

Queensland Project Perspective

ICN Queensland
August 2011



Supported By  Queensland Government

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Outline

- ICN Queensland – who we are, how we support projects and local industry
- Overview of Queensland project scene
- Overview of Major Queensland LNG and Coal Projects
- Supply Chains – advice to Suppliers
- Connecting through ICN via ICN Gateway

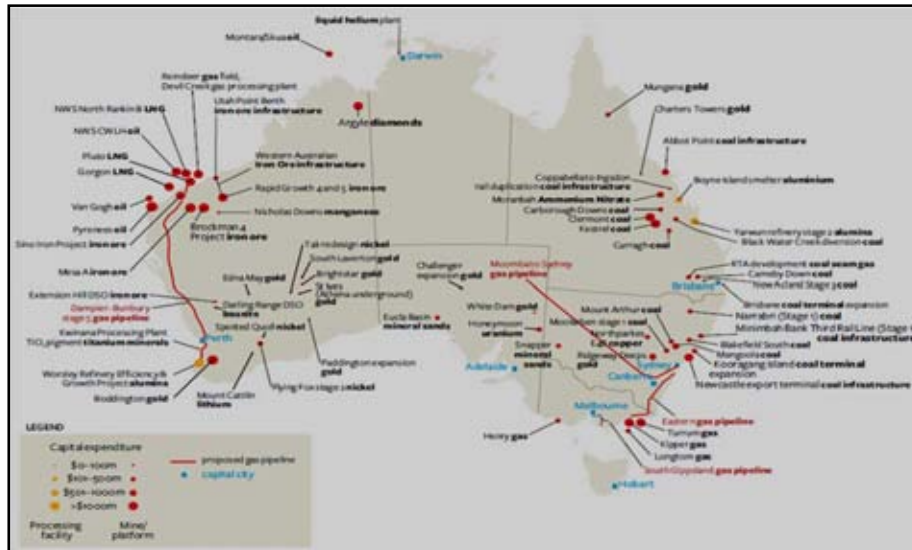
ICN Queensland



- Member of the National network
- Promotes capability & capacity of local industry
- Matching local manufacturers with the needs of major projects
- Assist projects meet Queensland Government Local Industry Policy (LIP) obligations.

Australian Projects at a Glance

- Australian Major Construction Projects 2010-2015;
 - Capital Value: \$327 Billion
 - Approved Projects: \$150 Billion
 - Average Capital Value: \$1 Billion



Current Australian Major Projects

Figure: Minerals and Energy, Major Development Projects in Australia as at March 2010 (Source: ABARE 2010)



Queensland Construction Activity

- Summary of Queensland Situation

- Total Projects: >111
- Capital Value: \$134 Billion
- 30 Major Projects in Mackay Fitzroy Region
- Major centre for LNG, Coal and Alumina
- 17 Projects planned to be Constructed by Bechtel



