night lived outside of the area.

The number and proportions of Karratha workers who are not Karratha residents vary widely by industry, with the mining, construction and transport industries making up around two-thirds of the total. A high proportion of the almost 2,400 workers in these industry categories, perhaps up to 40% - 50% or around 1,200 of them, will be in locations classified as remote by the City (e.g. Cape Preston). That still leaves large numbers of FIFO workers in these industries located in the urban areas of the City. It is noteworthy that the other large employment industry categories (Accommodation and Food Services, Public Administration and Safety, Health Care and Social Assistance, Education and Training and Retail Trade) have low numbers of non-Karratha resident workers.

A conclusion to be drawn from this evidence is that the City has good engagement of a local workforce in all industries except the mining and to lesser degree, the construction and transport industries. The City is now at a scale that an increasing proportion of a resident workforce in these industries is viable. The benefits of investment in health and education services, recreation and cultural facilities and urban amenity are becoming manifest.

### THE FIFO WORKFORCE AND WORKFORCE ACCOMMODATION DEMAND

Detailed demand assessment has been undertaken for the Karratha urban areas. It excludes the Cape Preston area – this is specific to the Citic Pacific projects and can be separately accounted for. The base data for the demand estimates is derived

from the results of a survey of major resources companies and contractors and local contractors undertaken for this report.

#### Operations

The survey results provide detailed data on the scale of the FIFO workforce for resource company operations and local contractors for the major on-going construction project, namely the Woodside Karratha Gas Hub life extension project. It thus accounts for the majority of FIFO workers in the Mining, Construction, Transport and Warehousing and manufacturing sectors in Karratha.

#### Short term demand fluctuations

There are two causes of short-term fluctuations in labour demand:

- **Operations:** there are routine but sometimes irregular aspects of operations of the large resource and processing projects in the City that require a large increase in workforce for short time periods. The maintenance shutdown operations are examples.
- **Construction projects:** While smaller construction projects in the City can be catered for by local contractors with a mostly residential workforce, larger projects require larger workforces and more diverse specialties. The very large major projects can require workforces of several thousand over extended periods. Most of the projects now in prospect for the City in the short to medium term are not at the major project scale, but still could require a temporary workforce of up to 1,000 or more for around 12 months. Beyond 2024, there is the prospect of the Pluto Train 2 project, which would be a major project and would substantially increase workforce accommodation demand and for several years.

The implications for workforce accommodation for each of these categories can then be drawn for the various FIFO categories:

- **Operational workforce.** These are more likely than other categories to include individuals with long term FIFO arrangements (for a range of personal or family reasons) and for some to have shorter (8-hour) shift rosters. The highest proportion of them are employees or direct contractors of the resource majors and are most likely to be accommodated in their facilities in the first instance.



- **Construction workforce, major projects.** Workforce scale is very large with extended work hours and a temporary workforce. In the past this has required the building of bespoke construction camps. These are now almost entirely closed. If new major projects eventuate (for example, Pluto Train 2) this may require the expansion of existing facilities or construction of new facilities.
- **Construction workforce, general projects and sub-contractors.** These generally are engaged for a relatively shorter timeframe, with variable shift patterns, and may seek accommodation in general market workforce accommodation facilities provided by independent operators.
- **Periodic maintenance shutdown, major projects.** These are characterised by very short-term engagements of multi-skilled teams and extended shift patterns. The nature of the project task means that resource companies prefer control for the period of works with a preference for dedicated workforce accommodation facilities. However, they are also commonly accommodated in general market workforce accommodation facilities.

The demand for workforce accommodation can be derived from estimates of the FIFO workforce considering several factors:

- On the one hand, not all FIFO workers will be in Karratha at any one time - the average shift roster means that they are working in Karratha for around two-thirds of total time (i.e. around two weeks out of three). This tends to reduce the total number of rooms required.
- On the other hand, there are many inefficiencies in room supply, including long term arrangements with major companies blocking out rooms; long occupancy periods and correspondingly extended changeover periods between occupancies; and permanent or long-term individual use of rooms for individuals. This tends to increase the total number of workforce accommodation beds required.

The net effect is that the total FIFO workforce figure is a good indicator of total workforce accommodation demand.

