

Surat Basin non-resident population projections, 2022 to 2026

Introduction

The resource sector in regional Queensland utilises fly-in/fly-out and drive-in/drive-out (FIFO/DIDO) workers as a source of labour supply. These non-resident workers live in the regions only while on-shift (refer to Notes, pages 9–10). The Australian Bureau of Statistics' (ABS) official population estimates and the Queensland Government's population projections for these areas only include residents.

To support planning for population change, the Queensland Government Statistician's Office (QGSO) publishes annual non-resident population estimates and projections for selected resource regions. This report provides a range of non-resident population projections for local government areas (LGAs) in the Surat Basin region (Figure 1), from 2022 to 2026.

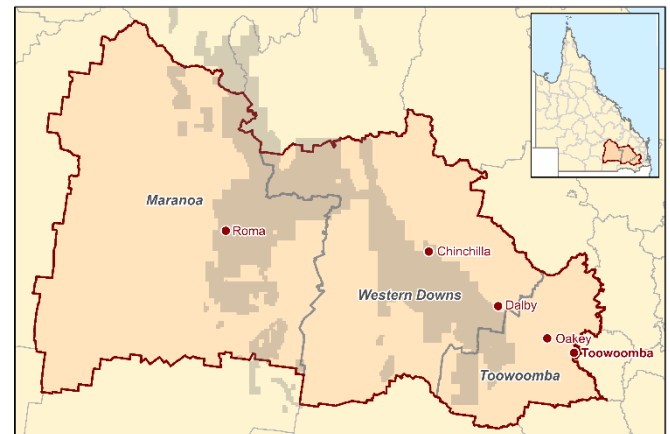
The projection series represent the projected non-resident populations associated with existing resource operations and future projects in the region. Projects are categorised according to their standing in the approvals pipeline, including stages of the environmental impact statement (EIS) process, and progress towards achieving financial close. Series A is based on existing operations, projects under construction and approved projects that have reached financial close. Series B, C and D projections are based on projects that are at earlier stages of the approvals process.

Projections in this report are derived from surveys conducted by QGSO and other sources. Data tables to supplement the report are available on the QGSO website (www.qgso.qld.gov.au).

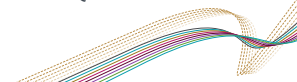
Key points

- The non-resident population of the Surat Basin was 3,620 persons in June 2021, up from 3,260 persons in June 2020. This growth was driven mainly by the construction of multiple renewable energy projects and CSG development.
- Three projection series are presented for the Surat Basin. All three series expect the region's non-resident population to decrease between June 2021 and June 2022, as several renewable energy projects transition from construction to operations and CSG development underway in June 2021 is also completed.
- According to all three series, the non-resident population of the Surat Basin will continue to decline overall from 2022, remaining below 2021 levels over the projections period.
- Under Series A, the Surat Basin's non-resident population will decrease to 3,010 persons in June 2022, then continue to decline gradually to reach a minimum of 2,530 persons in 2026.
- According to Series B, the non-resident population of the Surat Basin will remain above Series A for most of the projections period, reaching 3,050 persons in 2023, before declining to 2,530 persons in 2026.
- Series C projects the region's non-resident population will peak at 3,130 persons in 2023, then fall to 2,690 persons by 2026.
- At the LGA level, one projection series is presented for Maranoa. Series A projects minimal change in the size of the non-resident population of Maranoa between 2021 (870 persons) and 2026 (890 persons).
- According to Series A, the non-resident population of Western Downs will decline every year from 2,640 persons in 2021 to reach 1,510 persons in 2026. Series B projects the non-resident population will decrease to 2,010 persons in 2022, and eventually decline to 1,520 persons in 2026.
- The non-resident population of Toowoomba LGA is expected to remain relatively stable between 2021 (120 persons) and 2026 (130 persons) under Series A, or increase to a peak of 390 persons in 2025 under Series C.

Figure 1 Surat Basin region



In this publication, the Surat Basin region is defined as the local government areas (LGAs) of Maranoa, Western Downs and Toowoomba.



Surat Basin – future influences

The Surat Basin is Queensland's main source of coal seam gas (CSG) and a major energy province, with renewable energy projects, coal mines and power stations supplementing gas operations (Table 5, pages 8–9). Since June 2016, the region's non-resident population has largely comprised the ongoing production, maintenance and drilling workforces of major CSG projects, with development activities focused on expanding gas production to ensure supply to domestic and export markets.

