

*Welcome to ICN's*  
**accessing resources seminar**

**Colby Hauser**

**ICN**

**National Sector Manager – Oil & Gas**

**2013 FORMULA 1 ROLEX AUSTRALIAN GRAND PRIX**  
**Wednesday 13 March 2013, 1.00pm – 6.30pm**



# National Sector Manager – Oil & Gas

A National Coordination role whereby NSM works to develop ICN's strategy and direction in the Oil & Gas Sector, so that we are creating maximum value for Project Proponents and SME's alike in local content on major projects.

# Oil & Gas Overview

- **\$412.5 billion of resources projects** are currently shown within the *Investment Monitor* database. Of this amount, about 54% (\$222.8 billion) are definite, i.e. 'under construction' or 'committed'; 31% (\$125.8 billion) are under active investigation for a decision in the reasonably near future, i.e. in the 'under consideration' category; and 15% (\$63.8 billion) are in the 'possible' category.

Source: Deloitte Access Economics *Investment Monitor*

Under Construction	Under Consideration	Possible
\$222.8 billion	\$125.8 billion	\$63.8 billion

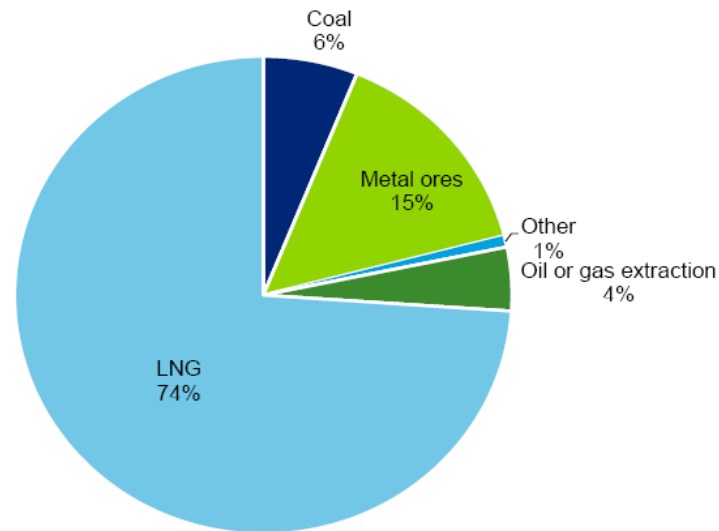
# Oil & Gas Overview

- By value some **74% (\$165 billion)** of all committed resource projects in the *Investment Monitor* database at present are **LNG projects**.

Chart 3.2: Value of definite resources projects by sector

## Definite projects

'Under construction' and 'Committed', March 2012



Source: Deloitte Access Economics *Investment Monitor*

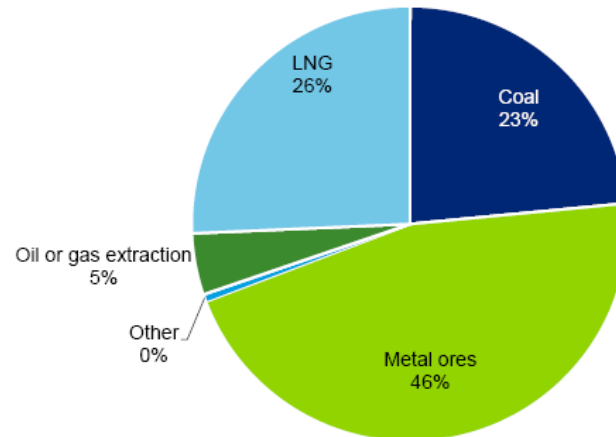
# Oil & Gas Overview

- LNG's dominance is less pronounced when looking at projects classed as 'under consideration'. LNG accounts for **26% (\$32 billion)** of these projects, with metal ores and coal contributing 46% and 23% respectively.