**Table S.1: Workforce Accommodation Demand Summary – City of Karratha Urban Areas**

|                       | Operations and long-term construction | Short term fluctuations |
|-----------------------|---------------------------------------|-------------------------|
| Resource Companies    | 1,700                                 | 2,400                   |
| Local Contractors     | 213                                   | 250                     |
| Other industries      | 840                                   |                         |
| Construction projects |                                       | 1,000                   |
| <b>Totals</b>         | <b>2,753</b>                          | <b>3,650</b>            |

Rounding these figures shows base demand of 2,750 beds and short-term demand fluctuations of up to 3,650 beds, not including major projects.

## WORKFORCE ACCOMMODATION FACILITIES

Including the workforce accommodation projects planned, approved and under development there are or soon will be 4,341 registered WA beds in the City of Karratha urban areas. This is a considerable reduction from 2015, when there were 7,870 WA beds. Of these, 1,798 WA beds / rooms (41% of the total) are or will be in resource company-controlled facilities and some rooms in general market facilities currently under long term contract are likely to remain so, leaving around 2,000 bedspaces uncommitted and available to the general workforce accommodation market and for short term demand fluctuations.

## DEMAND AND SUPPLY

In addition to the supply of 4,341 WA beds in the City of Karratha urban areas (i.e. Karratha, Dampier, Wickham, Point Samson), there are a further 701 rooms of serviced tourist accommodation. This would indicate that there is sufficient supply for the base demand of 2,825 beds, but limited supply for short term demand fluctuations.

**Table S.2: City of Karratha Urban Areas, Short-Stay Accommodation 2015 & 2018**

| Workforce Accommodation Facilities (bedspaces) | 2015         | 2018         |
|--|--------------|--------------|
| Resource Company Owned / Controlled*           | 5,738        | 1,798        |
| Independent                                    | 2,132        | 2,543        |
| <b>Total Workforce Accommodation</b>           | <b>7,870</b> | <b>4,341</b> |
| <b>Serviced Tourist Accommodation</b>          |              |              |
| Hotels/Motels (rooms)                          | 457          | 350          |
| Serviced Apartments (units)                    | 155          | 126          |
| Holiday Chalets (units)                        | 219          | 225          |
| <b>Total Serviced Accommodation</b>            | <b>831</b>   | <b>701</b>   |

\* Includes redeveloped Peninsula Palms and Bay Village

At present there is only small demand for any construction projects not accounted for in the base demand, but even one short term project, for example a Woodside maintenance period or a moderate scale construction project, would be sufficient to cause temporary accommodation shortage and reliance on some of the tourist accommodation. This would most likely be felt by smaller companies and companies in industries outside of the resource and contracting sectors.

This is supported by survey results. Some companies, particularly smaller local contractors, report periods when workforce accommodation cannot be found. In these periods more use is likely to be made of tourist accommodation. These are most likely to be in facilities that have some suitability for longer stays, such as the range of serviced apartments.

## FUTURE SUPPLY

### Workforce Accommodation Facilities

Other new workforce accommodation projects may be sought over time, for many reasons:

- To replace ageing facilities – some of the existing facilities have been in place for some time and many were not built as permanent structures and the quality of accommodation available is variable across the City;
- To replace facilities that have time-limited approvals – many workforce accommodation facilities have development approval for a defined time and will be near the end of their approval period;
- Control and consistency - the major resource companies have consistently expressed their preference for a high degree of control of the workforce accommodation for their staff, to allow greater consistency across accommodation types and better manage their overall work environment. They see it as a means of better human resources management.

### Expansion Capacity

There are proposed and possible expansions of several independent facilities. These are not currently in train, but could easily be activated with the right demand conditions. In total 2,008 additional rooms in existing facilities are in various stages of proposal and planning.

Tourist accommodation currently forms a backup reserve accommodation in periods of high workforce accommodation demand. The danger is that if it persists it will slow the growth of the tourism industry in the City of Karratha.

### The Future

The WA supply of 4,341 beds in the City of Karratha urban areas gives a surplus of around 1,500 beds over base demand. This should be sufficient to barely cater for most normal demand fluctuations, including a Woodside maintenance shutdown, provided it does not coincide with other large demand variations, for example a Rio Tinto maintenance period.

