Surat Basin non–resident population projections, 2015 to 2021

Introduction
With the use of fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) work practices, it is common for resource regions to have a large population of non-resident workers who live in the area only while on-shift. This non-resident population is not included in the Australian Bureau of Statistics’ (ABS) official resident population estimates for these areas.

To bridge this information gap, Surat Basin non–resident population projections, 2015 to 2021 provides projected numbers of non-resident workers on-shift for local government areas (LGAs) in the Surat Basin region (Figure 1). The report presents three projection series, based on information provided by industry regarding existing operations and future projects.

Data tables to supplement the report are available on the Queensland Government Statistician’s Office (QGSO) website (www.qgso.qld.gov.au).

Key points
Key points of this report include:

- The non-resident population of the Surat Basin reached 14,490 persons in June 2014, more than four times the number estimated in June 2011 (3,270 persons). This growth was largely influenced by the FIFO/DIDO construction workforces of three coal seam gas (CSG) projects, which are estimated to have peaked in 2014.
- Three projection series represent a range of potential non–resident population outcomes for the Surat Basin, based on different assumptions about future project and operations workforces. Under all three series, the winding down of CSG construction activity will see the region’s non-resident population decline rapidly in 2014–15.
- The Series A projection, which represents all existing operations plus projects that have passed final investment decision (FID), indicates that the Surat Basin’s non-resident population will decrease to 3,650 persons by 2021.
- The Series B projection, which factors in the additional impacts of projects that have had an Environmental Impact Statement (EIS) approved but are yet to reach FID, anticipates the non-resident population of the Surat Basin to fall to 4,460 persons by 2021.
- The Series C projection, which also includes consideration of projects that have yet to finalise an EIS process, expects the number of non–resident workers on-shift in the Surat Basin to decline to 5,470 persons by 2021.
- Western Downs (R) will continue to account for the majority of resource industry activity and to have the largest non-resident population of the three LGAs in the region. From a peak of 9,100 persons in 2014, Series A projects the non-resident population of Western Downs (R) to reach 2,450 persons by 2021.
- The Series B projection for Western Downs (R), which includes approved CSG and other resource projects that have not reached FID, sees a more gradual decrease to 3,250 persons by 2021.
- The non-resident population of Maranoa (R) is estimated to have peaked at 5,210 persons in 2014, with a projected decrease to 1,020 persons (Series A) or 2,020 persons (Series C) by 2021.
- The non-resident population of Toowoomba (R) is projected to remain stable at around 180 persons from 2014 to 2021 (Series A), with a potential peak of 490 persons in 2017 (Series C).
- Due to ongoing uncertainty around FID for the Surat Basin Rail project, none of the projection series for the Surat Basin include consideration of proposed coal mining projects in Western Downs (R).
Surat Basin future influences

The Surat Basin is emerging as Queensland's major energy province, as three CSG projects in the region approach production. The CSG to liquefied natural gas (LNG) industry was responsible for strong employment growth in the Surat Basin LGAs of Western Downs (R) and Maranoa (R) during 2013–14, as proponents increased their efforts to complete project construction according to schedule. Much of this growth took the form of FIFO/DIDO contract labour, which temporarily boosted the size of the region’s non-resident population.

By June 2014, construction of first stage gas gathering and processing facilities for the three CSG projects was well advanced, while all three trunk pipelines linking the Surat Basin gas fields to port facilities at Gladstone were completed (GasFields Commission, 2014).

- The Queensland Curtis LNG (QCLNG) project commenced gas exports from Gladstone in December 2014 (BG Group, 2014).
- Construction of a central processing plant (CPP) near Dalby and six field compression stations (FCS) was completed in 2014, while a further three CPPs and 17 FCS were under construction (Thiess, 2014).
- The Gladstone LNG (GLNG) project in Maranoa (R) was more than 85% complete by the end of 2014, with three upstream gas hubs ready for commissioning. The project is on track for first gas exports in 2015 (GasFields Commission, 2014).
- The Australia Pacific LNG (APLNG) project was 76% complete by June 2014, with construction of gas processing facilities near Miles and Chinchilla finalised. First LNG delivery to Gladstone is expected in mid-2015 (GasFields Commission, 2014).