Chart 3.3: Value of resources projects under consideration by sector

## Likely projects

'Under consideration', March 2012



Source: Deloitte Access Economics *Investment Monitor*

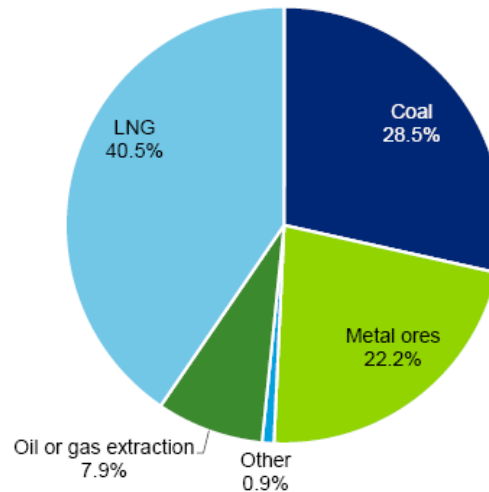
# Oil & Gas Overview

- LNG also leads the way on the **possible (40.5% - \$29 billion)** investment front, although its dominance is again significantly diminished relative to definite projects.

Chart 3.4: Value of possible resources projects by sector

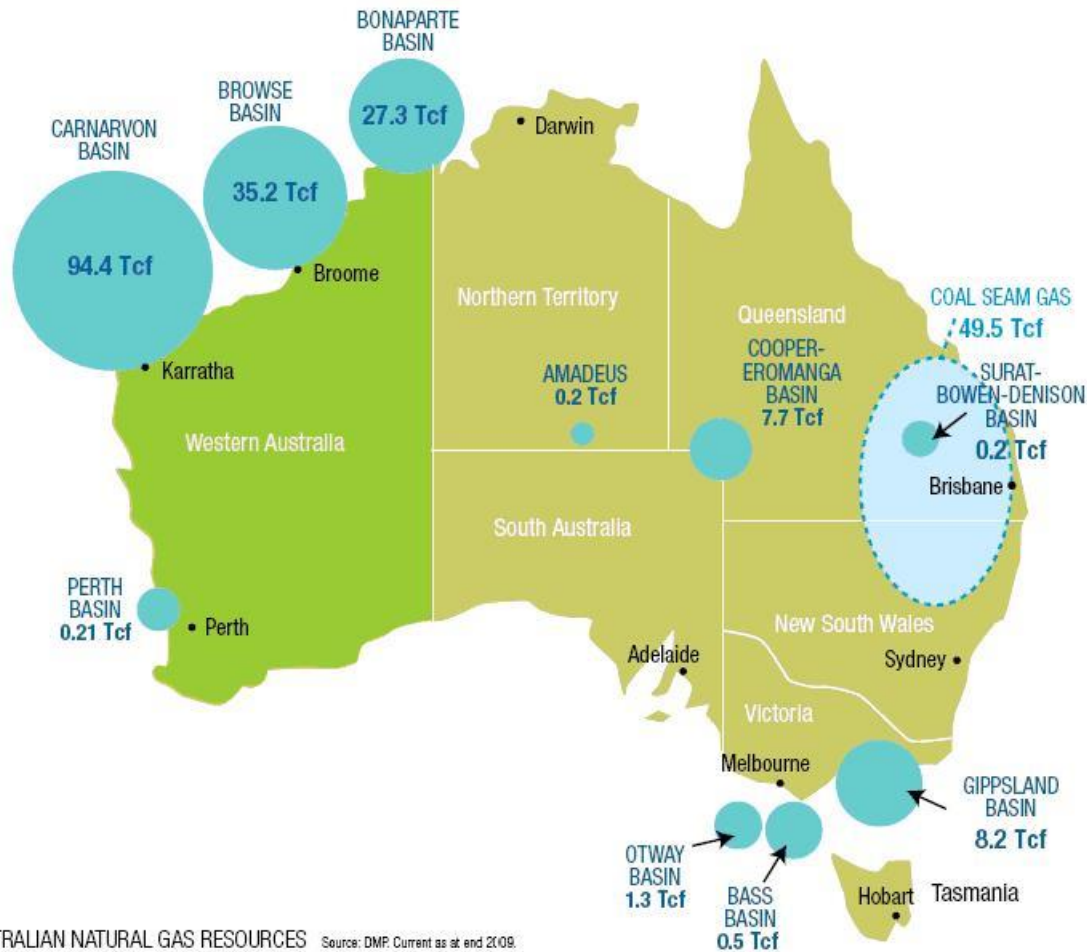
Possible projects

'Possible', March 2012



Source: Deloitte Access Economics *Investment Monitor*

# Oil & Gas Overview



# ICN Engagement in the Oil & Gas Sector:

ICN is and has been engaged in **every major LNG project** in Australia

Projects in **operation**:

- Northwest Shelf (Woodside)
- Darwin LNG (ConocoPhillips)
- Pluto LNG (Woodside)



These projects can operate for up to 40 years and present a lot of opportunities for Australian contractors and suppliers.

This should be a **key focus** area for companies.



# ICN Engagement in the Oil & Gas Sector:

Projects **under construction** include:

- Ichthys (INPEX)
- Gorgon (Chevron)
- Wheatstone (Chevron)
- Prelude FLNG (Shell)
- QCLNG (QGC)
- GLNG (Santos)
- APLNG (Origin)
- Longford Upgrade (ExxonMobil)



# ICN Engagement in the Oil & Gas Sector:

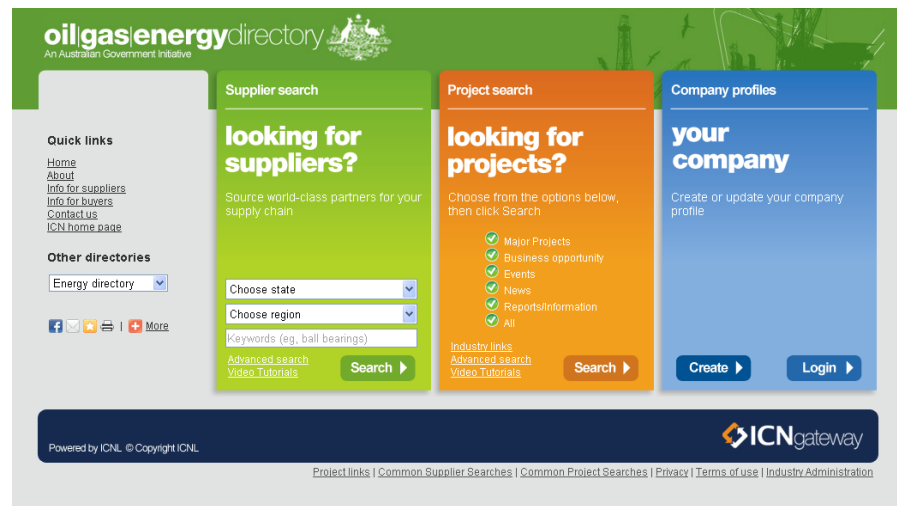
## Projects awaiting Final Investment Decision (FID)

- Browse LNG (Woodside)
- Bonaparte LNG (GDFSuez)
- Equus (Hess)
- Arrow Energy CSG - LNG Project (Arrow Energy)



# ICN Engagement in the Oil & Gas Sector:

- All of the aforementioned projects are listed on ICN Gateway and feature opportunities for suppliers to register their interest against specific packages.
- Check the Oil, Gas and Energy Directory to access these projects and register against specific packages.



# Key Take Away Points:

- ICN is engaged in **every major LNG Project** in Australia
- Opportunities are listed on ICN Gateway
- We have ICN Consultants dedicated to specific projects.
- These consultants are often embedded in project teams and work closely with both the project operator and major contractor.
- Utilize the knowledge of the ICN consultants to formulate your engagement strategy.
- ICN can make introductions to project teams when and where appropriate

# Key Take Away Points:

- Early engagement is critical to solidify an opportunity to bid in major project construction
- Know where you fit in the Supply Chain – Who is going to issue your purchase order?
- Opportunities in the Operations and Maintenance phases present tremendous opportunity for local companies.

# Contact Details:

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