

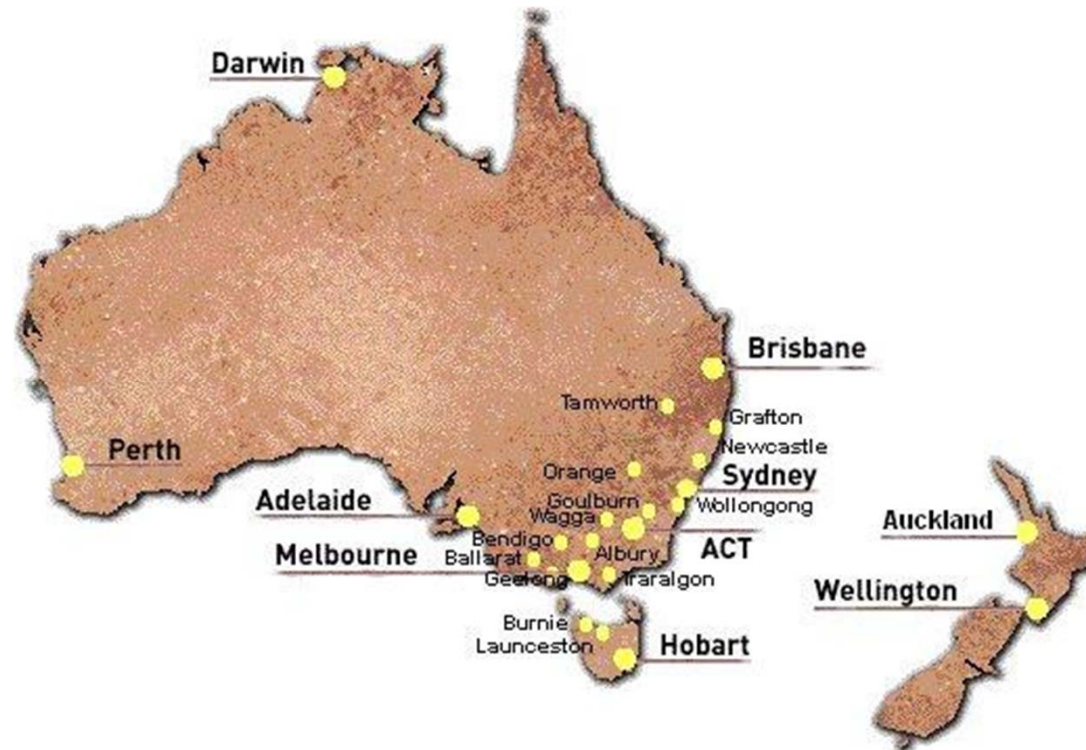
Industry Capability Network

Major Projects Forum
Melbourne 2011

“WHO WE ARE”

ICN is an **Australian** wide network comprising of:

- 80 Engineers and Supply Chain Specialists
- 24 offices located around Australia and New Zealand
- Share a common data base of over 40,000 companies capabilities.
- Principally funded by State Governments



ICN ROLE

Our AIM → Identify Competitive Australian Suppliers

- Enhance the tender list to reflect the most competitive capability in Australia at the time
- Thereby,
 - maximising competitive Australian content in projects
 - » minimizing projects costs

Investment in Major WA Projects (DMP figures as at 1 March 2011)

MAJOR PROJECTS

CAPEX \$Million

Commodity	Committed/ Under Construction	Planned	Possible
Alumina	2,737	1,500	
Gold	833	75	228
Iron Ore	22,799	25,808	22,851
Nickel	164	2,705	5,094
Other Minerals, Commodities and Infrastructure	15,261	6,466	11,196
	41,794	36,554	39,369
Crude Oil and Condensate	1,800		
LNG	57,000	72,950	37,000
Gas	6,010	5,615	1,300
Pipelines and Infrastructure	65	800	
	64,875	79,365	38,300
Total Forecast Investment	106,669	115,919	77,669

