

# V | Economics



# Kevin's Corner Economic Impact Study

## Final Report

September 2011



ECONOMIC ASSOCIATES

# Kevin's Corner Economic Impact Study

## Final Report

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## ABBREVIATIONS

ABS	Australian Bureau of Statistics
A\$	Australian Dollars
EIS	Environmental Impact Statement
€	Euro
US\$	United States Dollars
HGPL	Hancock Coal Pty Ltd
Mtpa	Millions of tonnes per annum
MDL	Mining Development Licence
NTA	Native Title Agreement
RC	Regional Council
SD	Statistical Division
SLA	Statistical Local Area
TR	Tourism Region

# EXECUTIVE SUMMARY

## Introduction

Hancock Galilee Pty Ltd (HGPL) proposes to establish a 30 million tonne per annum (Mtpa) capacity open-cut and underground longwall coal mine in the Galilee Basin to the north of Alpha. The Kevin's Corner Project has an expected mine life of 30 plus years. The Project will utilise the multi-user rail and port facilities proposed for the HGPL Alpha Coal Project.

Economic Associates Pty Ltd was commissioned by URS Australia Pty Ltd to prepare an economic impact assessment of the proposed Kevin's Corner Project.

This report provides an assessment of regional economic values and economic impact assessment.

## Economic Overview

The local and regional environments analysed were the Barcaldine Regional Council<sup>1</sup> (RC) and Central West statistical division (SD).

The socio-economic profile (ABS, 2006) highlights that the component statistical local areas (SLAs) of Barcaldine Regional Council are more mature relative to Queensland with a high incidence of lone person households. The region is characterised by a high incidence of home ownership but lower average household incomes. Agriculture, forestry and fishing was the dominant industry of employment in Aramac SLA and Jericho SLA but the incidence of employment in this sector (ABS, 2006) has declined since the 2001 Census.

The population of Barcaldine RC is projected to remain relatively stable until 2031, with Jericho SLA to record the highest growth rate of 0.1% per annum, without additional industry development.

In Central West SD, gross regional product decreased from \$629 million in 2000-01 to \$557 million in 2005-06 (OESR, 2008). In Central West SD, agriculture, forestry and fishing was the most significant sector in terms of gross value added.

Economic opportunities emerge from the presence of regional resources and capabilities that provide prospective industries with a locational advantage. The absence of suitable regional resources and capabilities for specific types of industries will limit their development and sustainability. The working population in Barcaldine RC declined between 2001 and 2006, principally due to rural decline. However, the recent spate of resource sector projects within the region present new opportunities in the primary industries, but in mining not agriculture. In 2006, Barcaldine RC and Central West SD recorded a significant competitive advantage for primary industries relative to Queensland.

Over the past nine years, the size of the labour force has remained relatively steady throughout Barcaldine RC, with the labour force participation rate averaging 77.8%. The unemployment rate in Barcaldine RC and its component SLAs has been consistently lower than the Queensland average (DEWR, various years).

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<sup>1</sup> Detailed analysis based on statistical local areas were also conducted for Barcaldine Regional Council.

There were a total of 567 businesses identified in Barcaldine RC as of June 2007, with Barcaldine SLA having the most with 210 businesses (ABS, 2006-07). Agriculture, forestry and fishing was the dominant business type across all SLAs within Barcaldine RC accounting for between 51.4% and 76.9% of total businesses. There were fifteen businesses identified within Barcaldine RC that employed over twenty persons with twelve agriculture, forestry and fishing businesses and three accommodation, cafes and restaurant businesses.

Livestock was the major agricultural activity in Barcaldine RC with the total value of livestock slaughtered estimated at \$97.01 million in 2005-06 (ABS, 2007). The majority of livestock slaughtered were cattle and calves accounting for \$93.40 million or 96.3% of total livestock slaughtered. Horticulture and cropping were not identified as significant agricultural industries in Barcaldine RC.

Analysis contained in section 3 of this report suggests that the local and regional economic environments of the Barcaldine RC and Central West SD have improved considerably over the last five to ten years, with labour force participation increasing and unemployment rates decreasing. However livestock production, the region's most significant form of agricultural production, has experienced significant decline.

Agricultural production has traditionally been a foundation of the Barcaldine local economy. The region has faced challenging climatic conditions over the past five to ten years including drought and extreme flooding. In the future, agriculture will face growing competition for labour from mining. Furthermore, as the local and regional economies grow agriculture will face competition from the services sector.

### **Availability of Accommodation and Housing in the Regional Economy**

The room occupancy rate of hotels, motels and serviced apartments with five or more rooms in Barcaldine RC fluctuated between 30.1% (March quarter 2005) and 57.2% (September quarter 2009) (ABS, various years). Over the past five years room occupancy rates for hotels, motels and serviced apartments in Barcaldine RC were generally lower than in the Outback tourism region (TR) and Queensland.

Data for the site occupancy rate of caravans in Barcaldine RC was unavailable due to the limited number of caravan parks. In the Outback TR, the site occupancy rate of caravans was highest in the September quarter 2009 at 59.2%. The average site occupancy rate over the past five years was 37.1% in the Outback TR, significantly below the Queensland average of 56.7%.

In Barcaldine RC, the average number of vacant rooms / beds per night ranged between:

- 39-67 vacant hotel / motel rooms and serviced apartments; and
- 33-77 vacancies at caravan sites.

Between 2001-02 and 2009-10, there were 57 residential building approvals in Barcaldine RC, including 51 new houses. The total value of approvals was highest in 2009-10 in Barcaldine RC (\$11.4 million) and Central West SD (\$29.2 million) (ABS, 2009-10). According to various construction cost indices building prices in Central West SD are approximately 20% to 40% higher than Metropolitan Brisbane.

The volume of house sales in Barcaldine RC accounted for approximately 25% to 32% of sales in Central West SD. The median price of house sales in Barcaldine RC was consistently below Central West SD.

There were four to eight commercial property sales per annum in Barcaldine RC with the median sales price fluctuating between \$64 per square metre and \$180 per square metre.

There was limited data in regards to unit and townhouse, and industrial property sales in Barcaldine RC so it was difficult to determine the trend in prices over the past nine years.

Between 2001 and 2009, there were 154 vacant lands sales in Barcaldine RC. Within Barcaldine RC, the median sale price of vacant land was highest in Jericho SLA.

Based on the paucity of rental bond data and the limited rental listings data, it is clear that the rental housing market in Alpha and Barcaldine is thin. Between July 2009 and February 2011, there were 20 rental listings in Alpha (generally between \$160 and \$180 per week) and three listings in Barcaldine (between \$200 and \$220 per week).

## Economic Impact Assessment

The purpose of economic impact assessment is to understand the scale of the proposed development's economic impact and effect relative to the size of the Queensland economy. The economic assessment will entail an economic impact assessment to estimate the scale of output, income, employment and value added impacts of the Project on the Queensland economy, identification of the Project's opportunity cost and the cumulative impacts of major projects within the region.

Table E.1 below describes the various impact measures used in economic impact assessment.

**Table E.1: Measures of Economic Impact**

Impact Measure	Description
Output	The output impact measures the increase in gross sales throughout the entire economy by aggregating all individual transactions (direct and indirect) resulting from the economic stimulus. The output impact provides an indication of the degree of structural dependence between sectors of the economy. However, output impacts are regarded as overstating the impact on the economy as they count all goods and services used in one stage of production as an input to later stages of production, hence counting their contribution more than once.
Household income	The household income impact measures the additional wages, salaries and supplements paid to households associated with the industry under consideration and with other industries benefiting from the stimulus to the economy. It is important to note that the input-output tables on which this analysis is based relate to 2005-06. The input-output tables represent the structural dependence of industry sectors within the regional economy. Since 2005-06 there may have been changes in the composition of real wages. While the input-output tables have been augmented to reflect changes in relative incomes between industries, they have not been augmented such that they reflect relative differences between regions on an inter-industry basis.
Employment	The employment impact measures the number of full time equivalent (FTE) positions for one year created directly and indirectly by the stimulus <sup>2</sup> . However, the short-term response to increased demand may be that existing employees work overtime. Consequently, actual levels of employment generated (in terms of persons employed) will tend to be lower than those estimated by the input-output analysis. This short-term employment response (of working additional overtime) will be more prevalent where the demand stimulus is likely to be temporary and short lived, or where there is limited spare capacity in the economy (that is, when the economy is at or near full employment).

<sup>2</sup> Therefore, if impacts are to be spread over a number of years, the FTE estimate (which relates to the annual equivalent) should be divided by the number of years over which the impact will be spread (in the absence of a clearly defined staging program) to provide an indicative ongoing employment estimate over the life of the impact.

Impact Measure	Description
Value added	The value added or Gross Regional Product (GRP) impact measures only the net activity at each stage of production resulting from a stimulus. GRP is defined as the addition of consumption, investment and government expenditure, plus net exports (exports minus imports) from a region. The value added (or GRP) impact is the preferred measure for the assessment of contribution to the economy from a stimulus or impact, and as such should be used to describe the net impact of the event.

Source: Jensen, R. & West, G. (2001) Community Economic Analysis, Department of Primary Industries: Brisbane, Qld

## Construction and Capital Effects

Table E.2 summarises the total construction and capital costs of the Kevin's Corner Coal Project. These costs will be expended throughout the life of the Project and comprise both initial and replacement capital costs.

The total construction and capital cost of the Project is approximately \$6,952.1 million, comprising approximately \$3,631.6 million in domestic expenditures and \$3,320.5 million in expenditure overseas. The economic impact of the proposed project on the regional, state and Australian economies is limited to those generated by domestic expenditures.

A detailed breakdown of project expenditures by year and type is provided in section 5.1.2 of this report.

**Table E.2: Total construction and capital costs for the Kevin's Corner Project (\$M)**

Expenditure item	Domestic	Overseas	Total
Drill & Blast	\$2.5	\$3.8	\$6.3
Draglines	\$113.8	\$170.6	\$284.4
Prestrip Fleets	\$179.3	\$269.0	\$448.3
Coal Mining Fleets	\$75.1	\$112.7	\$187.8
Ancillary Fleets	\$61.0	\$142.4	\$203.4
CHPP and Mobile Equipment	\$470.2	\$470.2	\$940.4
Access Road	\$282.6	\$0.0	\$282.6
Dams and Diversions	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$153.1	\$0.0	\$153.1
Camp and Airstrip	\$99.2	\$99.2	\$198.4
Other Infrastructure	\$46.5	\$46.5	\$93.0
Underground	\$2,006.2	\$2,006.2	\$4,012.4
Land Acquisition	\$20.3	\$0.0	\$20.3
BFS	\$99.0	\$0.0	\$99.0
Other	\$22.8	\$0.0	\$22.8
Total	\$3,631.6	\$3,320.5	\$6,952.1

## *Output or Consumption Effects*

The output (or consumption) impacts of construction and capital works associated with the Kevin's Corner Project are detailed in Tables E.3 and E.4 below. The most significant output (or consumption) impacts associated with these works are anticipated to arise in 2013, 2014 and 2015. These three years account for approximately 29% of output (or consumption) effects resulting from the Project.