If a medium-large sized new construction project comes to fruition (e.g. Perdaman Urea or Wesfarmers / Coogee Chemicals methanol plants), this is likely to increase demand for extended periods (12 months or more). This increases the chances of demand spikes coinciding and a consequent increase in scale in the short-term peak and will likely require additional short-term accommodation to be built. While this

might be a new facility, there is considerable capacity for additional accommodation in existing facilities and, if built, these would cover most foreseeable demand for the medium term.

Beyond 2024, if the Pluto Train 2 project eventuates this will bring a workforce accommodation demand of around 2,500 beds for several years. Depending on other activity at the time, some of this might be accommodated in existing facilities, particularly if smaller potential expansion projects have been completed by then, but it most likely would require additional facilities to be built. At minimum these would be short term construction camp facilities.

## WORKFORCE ACCOMMODATION FACILITIES AND SERVICED TOURIST ACCOMMODATION

While workforce accommodation facilities and serviced tourist accommodation are each designed as short-term accommodation, there are many differences between these two categories, including:

**Design considerations** – Differences in location, micro- and macro-design of facilities are responsible for the suitability of one type of accommodation over another by FIFO workers and tourists alike. While there may be competition for room-nights at serviced tourist establishments during periods of peak demand when workforce accommodation facilities have reached capacity, this is not ideal and should be avoided as the accommodation requirements for FIFO workers versus tourists are very different.

**Specific Workforce Requirements** - Bespoke workforce accommodation facilities have food and beverage provision that accounts for shift times, or the option for self-service in kitchenette facilities, an environment conducive to good sleeping and rest patterns, and opportunities for social interaction and exercise regimes. Such environments are thought to maximise both work effectiveness and efficiencies while at the same time ensuring that health and safety standards meet company policy. As a result, these types of facilities are favoured by large resources and construction companies rather than tourists.

## Serviced Tourist Accommodation

We consider there to be sufficient capacity from the existing and planned potential stock of serviced tourist accommodation to cater for projected increases in business and tourist visitor demands through the forecast horizon to 2025. In addition, any refurbishment plans at existing establishments should also help revitalise the quality of available accommodation and therefore enhance the tourist product experience.

Of concern will be the ability for current serviced tourist accommodation stock to meet the needs of tourists, with quality and historic price issues being potential obstacles to growing the tourism industry. The historic focus for accommodation providers and transport operators has been on meeting resource sector needs. As these demands stabilise, accommodation providers and the City of Karratha will need to re-engage with the different tourist markets (e.g. grey nomads, experience seekers etc.) through a well-executed tourism and marketing promotion strategy.

## IMPLICATIONS FOR WORKFORCE ACCOMMODATION POLICY

Four main workforce categories of workforce accommodation demand are identified, namely:

- Construction workforce, major projects
- Construction workforce, general projects and sub-contractors.
- Periodic maintenance shutdown, major projects.
- Operational workforce.

Each has different requirements for accommodation arising from a combination of the nature of their work, their work hours and shift roster and the specific requirements of the project on which they are working. Table S.1 provides a summary of the different classes of workforce accommodation required to meet these different classes of demand, the implications for future planning and strategies in considering workforce accommodation proposals.

Of these, the operational workforce category is best suited to a location and building type that allows for a level of integration with the general community. It is this group that will most easily transition to a residential workforce in more permanent forms of town-based accommodation.

This is consistent with the City's objectives, namely:

*The Council's preference is for operational workers to be town-based and the City will work with industry and the State Government to pursue options for increasing town-based workers;*

*The Council's aspiration is for workforce accommodation needs to be met as much as possible through more permanent forms of town-based accommodation;<sup>1</sup>.*

While in the past large construction camps were often sponsored by resource companies, of late a high proportion of workforce accommodation is provided by the market. However, resource companies retain their objective for increased control of accommodation for their FIFO employees and contractors. Their actions, and those of the independent market operators, will respond to changing demand and expectations over time and, in general, will seek to provide accommodation that meets their view of the accommodation preferences of whichever market / demand segment is being targeted. The regulatory system must account for this and enable the market players to respond to changing demand while simultaneously meeting the City's objectives and policies. In this time of transition towards a more stable local economy in the City of Karratha, compared with the frantic activity of the major project construction period, there is opportunity to refine workforce accommodation policy and pursue the City's objective of increasing the proportion of locally based workers.