CSG activity in the Surat Basin remained relatively subdued in 2020–21, due to the lingering impacts of low gas prices and general uncertainty as the global economy recovered from the COVID-19 pandemic. At the time of QGSO's Resource Employment Survey in mid-2021, the outlook for the next wave of project investment was uncertain, with companies adapting their operations and drilling activities in response to market conditions (DISER, 2021; QGSO, 2021).

While CSG workforces in the Surat Basin are expected to decline overall between 2022 and 2026, the gas industry will continue to be the major influence on the region's non-resident population over this period. **Arrow Energy** is continuing work on the first phase of its Surat Gas Project, with peak construction occurring between 2021 and 2025 (Arrow Energy, 2021). **Australia Pacific LNG (APLNG)** expects challenging market conditions to continue in 2021–22 with a rebound anticipated in 2022–23 if current forward prices continue (Origin Energy, 2021). **Gladstone LNG (GLNG)** commenced the second phase of its Arcadia project in late 2021, while continuing production from other gas fields (Santos, 2022). **Queensland Curtis LNG (QCLNG)** will progressively drill and connect approximately 145 new gas wells in the region between 2022 and 2024 (Shell, 2022). Drilling at Project Goondooloo is continuing towards a planned total of about 250 wells (Shell, 2021).

Some of this activity, including GLNG's Arcadia development, will occur in neighbouring Bowen Basin LGAs. As such, the non-resident population impacts of these developments are included in projections for the Bowen Basin rather than the Surat Basin (see *Bowen and Galilee Basins non-resident population projections, 2022 to 2026* (QGSO, 2022)).

In addition to ongoing CSG activity, renewable energy and other projects are also expected to contribute to the Surat Basin's non-resident population over the projections period. There were eight renewable energy projects under construction in Western Downs in June 2021: **Blue Grass Solar Farm**, **Columboola Solar Farm**, **Coopers Gap Wind Farm**, **Edenvale Solar Park**, **Dalby Hybrid Power Plant**, **Gangarri Solar Farm**, **Wandoan South BESS**, and **Western Downs Green Power Hub** (QGSO, 2021). Construction of the **Dulacca Wind Farm** also commenced in October 2021, and is expected to be completed by September quarter 2023 (Dulacca Wind Farm, 2021). At an earlier stage of development, the **Wambo Wind Farm** received Commonwealth Government approval in late 2021 (DAWE, 2021). The project will be constructed in stages, with the first stage consisting of approximately 42 wind turbines (Wambo Wind Farm, 2022). The large, temporary construction workforces of these projects will make a substantial contribution to the region's non-resident population before being replaced by smaller ongoing operations and maintenance workforces.

Other resource industry projects progressed between March 2021 and March 2022. CS Energy's **Kogan Renewable Hydrogen Demonstration Plant** near Chinchilla is expected to start construction in September 2022 once all relevant development approvals have been finalised (Queensland Government, 2022). The draft environmental impact statement (EIS) for the **Inland Rail – Gowrie to Helidon** project, which will pass through the LGA of Toowoomba, was released in August 2021 (DSDILGP, 2021). Carbon Transport and Storage Corporation (CTSCo) will undertake an EIS for its **CTSCo Project** (Glencore, 2022), which proposes to capture CO₂ from Millmerran Power Station in Toowoomba LGA and transport it to a site in southern Western Downs for permanent underground storage.

Projection methodology

QGSO's 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 non-resident population that would be present in each LGA at 30 June of each year from 2022 to 2026, should the listed operations and projects proceed as assumed.

The four projection series represent the estimated non-resident populations associated with existing operations and future projects. Projects are categorised according to their standing in the approvals pipeline, including stages of the environmental impact statement (EIS) process¹, and progress towards achieving financial close.

- **Series A** projection is based on the number of non-resident workers on-shift who were engaged in existing resource operations at June 2021. The projection takes into account future changes to those operational workforces as reported by company sources, as well as the estimated construction and operational workforces of Category A projects (i.e. those that are approved and have reached financial close).
- **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 and are awaiting other approvals and/or financial close).

¹ The projections also include some projects that do not require an EIS. Such projects are still subject to other approvals.

- **Series C** projection includes the Series A and B projections, plus projected growth in the non-resident population arising from Category C projects (those that have published an EIS that are not yet approved).
- **Series D** projection includes the Series A, B and C projections, plus 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).