In 2013, total output (or consumption) impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$959.05 million, comprising \$386.76 million in direct output (or consumption) effects and \$572.29 million in indirect output

(or consumption) effects. The construction and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$313.96 million and \$176.25 million respectively.

In 2014, total output (or consumption) impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$808.89 million, comprising \$340.88 million in direct output (or consumption) effects and \$468.02 million in indirect output (or consumption) effects. The manufacturing and construction sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$345.38 million and \$150.56 million respectively.

In 2015, total output (or consumption) impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$928.55 million, comprising \$399.07 million in direct output (or consumption) effects and \$529.49 million in indirect output (or consumption) effects. The manufacturing and construction sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$413.50 million and \$126.93 million respectively.

#### *Household Income Effects*

In 2013, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$232.05 million, comprising \$87.78 million in direct household income effects and \$144.27 million in indirect household income effects. The transport, postal & warehousing and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$65.75 million and \$51.66 million respectively.

In 2014, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$234.60 million, comprising \$112.69 million in direct household income effects and \$121.91 million in indirect household income effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$122.35 million and \$37.18 million respectively.

In 2015, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$279.40 million, comprising \$141.19 million in direct household income effects and \$138.21 million in indirect household income effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$147.56 million and \$45.60 million respectively.

#### *Employment Effects*

In 2013, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 4,105 full time equivalent positions, comprising direct employment effects of 1,802 full time equivalent positions and indirect employment effects of 2,303 full time equivalent positions. Employment effects are anticipated to be most significant in the transport, postal & warehousing and construction sectors, where construction and capital expenditure is anticipated to generate 1,254 full time equivalent positions and 1,163 full time equivalent positions respectively.

In 2014, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 3,553 full time equivalent positions, comprising direct employment effects of 1,748 full time equivalent positions and indirect employment effects of 1,805 full time equivalent positions. Employment effects are anticipated to be most significant in the manufacturing and transport, postal & warehousing sectors, where construction and capital expenditure is anticipated to generate 1,493 full time equivalent positions and 692 full time equivalent positions respectively.

In 2015, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 4,131 full time equivalent positions, comprising direct employment effects of 2,126 full time equivalent positions and indirect employment effects of 2,005 full time equivalent positions. Employment effects are anticipated to be most significant in the manufacturing and transport, postal & warehousing sectors, where construction and capital expenditure is anticipated to generate 1,807 full time equivalent positions and 849 full time equivalent positions respectively.

#### *Value Added Effects*

In 2013, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$399.24 million, comprising \$142.45 million in direct value added effects and \$256.79 million in indirect value added effects. The transport, postal & warehousing and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$90.75 million and \$78.42 million respectively.

In 2014, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$359.84 million, comprising \$150.48 million in direct value added effects and \$209.37 million in indirect value added effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$154.11 million and \$51.62 million respectively.

In 2015, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$424.40 million, comprising \$185.38 million in direct value added effects and \$239.02 million in indirect value added effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$185.42 million and \$63.30 million respectively.

**Table E.3: Economic impacts of construction and capital expenditure, 2013-2028**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>Output (\$M)</b>																
Direct	\$386.76	\$340.88	\$399.07	\$192.60	\$244.56	\$198.18	\$189.08	\$160.28	\$108.09	\$29.05	\$43.92	\$89.92	\$40.77	\$68.52	\$51.07	\$104.33
Indirect	\$572.29	\$468.02	\$529.49	\$300.53	\$389.39	\$336.41	\$328.59	\$249.14	\$159.30	\$50.06	\$75.06	\$142.30	\$70.48	\$115.04	\$88.75	\$168.35
Total	\$959.05	\$808.89	\$928.55	\$493.13	\$633.94	\$534.59	\$517.68	\$409.42	\$267.40	\$79.11	\$118.98	\$232.22	\$111.24	\$183.56	\$139.82	\$272.68
<b>Household Income (\$M)</b>																
Direct	\$87.78	\$112.69	\$141.19	\$39.28	\$46.89	\$23.05	\$16.60	\$34.37	\$29.49	\$2.69	\$4.30	\$17.39	\$3.71	\$8.37	\$4.48	\$18.09
Indirect	\$144.27	\$121.91	\$138.21	\$76.55	\$99.54	\$84.78	\$82.40	\$63.92	\$41.41	\$12.55	\$18.79	\$36.34	\$17.66	\$28.95	\$22.25	\$42.85
Total	\$232.05	\$234.60	\$279.40	\$115.84	\$146.44	\$107.83	\$99.00	\$98.29	\$70.90	\$15.24	\$23.10	\$53.73	\$21.37	\$37.33	\$26.74	\$60.94
<b>Employment (FTEs)</b>																
Direct	1,802	1,748	2,126	737	856	576	508	585	443	79	120	313	110	201	137	348
Indirect	2,303	1,805	2,005	1,215	1,578	1,398	1,378	998	623	209	312	574	295	475	372	685
Total	4,105	3,553	4,131	1,952	2,435	1,974	1,886	1,583	1,066	288	432	888	405	676	509	1,034
<b>Value Added (\$M)</b>																
Direct	\$142.45	\$150.48	\$185.38	\$62.61	\$75.54	\$48.14	\$41.21	\$52.81	\$41.10	\$6.49	\$10.07	\$28.00	\$9.03	\$17.12	\$11.13	\$30.61
Indirect	\$256.79	\$209.37	\$239.02	\$133.06	\$171.48	\$147.67	\$144.03	\$110.23	\$70.69	\$22.02	\$33.13	\$62.92	\$30.96	\$50.75	\$38.90	\$74.24
Total	\$399.24	\$359.84	\$424.40	\$195.67	\$247.02	\$195.82	\$185.24	\$163.04	\$111.80	\$28.51	\$43.20	\$90.92	\$39.99	\$67.87	\$50.03	\$104.85

Source: Economic Associates estimates

**Table E.4: Economic impacts of construction and capital expenditure, 2029-2043**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
<b>Output (\$M)</b>															
Direct	\$56.21	\$74.62	\$71.88	\$53.57	\$49.48	\$119.15	\$49.12	\$53.49	\$58.15	\$109.33	\$109.15	\$88.58	\$36.14	\$25.12	\$30.49
Indirect	\$97.68	\$118.19	\$122.79	\$90.09	\$85.64	\$193.81	\$73.59	\$92.95	\$100.20	\$188.14	\$188.11	\$151.39	\$53.98	\$43.66	\$52.99
Total	\$153.89	\$192.82	\$194.67	\$143.67	\$135.12	\$312.96	\$122.70	\$146.44	\$158.35	\$297.47	\$297.25	\$239.98	\$90.11	\$68.78	\$83.48
<b>Household Income (\$M)</b>															
Direct	\$4.93	\$14.34	\$7.54	\$6.18	\$4.47	\$19.71	\$12.13	\$4.70	\$5.41	\$10.25	\$10.56	\$9.46	\$9.25	\$2.21	\$2.68
Indirect	\$24.49	\$30.17	\$30.85	\$22.61	\$21.47	\$49.27	\$18.97	\$23.31	\$25.11	\$47.14	\$47.22	\$38.07	\$13.96	\$10.95	\$13.29
Total	\$29.43	\$44.51	\$38.39	\$28.80	\$25.93	\$68.97	\$31.10	\$28.01	\$30.51	\$57.38	\$57.78	\$47.53	\$23.21	\$13.15	\$15.96
<b>Employment (FTEs)</b>															
Direct	151	259	202	154	134	391	191	144	158	297	301	251	140	68	82
Indirect	410	477	511	372	358	792	289	390	418	785	786	631	205	183	222
Total	561	736	713	526	492	1,182	480	534	576	1,082	1,087	881	346	251	304
<b>Value Added (\$M)</b>															
Direct	\$12.25	\$23.16	\$16.81	\$13.13	\$10.92	\$34.09	\$17.67	\$11.66	\$13.01	\$24.55	\$24.67	\$20.81	\$13.23	\$5.48	\$6.65
Indirect	\$42.81	\$52.27	\$53.99	\$39.85	\$37.60	\$85.37	\$32.80	\$40.74	\$44.07	\$82.80	\$82.55	\$66.48	\$23.97	\$19.14	\$23.22
Total	\$55.06	\$75.43	\$70.80	\$52.98	\$48.52	\$119.46	\$50.46	\$52.40	\$57.09	\$107.35	\$107.22	\$87.29	\$37.20	\$24.61	\$29.87

Source: Economic Associates estimates

### **Ongoing and Operating Effects**

Tables E.5 and E.6 below provide a breakdown of operating costs associated with the Kevin's Corner project. Operating costs associated with the Kevin's Corner project are anticipated to commence in 2014. Total operating expenditure between 2014 and 2043 is estimated at \$22,895.9 million, with expenditure peaking in 2020 at \$946.9 million. Annual operating expenditure associated with the Kevin's Corner project is anticipated to remain above \$800 million between 2019 and 2040.