Some Current Projects ICN is supporting



Queensland Curtis LNG

Gold Coast Rapid Transit

Gold Coast Rapid Transit System



GLNG



Australia Pacific LNG



Gold Coast University Hospital



Alpha Coal Project



Airport Link Project



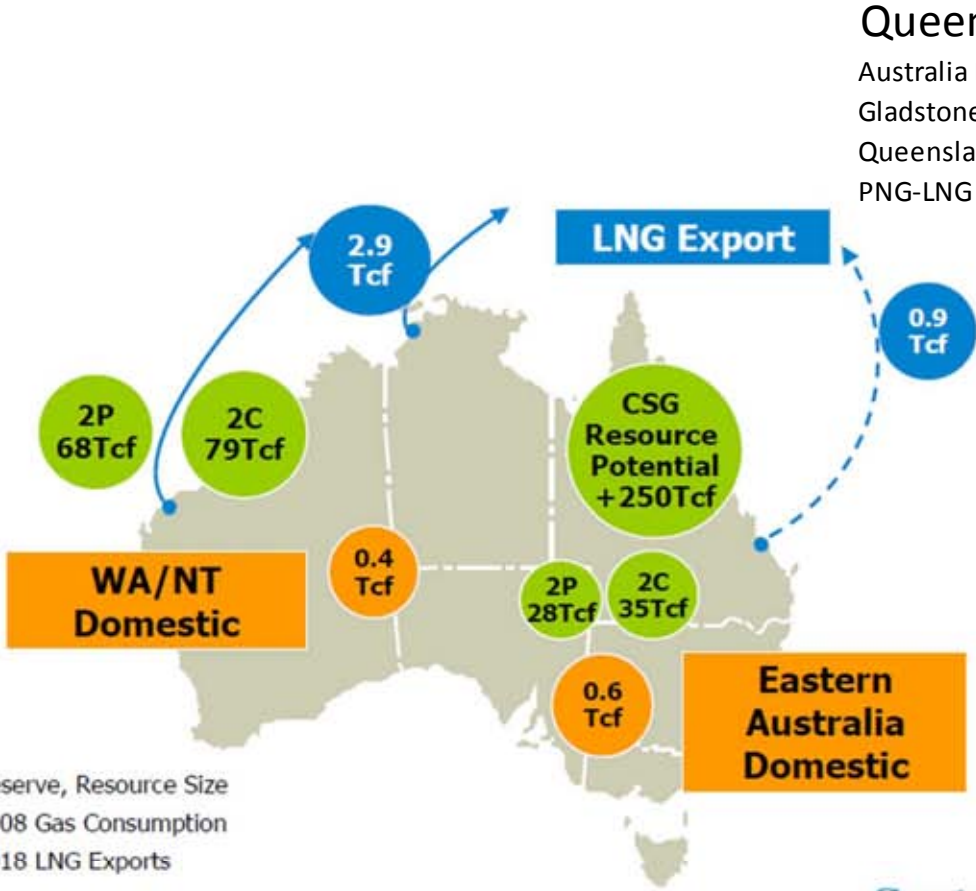
Queensland Children's Hospital

And many more....



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LNG Industry



Queensland

- Australia Pacific LNG
- Gladstone LNG
- Queensland Curtis LNG
- PNG-LNG

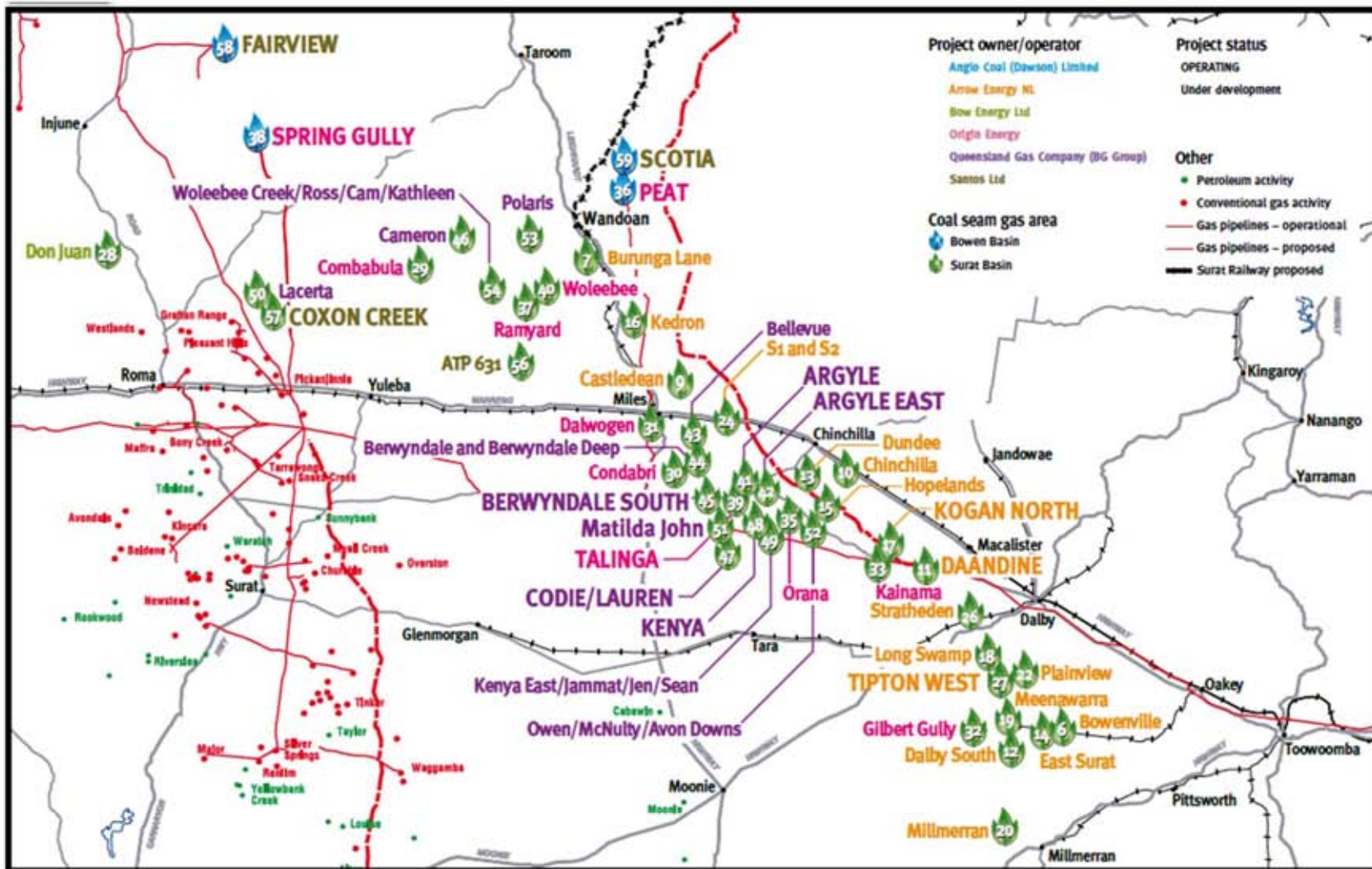
- 1st and 2nd Tier suppliers
- 1st and 2nd Tier suppliers
- 1st and 2nd Tier suppliers
- 2nd Tier suppliers