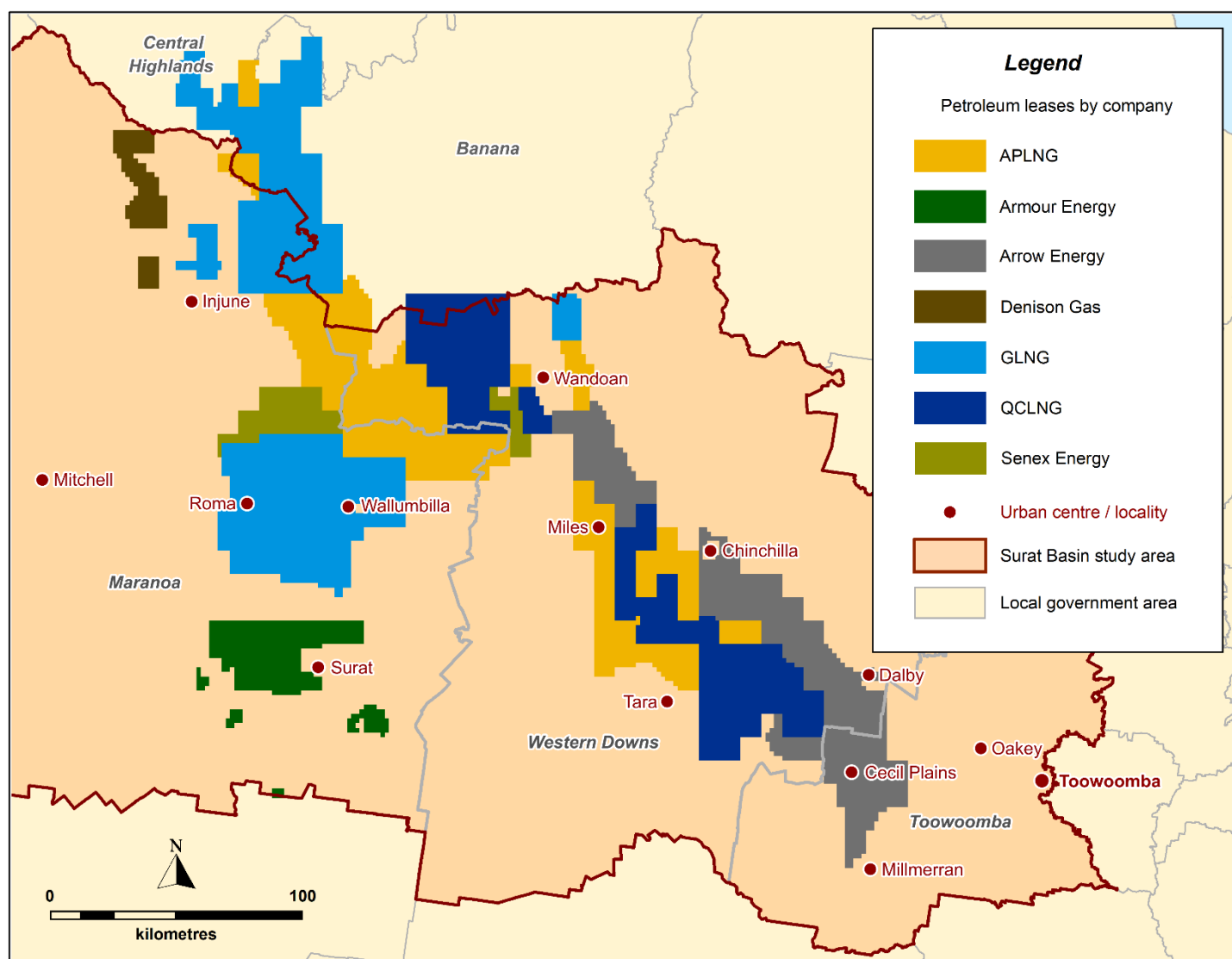
Only series containing more than one project are published in this report.

Where financial close for an approved project has been delayed indefinitely, or where it is not possible to give consideration to indicative workforce data or sequencing, the project is designated as **Category E** and is not included in any of the four projection series. Other projects that are dependent on Category E projects in order to commence are also designated as Category E and are excluded from consideration in the projections.

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 of the range of potential outcomes rather than forecasts of future growth. 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.

A full list of existing operations and projects included in each category is available in Table 5 (pages 8–9). A map of petroleum leases by company in the Surat Basin is shown in Figure 2.

Figure 2 Petroleum leases (PLs) by company^(a), Surat Basin



(a) Includes PL applications and PLs granted as at March 2022. Does not include PLs held by other companies.

Source: Queensland Government, 2022; QGSO, 2022

Projected non-resident population, Surat Basin

The non-resident population of the Surat Basin increased from 3,260 persons in June 2020 to 3,620 persons in June 2021 (Figure 3). This growth was mainly driven by the construction of multiple renewable energy projects, as well as CSG development, ongoing CSG activity and other resource industry operations (QGSO, 2021).