**Table E.5: Ongoing and operating costs of the Kevin's Corner Coal Project, 2014-2028**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Opencut Waste Removal	0.0	88.8	111.8	130.6	132.3	128.0	147.3	75.8	73.8	70.6	71.2	68.6	71.4	71.3	68.5
Opencut Mining	0.0	5.3	12.2	19.0	20.5	9.4	14.6	11.1	9.3	7.4	7.5	7.8	7.5	7.7	8.7
Underground Mining	0.0	6.7	166.7	359.6	398.9	476.6	552.7	553.8	556.1	563.9	546.0	556.8	541.2	541.0	545.8
CHPP	0.0	37.8	51.1	67.1	87.0	88.4	108.2	106.0	98.4	107.6	134.5	103.4	111.7	119.0	103.0
Overheads	0.0	29.9	37.2	39.0	39.3	37.5	34.9	26.8	27.4	25.2	26.1	25.0	25.1	25.1	25.3
MIA	12.9	22.4	31.3	46.6	61.0	67.4	89.1	94.5	92.7	90.9	91.7	92.0	90.8	91.1	91.2
<b>Total</b>	<b>12.9</b>	<b>190.9</b>	<b>410.3</b>	<b>661.8</b>	<b>739.0</b>	<b>807.3</b>	<b>946.9</b>	<b>868.0</b>	<b>857.8</b>	<b>865.6</b>	<b>877.1</b>	<b>853.6</b>	<b>847.7</b>	<b>855.2</b>	<b>842.6</b>

**Table E.6: Ongoing and operating costs of the Kevin's Corner Coal Project, 2029-2043**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Opencut Waste Removal	67.0	89.8	103.7	95.4	100.0	93.8	131.8	127.1	128.0	127.8	121.6	128.3	108.9	128.7	69.3
Opencut Mining	8.4	9.1	10.6	12.3	10.8	9.9	12.5	13.7	13.1	12.7	15.8	15.1	15.6	15.9	13.9
Underground Mining	526.5	537.2	531.2	527.7	519.8	509.8	468.2	469.0	463.6	474.1	465.3	462.3	413.8	421.4	282.7
CHPP	110.8	99.0	103.4	113.0	98.1	130.6	118.1	99.1	117.4	110.9	98.9	96.2	108.0	103.8	85.4
Overheads	25.6	27.4	28.2	27.7	28.3	28.6	31.2	31.5	31.3	31.2	31.8	31.5	31.4	31.0	20.8
MIA	89.8	91.4	93.9	94.2	93.5	92.5	90.8	91.7	89.6	89.7	92.1	90.9	88.1	84.6	73.3
<b>Total</b>	<b>828.0</b>	<b>853.7</b>	<b>870.9</b>	<b>870.2</b>	<b>850.5</b>	<b>865.3</b>	<b>852.5</b>	<b>832.1</b>	<b>843.0</b>	<b>846.4</b>	<b>825.5</b>	<b>824.3</b>	<b>765.8</b>	<b>785.5</b>	<b>545.4</b>

### *Output or Consumption Impacts*

The output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are detailed in Tables E.7 and E.8 below. The economic impacts resulting from operating expenditure increase from generally minimal impacts in the first year of operation, peaking in 2020 and remaining significant for the remaining life of the project.

In the first year of operation (2014), total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$35.04 million, comprising \$12.88 million in direct output (or consumption) effects and \$22.16 million in indirect output (or consumption) effects. The most significantly impacted sector at this stage of the Project is construction, accounting for over half of all direct impacts (\$17.97 million or 51% of total impacts).

By 2020, total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$1,997.79 million, comprising \$946.87 million in direct output (or consumption) effects and \$1,050.92 million in indirect output (or consumption) effects.

In 2031, total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$1,838.16 million, comprising \$870.93 million in direct output (or consumption) effects and \$967.23 million in indirect output (or consumption) effects.

In the final year of operation (2043), total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$1,154.95 million, comprising \$545.39 million in direct output (or consumption) effects and \$609.56 million in indirect output (or consumption) effects.

### *Household Income Effects*

In the first year of operation (2014), total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$6.84 million, comprising \$1.29 million in direct household income effects and \$5.55 million in indirect household income effects.

By 2020, total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$546.78 million, comprising \$270.87 million in direct household income effects and \$275.90 million in indirect household income effects.

By 2031, total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$500.90 million, comprising \$247.24 million in direct household income effects and \$253.66 million in indirect household income effects.

In the final year of operation (2043), total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$309.24 million, comprising \$149.94 million in direct household income effects and \$159.30 million in indirect household income effects.

### *Employment Effects*

In the first year of operation (2014), operating expenditure associated with the Kevin's Corner Project is estimated to support 127 full time equivalent positions, including 35 direct full time equivalent positions and 92 indirect full time equivalent positions.

In 2020, operating expenditure associated with the Kevin's Corner is estimated to support 7,258 full time equivalent positions, including 3,477 direct full time equivalent positions and 3,781 indirect full time equivalent positions.

In 2031, operating expenditure associated with the Kevin's Corner is estimated to support 6,664 full time equivalent positions, including 3,182 direct full time equivalent positions and 3,482 indirect full time equivalent positions.

In the final year of operation (2043), operating expenditure associated with the Kevin's Corner Project is estimated to support 4,160 full time equivalent positions, including 1,955 direct full time equivalent positions and 2,206 indirect full time equivalent positions.

#### *Value Added Effects*

In the first year of operation (2014), total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$12.70 million, comprising \$2.96 million in direct value added effects and \$9.75 million in value added effects. The most significantly impacted sector at this stage of the Project is construction, accounting for over a third of all direct impacts (\$4.47 million or 35% of total impacts).

By 2020, total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$984.66 million, comprising \$510.10 million in direct value added effects and \$474.56 million in indirect value added effects.

In 2031, total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$905.00 million, comprising \$468.15 million in direct value added effects and \$436.85 million in indirect value added effects.

In the final year of operation (2043), total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$565.11 million, comprising \$289.82 million in direct value added effects and \$275.29 million in indirect value added effects.

**Table E.7: Economic impact of ongoing and operating expenditure of the Kevin's Corner Project, 2014-2028**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>Output (\$M)</b>															
Direct	\$12.88	\$190.94	\$410.31	\$661.84	\$739.04	\$807.30	\$946.87	\$867.99	\$857.76	\$865.56	\$877.09	\$853.61	\$847.74	\$855.21	\$842.56
Indirect	\$22.16	\$198.05	\$459.11	\$743.70	\$828.35	\$898.50	\$1,050.92	\$981.67	\$966.49	\$972.99	\$992.95	\$961.39	\$954.62	\$963.08	\$944.20
Total	\$35.04	\$388.99	\$869.41	\$1,405.54	\$1,567.39	\$1,705.80	\$1,997.79	\$1,849.66	\$1,824.25	\$1,838.55	\$1,870.04	\$1,814.99	\$1,802.36	\$1,818.28	\$1,786.76
<b>Household Income (\$M)</b>															
Direct	\$1.29	\$40.50	\$122.70	\$204.16	\$222.60	\$238.94	\$270.87	\$257.50	\$252.49	\$255.93	\$263.52	\$252.36	\$250.65	\$253.13	\$245.58
Indirect	\$5.55	\$50.82	\$120.76	\$196.15	\$218.01	\$236.33	\$275.90	\$258.20	\$254.06	\$255.93	\$261.43	\$252.84	\$251.07	\$253.32	\$248.09
Total	\$6.84	\$91.32	\$243.46	\$400.32	\$440.61	\$475.27	\$546.78	\$515.70	\$506.56	\$511.86	\$524.96	\$505.20	\$501.73	\$506.45	\$493.66
<b>Employment (FTEs)</b>															
Direct	35	542	1,568	2,597	2,844	3,050	3,477	3,309	3,245	3,281	3,376	3,238	3,216	3,247	3,155
Indirect	92	717	1,655	2,670	2,976	3,225	3,781	3,543	3,486	3,505	3,580	3,466	3,442	3,472	3,403
Total	127	1,259	3,223	5,267	5,820	6,274	7,258	6,852	6,731	6,786	6,956	6,704	6,658	6,719	6,557
<b>Value Added (\$M)</b>															
Direct	\$2.96	\$104.17	\$220.15	\$356.13	\$397.07	\$435.67	\$510.10	\$462.04	\$457.57	\$463.10	\$467.48	\$455.87	\$452.82	\$456.88	\$451.04
Indirect	\$9.75	\$90.06	\$207.39	\$335.75	\$374.07	\$405.86	\$474.56	\$442.78	\$436.06	\$439.04	\$447.85	\$433.76	\$430.70	\$434.51	\$426.15
Total	\$12.70	\$194.23	\$427.54	\$691.88	\$771.14	\$841.52	\$984.66	\$904.82	\$893.63	\$902.14	\$915.33	\$889.62	\$883.52	\$891.39	\$877.19

**Table E.8: Economic impact of ongoing and operating expenditure of the Kevin's Corner Project, 2029-2043**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
<b>Output (\$M)</b>															
Direct	\$828.00	\$853.73	\$870.93	\$870.22	\$850.47	\$865.30	\$852.48	\$832.13	\$843.02	\$846.45	\$825.48	\$824.29	\$765.85	\$785.49	\$545.39
Indirect	\$930.13	\$947.57	\$967.23	\$970.88	\$939.97	\$962.95	\$943.61	\$914.98	\$931.89	\$932.02	\$915.07	\$898.83	\$845.95	\$854.58	\$609.56
Total	\$1,758.13	\$1,801.30	\$1,838.16	\$1,841.10	\$1,790.43	\$1,828.25	\$1,796.09	\$1,747.11	\$1,774.91	\$1,778.46	\$1,740.55	\$1,723.11	\$1,611.80	\$1,640.08	\$1,154.95
<b>Household Income (\$M)</b>															
Direct	\$243.19	\$242.72	\$247.24	\$249.72	\$237.89	\$247.80	\$239.24	\$227.69	\$235.71	\$234.44	\$229.72	\$220.58	\$208.88	\$207.98	\$149.94
Indirect	\$244.46	\$248.55	\$253.66	\$254.80	\$246.23	\$252.64	\$247.24	\$239.30	\$244.11	\$244.01	\$239.55	\$234.75	\$221.18	\$223.18	\$159.30
Total	\$487.65	\$491.27	\$500.90	\$504.52	\$484.12	\$500.44	\$486.48	\$466.99	\$479.82	\$478.45	\$469.27	\$455.33	\$430.05	\$431.16	\$309.24
<b>Employment (FTEs)</b>															
Direct	3,122	3,122	3,182	3,214	3,066	3,186	3,084	2,943	3,039	3,023	2,969	2,854	2,708	2,692	1,955
Indirect	3,351	3,410	3,482	3,498	3,382	3,465	3,396	3,293	3,354	3,352	3,297	3,231	3,051	3,075	2,206
Total	6,473	6,532	6,664	6,711	6,448	6,651	6,480	6,236	6,393	6,375	6,266	6,086	5,759	5,767	4,160
<b>Value Added (\$M)</b>															
Direct	\$442.76	\$459.25	\$468.15	\$466.62	\$458.04	\$464.85	\$458.75	\$448.76	\$453.95	\$456.78	\$443.11	\$446.42	\$411.16	\$425.88	\$289.82
Indirect	\$419.80	\$427.98	\$436.85	\$438.35	\$424.71	\$434.92	\$426.31	\$413.59	\$421.05	\$421.22	\$413.42	\$406.53	\$382.25	\$386.45	\$275.29
Total	\$862.56	\$887.23	\$905.00	\$904.96	\$882.76	\$899.77	\$885.06	\$862.35	\$875.00	\$878.00	\$856.53	\$852.95	\$793.41	\$812.33	\$565.11

## Summary of Other Impacts

The Kevin's Corner Coal Project represents a major potential stimulus to the regional, state and national economies. The Project will generate significant demand for labour in both development and operational phases.

A significant quantum of on-site employment is anticipated to be satisfied by fly-in-fly-out or drive-in-drive-out workers. However, a proportion of the workforce is likely to choose to reside within the region. The demand for labour would not be exclusively limited to mine construction or operation. Project-related expenditure will stimulate significant labour demand throughout Queensland.