12. Sources: Wood Mackenzie, Energy Quest, CSIRO



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Project Values



Queensland Curtis LNG

\$15 Billion



GLNG

\$16 Billion



Australia Pacific LNG

\$35 Billion



Shell LNG

\$10 Billion*



Gladstone LNG

\$0.5 Billion

Total

\$76.5 Billion

*Estimated



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Current Status

					
FEED Stage	✓	✓	✓	Tendered	✓
EIS Preparation				✓	
EIS Completion	✓	✓	✓		✓
State Approval of EIS	✓	✓	✓		✓
Federal Approval of EIS	✓	✓	✓		✓
FID	✓	✓	Pending	Mid 2012	?
Contracts being placed	✓	✓	✓		
First Production Due	2014	2014	2014	2015	?

Challenges for Suppliers to the Oil & Gas Sector

- How to declare interest in the projects
- What real opportunities exist for their capability
- Transitioning from other industries to Oil & Gas
- Making it through multiple project pre-qualifications
- Local capability versus project requirements
eg. Pre Assembled Modules
- Engaging with the right level in the supply chain
- Collaborating for success
- Breaking into Global Supply Chains



Queensland Coal Opportunities

➤ BMA Coal Expansion	\$12.0 B
➤ Hancock	\$ 7.0 B
➤ Waratah	\$ 7.1 B
➤ Multi-cargo Facility	\$ 3.6 B
➤ X80 – X110	\$ 3.4 B
➤ Wiggins Island	\$ 2.5 B
➤ Rail lines	+\$ 2.0 B



➤ Coal Projects - \$37.6 B

What the Projects want to see

- SAFETY – reporting, training & history
- Environment
- OH&S - AS4801
- Quality
- Financial Stability
- People - qualifications
- Community Involvement



ICN Advice for Suppliers

- Know your Tier 'Fit' in the supply Chain
- Prepare a Capability Statement
- Register with ICN
- Register an Expression of Interest for Projects on ICN Gateway
- Improve your competitiveness - consider available support programs