For the immediate future, issues of major project construction camps are well understood and, as is likely, there will be fewer workforce accommodation camps required in the future (perhaps one for the Pluto 2 LNG Train extension), and then for only relatively short time periods. Similarly, short term accommodation for the general construction workforce for small projects is relatively small and well catered for by the market. Accommodation for the maintenance shutdown workforce, with its short term demand spikes, requires significant involvement and stewardship by the resource companies. For the City, a main target for the future is likely to be to assist in the transition of the long term operational workforce of major companies to a higher residential component. It is assisted in this by the major companies

themselves: each of the major resources companies based in the City urban areas already has a high proportion of local workers in its workforce and active programs to increase that proportion.

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<sup>1</sup> City of Karratha. Local Planning Policy DP10, Transient Workforce Accommodation

**Table S.1: Summary of Accommodation Requirements and Planning Implications for Future Development of Workforce Accommodation**

| Workforce Categories                                     | Accommodation Requirements  | Implications for Planning   | Strategies for Consideration   |
|--|---|---|--|
| <b>Construction workforce – major projects</b>           | <ul style="list-style-type: none"> <li>Accommodation required to support the life of a construction project only.</li> <li>Most suitable for the construction workforce for major projects.</li> </ul>  | <ul style="list-style-type: none"> <li>Appropriate for the outer lying zones, including: Urban Development, Strategic Industry and Rural zone, on the basis that construction camps are temporary and need to be in proximity to resource and major construction projects. To allow on-going workforce accommodation in the Strategic Industry zone once the industry is operational would compromise the industry's operations. Any workforce accommodation in the Strategic Industry zone must not compromise industrial activity in that zone</li> <li>The standard of development for construction camps would be lower than that expected of temporary or permanent workforce accommodation.</li> </ul>  | <p><b>Short Term Demand Fluctuations:</b></p> <ul style="list-style-type: none"> <li>Encourage engagement of local labour and contractors for components of this work;</li> <li>Recognise the short-term and intermittent nature of this task and allow reduced expectations of community integration in workforce accommodation location and construction. Some of the same provisions that apply to time-limited construction camps might apply. For example, bespoke maintenance shutdown camps that have low levels of integration with the general community but are only used for short periods of high demand (i.e. specifically for maintenance shutdowns) might be appropriate.</li> <li>Where any new facilities are operated by the main resource companies and used primarily for the maintenance shutdown period, they might be required to be solely for employees and direct contractors of that company and not available to the general WA market.</li> </ul> |
| <b>Short term construction and maintenance workforce</b> | <ul style="list-style-type: none"> <li>Built for intermittent but on-going use (e.g. for maintenance shut-down labour) or for some of the construction workforce for general projects.</li> </ul>   | <ul style="list-style-type: none"> <li>Appropriate for the Urban Development, Tourism and Mixed Business zones and considered consistent with the objective of these zones.</li> <li>These zones are typically located on the perimeter of town sites which is considered an appropriate location for this style of accommodation.</li> <li>Given the temporary nature of the infrastructure, the expectations for the standard of development would not be as high as the permanent workforce accommodation.</li> <li>Temporary workforce accommodation is considered an appropriate use for the Tourism zone on the basis that the use will be subject to a time limited approval, and therefore Tourism zoned land would still be available for future tourism development.</li> </ul> | <p><b>Operational workforce:</b></p> <ul style="list-style-type: none"> <li>Encourage a reduction in the FIFO component and increased use of locally based employees, with best available operational workers being afforded opportunities for residential based employment and for the City to encourage a trend of reduced FIFO operational workforces.</li> <li>Any new workforce accommodation for the operational workforce should be fully integrated into the community, with accommodation that is consistent in form with the local built form.</li> <li>Accommodation might include individual houses or units, or apartment style accommodation in the town centre and other appropriate locations. Encouragement for use of town-based commercial, recreational and community facilities.</li> </ul>   |
| <b>Long term operational workforce</b>                   | <ul style="list-style-type: none"> <li>Built to an appropriate standard for its urban location and appropriately integrated into its urban context.</li> <li>It would be most suitable for the operational FIFO workforce and for much of the regular small projects and sub-contracts construction FIFO labour.</li> </ul> | <ul style="list-style-type: none"> <li>Appropriate for Residential, Town Centre, Commercial and City Centre zones and is consistent with the objective of these zones.</li> <li>A high standard of development would be expected for this use, therefore allowing it to be appropriately integrated with other uses in these zones.</li> <li>Permanent workforce accommodation will therefore be required to be built to a higher standard than temporary workforce accommodation or construction camps.</li> <li>To promote tourism development, permanent workforce accommodation should not be permitted within the Tourism zone, to ensure the land is not permanently sterilised for tourism development.</li> </ul>   |  |

Source: AEC, TBB



## KARRATHA AS A SERVICE AND RESIDENTIAL HUB

The majority (around 88%) of operational FIFO workers in the City of Karratha urban areas are employees or contractors of the major energy and resources companies. Each of these has active programs to increase residential employment. However, despite this, changes in existing workforce residential arrangements is slow. It is time-consuming to change long-established workforce habits.