The Project is likely to place pressure on local and regional labour and accommodation (both housing and commercial accommodation) markets. The local area and the region have experienced rising property costs associated with growing interest in the development of resource projects within the Galilee Basin.

The Project will generate significant positive economic impacts in the form of additional exports, increased employment and demand for local and regional production. However, the Project will place growing pressure on local and regional social infrastructure and could result in localised inflation particularly in relation to wages, housing and accommodation.

## Value of Coal Exports

The Kevin's Corner Coal Project will produce approximately 856 million tonnes (Mt) of coal for export from Queensland throughout the life of the mine, the value of these exports to the Queensland economy will be approximately \$67.8 billion. Once fully operational the coal mine, will produce between 25 Mtpa and 30 Mtpa of coal exports, equating to a value of \$2.7 billion per annum.

## Project Opportunity Costs

Assuming that no grazing would occur within the project area and a grazing density of one head of cattle per twelve hectares and 10,200 hectares of non-remnant grassland for grazing, the subject site could support approximately 850 head of cattle. Alternatively, assuming that grazing only ceased within non-remnant grassland directly impacted by the project (i.e. 2,988 hectares) and the same stocking rate as discussed above, the loss of production would be 249 head of cattle. Hence the loss of grazing production as a result of the project is likely to be between 249 head of cattle and 850 head of cattle.

Data contained in section 3.5.3 indicates a slaughter value of approximately \$1,100 per head of cattle. Based on estimates provided in section 5.3.2 of this report, the loss of potential grazing production is likely to be between 249 head of cattle and 850 head of cattle, representing a potential loss in slaughter value of between \$0.3 million and \$0.9 million per annum. Based on a social opportunity cost of capital of 6%, this represents a capitalised value of between \$4.6 million and \$15.6 million.

Approximately 5,356 hectares of woodland or heath are to be directly impact by the project. Based on a total economic value of \$200/ha/annum, the annual economic value of direct impacts on woodland and heath vegetation communities would be approximately \$1.1 million per

annum. Based on a social opportunity cost of capital of 6%<sup>3</sup>, the capitalised value of these direct impacts on woodland and heath communities would be approximately \$17.9 million.

### **Distribution Effects of the Project**

Due to the nature of the Kevin's Corner Project, the project creates significant demand for skilled blue collar workers. As such, this will cause inflationary wage prices within these sectors. As a result, competing sectors such as agriculture and population servicing sectors are also likely to experience higher incomes. Persons renting within the area are likely to face cost pressures while household owners will benefit from an increase in asset wealth. People receiving government transfer payment and self funding retirees would not significantly benefit from the project.

### **Strategies to Mitigate Impacts**

To encourage the development of local and regional industry capability, HGPL will develop an employment and procurement policy guided by industry standards and relevant government guidelines that will reflect:

- Maximising local employment (including work readiness if appropriate);
- Promoting Indigenous employment; and
- Employment of apprentices and trainees (including work readiness if appropriate).

Potential shortages in hard and soft social infrastructure that may result from increased local and regional population (facilitated by increased labour demand) are addressed in the social impact assessment.

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<sup>3</sup> A 6% discount rate is the standard test discount rate for Queensland Government projects.

# 1 INTRODUCTION

Hancock Galilee Pty Ltd (HGPL) proposes to establish a 30 Mtpa open-cut and underground longwall coal mine in the Galilee Basin to the north of Alpha. The Kevin's Corner Project has an expected mine life of 30 plus years. The Project is located adjacent to HGPL's Alpha Coal Project will utilise the multi-user rail and port facilities proposed for the Alpha Coal Project.

Economic Associates Pty Ltd (Economic Associates) was commissioned by URS Australia Pty Ltd (URS) to prepare and economic impact assessment of the proposed Kevin's Corner Project.

This report provides an assessment of the following regional economic values.

- Regional and sub-regional population analysis (historic and projected).
- Regional and sub-regional employment and labour force analysis (by industry, occupation, participation rate and unemployment), skills and training.
- Demographic profile (age, family structure, income).
- Analysis of industrial activity and significance (e.g. number of employing and non-employing businesses by industry).
- Enterprise activity (business type and number). This would include a description of large scale industrial projects and their effects in the region.
- Analysis of local and regional residential, commercial and industrial property markets.
- Availability and capacity of commercial accommodation to meet the accommodation needs of the construction and operational workforce.

The assessment of regional economic values identifies the following areas of interest (shown in Figure 1.1 below):

- Barcaldine Regional Council (RC) (local level);
- Central West Statistical Division (SD) (regional)<sup>4</sup>; and
- Queensland (state).

The report also includes an economic impact assessment of the Kevin's Corner Project based on:

- Construction and capital expenditure impacts; and
- Operating and ongoing expenditure impacts.

Cumulative economic impacts of the Kevin's Corner Project and other major resource Projects are also assessed.

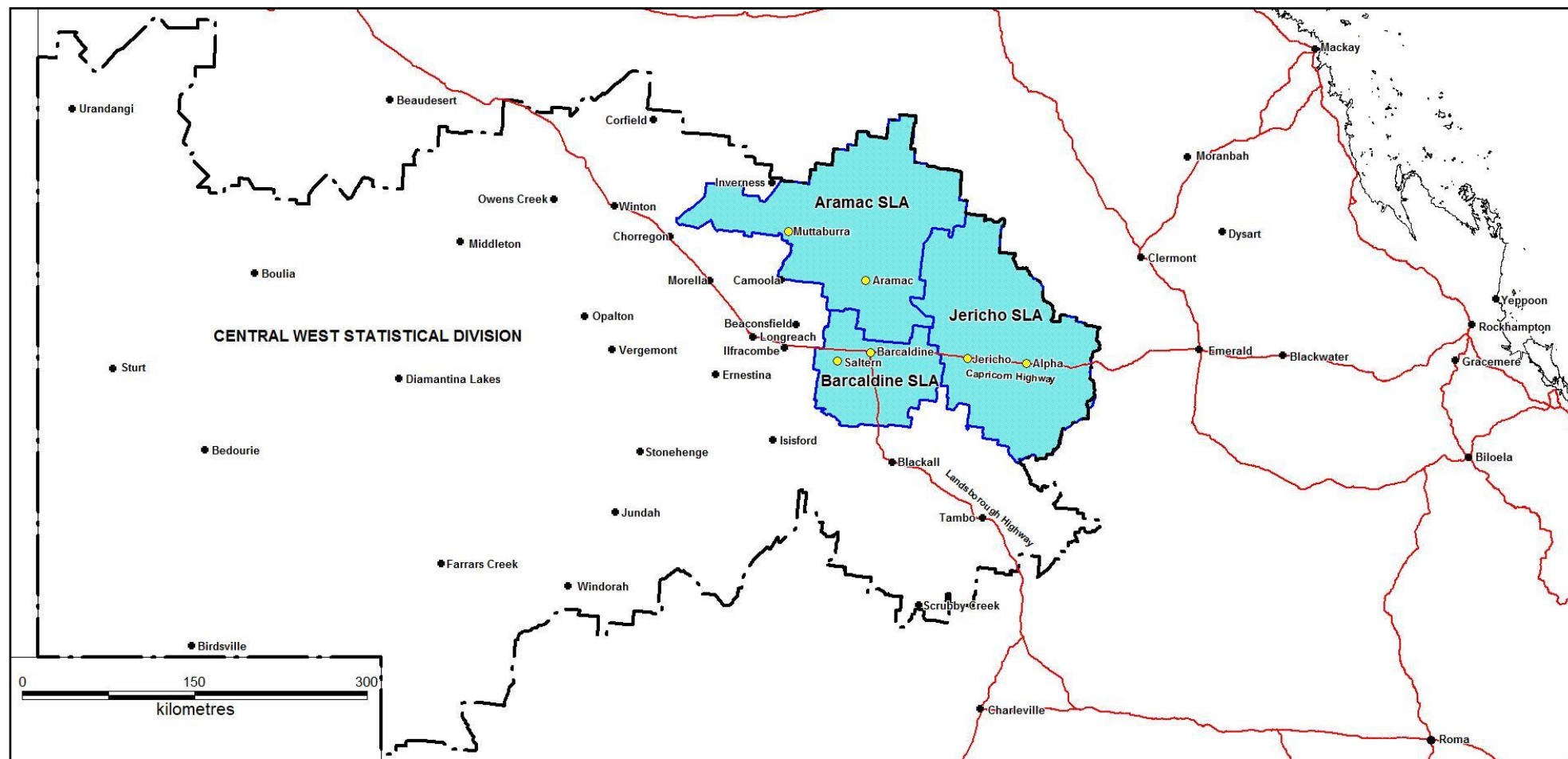
## 1.1 Disclaimer

Data contained in this report was drawn from publicly available sources and from specialist advice from URS and HGPL. While all due care has been taken in applying this data, Economic Associates accepts no responsibility for the accuracy of data provided or sourced from third parties.

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<sup>4</sup> The assessment of commercial accommodation uses the Outback Tourism Region (TR) as the regional boundary.

Figure 1.1: Study Area Map



## 2 SOCIO-ECONOMIC PROFILE

A socio-economic profile of Aramac statistical local area (SLA), Barcaldine SLA, Jericho SLA and Barcaldine Regional Council (RC) as at the 1996, 2001 and 2006 Censuses of Population and Housing, benchmarked against Central West Statistical Division (SD) and Queensland is provided in Table 2.1. The following key points can be drawn from this profile.

- In 2006, there were an estimated 3,475 persons living in Barcaldine RC including 748 persons in Aramac SLA (21.5% of Barcaldine RC population), 1,811 persons living in Barcaldine SLA (52.1% of Barcaldine RC population) and 916 persons living in Jericho SLA (26.4% of Barcaldine RC population).
- Between 1996 and 2001, there was a decline in the Barcaldine RC population driven by Aramac SLA and Barcaldine SLA between 1996 and 2001 and by Jericho SLA between 2001 and 2006.
- Barcaldine RC had a relatively mature population with a higher proportion of persons aged 55 years and over than Queensland. The average age of residents in 2006 was above Queensland but marginally below the Central West SD average.
- Within Barcaldine RC, the average age of residents was similar in all regions with Barcaldine SLA recording the highest proportion of children and residents aged 65 years and over.
- Barcaldine RC is characterised by a lower proportion of couple families with children and single parent family households and a higher proportion of lone person households relative to Queensland. Between 1996 and 2006, there was a significant decrease in the proportion of couple families with children households within Barcaldine RC and its component SLAs, particularly in Jericho SLA (down 13.4% points).
- Traditionally the proportion of households fully owning their home has been significantly higher in Barcaldine RC and its component SLAs than in Queensland. In Aramac SLA, almost half of all households fully owned their home in 2006, compared with approximately 30% in Queensland. The incidence of households with a mortgage in Barcaldine RC and its component SLAs was significantly lower than Queensland.
- The proportion of households renting in Barcaldine RC was marginally below Central West SD and Queensland. Average weekly rents were significantly lower in Barcaldine RC than in Queensland and lowest in Aramac SLA (\$49 per week).
- Households within Barcaldine RC generally earn a lower income than the state average with the average weekly household income below \$1,000. Within Barcaldine RC, the average weekly household income was lowest in Aramac SLA.
- Barcaldine RC is characterised by a high proportion of full time employment and a low unemployment rate relative to Queensland. Within Barcaldine RC, Aramac SLA recorded the lowest unemployment rate, decreasing by 6.7% points between 1996 and 2006, while Jericho SLA recorded the highest labour force participation rate in 2006.
- The proportion of persons with a post-school qualification in Barcaldine RC increased between 1996 and 2006 but remained below Central West SD and Queensland. Within Barcaldine RC, Jericho SLA recorded a similar proportion of persons with a certificate to Queensland.