The construction stage of these projects will wind down rapidly from 2015 onward, and the non-resident population of the Surat Basin is expected to decline accordingly. The extent of this downturn will depend on the approval and commencement of other gas projects in the region, most notably:

- the Surat Gas project component of the Arrow Energy LNG project, which has been approved but is awaiting FID
- the Santos GLNG Gas Field Development project, which lodged an EIS with the Queensland Government in 2014, but has yet to receive approval or FID.

At January 2015 there were four coal mining operations in the Surat Basin, all producing thermal coal for local markets and for limited export.

Projection methodology

QGSO’s 2015 to 2021 non–resident population projection methodology comprises four different series, which represent a range of possible outcomes arising from the future development of resource projects and operations in the Surat Basin. Each series estimates the cumulative non-resident population that would be present in each LGA at 30 June of each year to 2021, should the operations and projects listed in each category proceed according to advised timeframes and workforce numbers.

Users of these projections should note that there is a degree of uncertainty about the likelihood of these projects proceeding as assumed, and as such the projections should be regarded as being indicative scenarios rather than probabilistic predictions. QGSO does not advocate any of the projection series as being the most likely or favoured outcome. See caveats on page 9 of this report for further details.

The four projection series are based on the workforces of operations and projects at the time of preparation. Projects are categorised and included in each scenario according to their standing in the EIS process.

- **Series A** projection is based on the number of non–resident workers on-shift who were engaged in existing resource operations and associated infrastructure activities in the area at June 2014. The projection takes into account future changes to those operational workforces as advised by resource company sources, as well as the estimated non–resident construction and operational workforces of Category A projects (i.e. those that had reached FID) at the time of preparation.
- **Series B** projection includes the Series A projection plus projected growth in the non-resident population arising from Category B projects (those that have an EIS approved but have yet to reach FID).
- **Series C** projection includes the Series A and B projections, plus the projected growth in the non-resident population arising from Category C projects (those that have lodged an EIS, but have yet to proceed through to final approval).
- **Series D** projection includes Series A, B and C projections, plus the projected growth in the non-resident population from Category D projects (those that have yet to publish an EIS, including projects that have lodged an Initial Advice Statement (IAS) as well as projects that have yet to begin the approvals process). However, there is no Series D projection for the Surat Basin in this edition as there are no future projects in Category D.

Where FID for an approved project has been delayed indefinitely by the proponent, it is not possible to give consideration to its indicative workforce data or project sequencing in the QGSO projections. Such projects, along with other projects that are dependent on them in order to commence, are designated as Category E and are not included in any of the four projection series.

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2. The projections also include some projects where an EIS is not or may not be mandatory.
A full list of existing operations and projects included in each category is available in Table 5 (page 8), and a map of future projects in the Surat Basin is shown in Figure 2.

**Figure 2: Selected future projects**, Surat Basin

(legend)

**Projects by category**
- Category A
- Category B
- Category C
- Category D
- Coal mine
- LNG pipeline
- LNG pipeline project
- Rail project
- Urban centre / locality

**Source:** QGSO, 2015

(a) Does not include gas field development and expansion projects, or existing gas operations. Future project status is current as at January 2015. See Table 5 (page 8) for a full list of existing operations and future projects by category. Pipelines, rail corridors, and other project locations shown in map are indicative only.

Source: QGSO, 2015
Projected non–resident workers on-shift, Surat Basin

The non-resident population of the Surat Basin has grown strongly in recent years with the establishment of the CSG industry. At June 2014 there were an estimated 14,490 non–resident workers on-shift in the region—more than four times the number estimated in June 2011 (3,270 persons) (Figure 3). This steep increase was largely due to the FIFO/DIDO construction workforces of the APLNG, GLNG and QCLNG projects present in the region during this period.

The Surat Basin’s non-resident population is projected to decline rapidly to 7,170 persons in June 2015 according to all three projection series, then continue to fall to less than 6,000 persons in June 2016, as the large construction workforces of the three CSG projects taper off and are replaced by smaller operational workforces (Table 1). Under the Series A projection, the non-resident population of the Surat Basin will continue to decrease, from 5,400 persons in 2016 to 3,650 persons in 2021. This series includes the ongoing workforces of existing operations, along with the APLNG, GLNG and QCLNG projects, Wallumbilla Gas Treatment Facility, and Kogan Creek Solar Boost Project.

