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Western Downs Major Projects 2010

An Overview

What are the key drivers of growth?

Thermal Coal and Coal Seam Gas



Thermal Coal...

- The Surat Basin contains over 6.3 billion tonnes of thermal coal
- It is used for both export sales and local power generation.
- Upgrades and developments of road, rail and port infrastructure will be necessary to enable increased export sales.
- By converting coal to syngas, other products such as diesel, fertiliser and plastics can also be produced.



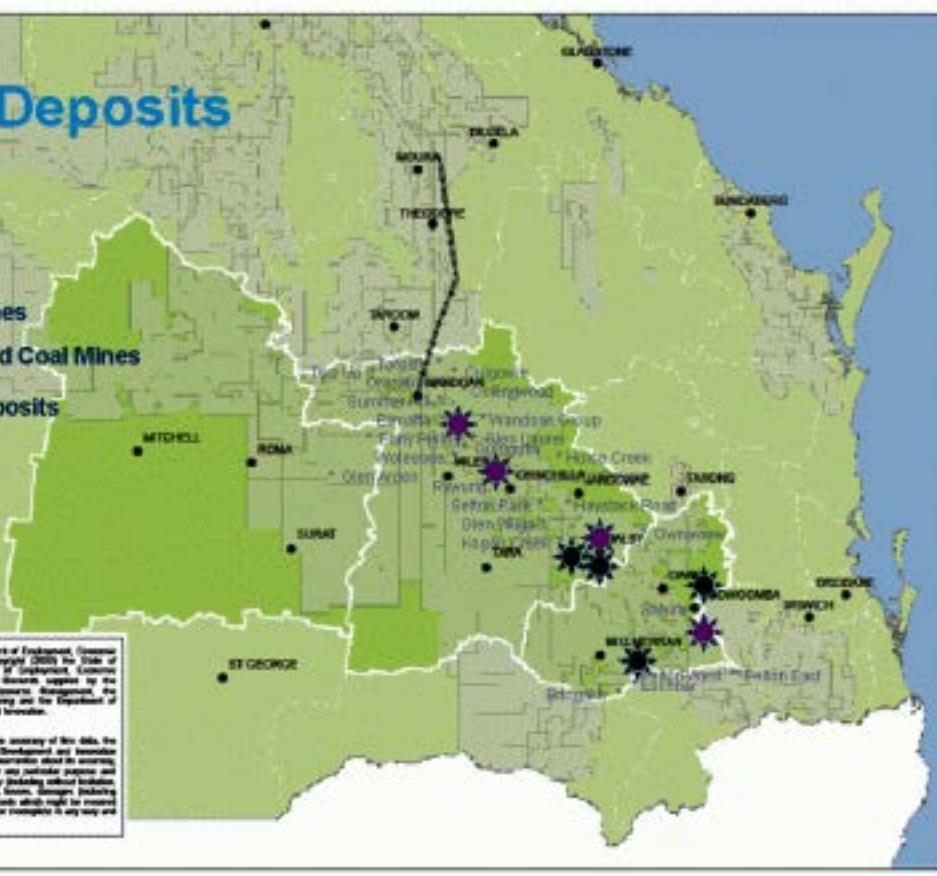
Coal Deposits

- ☀ Coal Mines
- ✳ Proposed Coal Mines
- ✳ Coal Deposits

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Coal Seam Gas...

- Coal seam gas is a form of natural gas (methane) that is extracted from underground coal deposits.
- Demand for Coal Seam Gas is driven by:
 - power generation
 - replacement of natural gas from the Cooper-Eromanga basin
 - demand from southern markets (NSW & SA)
 - and global demand.
- The supply of gas to global markets is subject to the development of LNG facilities at Gladstone.





Power stations...