- Barcaldine RC and its component SLAs are characterised by persons employed as managers and labourers. The incidence of managers and labourers was higher in Aramac SLA and Jericho SLA than in Barcaldine SLA. Barcaldine SLA recorded a significantly higher proportion of persons employed in lower white collar professions than Aramac SLA, Jericho SLA and Central West SD.

Agriculture, forestry and fishing was the most significant industry in terms of employment in Aramac SLA and Jericho SLA accounting for almost half of total employment. Aramac SLA and Jericho SLA also recorded a higher proportion of persons employed in public administration and safety than Queensland. In 2006, the most significant industries of employment in Barcaldine SLA were agriculture, forestry and fishing, public administration and safety, and retail trade.

**Table 2.1: Socio-Economic Profile, Barcaldine RC, Central West SD and Queensland, 1996 to 2006**

	Aramac SLA			Barcaldine SLA			Jericho SLA			Barcaldine RC			Central West SD			Queensland		
	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006
Population	792	722	748	1,841	1,763	1,811	964	1,024	916	3,597	3,509	3,475	14,258	14,556	13,371	3,319,186	3,585,639	3,973,960
Ave. Annual Population Growth (%)	-	-1.8%	0.7%	-	-0.9%	0.5%	-	1.2%	-2.2%	-	-0.5%	-0.2%	-	0.4%	-1.7%	-	1.6%	2.1%
<b>Age Distribution</b>																		
0-14 years	23.1%	22.2%	21.4%	23.1%	23.7%	22.1%	24.0%	23.9%	20.3%	23.4%	23.5%	21.5%	23.0%	21.6%	19.4%	21.9%	21.3%	20.4%
15-24 years	10.5%	10.2%	8.2%	12.2%	10.9%	11.9%	10.6%	10.4%	9.0%	11.4%	10.6%	10.3%	12.6%	12.6%	11.1%	14.8%	13.8%	13.6%
25-34 years	14.8%	14.3%	12.7%	15.8%	14.1%	9.7%	18.9%	17.3%	12.1%	16.4%	15.1%	11.0%	16.0%	14.3%	11.6%	15.2%	14.2%	13.3%
35-44 years	12.2%	16.1%	14.6%	14.3%	13.9%	13.5%	14.4%	14.1%	16.3%	13.9%	14.4%	14.4%	14.2%	14.5%	13.5%	15.0%	14.9%	14.6%
45-54 years	15.0%	13.0%	14.4%	11.3%	11.5%	12.2%	12.3%	12.3%	14.4%	12.4%	12.0%	13.3%	12.0%	13.1%	13.6%	12.7%	13.7%	13.7%
55-64 years	12.2%	12.6%	15.2%	9.9%	11.9%	12.6%	10.4%	10.6%	15.6%	10.5%	11.7%	14.0%	10.0%	11.4%	14.6%	8.4%	9.7%	11.4%
65+ years	12.1%	11.6%	13.5%	13.4%	14.0%	18.0%	9.4%	11.3%	12.3%	12.0%	12.7%	15.5%	12.3%	12.5%	16.2%	12.0%	12.4%	13.0%
Average age (years)	37.1	37.2	39.1	36.0	37.0	39.4	34.4	35.5	39.1	35.9	36.6	39.2	35.6	36.8	40.1	35.5	36.6	37.6
<b>Household Type (% of dwellings)</b>																		
Couple families with children	37.5%	33.7%	28.3%	35.7%	30.0%	25.2%	42.0%	38.3%	28.6%	37.8%	33.0%	26.8%	35.2%	29.8%	25.3%	33.7%	30.7%	29.4%
Couple families without children	27.6%	28.5%	22.8%	21.9%	22.3%	23.2%	24.2%	25.3%	26.7%	23.9%	24.4%	24.1%	21.3%	22.7%	23.0%	25.0%	25.3%	26.0%
Single parent family	4.9%	5.2%	7.4%	6.6%	6.7%	8.2%	4.2%	4.2%	5.3%	5.6%	5.7%	7.2%	6.2%	6.5%	7.3%	9.9%	10.8%	10.5%
Lone person households	24.3%	24.0%	29.3%	24.8%	22.2%	23.4%	23.4%	20.0%	27.8%	24.3%	22.0%	25.9%	22.7%	22.2%	23.3%	20.6%	21.8%	21.0%
Average household size	2.7	2.5	2.4	2.9	2.6	2.5	2.7	2.9	2.4	2.8	2.6	2.5	2.9	2.7	2.5	2.8	2.6	2.6
<b>Household Finances</b>																		
% of households fully owning home	56.1%	59.6%	49.0%	46.9%	46.4%	44.0%	50.4%	53.8%	47.1%	50.0%	51.2%	45.9%	46.6%	46.0%	42.9%	38.7%	36.6%	30.4%
% of households purchasing home	12.2%	5.6%	13.3%	16.3%	14.3%	20.3%	11.2%	9.5%	16.2%	14.0%	11.1%	17.6%	12.1%	12.0%	17.2%	29.0%	25.8%	31.4%
% of households renting	25.7%	26.5%	28.2%	29.0%	29.8%	27.7%	31.1%	28.7%	27.9%	28.8%	28.8%	27.9%	33.3%	32.8%	30.9%	31.8%	31.6%	30.0%
Average weekly household income	-	\$856	\$871	-	\$864	\$981	-	\$785	\$976	-	\$841	\$956	-	\$883	\$1,007	-	\$905	\$1,202
Average weekly family income	\$739	\$1,165	\$1,331	\$795	\$1,092	\$1,335	\$663	\$1,072	\$1,306	\$744	\$1,102	\$1,326	\$784	\$1,179	\$1,354	\$918	\$1,175	\$1,499
Average monthly housing loan repayment	\$885	\$1,105	\$953	\$643	\$575	\$917	\$549	\$566	\$1,327	\$660	\$647	\$1,003	\$709	\$788	\$946	\$870	\$977	\$1,475
Average weekly rent payment	\$45	\$45	\$49	\$62	\$68	\$88	\$46	\$50	\$69	\$54	\$58	\$74	\$66	\$74	\$91	\$130	\$154	\$218
<b>Labour Market</b>																		
Full-time employment (% labour force)	71.3%	76.8%	74.7%	69.8%	68.1%	65.4%	84.4%	74.6%	76.3%	74.0%	72.0%	70.7%	65.6%	62.4%	67.0%	61.4%	58.9%	61.8%
Part-time employment (% labour force)	16.3%	12.6%	14.8%	19.9%	22.7%	25.8%	12.7%	14.3%	16.7%	17.1%	17.8%	20.6%	20.9%	23.1%	22.7%	24.1%	26.3%	27.3%
Total employment (% labour force)	90.7%	96.1%	97.4%	95.5%	96.2%	95.5%	97.7%	96.5%	97.3%	95.0%	96.3%	96.5%	92.1%	92.6%	96.5%	90.3%	91.7%	95.2%
Unemployment rate (% labour force)	9.3%	3.9%	2.6%	4.5%	3.8%	4.5%	2.3%	3.5%	2.7%	5.0%	3.7%	3.5%	7.9%	7.4%	3.5%	9.7%	8.3%	4.8%
Participation rate (% of population > 15 years)	76.6%	78.2%	71.1%	71.0%	72.2%	70.3%	72.6%	77.3%	78.3%	72.7%	75.0%	72.7%	71.5%	70.2%	70.7%	70.7%	70.5%	71.3%
<b>Qualifications</b>																		
% of persons with a post-school qualification	17.1%	19.0%	23.0%	22.2%	24.0%	28.8%	14.5%	18.7%	26.4%	19.0%	21.4%	26.9%	21.1%	25.3%	31.3%	27.6%	32.3%	37.5%
% of persons with Bachelor or higher	4.3%	5.5%	6.3%	6.4%	8.3%	7.7%	3.4%	6.0%	5.1%	5.2%	7.0%	6.7%	5.7%	7.4%	8.5%	8.6%	10.8%	13.1%
% of persons with Diploma	4.3%	3.2%	4.8%	5.0%	4.5%	5.5%	4.1%	3.5%	3.7%	4.6%	3.9%	4.8%	4.9%	4.6%	5.8%	5.4%	5.5%	6.6%
% of persons with Certificate	8.5%	10.3%	11.9%	10.7%	11.2%	15.6%	7.0%	9.2%	17.7%	9.2%	10.5%	15.4%	10.4%	13.3%	17.1%	13.6%	16.0%	17.8%
<b>Occupation</b>																		