Current Major WA Projects - Oil & Gas

Underconstruction-

Gorgon

Shell Prelude FLNG

Macedon

FEED Phase-

Wheatstone

Browse Basin

Feasibility-

Pluto 2/3

Woodside expansion – Western Flank

Sunrise

Opportunities - Oil & Gas

Gorgon

Downstream EPCM – Kellogg Joint Venture

Major Contractors – CB&I, Leighton, Clough/Sea Trucks JV, CB&I/Kentz JV

Shell Prelude FLNG

FLNG – Technip (Paris) and Samsung Heavy industries Korea

Subsea – FMC and Shell (Kuala Lumpur)

Mooring – SBM (Monaco)

Logistics – Shell Perth

Macedon

EPC – Technip (Perth with support from Kuala Lumpur)

Wheatstone

Downstream Engineers – Bechtel Oil & Gas (Houston)

Browse

LNG Plant – Two competing consortia

Chiyoda/CB&I/Saipem

Kellogg/Leighton/Holland

Current Major WA Projects - Mineral

Underconstruction-

CITIC Pacific Sino Iron

BHP Billiton Iron Ore (expansion to 220Mtpa)

Rio Tinto (programmed expansion to 333Mtpa by 2015)

Karara Iron Ore

Koolyanobbing Iron Ore Upgrade

FMC (Solomon hub)

FEED Phase-

Roy Hill Iron Ore

Perdaman Chemicals

Tropicana Gold

Grange Resources

Mid West Iron Ore projects

Feasibility-

Boddington Upgrade

BHP Billiton Iron Ore (outer harbour)