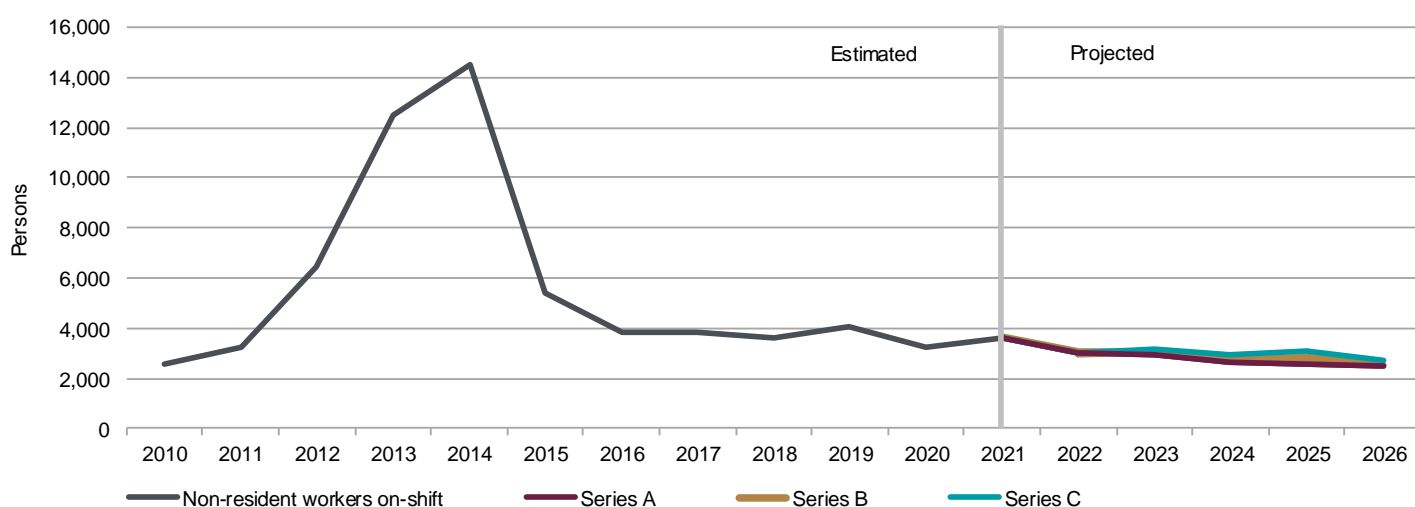
Three projection series are presented for the Surat Basin (Table 1). All three series anticipate the region's non-resident population will decrease between June 2021 and June 2022, as a number of renewable energy projects transition from construction to operations and CSG development underway in June 2021 is also completed. Under all three series, the non-resident population will continue to decline overall from 2022, remaining below 2021 levels over the projections period. The CSG industry will continue to provide most of the region's resource-related employment between 2022 and 2026.

Under Series A, the Surat Basin's non-resident population will decrease to 3,010 persons in June 2022, then continue to decline gradually to reach a minimum of 2,530 persons in 2026. This series reflects expected changes to the non-resident workforces of existing operations and projects under construction (Table 5, pages 8–9).

Series B takes into account the additional influence of a number of renewable energy projects that have been approved and have yet to reach financial close. This series projects the Surat Basin's non-resident population will remain above Series A for most of the projections period, reaching 3,050 persons in 2023, before declining to 2,530 persons in 2026.

According to Series C, which includes two rail infrastructure projects, the Surat Basin's non-resident population will peak at 3,130 persons in 2023, then decrease to 2,690 persons by 2026. Under all three projections series presented, the region's non-resident population will remain well below the total (14,490 persons) reached at the peak of CSG infrastructure construction in 2014.

Figure 3 Estimated and projected non-resident population, Surat Basin



Source: QGSO estimates, 2010 to 2021; QGSO projections, 2022 to 2026

Table 1 Projected non-resident population, Surat Basin

Projection series	Number of non-resident workers on-shift at 30 June					
	Estimated	Projected				
	2021	2022	2023	2024	2025	2026
Series A	3,620	3,010	2,930	2,620	2,550	2,530
Series B	3,620	3,030	3,050	2,750	2,830	2,530
Series C	3,620	3,030	3,130	2,980	3,090	2,690

Figures in all tables have been rounded to the nearest 10; see Notes at end of report for details.