	Aramac SLA			Barcaldine SLA			Jericho SLA			Barcaldine RC			Central West SD			Queensland		
	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006	1996	2001	2006
Upper White Collar																		
Managers	43.6%	39.7%	35.7%	21.0%	20.4%	20.3%	41.8%	39.6%	36.7%	32.0%	30.7%	28.8%	27.7%	26.0%	25.1%	13.3%	12.9%	12.4%
Professionals	4.8%	4.7%	6.3%	12.8%	14.6%	12.9%	5.8%	7.1%	7.0%	9.0%	10.0%	9.6%	9.9%	10.1%	10.7%	15.3%	16.4%	17.2%
<i>Subtotal</i>	48.4%	44.4%	42.0%	33.7%	35.0%	33.2%	47.6%	46.7%	43.8%	41.0%	40.7%	38.4%	37.6%	36.0%	35.7%	28.6%	29.3%	29.6%
Lower White Collar																		
Community & Personal Service Workers	7.2%	6.0%	6.3%	8.2%	7.9%	9.9%	3.9%	5.2%	6.4%	6.8%	6.6%	8.0%	6.8%	6.9%	8.6%	8.1%	8.9%	9.1%
Clerical and Admin Workers	5.6%	3.5%	5.2%	12.9%	9.8%	11.8%	5.2%	5.2%	5.4%	9.1%	6.9%	8.4%	9.0%	8.5%	9.2%	15.3%	15.0%	14.8%
Sales Workers	0.8%	2.0%	1.6%	6.1%	6.2%	6.1%	3.5%	2.7%	3.8%	4.1%	4.2%	4.4%	4.6%	4.6%	5.2%	10.2%	10.7%	10.3%
<i>Subtotal</i>	13.6%	11.5%	13.2%	27.2%	23.8%	27.8%	12.6%	13.1%	15.7%	20.0%	17.7%	20.8%	20.4%	20.1%	23.1%	33.6%	34.7%	34.2%
Upper Blue Collar																		
Technicians & Trades Workers	10.6%	11.7%	9.9%	16.1%	16.2%	15.7%	7.8%	6.8%	9.6%	12.5%	12.3%	12.5%	13.6%	14.1%	13.2%	15.6%	14.7%	15.3%
<i>Subtotal</i>	10.6%	11.7%	9.9%	16.1%	16.2%	15.7%	7.8%	6.8%	9.6%	12.5%	12.3%	12.5%	13.6%	14.1%	13.2%	15.6%	14.7%	15.3%
Lower Blue Collar																		
Machinery Operators & Drivers	6.1%	8.7%	11.5%	7.3%	7.1%	4.5%	8.7%	7.9%	9.0%	7.4%	7.7%	7.5%	8.5%	8.1%	7.4%	8.3%	7.8%	7.2%
Labourers	17.6%	20.0%	22.0%	13.9%	17.4%	17.6%	21.6%	23.2%	20.7%	16.9%	19.7%	19.5%	17.6%	19.7%	18.6%	11.4%	11.5%	11.9%
<i>Subtotal</i>	23.7%	28.7%	33.5%	21.2%	24.5%	22.1%	30.3%	31.1%	29.7%	24.3%	27.5%	27.0%	26.1%	27.8%	26.0%	19.7%	19.3%	19.1%
<b>Employment by Industry (% of employees)</b>																		
Agriculture, forestry & fishing	53.3%	50.2%	45.9%	15.8%	18.1%	15.0%	45.8%	52.4%	47.8%	32.9%	36.0%	32.0%	31.4%	33.1%	28.3%	5.2%	4.9%	3.4%
Mining	0.8%	0.0%	0.0%	0.6%	0.4%	0.5%	0.6%	0.0%	2.0%	0.7%	0.2%	0.9%	0.9%	0.8%	0.9%	1.6%	1.2%	1.7%
Manufacturing	0.8%	3.2%	1.6%	1.7%	2.4%	2.6%	1.9%	2.3%	2.4%	1.6%	2.6%	2.3%	2.2%	3.3%	3.3%	10.1%	10.5%	9.9%
Electricity, gas, water & waste services	0.8%	0.0%	0.0%	3.1%	2.5%	2.4%	0.6%	0.6%	0.0%	1.9%	1.3%	1.1%	0.8%	0.9%	0.9%	0.9%	1.0%	1.0%
Construction	2.6%	7.7%	8.8%	8.9%	13.7%	7.5%	3.2%	4.5%	3.8%	5.8%	9.5%	6.7%	6.7%	7.4%	5.2%	7.0%	6.9%	9.0%
Wholesale trade	0.8%	0.7%	1.6%	3.5%	2.5%	2.4%	4.5%	2.5%	2.4%	3.2%	2.1%	2.2%	3.4%	3.0%	2.7%	5.3%	4.9%	3.9%
Retail trade	3.4%	3.0%	3.3%	8.0%	9.2%	10.2%	3.5%	4.7%	5.8%	5.6%	6.4%	7.3%	6.7%	7.4%	8.0%	10.6%	11.5%	11.6%
Accommodation & food services	1.8%	1.7%	1.6%	6.9%	6.2%	7.1%	3.7%	2.1%	2.6%	4.8%	3.9%	4.5%	5.9%	5.3%	5.4%	7.2%	7.4%	7.0%
Transport, postal & warehousing	3.7%	3.5%	4.7%	7.6%	5.7%	7.1%	9.3%	7.6%	5.0%	7.2%	5.7%	5.9%	5.4%	4.8%	4.3%	5.1%	5.2%	5.1%
Information media & telecommunications	0.0%	0.0%	0.0%	1.1%	0.8%	0.4%	0.9%	0.0%	1.2%	0.8%	0.4%	0.6%	1.1%	0.9%	0.8%	2.1%	1.9%	1.4%
Financial & insurance services	0.0%	0.7%	0.0%	1.6%	0.4%	0.0%	0.6%	0.6%	0.6%	1.0%	0.5%	0.2%	1.5%	0.9%	1.0%	3.0%	2.8%	2.9%
Rental, hiring & real estate services	0.0%	0.0%	1.1%	0.6%	1.4%	0.5%	0.6%	0.0%	0.6%	0.5%	0.6%	0.7%	0.6%	0.7%	0.7%	2.0%	2.0%	2.1%
Professional, scientific & technical services	0.8%	0.0%	0.8%	3.6%	3.3%	3.9%	1.9%	0.6%	0.0%	2.5%	1.7%	2.0%	2.3%	1.7%	2.0%	5.5%	5.4%	5.6%
Administrative & support services	2.1%	0.7%	0.0%	0.9%	2.0%	1.4%	0.0%	0.6%	0.0%	0.9%	1.3%	0.7%	1.3%	1.8%	1.2%	2.7%	3.2%	3.0%
Public administration & safety	12.8%	8.2%	12.9%	13.1%	6.8%	12.6%	8.4%	6.4%	8.2%	11.7%	7.0%	11.3%	9.7%	7.7%	12.5%	6.3%	6.2%	6.7%
Education & training	5.5%	5.0%	4.1%	8.0%	8.5%	9.3%	5.6%	4.7%	5.8%	6.7%	6.5%	7.1%	7.5%	7.0%	7.3%	7.5%	8.0%	7.6%

Source: Australian Bureau of Statistics (2006)

## 2.1 Population Projections

The population of Barcaldine RC is projected to increase from 3,504 persons in 2010 to 3,529 persons in 2016 before decreasing to 3,435 persons in 2031. Within Barcaldine RC, Jericho SLA is anticipated to record the highest rate of population growth in the 2010 to 2031 period, increasing from 982 persons in 2010 to 1,011 persons in 2031 or by 0.1% per annum.

The working age population (persons aged 15 to 64) in Barcaldine RC is anticipated to increase from 2,311 persons in 2010 to 2,377 persons in 2021 before decreasing to 2,249 persons in 2031.

The rate of both total population and working population growth in Barcaldine RC and its component SLAs are anticipated to be below rates for Central West SD and Queensland.

Table 2.2 shows the population projections for the total and working age populations in Barcaldine RC, Central West SD and Queensland.

**Table 2.2: Population Projections, Barcaldine RC, Central West SD and Queensland, 2010 to 2031**

	2010	2011	2016	2021	2026	2031	2010-31 Average Annual Growth
<b><u>Total Population</u></b>							
Aramac SLA	796	802	803	786	753	715	-0.5%
Barcaldine SLA	1,726	1,729	1,736	1,733	1,726	1,709	0.0%
Jericho SLA	982	984	990	997	1,004	1,011	0.1%
Barcaldine RC	3,504	3,515	3,529	3,516	3,483	3,435	-0.1%
Central West SD	12,330	12,279	12,570	11,814	13,142	13,580	0.5%
Queensland	4,468,101	4,567,713	5,040,325	5,478,715	5,884,439	6,273,885	1.6%
<b><u>15-64 Population</u></b>							
Aramac SLA	469	470	472	465	448	430	-0.4%
Barcaldine SLA	1,105	1,114	1,142	1,154	1,137	1,103	0.0%
Jericho SLA	737	743	756	758	742	717	-0.1%
Barcaldine RC	2,311	2,327	2,370	2,377	2,327	2,249	-0.1%
Central West SD	7669	7725	7990	8079	8204	8408	0.4%
Queensland	3,013,486	3,072,544	3,326,612	3,540,104	7,474,162	3,889,397	1.2%

Source: Department of Infrastructure and Planning (2008) and Economic Associates estimates

## 2.2 Summary

The socio-economic profile highlights that the component SLAs of Barcaldine Regional Council are more mature relative to Queensland with a high incidence of lone person households. The region is characterised by a high incidence of home ownership but lower average household incomes. Agriculture, forestry and fishing is the dominant industry of employment in Aramac SLA and Jericho SLA, but the incidence of employment in this sector has declined since the 2001 Census. The population of Barcaldine Regional Council is projected to remain relatively stable until 2031, with Jericho SLA to record the highest growth rate of 0.1% per annum.

## 2.3 Gross Regional Product

While there are a number of unofficial estimates of GRP for Queensland regions, the only estimates with any endorsement by the Queensland Government are those prepared by OESR in the Experimental Estimates of Gross Regional Product, 2005-06 Publication.

In Central West SD, gross regional product (GRP) decreased from \$629 million in 2000-01 (0.5% of Queensland GRP) to \$557 million in 2005-06 (0.3% of Queensland GRP). In Central West SD, the most significant sectors in terms of gross value added were:

- Agriculture, forestry and fishing: increasing from \$225 million in 2000-01 to \$231 million in 2005-06, accounting for 41.4% of total GRP in 2005-06;
- Government administration and defence: increasing from \$35 million in 2000-01 to \$47 million in 2005-06, accounting for 8.4% of total GRP in 2005-06; and
- Health and community services: increasing from \$31 million in 2000-01 to \$33 million in 2005-06, accounting for 5.9% of total GRP in 2005-06.

In 2005-06, agriculture, forestry and fishing made the most significant contribution to Queensland gross value added (3.7%).

Table 2.3 below reports GRP estimates for the Central West SD.