Series B projects the non-resident population to fall to 5,830 persons in 2016, then increase to around 6,600 persons in 2017 and 2018. This variation largely reflects the impacts of Arrow Energy’s proposed Surat Gas Project and Surat to Gladstone Pipeline Project, as well as the Braemar 3 Power Station and New Acland Coal Mine Stage 3 Project. Under this scenario the non-resident population will resume its decline from 2018, reaching 4,460 persons in 2021.

The Series C projection follows a similar trajectory to Series B, reaching around 6,700 persons in 2017 and 2018, before declining to 5,470 persons in 2021. In addition to Category B projects, this series reflects the influence of the Santos GLNG Gas Field Development Project.

Figure 3: Past and projected non–resident workers on-shift, Surat Basin

![Graph showing past and projected non-resident workers on-shift, Surat Basin](image)

Table 1: Projected non–resident workers on-shift, Surat Basin

<table>
<thead>
<tr>
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<tbody>
<tr>
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<td>5,400</td>
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<td>4,930</td>
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<td>3,650</td>
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<td>Series B</td>
<td>14,490</td>
<td>7,170</td>
<td>5,830</td>
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<td>5,750</td>
<td>5,340</td>
<td>4,460</td>
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<tr>
<td>Series C</td>
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<td>7,170</td>
<td>5,830</td>
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<td>6,690</td>
<td>5,850</td>
<td>5,940</td>
<td>5,470</td>
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</tbody>
</table>

(a) There is no Series D projection for the Surat Basin.

Figures in all tables have been rounded to the nearest 10; see notes for details.

Source: QGSO estimates, 2014; QGSO projections, 2015 to 2021
The non-resident population of Maranoa (R) is primarily associated with the CSG industry, with two existing gas operations in the LGA at January 2015 (Table 5, page 8). Current and future CSG developments in Maranoa (R) are located a considerable distance from large population centres, and will continue to rely on FIFO workforces for project construction and ongoing operations.

The non-resident population of Maranoa (R) increased steeply from 1,160 persons in 2011 to 5,210 persons in 2014, due largely to construction of surface infrastructure for the APLNG and GLNG projects (Figure 4). The non-resident population is estimated to have peaked in June 2014, and is expected to decline rapidly thereafter as large construction workforces are gradually replaced by smaller operational workforces.

Series A projects that the number of non-resident workers on-shift in Maranoa (R) will fall sharply to 1,820 persons in 2015, then continue to decline more gradually to 1,020 persons in 2021 (Table 2). This population includes the continuing non-resident workforce influences of existing gas operations, the APLNG and GLNG projects, and Santos GLNG’s Wallumbilla Gas Treatment Facility.

The Series C projection includes consideration of the Santos GLNG Gas Field Development Project, which has an EIS published and is awaiting approval. This scenario would see a less steep decline between 2016 and 2019, followed by an increase to reach 2,020 persons in 2021 as the project’s construction workforce peaks.

There are no Series B or D projections for Maranoa (R), as there are no future projects in those categories.

![Figure 4: Past and projected non-resident workers on-shift, Maranoa (R)](image)

(a) Estimates for 2009 are extrapolated from 2008 data.
Source: QGSO estimates, 2008 to 2014; QGSO projections, 2015 to 2021

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<tr>
<th>Projection series</th>
<th>Estimated</th>
<th>Projected</th>
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<td>1,820</td>
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<td>1,430</td>
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<td>1,060</td>
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<td>Series C</td>
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<td></td>
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<td></td>
<td>1,660</td>
<td>2,020</td>
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</tbody>
</table>

(a) There are no Series B or Series D projections for Maranoa (R).
Source: QGSO estimates, 2014; QGSO projections, 2015 to 2021
Western Downs (R)
The LGA of Western Downs (R) accounts for the majority of resource industry activity in the Surat Basin, with six existing gas and coal operations at January 2015 (Table 5, page 8). The LGA’s non-resident population was estimated at 9,100 persons in June 2014. The number of non–resident workers on-shift grew by 7,100 persons (or 354%) between 2011 and 2014, largely due to the FIFO/DIDO construction workforces of the APLNG and QCLNG projects (Figure 5).