Capability Statement

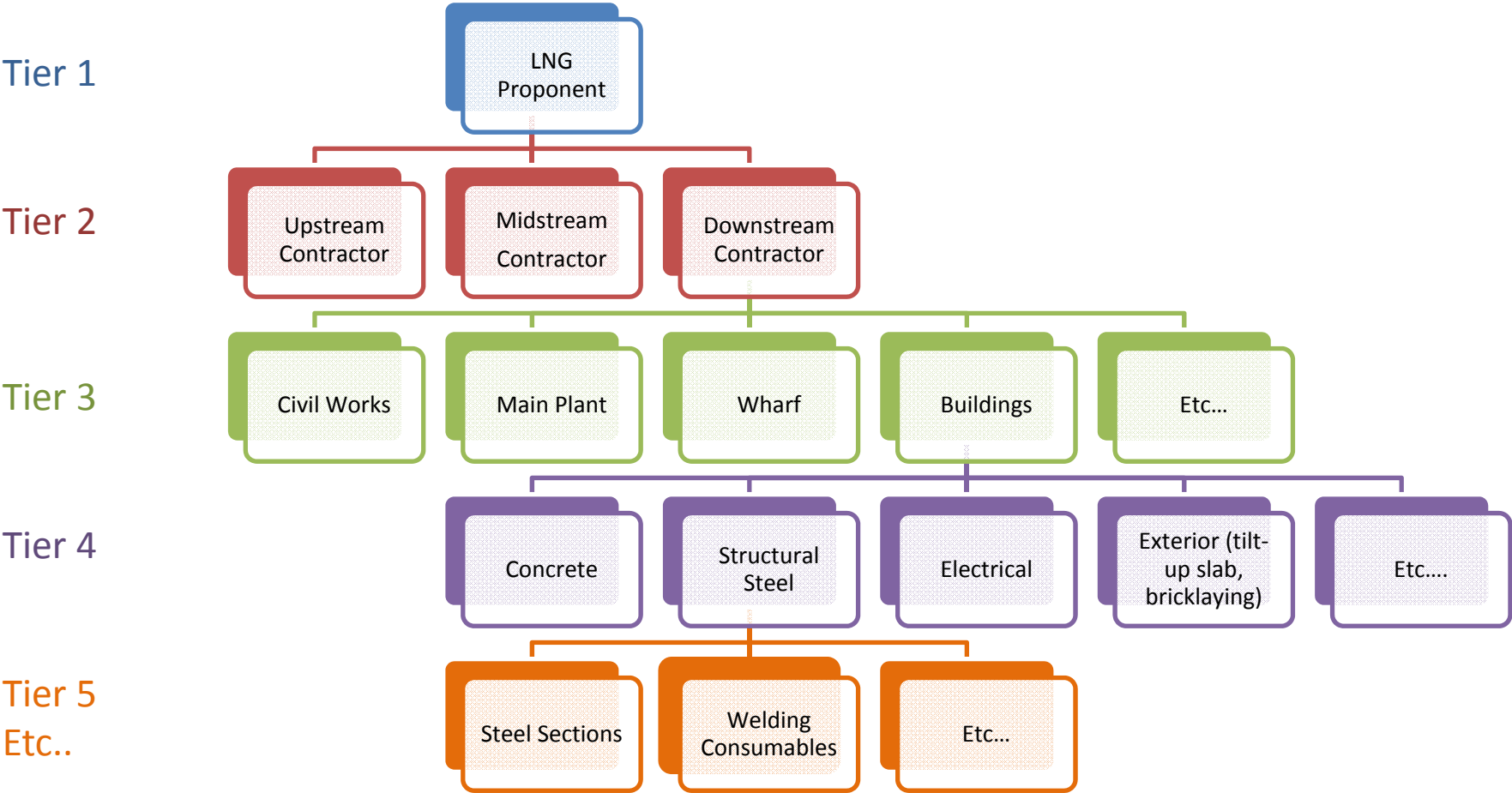
- Company Name, ABN, postal and email address of primary contact, phone numbers
- Scope of Activities (What does your company provide?)
- Special Facilities & Equipment
- Specific Products and Services
- Any accreditations e.g. OHS, Environmental, QA,
- Track Record - major clients/ work on major projects
- Website also preferable