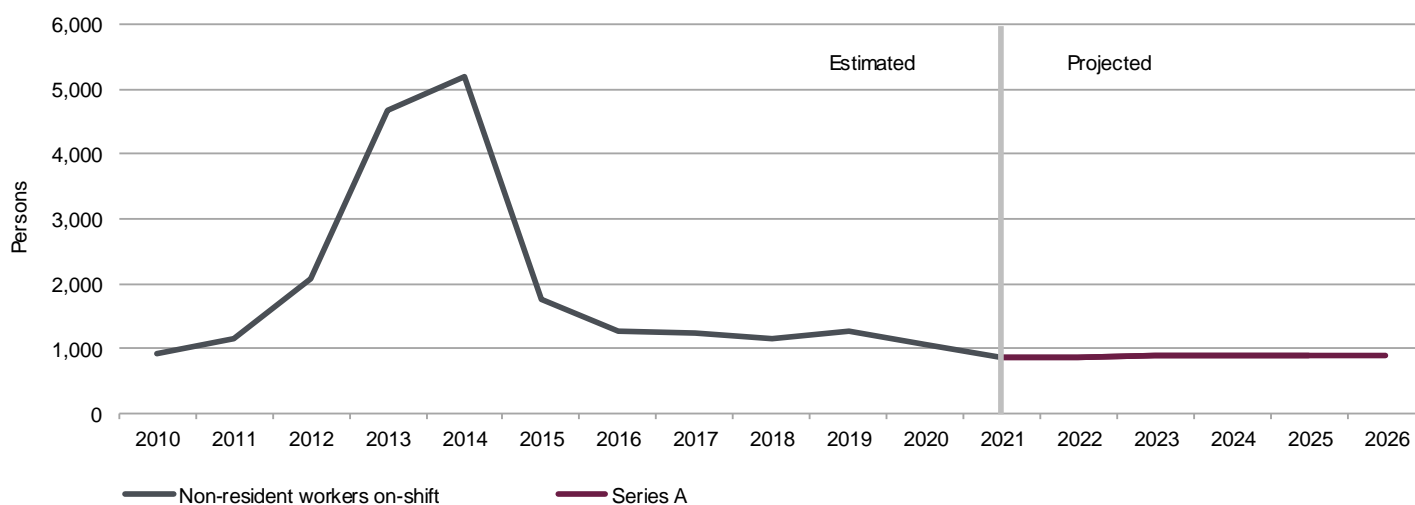
Source: QGSO estimates, 2021; QGSO projections, 2022 to 2026

Maranoa

Resource activity in the LGA of Maranoa is primarily associated with the CSG industry (Table 5, pages 8–9), with most of the non-resident population engaged in CSG operations, gas gathering, drilling and maintenance activities. CSG activity in Maranoa decreased between June 2020 and June 2021 (QGSO, 2021), which saw the non-resident population fall from 1,080 persons to 870 persons over this period (Figure 4).

One projection series is presented for Maranoa (Table 2). Series A projects minimal change in the size of the non-resident population of Maranoa between 2021 (870 persons) and 2026 (890 persons). This series includes consideration of the ongoing gas gathering, drilling and operation workforces of the APLNG and GLNG projects, as well as Denison South (Yellowbank), the Kincora Project and the Western Surat Gas Project.

Figure 4 Estimated and projected non-resident population, Maranoa



Source: QGSO estimates, 2010 to 2021; QGSO projections, 2022 to 2026

Table 2 Projected non-resident population, Maranoa

Projection series	Number of non-resident workers on-shift at 30 June					
	Estimated	Projected				
	2021	2022	2023	2024	2025	2026
Series A	870	880	890	890	890	890

Source: QGSO estimates, 2021; QGSO projections, 2022 to 2026

Western Downs

Western Downs has the largest non-resident population of the Surat Basin LGAs and is host to a range of resource industry activities including CSG operations and projects, coal mines, coal and gas fired power stations, and renewable energy projects (Table 5, pages 8–9). The non-resident population of Western Downs increased from 2,050 persons in June 2020 to 2,640 persons in June 2021 (Figure 5), driven by a significant increase in renewable energy project construction and supported by CSG development and operations activity (QGSO, 2021).