With construction of pipelines and surface infrastructure either completed or substantially advanced by the end of 2014, the level of activity associated with the CSG industry in Western Downs is expected to contract from 2015 onward. According to both the Series A and B projections, the non-resident population of Western Downs (R) is projected to fall to 5,170 persons in 2015, after reaching a peak of 9,100 persons in June 2014 (Table 3).

According to the Series A projection, the non-resident population of Western Downs (R) will stabilise at around 3,650 persons between 2016 and 2019, before declining to 2,450 persons in 2021. In addition to ongoing resource industry operations in the LGA, the Series A projection takes into consideration the non－resident construction workforces of the APLNG, GLNG and QCLNG projects and the Kogan Creek Solar Boost Project.

Series B projects a less steep decline in the non-resident population to 2016 (3,970 persons), before an increase to 5,150 persons in 2018. This projected growth would be largely influenced by the construction workforces of proposed Arrow Energy developments and the Braemar 3 Power Station. Numbers are projected to decline thereafter, reaching 3,250 persons in 2021.

There are no Series C or D projections for Western Downs (R), as there are no future projects in those categories. None of the projection series for Western Downs (R) include consideration of the Surat Basin Rail Project or proposed coal mining projects, which are classified as Category E (refer Table 5, page 8).

Figure 5: Past and projected non–resident workers on-shift, Western Downs (R)

![Graph showing past and projected non-resident workers on-shift](image)

(a) Estimates for 2009 are extrapolated from 2008 data.
Source: QGSO estimates, 2008 to 2014; QGSO projections, 2015 to 2021

Table 3: Projected non–resident workers on-shift, Western Downs (R)

<table>
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<tr>
<th>Projection series(a)</th>
<th>Estimated</th>
<th>Projected</th>
</tr>
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<tbody>
<tr>
<td>Series A</td>
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<td>5,170</td>
</tr>
<tr>
<td>Series B</td>
<td>9,100</td>
<td>5,170</td>
</tr>
</tbody>
</table>

(a) There are no Series C or Series D projections for Western Downs (R).
Source: QGSO estimates, 2014; QGSO projections, 2015 to 2021
Toowoomba (R)
The LGA of Toowoomba (R) has a relatively small non-resident population associated with resource industry activity, with two existing resource operations (the Commodore and New Acland coal mines) at January 2015 (Table 5, page 8). The non-resident workforces of these operations, along with a small number of FIFO/DIDO workers engaged in CSG projects and road construction activities, contributed to the LGA’s non-resident population of 180 persons in June 2014 (Figure 6).

The proximity of the large population centre of Toowoomba means that the workforces of future resource operations and projects will be more likely to reside within the local area, rather than FIFO/DIDO from elsewhere. Accordingly, the number of non–resident workers on-shift in Toowoomba (R) over the period to 2021 is expected to remain modest by comparison with other Surat Basin LGAs.

The non-resident population of Toowoomba (R) is projected to remain stable at 180 persons from 2014 to 2021, according to Series A (Figure 6, Table 4). This population includes non-resident workers associated with existing coal mine operations in the LGA, as well as the APLNG project.

The Series B projection includes the anticipated non–resident population impacts of the New Acland Coal Mine Stage 3 Project and the Arrow Energy Surat Gas Project. Under this scenario the number of non–resident workers on-shift in the LGA would increase from 2015 as construction ramps up, returning to between 300 and 340 people in the three years to June 2020, before falling to 200 persons in 2021.

In addition to the workforces of resource operations and projects, occasional non-resident workforces of associated infrastructure projects—including seasonal power station maintenance workers and highway construction crews—may also influence the size of Toowoomba (R)’s non-resident population over this period. These have not been factored into the projections.

There are no Series C or D projections for Toowoomba (R), as there are no future projects in those categories.