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Project Tiers – LNG Example



Connecting with ICN

Supplier Opportunities

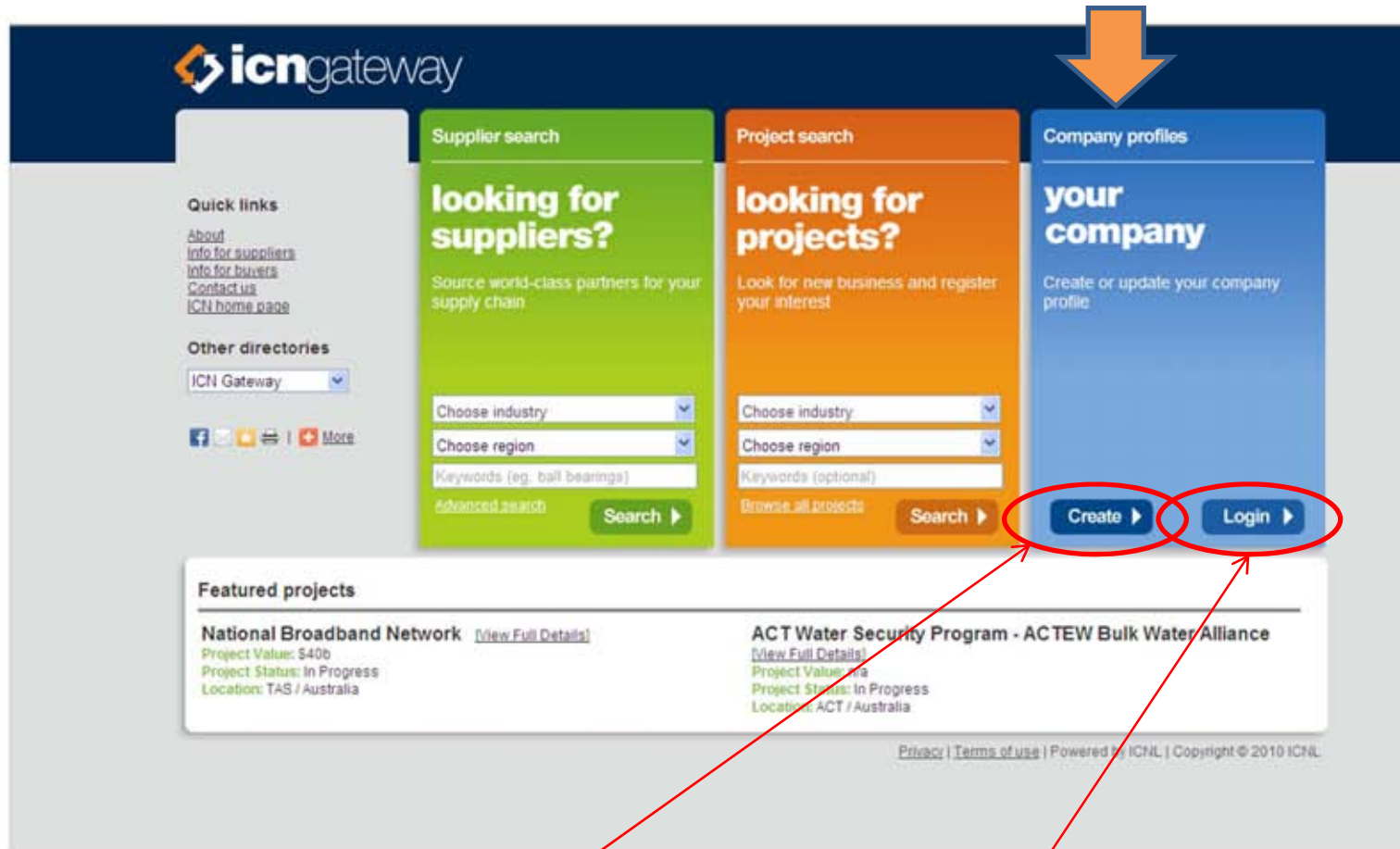
The screenshot shows the ICN website homepage. The top navigation bar includes links for Home, About ICN, Publications, Media, Useful links, and Contact. The main content area features a video player with the text "there's an AUSSIE who can help" and "Industry Capability Network". Below the video are three call-to-action boxes: "Info for buyers", "Info for suppliers", and "ICN Gateway". The "ICN Gateway" box contains the text "Register your company, find suppliers or look for new business." and a "Click here" button, which is circled in red. A red arrow points from the text "Supplier Opportunities" to this button. The left sidebar contains news articles under the heading "Industry news".