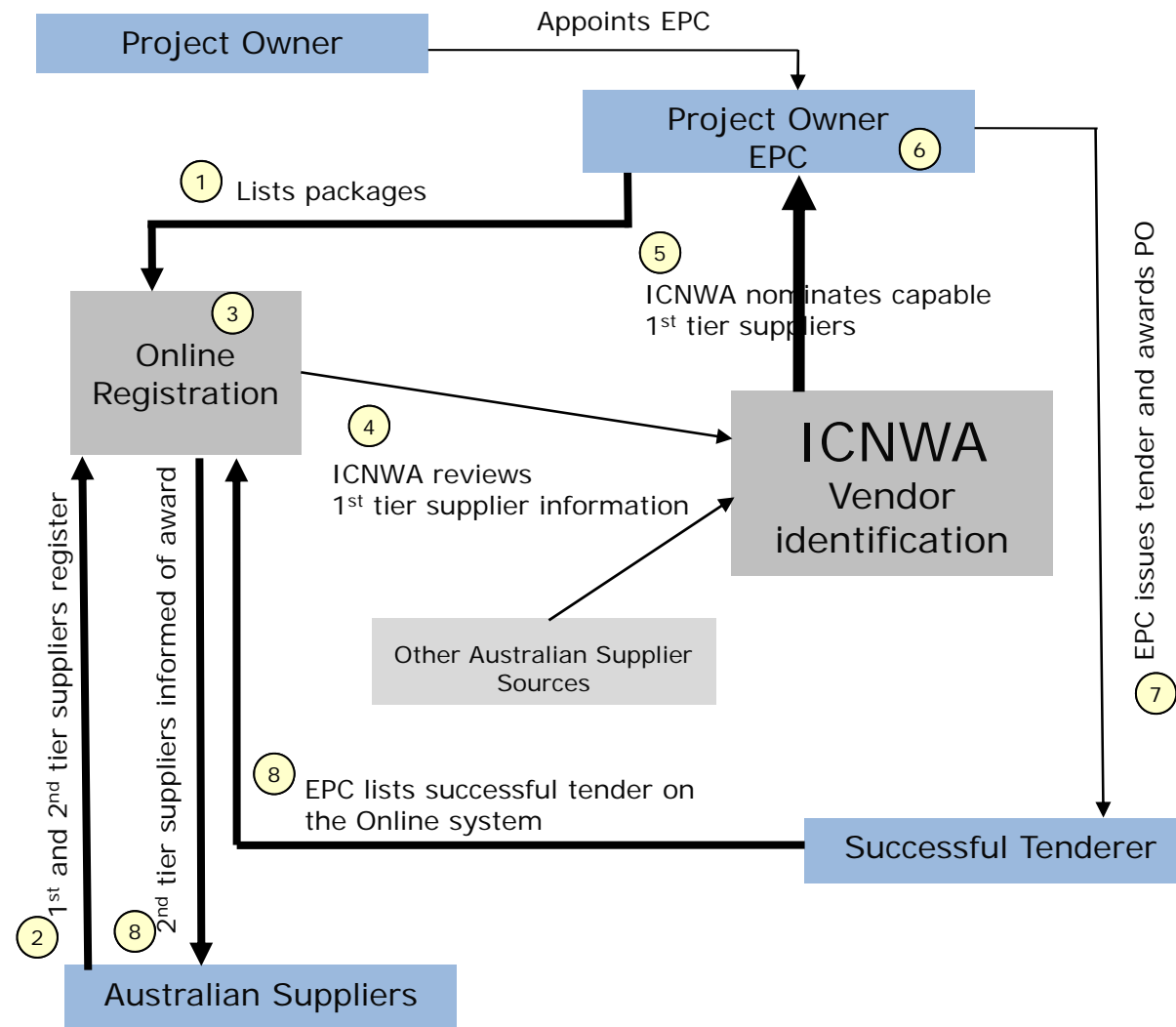
MCC Cape Lambert Iron Ore

Opportunities - Minerals

Selection of Engineering Companies currently involved in the WA Minerals Sector

- AMEC Minproc
- Calibre Global Pty Ltd
- Engenium
- FAST - Fluor SKM Iron Ore Joint Venture
- Fluor Australia Pty Ltd
- GHD
- GR Engineering
- Jacobs (acquired Aker Solutions)
- Hatch Associates Pty Ltd
- Lycopodium
- Sinclair Knight Mertz (SKM)
- SNC-Lavalin Australia Pty Ltd
- Onyx Projects
- ProMet Engineers
- Proteus (acquired by Tetra Tech)
- WorleyParsons

Vendor Identification Process



ICNWA Team

WA Projects:

- Manager
- Senior Consultant
- Senior Consultant
- Consultant
- Consultant
- Consultant
- Consultant
- Administration Officer

Linus O'Brien
Brian Sweeney (Wheatstone)
Colby Hauser (Browse)
Navin Nathan (Gorgon)
Paula du Plessis (Macedon)
Danielle D'Souza (Prelude)
Carla Kaplanian
Amy Bellamy

SAMP global project:

- Senior Consultant

Todd Barrett

ICN National Sector Manager

- National Sector Manager

Bruce Dann

Challenges to Local Suppliers

- **Offshore Engineering and Procurement**
- **Global tendering**
- **Offshore Investment in WA projects**
- **Tender/Contract package size**
- **Modularisation**

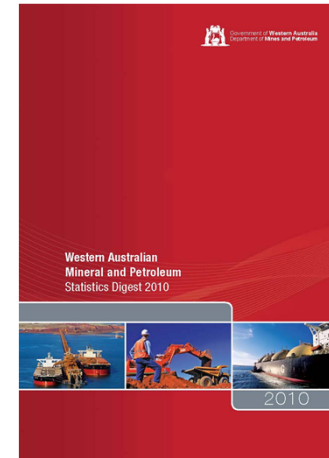
Local Suppliers critical focus areas

- **Responsiveness to buyer enquires**
- **Financial risk assessment in undertaking the enquiry**
- **Providing the buyer the requested information**
- **Understand competitors**

State Government Publications

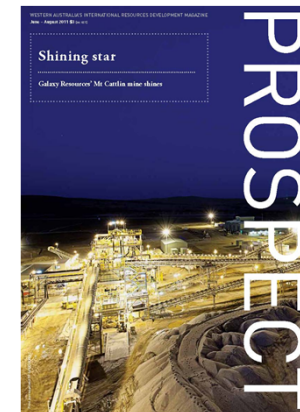
Statistics Digest

www.dmp.wa.gov.au/documents/StatsDigest2010a.pdf



Prospect magazine

www.dmp.wa.gov.au/documents/Prospect_June_2011.pdf



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