![Figure 6: Past and projected non–resident workers on-shift, Toowoomba (R)](source: QGSO estimates, 2010 to 2014; QGSO projections, 2015 to 2021)

**Table 4: Projected non–resident workers on-shift, Toowoomba (R)**

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<td>180</td>
<td>180</td>
<td>180</td>
<td>180</td>
<td>180</td>
</tr>
<tr>
<td>Series B</td>
<td>180</td>
<td>180</td>
<td>330</td>
<td>490</td>
<td>310</td>
<td>300</td>
<td>340</td>
<td>200</td>
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(a) There are no Series C or Series D projections for Toowoomba (R).
Source: QGSO estimates, 2014; QGSO projections, 2015 to 2021
### Table 5: Resource operations and future projects, Surat Basin

<table>
<thead>
<tr>
<th>Category(^{(a)})</th>
<th>Project / operation name</th>
<th>Company name</th>
<th>LGA</th>
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<tr>
<td><strong>Existing operations</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>A</td>
<td>Arrow Energy – existing gas operations</td>
<td>Arrow Energy</td>
<td>Western Downs (R)</td>
</tr>
<tr>
<td>A</td>
<td>Cameby Downs mine</td>
<td>Yancoal Australia</td>
<td>Western Downs (R)</td>
</tr>
<tr>
<td>A</td>
<td>Commodore mine</td>
<td>Millmerran Power Partners</td>
<td>Toowoomba (R)</td>
</tr>
<tr>
<td>A</td>
<td>Kogan Creek mine</td>
<td>CS Energy</td>
<td>Western Downs (R)</td>
</tr>
<tr>
<td>A</td>
<td>New Acland mine</td>
<td>New Hope Group</td>
<td>Toowoomba (R)</td>
</tr>
<tr>
<td>A</td>
<td>Origin Energy – existing gas operations</td>
<td>Origin Energy</td>
<td>Maranoa (R), Western Downs (R)</td>
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<tr>
<td>A</td>
<td>QGC – existing gas operations</td>
<td>QGC (BG Group)(^{(c)})</td>
<td>Western Downs (R)</td>
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<tr>
<td>A</td>
<td>Santos – existing gas operations</td>
<td>GLNG Operations</td>
<td>Maranoa (R), Western Downs (R)</td>
</tr>
<tr>
<td><strong>Future projects</strong></td>
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<td></td>
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<tr>
<td>A</td>
<td>Australia Pacific LNG Project</td>
<td>APLNG(^{(b)})</td>
<td>Maranoa (R), Toowoomba (R), Western Downs (R)</td>
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<td>A</td>
<td>Kogan Creek Solar Boost Project</td>
<td>CS Energy</td>
<td>Western Downs (R)</td>
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<td>A</td>
<td>Queensland Curtis LNG Project</td>
<td>QGC (BG Group)(^{(c)})</td>
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<tr>
<td>A</td>
<td>Santos GLNG</td>
<td>Santos GLNG(^{(d)})</td>
<td>Maranoa (R), Western Downs (R), Central Highlands (R)</td>
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<td>Wallumbilla Gas Treatment Facility</td>
<td>Santos GLNG(^{(d)})</td>
<td>Maranoa (R)</td>
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<td>B</td>
<td>Braemar 3 Power Station</td>
<td>ERM Power</td>
<td>Western Downs (R)</td>
</tr>
<tr>
<td>B</td>
<td>New Acland Coal Mine Stage 3 Project</td>
<td>New Hope Group</td>
<td>Toowoomba (R)</td>
</tr>
<tr>
<td>B</td>
<td>Surat Gas Project</td>
<td>Arrow Energy</td>
<td>Western Downs (R), Toowoomba (R)</td>
</tr>
<tr>
<td>B</td>
<td>Surat to Gladstone Pipeline Project</td>
<td>Arrow Energy</td>
<td>Western Downs (R), Banana (S), Gladstone (R)</td>
</tr>
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<td>C</td>
<td>Santos GLNG Gas Field Development Project</td>
<td>Santos GLNG</td>
<td>Maranoa (R), Central Highlands (R)</td>
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<tr>
<td>E</td>
<td>Elmatta Project</td>
<td>New Hope Group</td>
<td>Western Downs (R)</td>
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<td>E</td>
<td>Ironbark Project</td>
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<td>E</td>
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<td>E</td>
<td>Surat Basin Rail Project</td>
<td>Surat Basin Rail</td>
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<td>Stanmore Coal</td>
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<td>E</td>
<td>Wandoan Coal Project</td>
<td>Wandoan Joint Venture</td>
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\(^{(a)}\) The five categories include existing operations and future projects, grouped according to their status in the EIS process as at January 2015. See methodology (page 2) and caveats (page 9) for further details. There are no Category D projects in the Surat Basin.