**Table 2.3: Central West SD, Gross Regional Product, 2000-01 and 2005-06**

Industry	2000-01			2005-06		
	\$M	% of Total	% of Queensland Value Added	\$M	% of Total	% of Queensland Value Added
Agriculture, forestry and fishing	225	35.7%	4.5%	231	41.4%	3.7%
Mining	18	2.8%	0.3%	18	3.3%	0.1%
Manufacturing	5	0.8%	0.0%	2	0.4%	0.0%
Electricity, gas and water	10	1.6%	0.4%	14	2.6%	0.4%
Construction	55	8.8%	0.8%	28	5.0%	0.2%
Wholesale trade	21	3.4%	0.3%	12	2.1%	0.1%
Retail trade	38	6.0%	0.4%	27	4.8%	0.2%
Accommodation, cafes and restaurants	21	3.4%	0.5%	18	3.2%	0.3%
Transport and storage	31	5.0%	0.5%	26	4.6%	0.2%
Communication services	15	2.4%	0.4%	11	1.9%	0.3%
Finance and insurance	14	2.2%	0.2%	11	1.9%	0.1%
Property and business services	31	4.9%	0.3%	15	2.7%	0.1%
Government administration and defence	35	5.6%	0.7%	47	8.4%	0.5%
Education	31	5.0%	0.5%	27	4.8%	0.3%
Health and community services	31	4.9%	0.4%	33	5.9%	0.3%
Cultural and recreational services	5	0.8%	0.4%	6	1.0%	0.2%
Personal and other services	12	1.9%	0.4%	11	1.9%	0.3%
Ownership of dwellings	29	4.6%	0.3%	23	4.1%	0.1%
<b>Gross Regional Product</b>	<b>629</b>	<b>100.0%</b>	<b>0.5%</b>	<b>557</b>	<b>100.0%</b>	<b>0.3%</b>

Note: Totals may not add due to rounding

Source: Office of Economic and Statistical Research (2008)

## 2.4 Regional Competitive Advantage

Economic opportunities emerge from the presence of regional resources and capabilities that provide prospective industries with a locational advantage. The absence of suitable regional resources and capabilities for specific types of industries will limit their development and sustainability. Attempts to establish industry sectors within a regional economy that do not have access to the requisite resources and capabilities are likely to result in an inefficient allocation of regional resources and capabilities. This is not to say regions cannot transition or diversify by augmenting or adding to regional resources and capabilities (dynamic competitive advantage versus static competitive advantage).

Regional economies evolve over time as key centres establish themselves as regional, state or national hubs of commerce or specialised economic activities. Hence, state or national hubs typically tend to possess regional competitive advantages in higher order economic activities (i.e. quinary and quaternary industries), while rural and regional centres typically possess advantages in primary or secondary industries. Regional economies can partly insulate themselves from the economic cycle by diversifying their economic bases. However, diversification of an economic base must be supported by the region's endowment (or evolving endowment through dynamic competitive advantage) of resources and capabilities to maintain allocative efficiency within the regional economy.

Figure 2.1 below illustrates the range of economic structures from one with significant competitive advantages in primary production to one which possesses a significant competitive advantage in quinary industry activities (e.g. health, community and cultural services).

**Figure 2.1: Regional economic structures based on regional competitive advantages across industry sectors**

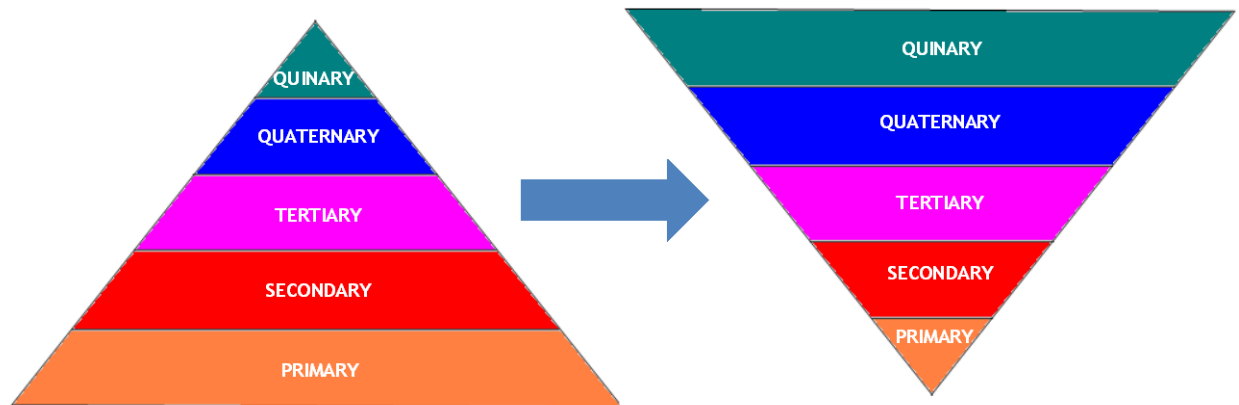


Table 2.4 below summarises the classification of industry sectors to broad industry categories (e.g. primary, secondary, tertiary, quaternary and quinary industry)

**Table 2.4: Sectors by industry categories**

Primary	Secondary	Tertiary	Quaternary	Quinary
Agriculture, Forestry & Fishing Mining	Construction Electricity, Gas, Water & Waste Services Manufacturing	Accommodation & Food Services Retail Transport, Postal & Warehousing Wholesale Trade	Administration & Support Services Education & Training Financial & Insurance Services Professional, Scientific & Technical Services Public Administration & Safety Rental, Hiring & Real Estate Services	Arts & Recreation Services Health Care & Social Assistance Information & Communication Technology Other services

### 2.4.1 Working Population Profile

The working population in Barcaldine RC decreased from 2,174 persons in 2001 to 1,562 persons in 2006, or by approximately 28.2%. Between 2001 and 2006, public administration and safety was the only industry sector to record an increase in the size of the working population.

The working population, and in turn the resident population, is likely to continue to decline in the absence of major stimulus from a significant project. Mining projects typically stimulate the following industry sectors:

- Mining;
- Manufacturing;
- Construction;
- Transport, postal and warehousing; and
- Property and business services.

**Table 2.5: Working Population Profile Barcaldine RC**

	2001	2006	% Change 2001 to 2006
Agriculture, forestry & fishing	639	529	-17.2%
Mining	30	0	-100.0%
Manufacturing	117	41	-65.0%
Electricity, gas, water & waste services	26	22	-15.4%
Construction	203	87	-57.1%
Wholesale trade	65	33	-49.2%
Retail trade	203	122	-39.9%
Accommodation & food services	92	60	-34.8%
Transport, postal & warehousing	99	85	-14.1%
Information media & telecommunications	21	6	-71.4%
Financial & insurance services	13	0	-100.0%
Property & business services	90	50	-44.4%
Public administration & safety	135	190	40.7%
Education & training	145	107	-26.2%
Health care & social assistance	196	148	-24.5%
Arts & recreation services	27	12	-55.6%
Other services	34	33	-2.9%
Inadequately described/Not stated	39	37	-5.1%
Total	2,174	1,562	-28.2%

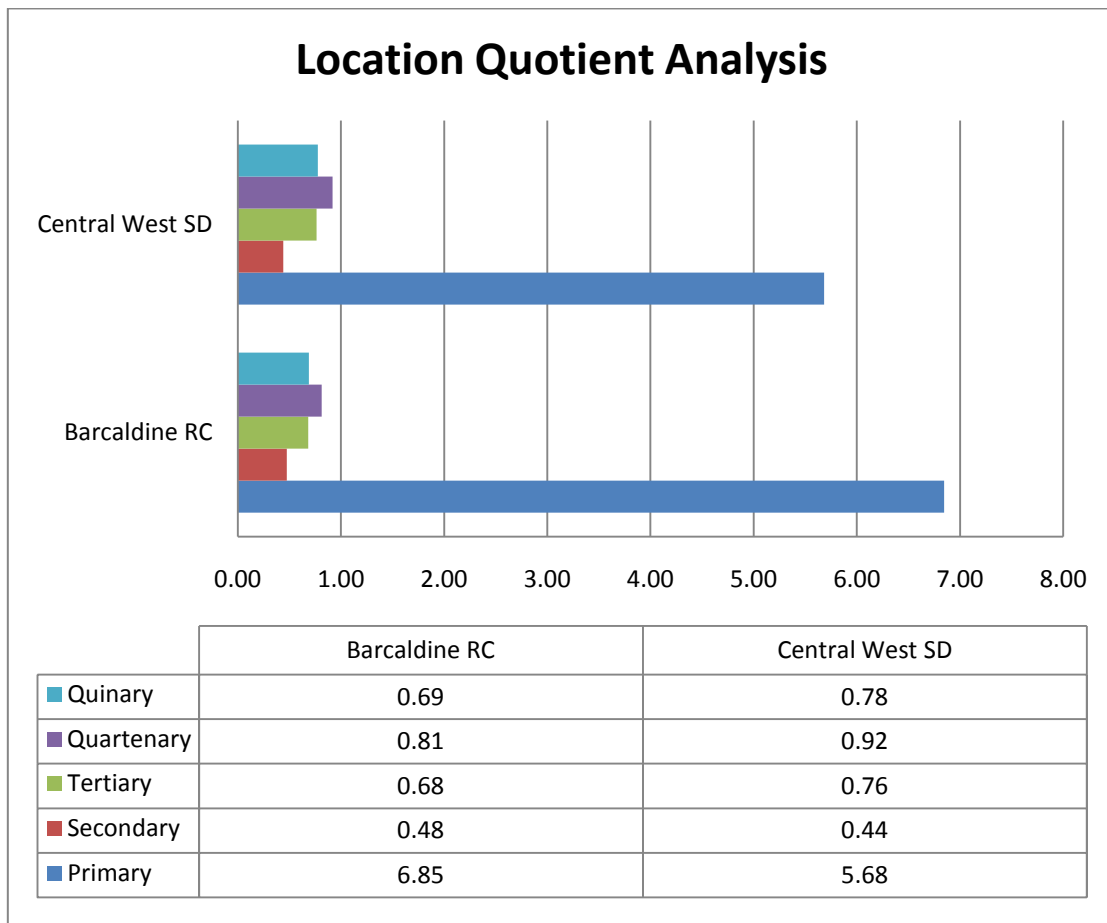
Note: The 2001 working population is based on the 1996 ANSZIC classification while the 2006 working population is based on the 2006 ANZSIC classification. Property and business services includes the 2006 ANZSIC industry sectors of rental, hiring and real estate services, professional, scientific and technical services, and administrative and support services.  
Source: Australian Bureau of Statistics (2006)

## 2.4.2 Location Quotient

The location quotient analysis is provided for the resident population of Barcaldine RC and Central West SD. Location quotients express the relationship between employment in a given industry within a region relative to employment in the same industry at a state or national level.

Figure 2.2 below shows that in 2006 Barcaldine RC and Central West SD recorded a significant competitive advantage for primary industries relative to Queensland. However as indicated above, primary industry within the region declined between 2001 and 2006. This has been principally due to rural decline. However, the recent spate of resource sector projects within the region present new opportunities in the primary industries, but in mining not agriculture.

Figure 2.2: Location quotient analysis, Barcaldine RC and Central West SD, 2006



## 3 EMPLOYMENT AND ENTERPRISE ACTIVITY WITHIN THE BARCADDINE REGIONAL ECONOMY

### 3.1 Workforce Size

The size of the labour force in Barcaldine RC increased from 2,005 persons in 2010 to 2,067 persons in 2031, peaking in 2006-07 at 2,274 persons. The labour force in Barcaldine SLA is estimated to account for approximately half of the regional council labour force peaking at 1,054 persons in 2006-07. In Aramac SLA and Jericho SLA the labour force size peaked in 2006-07 at 517 persons and 704 persons respectively.