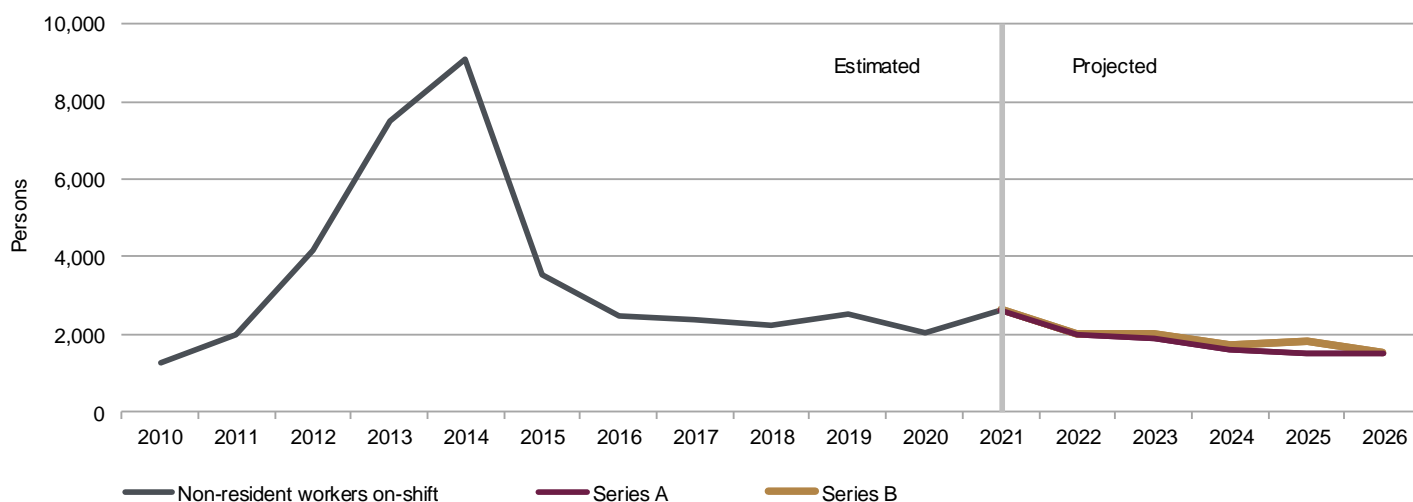
Two projection series are presented for Western Downs (Table 3). Under both series, the non-resident population is expected to decline over the year to June 2022, as a number of renewable energy projects transition from construction to operations and CSG development that was underway in June 2021 is also completed.

Under Series A, the non-resident population of Western Downs is projected to decline every year to reach 1,510 persons in 2026. This series reflects expected changes to the non-resident workforces of existing resource operations and projects under construction in the area, as CSG drilling campaigns and gas facilities construction wind down.

The Series B projection for Western Downs accounts for the additional non-resident population impacts of four renewable energy projects that have yet to reach financial close. Series B projects the non-resident population will decrease to 2,010 persons in 2022, and eventually decline to 1,520 persons in 2026.

Neither of the projection series for Western Downs include consideration of the Surat Basin Rail project or four proposed coal mining projects, which are classified as Category E (Table 5, pages 8–9).

Figure 5 Estimated and projected non-resident population, Western Downs



Source: QGSO estimates, 2010 to 2021; QGSO projections, 2022 to 2026

Table 3 Projected non-resident population, Western Downs

Projection series	Number of non-resident workers on-shift at 30 June					
	Estimated	Projected				
	2021	2022	2023	2024	2025	2026
Series A	2,640	1,980	1,910	1,600	1,530	1,510
Series B	2,640	2,010	2,030	1,730	1,810	1,520

Source: QGSO estimates, 2021; QGSO projections, 2022 to 2026

Toowoomba

Compared with the other Surat Basin LGAs, Toowoomba has a relatively small non-resident population. The proximity of the large population centre of Toowoomba to most resource operations in the LGA means that workers are more likely to live locally and less likely to commute from outside the region. In June 2021, the non-resident population of Toowoomba LGA was 120 persons, a small decline from 130 persons in June 2020 (Table 4, Figure 6). This population comprised workers engaged at gas operations, power stations and coal mines, as well as in support services for the gas and mining industries (Table 5, pages 8–9).