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Maintain Your Company Information



Create New Listing or 'First Time'

Existing User and Updates

www.gateway.icn.org.au



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Creating an ICN Listing

The screenshot shows the 'Create Company Profile' form on the ICN Gateway website. The form includes a search bar, navigation tabs for 'Supplier search', 'Project search', and 'Company profiles', and a sidebar with 'Quick links' and social media icons. The main content area contains instructions and a form with the following fields:

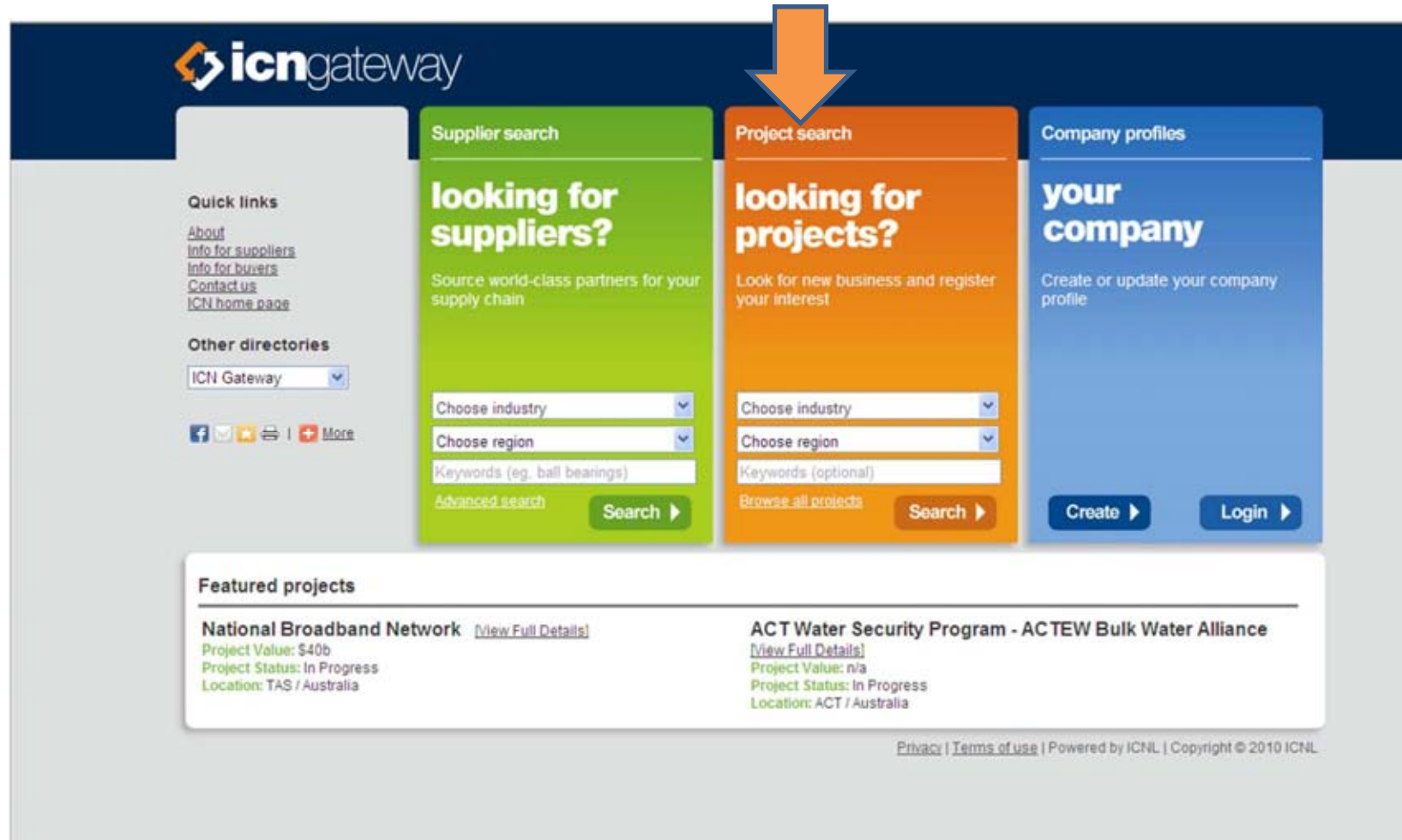
- Your Email:** A text input field circled in red, with a red arrow pointing to it from the label 'Email Address'.
- Country:** A dropdown menu set to 'AUSTRALIA'.
- ABN:** A text input field circled in red, with a red arrow pointing to it from the label 'ABN Number'. A 'lookup your ABN' link is visible next to the field.
- Image:** A CAPTCHA image showing the number '69d42' and a text input field labeled 'Enter text from image'.
- Buttons:** 'Continue >>' and 'Cancel' buttons.