Coal

- **Millmerran**
Intergen 880 MW
- **Tarong**
Tarong Energy 1400 MW
- **Tarong North**
Tarong Energy 450 MW
- **Kogan Creek**
CS Energy 750 MW

Gas

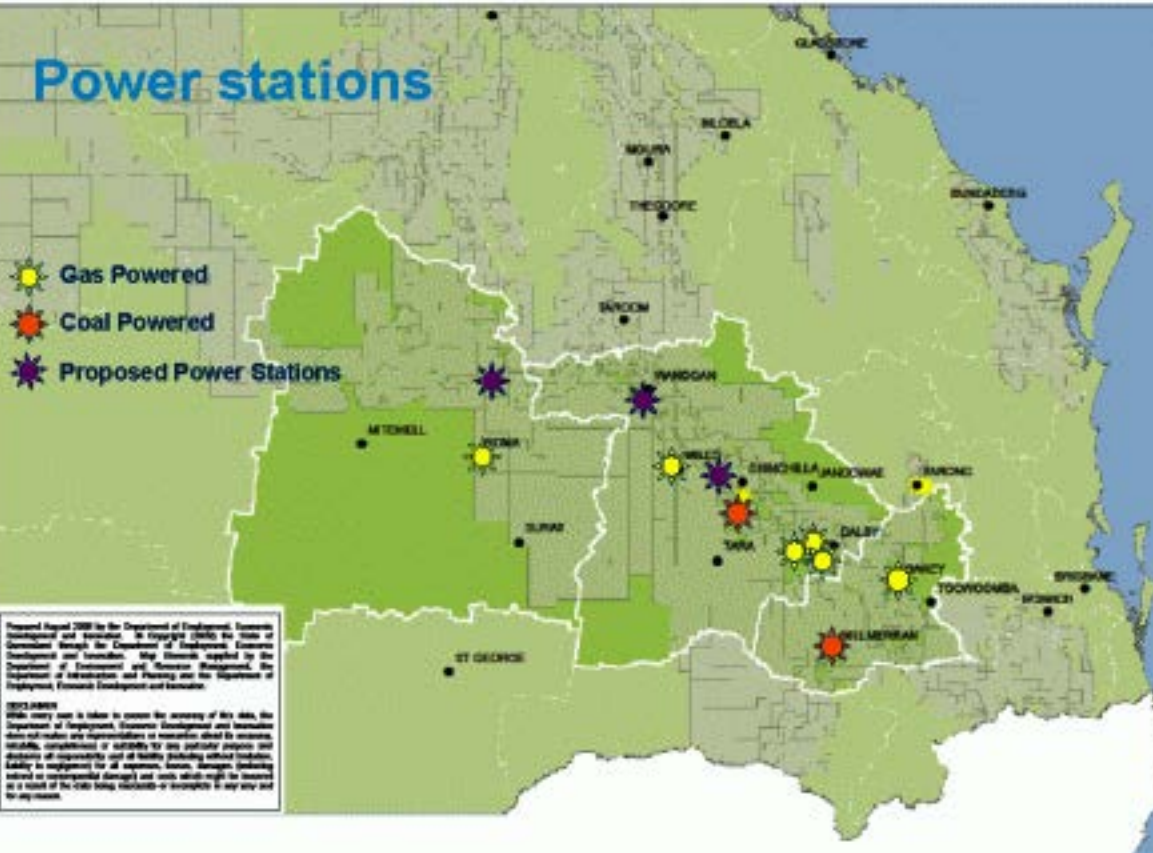
- **Braemar**
NewGen Power 450 MW
- **Braemar**
Origin Energy 630 MW
- **Spring Gully**
Origin 1000 MW
- **Oakey**
Oakey Power Holdings 300 MW
- **Roma**
Origin 70 MW
- **Condamine**
Qld Gas 140 MW