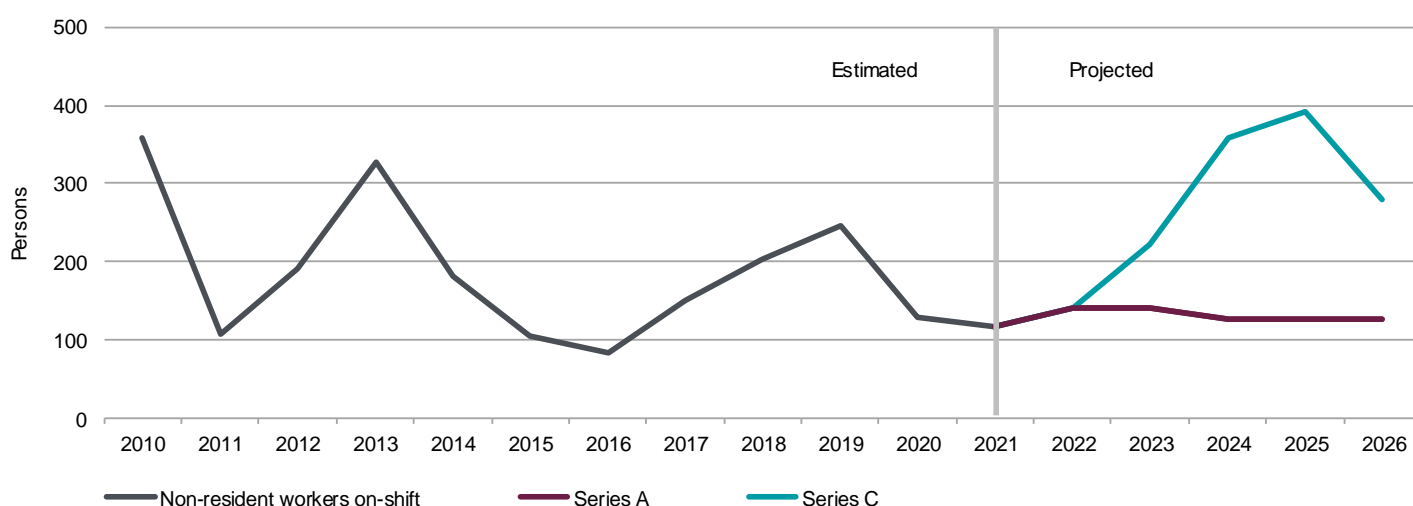
Two projection series are presented for Toowoomba (Table 4). Under Series A, the non-resident population is expected to remain at between 130 and 140 persons over the projections period. This series reflects the ongoing non-resident workforces associated with coal mines, gas operations and projects, and power stations in the LGA.

Series C includes the Inland Rail – Border to Gowrie and Inland Rail – Gowrie to Helidon projects, both of which have published an EIS and are awaiting approval. This series projects the non-resident population of Toowoomba will peak at 390 persons in 2025, before decreasing to 280 persons in 2026.

The projection series for Toowoomba does not include consideration of the New Acland Coal Mine Stage 3 Project, which is classified as Category E (Table 5, pages 8–9).

Due to the relatively small number of non-resident workers on-shift in Toowoomba LGA, infrastructure maintenance and other resource-related construction activities may also have a notable temporary influence on the size of the non-resident population. These workforces have not been included in any of the projection series.

Figure 6 Estimated and projected non-resident population, Toowoomba



Source: QGSO estimates, 2010 to 2021; QGSO projections, 2022 to 2026

Table 4 Projected non-resident population, Toowoomba

Projection series	Number of non-resident workers on-shift at 30 June					
	Estimated	Projected				
	2021	2022	2023	2024	2025	2026
Series A	120	140	140	130	130	130
Series C	120	140	220	360	390	280