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Search & Register for Projects



The screenshot displays the 'icn gateway' website interface. At the top left is the logo. The main navigation area is divided into three columns: 'Supplier search' (green), 'Project search' (orange), and 'Company profiles' (blue). An orange arrow points to the 'Project search' column. The 'Project search' column contains the heading 'looking for projects?' and the text 'Look for new business and register your interest'. It includes a search form with dropdowns for 'Choose industry' and 'Choose region', a text field for 'Keywords (optional)', and a 'Search' button. Below the search form is a link for 'Browse all projects'. The 'Company profiles' column has the heading 'your company' and the text 'Create or update your company profile', with 'Create' and 'Login' buttons. A 'Quick links' section on the left lists 'About', 'Info for suppliers', 'Info for buyers', 'Contact us', and 'ICN home page'. Below this is an 'Other directories' section with a dropdown menu set to 'ICN Gateway' and social media icons. At the bottom, a 'Featured projects' section lists two projects: 'National Broadband Network' and 'ACT Water Security Program - ACTEW Bulk Water Alliance', each with a 'View Full Details' link and project details like value, status, and location. The footer contains 'Privacy | Terms of use | Powered by ICNL | Copyright © 2010 ICNL'.

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ICN Gateway Search Options

The screenshot displays the ICN Gateway website interface. At the top left is the logo 'icngateway'. Below it, there are three main search panels: 'Supplier search' (green), 'Project search' (orange), and 'Company profiles' (blue). The 'Supplier search' panel includes a dropdown for 'Choose industry', a dropdown for 'Choose region', a text input for 'Keywords (eg. ball bearings)', and a 'Search' button. The 'Project search' panel includes a dropdown for 'Choose industry' with a list of industries: All industries, Automotive, Clean Tech, Construction & Engineering, Defence, Health, Indigenous, IT & Communications, Land & Agriculture, Manufacturing, Mining, Oil, Gas & Energy (highlighted), Rail, Steel, Transport, and Water. The 'Company profiles' panel has 'Create' and 'Login' buttons. On the left side, there are 'Quick links' (About, Info for suppliers, Info for buyers, Contact us, ICN home page) and 'Other directories' (ICN Gateway dropdown). At the bottom left, there is a 'Featured projects' section with details for the 'National Broadband Network' project. The footer contains the text 'of use | Powered by ICNL | Copyright © 2010 ICNL'.

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Oil/Gas/Energy directory via ICN Gateway

The screenshot displays the ICN Gateway website interface. At the top, the 'icngateway' logo is visible. Below it, there are three main navigation buttons: 'Supplier search' (green), 'Project search' (orange), and 'Company profiles' (blue). On the left side, there is a sidebar with search filters: 'Oil, Gas & Energy' (dropdown), 'Choose region' (dropdown), and a 'keywords' input field with a 'GO' button. Below the filters are 'Quick links' (Home, About, Info for suppliers, Info for buyers, Contact us, ICN home page) and 'Other directories' (ICN Gateway dropdown). Social media icons for Facebook, Twitter, LinkedIn, and YouTube are also present.

The main content area shows 'Search results' for 'oil/gas/energy directory'. The results are displayed in a list format with the following details:

- Australia Pacific LNG** [View Full Details]
Project Owner: Origin Australia Pty Limited
Project Value: n/a
Project Status: In Progress
Location: QLD, Australia
Applications Open: 29 Apr 2010
Applications Close: 29 Apr 2014
Summary: Australia Pacific LNG has Australia's largest CSG reserves position and is well placed to enable the creation of a world-class, long-term industry in Queensland.
- China Oil and Gas Program (Guangdong Province Services Program)** [View Full Details]
Project Owner: Industry Capability Network
Project Value: n/a
Project Status: In Progress
Location: VIC, Australia
Applications Open: 1 Jan 2010
Applications Close: 30 Jun 2011
Summary: The aim of the Guangdong Province Services (GPS) program is to facilitate AUD\$25 million in professional services export orders to Australian companies, resulting from three significant projects in the southern province of Guangdong.
- GLNG Downstream (LNG Facility)** [View Full Details]
Project Owner: Santos Ltd (QLD)
Project Value: n/a
Project Status: In Progress
Location: QLD, Australia
Applications Open: 4 Aug 2009
Applications Close: 4 Aug 2014
Summary: Development of LNG Facility.
- GLNG Midstream (Pipeline)** [View Full Details]
Project Owner: Santos Ltd (QLD)
Project Value: n/a
Project Status: In Progress
Location: QLD, Australia
Applications Open: 4 Aug 2009
Applications Close: 4 Aug 2014