Power stations


-  Gas Powered
-  Coal Powered
-  Proposed Power Stations

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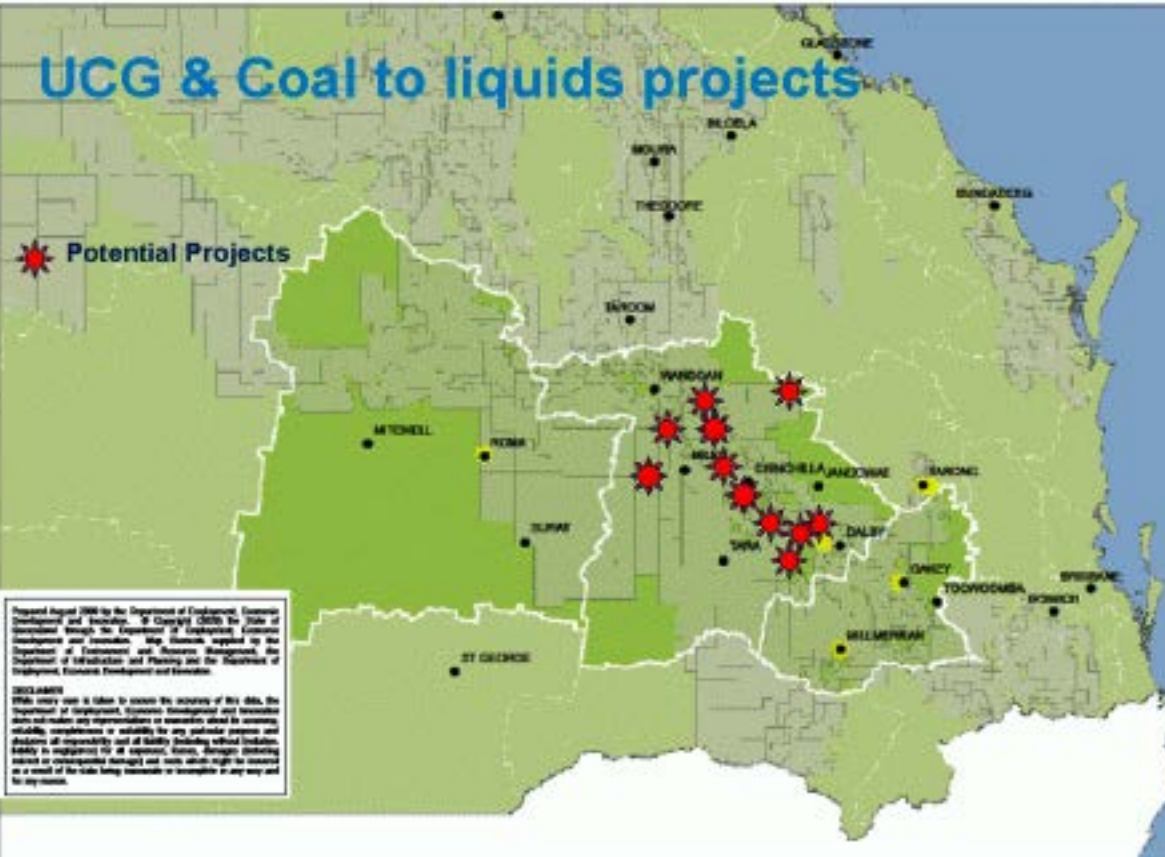


UCG & Coal to liquids projects

 Potential Projects

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Other significant drivers include

- **LNG plants:** Curtis Island, Gladstone
- **Port infrastructure:** Wiggins Island (north of Gladstone).
- **Water:** Bi product of CSM gas extraction- 166,000 ML pa.
- **Rail:** Southern inland missing link and other rail line upgrades.
- **Roads:** Upgrades are needed for efficient transportation.

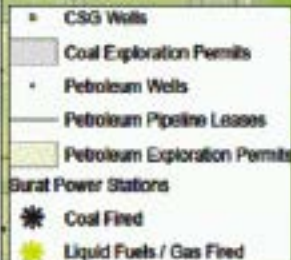




Major companies operating in the Surat Basin.

- **Power stations:**
CS Energy, Origin, QGC and Newgen Power.
- **Coal:**
Xstrata, Anglo, New Hope, Peabody, Cockatoo, Tarong Energy.
- **Coal Seam Gas:**
Qld Gas/British Gas, Origin/Conoco Phillips, Santos/Petronas, Arrow/Shell
- **Coal Gasification:**
Linc Energy, Metex Resources and Cougar Energy
- **Missing link Rail:**
Qld Rail, Xstrata, Anglo and 2 private companies.
- **Drilling services:**
Easternwell, Lucas Mitchell, Atlas Drilling

Development in the Surat Basin



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Some of the key business opportunities include...

- Exploration & drilling services
- Earth moving contractors
- Pipeline construction
- Welding & fabrication services
- Hydraulics & auxiliary services
- Electrical services
- Transport & logistics
- Equipment repair & maintenance
- Sandblasting, painting & galvanising
- Hospitality, cleaning & catering
- Engineering & surveying services
- Water treatment
- Scientific analysis services
- Project management services
- Security & safety system providers
- Accounting & administration
- Training & education
- Residential & commercial construction
- Health & other social services



The Challenges...

- Development of coordinated infrastructure (roads, rail, water and gas)
- Managing social services & community infrastructure
- Up-skilling local industry to service and supply energy development.
- Attraction of new business and industries
- Attracting skilled and non skilled labour



Key messages to take home...

Major international companies are currently investing
\$140 Billion in our region