\(^{(b)}\) Australia Pacific LNG (APLNG) is a joint venture between Origin Energy, ConocoPhillips and Sinopec.

\(^{(c)}\) BG Group’s Australian business QGC Pty Limited is the operator and majority owner of the Queensland Curtis LNG (QCLNG) project.

\(^{(d)}\) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.

Source: QGSO, 2015
Caveats

QGSO’s non-resident population projections provide an estimate of the number of non-resident workers on-shift by LGA. They are based on the on-shift non-resident worker population estimates established in previous years and take into account future workforce growth arising from resource industry and infrastructure projects planned for the region, as reported directly by resource companies.

Projections are based on the best available data and advice at the time of preparation. Numbers of non-resident workers on-shift are projected for the period to 2021 only, as it is considered that the reliability of information regarding future projects diminishes considerably beyond that point. Projected numbers of non-resident workers on-shift presented in this report represent an estimate for 30 June of the indicated year. Temporary peaks and falls in project workforces may occur in between these mid-year estimates for successive years.

The four projection series represent a range of possible outcomes based on the status of projects in the EIS process at the time of production in January 2015 (see the projection methodology, page 2, for further details). These outcomes are subject to change over time as projects proceed through the approvals process. Projections reflect the cumulative impacts of multiple projects at a given point in time, and changes to any individual project will affect the projected cumulative outcome.

Category E comprises projects that have completed the approvals process but where FID has been delayed indefinitely, as well as other projects that are dependent on the commencement of projects in this category. As no indicative timeframes were available at the time of preparation they could not be allocated to a projection series. Changes in the status of these projects could substantially alter any or all of the possible outcomes represented by the four projection series.

The projections reflect certain assumptions about the likelihood of projects advancing according to advised commencement dates, sequencing of project stages and timing of workforce peaks. Changes to any of these factors can make a significant difference to the cumulative non-resident workforce at a given point in time, particularly during construction phases. Short-term influences such as extreme weather events, industrial action and supply chain delays can all result in changes to project scheduling and to these projections.

QGSO does not advocate any one series as being the most likely or favoured outcome and users should consider the assumptions affecting each potential scenario. Given the volatile nature of the resource sector and the inherent uncertainty about the likelihood of projects proceeding as indicated, these projections should be considered as being indicative of the range of potential outcomes rather than literal accounts of future growth.

Notes

(R) – Regional Council (S) – Shire

Non-resident workers are people who fly-in/fly-out or drive-in/drive-out (FIFO/DIDO) to work and live in the area temporarily while rostered on, and who have their usual place of residence elsewhere. Non-resident workers include FIFO/DIDO mining and gas industry employees and contractors, construction workers and associated sub-contractors. Figures in this report refer to the number of non-resident workers on-shift, or present in the area at a given point in time, and should not be confused with total non-resident workforce numbers.

CSG/LNG pipeline and rail projects, and some gas field projects, will extend beyond the Surat Basin into neighbouring LGAs. Where this occurs, the population impacts of these projects are included in projections for the Bowen Basin and Gladstone (R) rather than the Surat Basin.


The total number of non-resident workers on-shift for the Surat Basin represents the aggregate non-resident populations of all LGAs in the region. This total may include a small number of non-resident workers in each LGA who live elsewhere within the Surat Basin. Data for Toowoomba (R) were not collected in 2008. The total number of non-resident workers on-shift in the Surat Basin therefore does not include any non-resident workers that may have been in Toowoomba (R) during the survey period. As no data were collected for the Surat Basin in 2009, estimates for that year are extrapolated from 2008 data.

Figures in tables have been rounded to the nearest 10. As a result of rounding, discrepancies may occur between sums of the component items and totals. Percentages and other calculations are made prior to rounding of figures and discrepancies might therefore exist between these calculations and those that could be derived from the rounded figures.

Data tables to supplement this report are available online at http://www.qgso.qld.gov.au/products/tables/index.php.

References


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