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ICN Gateway

icngateway

Search | **Supplier search** | Project search | Company profiles

Expressions of Interest: **Gladstone LNG**

Project Owner: Santos Ltd (GLD)
 Project Status: In Progress
 Location: QLD, Australia

Associated Projects:
 - Gladstone LNG Feed Development
 - Gladstone LNG Feed
 - Gladstone LNG Feed

Santos and PETROBRAS are encouraging Australian companies to register their interest in providing services for the Gladstone Unleashed Fuel Gas project (GLUG). This Project Gateway, managed in collaboration with ICN-QLD provides the means for companies to register their interest in the project.

Companies that register through this Project Gateway and complete the ICN supplier resume will then be included in all future searches that ICN undertakes for procurement and contracting opportunities through the life of the project.

The GLNG project has three project components (sub-projects): Unleashed - CO2 Feed Development, Midstream - Pipeline and Onshore - LNG Facility.

Project Details

The GLNG project is a significant step in Australia's efforts to develop cleaner energy for the future. Australia's coal gas reserves can play an important role to help Australia and through LNG exports, the world move to a substantially less carbon-intensive future.

The GLNG project has three main components:

icngateway

Search | **Supplier search** | Project search | Company profiles

Expressions of Interest: **Queensland Curtis LNG**

Register

Project Owner: Santos Ltd (GLD)
 Project Status: In Progress
 Location: QLD, Australia

Associated Projects:
 - Queensland Curtis LNG Unleashed
 - Queensland Curtis LNG Unleashed Feed Development
 - Queensland Curtis LNG Unleashed Feed

Queensland Curtis LNG is a private project of QGC, a B2B Group business, to develop Queensland's coal seam gas for Australian and international markets.

QGC is committed to providing local industry with fair and reasonable opportunities to become involved in the project.

ICN is helping QGC identify local companies with the capacity to supply goods and services to the standards required. As part of this, local suppliers are encouraged to register their interest via ICN's Project Gateway.

Companies which register through Project Gateway and complete the ICN supplier resume, will be included in all future searches that ICN undertakes for procurement and contracting opportunities through the life of the project.

The project

Key elements of the proposed Queensland Curtis LNG project involve:

- an expansion of QGC's extraction and gas production operations in the Surat Basin, in

icngateway

Search | **Supplier search** | Project search | Company profiles

Expressions of Interest: **Australia Pacific LNG**

Register

Project Owner: Origin Australia Pty Limited
 Project Status: In Progress
 Location: QLD, Australia

Associated Projects:
 - Australia Pacific LNG Feed Development
 - Australia Pacific LNG Feed

Australia Pacific LNG is a 50:50 joint venture between Origin Energy and ConocoPhillips to deliver a coal seam gas (CSG) to liquefied natural gas (LNG) production Queensland.

The Project is proposed to span from gas fields in the Surat and Bowen Basins in Queensland along a 420km pipeline to an LNG facility near Lord Howe on Curtis Island off Gladstone.

There are three main components to the Project where supplier, contractor and employment opportunities may become available:

- Further development of Australia Pacific LNG's existing coal seam gas fields in the Surat and Bowen Basins
- Construction of a gas transmission pipeline which will be approximately 450km long from the coal seam gas fields to an LNG facility at Curtis Island off the coast of Gladstone.
- Development of the LNG facility, including gas processing, liquefaction and export infrastructure which will have a capacity of up to 18 million tonnes per annum (MTPA).

Australia Pacific LNG is already producing almost 40 per cent of Australia's total CSG production to meet domestic market requirements. Australia Pacific LNG holds the largest CSG reserves in Australia.

Australia Pacific LNG is working towards making a final investment decision by the end of 2015. This decision will follow an extensive approval process by State and Federal Governments and will

www.glng.icn.org.au
www.qclng.icn.org.au
www.aplng.icn.org.au



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More Information

ICN Queensland
www.icnqld.org.au

ICN Network
www.icn.org.au

Peter Robinson
General Manager – ICN Qld
(07) 3364 0700



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