Source: QGSO estimates, 2021; QGSO projections, 2022 to 2026



Queensland Government Statistician's Office

Table 5 Resource operations and projects, Surat Basin

Category ^(a)	Project / operation name	Company name	LGA
A	APLNG Drilling and Completions	APLNG ^(b)	Maranoa, Western Downs
A	APLNG Surat Operations and Gas Gathering	APLNG	Maranoa, Western Downs
A	Arrow Energy Surat Operations	Arrow Energy	Toowoomba, Western Downs
A	Blue Grass Solar Farm	X-Elio Australia	Western Downs
A	Braemar Power Station	Alinta Energy	Western Downs
A	Braemar 2 Power Station	Arrow Energy	Western Downs
A	Cameby Downs Mine	Yancoal Australia	Western Downs
A	Columboola Solar Farm	Hana Financial Investment	Western Downs
A	Commodore Mine	Millmerran Power Partners	Toowoomba
A	Condamine Power Station	QGC	Western Downs
A	Coopers Gap Wind Farm	AGL Energy	Western Downs
A	Daandine Power Station	Energy Infrastructure Investments	Western Downs
A	Dalby Hybrid Power Plant	FRV Australia	Western Downs
A	Darling Downs Power Station	Origin Energy	Western Downs
A	Denison South (Yellowbank)	Denison Gas	Maranoa
A	Dulacca Wind Farm	Octopus Australia	Western Downs
A	Edenvale Solar Park	Sapphire Energy	Western Downs
A	Gangarri Solar Farm	Shell Energy	Western Downs
A	GLNG Drilling and Completions	GLNG ^(c)	Maranoa, Western Downs
A	GLNG Surat Operations and Gas Gathering	GLNG	Maranoa, Western Downs
A	Kincora Project	Armour Energy	Maranoa
A	Kogan Creek Mine	CS Energy	Western Downs
A	Kogan Creek Power Station	CS Energy	Western Downs
A	Millmerran Power Station	InterGen	Toowoomba
A	Oakey Power Station	Shell Energy	Toowoomba
A	Oakey Solar Farm	Canadian Solar	Toowoomba
A	Project Atlas	Senex Energy	Western Downs
A	QCLNG Drilling and Completions	QCLNG ^(d)	Western Downs
A	QCLNG Surat Operations and Gas Gathering	QCLNG	Western Downs
A	Roma Power Station	Origin Energy	Maranoa
A	Surat Gas Project	Arrow Energy	Toowoomba, Western Downs
A	Wandoan South BESS	Vena Energy	Western Downs
A	Western Downs Green Power Hub	Neoen Australia	Western Downs
A	Western Surat Gas Project	Senex Energy	Maranoa
B	Beelbee Solar Farm	APA	Western Downs
B	Bulli Creek Solar Farm	Solar Choice	Toowoomba
B	Kogan Renewable Hydrogen Demonstration Plant	CS Energy	Western Downs
B	Wambo Wind Farm	Renewable Energy Projects / Cubico Sustainable Investments	Western Downs
B	Wandoan South Solar Project	Vena Energy	Western Downs
C	Inland Rail – Border to Gowrie	Australian Rail Track Corporation	Toowoomba
C	Inland Rail – Gowrie to Helidon	Australian Rail Track Corporation	Toowoomba
D	CTSCo Project	Carbon Transport and Storage Corporation (CTSCo)	Toowoomba, Western Downs
E	Elimatta Coal	New Hope Group	Western Downs
E	New Acland Coal Mine Stage 3 Project	New Hope Group	Toowoomba
E	Surat Basin Rail	Surat Basin Rail	Western Downs
E	The Range Coal	Stanmore Resources	Western Downs



E	Wandoan Coal	Glencore Coal	Western Downs
E	Wilkie Creek	New Wilkie Energy	Western Downs

- (a) The five categories include operations and projects, grouped according to their status in the approvals process as at March 2022. Operations that are in care and maintenance are not included in this list or the projections. See methodology (page 2) and caveats (page 9) for further details.
- (b) Australia Pacific LNG (APLNG) is a joint venture between ConocoPhillips, Origin Energy, and Sinopec.
- (c) Santos Gladstone LNG (GLNG) is a joint venture between Santos, PETRONAS, Total and KOGAS.
- (d) Queensland Curtis LNG (QCLNG) is a joint venture between QGC, CNOOC and Tokyo Gas.

Source: QGSO, 2022

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 consider future workforce growth arising from resource industry and infrastructure projects planned for the region, as reported by company sources.

Projections are based on the best available data and advice at the time of preparation. Non-resident populations are projected for the period to 2026 only, as the availability and reliability of information regarding operations and projects may diminish beyond that point. Project timeframes and workforce impacts may extend beyond the projections period. 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 annual mid-year estimates.

The four projection series represent a range of possible outcomes based on the status of projects in the approvals process at the time of production in March 2022 (see the projection methodology, page 2, for further details). These outcomes are subject to change over time as projects proceed through the approvals pipeline. 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.

Only series containing more than one project are published in this report.

Series D projections include projects that are in the early stages of planning and that have yet to proceed to a published EIS. Workforce data and indicative start dates provided to QGSO for these projects are preliminary company estimates, which may not be publicly available. Both estimated workforce numbers and project timeframes are subject to change during the course of project planning. As such, Series D projections should be regarded as having a higher degree of uncertainty than the other three series.

Category E comprises projects that have completed the approvals process although financial close has been delayed indefinitely; projects where it is not possible to consider indicative workforce data or sequencing; and other projects that are dependent on the commencement of projects in this category. These projects could not be allocated to a projection series at the time of preparation. 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 forecasts of future growth.

Notes

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.

Data in this report are derived from surveys conducted by QGSO in 2021 and other sources. The Survey of Accommodation Providers counted the number of non-resident workers on-shift during the last week of June 2021. See the *Surat Basin population report, 2021* <https://www.qgso.qld.gov.au/statistics/theme/population/non-resident-population-queensland-resource-regions/surat-basin#current->



[release-surat-basin-population-report](#) for further details. The Resource Employment Survey collected workforce information from all resource companies with existing operations and projects in the Surat Basin as at June 2021. A full list of operations and projects is available in Table 5 of this report.

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.

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 <https://www.qgso.qld.gov.au/statistics/theme/population/non-resident-population-queensland-resource-regions>.

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