Other smaller projects and more recently established ones have an almost entirely local workforce. It is likely that the City of Karratha is now at a scale and level of economic and social sophistication that new projects will routinely seek a local-resident workforce.

Amongst locally-based contractors around 90% of employees are Karratha residents. Those who do have a proportion of FIFO workers perceive some difficulty in attracting sufficiently skilled or qualified people locally. This might reflect the actual situation, or it might indicate that local labour demand and supply is not always well matched or opportunities communicated.

The local general contractors surveyed employ around 630 people. (This does not include companies directly engaged in major resource company operations, for example stevedoring, marine services and freight and logistics companies.) Many of these general local contractors have work from projects in the Pilbara that are remote from Karratha, for example mine development projects. Most expect this to continue and expand. This indicates that this group of companies is forming the nucleus of a local services hub for Pilbara projects generally and expansion from this base is possible.

However, there are factors subduing this. There was evidence in the survey that any local advantage the local companies may have reduces quickly with greater distance from Karratha. For large and more remote projects, servicing from a Perth base with Perth-based contractors continues to be the norm. Other Pilbara locations continue to establish and expand.

It is possible that new mining projects that are close enough for Drive-in/Drive-out servicing from the City of Karratha may use it as a residential base and some recent analysis has confirmed that this is viable.

## STRATEGIC PLANNING CONSIDERATIONS

Diversification of the economy is an important objective for the City. Tourism is identified as one of the industries that can viably and quickly contribute to this diversification. The City's Economic Development Strategy identifies a lack of tourism accommodation and a poorly developed tourism sector, which has been displaced over the years by the short-term workforce accommodation demands.

Appropriate planning is essential to ensure that:

- Appropriate and affordable housing supply is available to the existing and future resident populations to attract and support permanent residents and develop sustainable local communities.
- Where FIFO workforces are necessary, dedicated workforce accommodation is available in a timely manner to ensure that pressures are not placed on short stay accommodation and residential housing.
- The specific operational requirements of the main sources of workforce accommodation demand, namely Woodside Energy, Rio Tinto Iron Ore and CITIC Pacific, are recognized.
- Sufficient short-term accommodation is available for tourists, business/corporate and other visitors to ensure that town visitation and the broader tourism sector is not impeded.
- Where appropriate, long-term workforce accommodation (e.g. for operational FIFO workers) is integrated into the urban centre to maximise contributions to the local economy and community.

The City accepts that accommodation of FIFO labour and the consequent requirement for transient worker accommodation will be a long-term element of the City's accommodation inventory. However, in general, future demand is expected to be at a lower rate than the past, with stable long-term demand patterns, in contrast to previous periods of extreme demand and high variability. This gives opportunity for workforce accommodation to move towards forms that are consistent with the City's vision.

Nevertheless, there is a level of uncertainty about the scale and timing of some key projects that will impact on worker accommodation demand, particularly in the construction phase. There are some major projects that have been put on hold or now might become possible for which there is currently no time frame. The statutory framework needs to allow for associated accommodation requirements to be met, indicating a level of flexibility in approach is required. In doing this, it is important for the planning framework to account for the distinction between the operational workforce and short term workforces with their associated accommodation needs and options.

## Coordination

The evidence is that the City is now entering a period of stable operations, with little change in long term demand for workforce accommodation. In this context, the maintenance shutdown events will continue to be disruptive events, placing very high demand on available workforce accommodation. This will particularly be so if company-specific accommodation is not sufficient to fully accommodate short term peak demand. It would be further exacerbated if the shut-down periods coincided.

There is therefore a role for an agency – the City of Karratha is the obvious one – to facilitate information-sharing between the organisations with large maintenance shutdown schedules with a view to spreading the demand across the year.

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