A summary of the labour force size in Barcaldine RC between 2001-02 and 2009-10 is presented in Table 3.1.

**Table 3.1: Labour Force, Barcaldine RC, Central West SD and Queensland, 2001-02 to 2009-10**

	Aramac SLA	Barcaldine SLA	Jericho SLA	Barcaldine RC	Central West SD	Queensland
2001-02	503	936	567	2,005	7,722	1,875,400
2002-03	461	949	609	2,019	8,086	1,922,297
2003-04	472	962	642	2,075	8,311	1,967,824
2004-05	500	1,019	680	2,198	8,805	2,048,774
2005-06	513	1,047	699	2,259	9,046	2,109,754
2006-07	517	1,054	704	2,274	9,083	2,196,407
2007-08	460	995	651	2,105	8,061	2,263,618
2008-09	446	986	640	2,072	7,858	2,329,919
2009-10	445	983	639	2,067	7,841	2,370,300
<b>Average Annual Change, 2001-02 to 2009-10</b>	<b>-1.5%</b>	<b>0.6%</b>	<b>1.5%</b>	<b>0.4%</b>	<b>0.2%</b>	<b>3.0%</b>
<b>Average Annual Change, 2008-09 to 2009-10</b>	<b>-0.1%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>-0.2%</b>	<b>1.7%</b>

Note: 2009-10 figures are estimates only, as the June Quarter 2010 figures are yet to be released  
Source: Department of Employment and Workplace Relations (various years)

### 3.2 Unemployment Rate

The unemployment rate in Barcaldine RC decreased from 2.5% in 2001-02 to 1.5% in 2006-07 before increasing to 3.0% in 2009-10. The unemployment rate in Barcaldine RC was consistently below the rate in Central West SD and Queensland, with the exception of 2005-06 when it was marginally above Central West SD. Within Barcaldine RC, the unemployment rate was lowest in 2006-07 in Aramac SLA (0.7%) and Barcaldine SLA (1.6%) and 2007-08 in Jericho SLA (1.4%). In 2009-10, the unemployment rate was higher in Aramac SLA (4.5%) than in Barcaldine SLA (2.8%), Jericho SLA (2.1%) and Central West SD (3.4%).

The unemployment rates in Barcaldine RC between 2001-02 and 2009-10 are summarised in Table 3.2.

**Table 3.2: Unemployment Rate, Barcaldine RC, Central West SD and Queensland, 2001-02 to 2009-10**

	Aramac SLA	Barcaldine SLA	Jericho SLA	Barcaldine RC	Central West SD	Queensland
2001-02	1.6%	2.6%	3.1%	2.5%	3.2%	7.9%
2002-03	2.9%	2.3%	2.8%	2.6%	3.3%	7.1%
2003-04	3.1%	2.5%	1.6%	2.3%	2.9%	6.2%
2004-05	1.6%	1.8%	2.6%	2.0%	2.1%	4.9%
2005-06	1.4%	1.8%	2.0%	1.8%	1.7%	5.0%
2006-07	0.7%	1.6%	2.1%	1.5%	1.6%	4.0%
2007-08	2.6%	1.7%	1.4%	1.8%	2.1%	3.7%
2008-09	3.9%	2.3%	1.7%	2.4%	2.8%	4.4%
2009-10	4.5%	2.8%	2.1%	3.0%	3.4%	5.8%
<b>Average Annual Change, 2001-02 to 2009-10</b>	<b>0.4%</b>	<b>0.0%</b>	<b>-0.1%</b>	<b>0.1%</b>	<b>0.0%</b>	<b>-0.3%</b>
<b>Average Annual Change, 2008-09 to 2009-10</b>	<b>0.6%</b>	<b>0.6%</b>	<b>0.5%</b>	<b>0.5%</b>	<b>0.7%</b>	<b>1.3%</b>

Note 1: The average annual change figures in this table represent the average annual percentage point change in the unemployment rate.

Note 2: 2009-10 figures are estimates only, as the June Quarter 2010 figures are yet to be released.

Source: Department of Employment and Workplace Relations (various years)

### 3.3 Labour Force Participation Rate

The average labour force participation rate between 2001-02 and 2009-10 was 77.8% in Barcaldine RC, above the Queensland average (65.1%) but below Central West SD (82.3%). Within Barcaldine RC, the average labour force participation rate was 80.0% in Aramac SLA, 75.1% in Barcaldine SLA and 80.8% in Jericho SLA. The labour force participation rate was highest in 2004-05 in Aramac SLA (87.6%) and 2006-07 in Barcaldine SLA (80.3%) and Jericho SLA (91.8%).

The labour force participation rate in the Barcaldine RC and its component SLAs between 2001-02 and 2009-10 is summarised in Table 3.3.

**Table 3.3: Labour Force Participation Rate, Barcaldine RC, Central West SD and Queensland, 2001-02 to 2009-10**

	Aramac SLA	Barcaldine SLA	Jericho SLA	Barcaldine RC	Central West SD	Queensland
2001-02	84.9%	70.4%	67.4%	72.6%	73.3%	64.1%
2002-03	78.9%	72.6%	73.7%	74.3%	77.7%	63.9%
2003-04	83.2%	74.0%	75.4%	76.4%	80.2%	63.8%
2004-05	87.6%	78.1%	78.6%	80.2%	84.7%	64.9%
2005-06	86.1%	78.8%	90.7%	83.8%	91.6%	64.8%
2006-07	84.3%	80.3%	91.8%	84.5%	92.5%	65.8%
2007-08	74.8%	75.9%	85.0%	78.2%	82.3%	66.0%
2008-09	70.6%	73.5%	82.3%	75.3%	79.3%	66.5%
2009-10	69.5%	72.6%	81.9%	74.5%	79.0%	66.0%
<b>Average</b>	<b>80.0%</b>	<b>75.1%</b>	<b>80.8%</b>	<b>77.8%</b>	<b>82.3%</b>	<b>65.1%</b>

Note: 2009-10 figures are estimates only, as the June Quarter 2010 figures are yet to be released.

Source: Department of Employment and Workplace Relations (various years), Australian Bureau of Statistics (2009)

## 3.4 Enterprise Activity

### 3.4.1 Number of Businesses

#### Aramac SLA

Within Aramac SLA there were an estimated 162 businesses as at June 2007 comprising of 66 employing businesses and 96 businesses operating as sole traders. In June 2007, the most significant industry in Aramac SLA in terms of the number of businesses was agriculture, forestry and fishing (120 businesses). The majority of employing businesses had less than 20 employees (63 businesses).

The number of businesses by size in Aramac SLA as at June 2007 are summarised in Table 3.4.

**Table 3.4: Number of Businesses, Aramac SLA, June 2007**

	Number of Employees				Number of Businesses	
	1-19	20-199	200+	Total Employing Businesses	Non-Employing Businesses	Total Businesses
Agriculture, Forestry & Fishing	36	3	0	39	81	120
Mining	3	0	0	3	3	6
Manufacturing	3	0	0	3	0	3
Electricity, Gas & Water Supply	0	0	0	0	0	0
Construction	6	0	0	6	6	12
Wholesale Trade	0	0	0	0	0	0
Retail Trade	6	0	0	6	0	6
Accom, Cafes & Restaurants	3	0	0	3	0	3
Transport & Storage	6	0	0	6	0	6
Communications Services	0	0	0	0	0	0
Finance & Insurance	0	0	0	0	0	0
Property & Business Services	0	0	0	0	6	6
Education	0	0	0	0	0	0
Health & Community Services	0	0	0	0	0	0
Cultural & Recreational Services	0	0	0	0	0	0
Personal & Other Services	0	0	0	0	0	0
<b>Total</b>	<b>63</b>	<b>3</b>	<b>0</b>	<b>66</b>	<b>96</b>	<b>162</b>

Source: Australian Bureau of Statistics (2007)

#### Barcaldine SLA

Within Barcaldine SLA there were an estimated 210 businesses as at June 2007 comprising of 108 employing businesses and 102 businesses operating as sole traders. In June 2007, the most significant industries in Barcaldine SLA in terms of the number of businesses were agriculture forestry and fishing (108 businesses), construction (21 businesses) and property and business services (18 businesses). The majority of employing businesses had less than 20 employees (96 businesses).

The number of businesses by size in Barcaldine SLA as at June 2007 is summarised in Table 3.5.

**Table 3.5: Number of Businesses, Barcaldine SLA, June 2007**

	Number of Employees				Number of Businesses	
	1-19	20-199	200+	Total Employing Businesses	Non Employing Businesses	Total Businesses
Agriculture, Forestry & Fishing	33	9	0	42	66	108
Mining	0	0	0	0	0	0
Manufacturing	3	0	0	3	6	9
Electricity, Gas & Water Supply	0	0	0	0	0	0
Construction	15	0	0	15	6	21
Wholesale Trade	6	0	0	6	3	9
Retail Trade	9	0	0	9	3	12
Accom, Cafes & Restaurants	6	3	0	9	0	9
Transport & Storage	6	0	0	6	3	9
Communications Services	0	0	0	0	0	0
Finance & Insurance	0	0	0	0	0	0
Property & Business Services	9	0	0	9	9	18
Education	0	0	0	0	0	0
Health & Community Services	0	0	0	0	3	3
Cultural & Recreational Services	6	0	0	6	0	6
Personal & Other Services	3	0	0	3	3	6
<b>Total</b>	<b>96</b>	<b>12</b>	<b>0</b>	<b>108</b>	<b>102</b>	<b>210</b>

Source: Australian Bureau of Statistics (2007)

## Jericho SLA

Within Jericho SLA, there were an estimated 195 businesses as at June 2007, consisting of 69 employing businesses and 126 businesses operating as sole traders. In June 2007, the most significant industry in Jericho SLA in terms of the number of businesses was agriculture, forestry and fishing (150 businesses). All the employing businesses in Jericho SLA had less 20 employees.

The number of businesses by size in Jericho SLA as at June 2007 is presented in Table 3.6.

**Table 3.6: Number of Businesses, Jericho SLA, June 2007**

	Number of Employees				Number of Businesses	
	1-19	20-199	200+	Total Employing Businesses	Non Employing Businesses	Total Businesses
Agriculture, Forestry & Fishing	45	0	0	45	105	150
Mining	0	0	0	0	0	0
Manufacturing	6	0	0	6	0	6
Electricity, Gas & Water Supply	0	0	0	0	0	0
Construction	3	0	0	3	3	6
Wholesale Trade	0	0	0	0	3	3
Retail Trade	3	0	0	3	6	9
Accom, Cafes & Restaurants	6	0	0	6	0	6
Transport & Storage	3	0	0	3	6	9
Communications Services	3	0	0	3	0	3
Finance & Insurance	0	0	0	0	0	0
Property & Business Services	0	0	0	0	3	3
Education	0	0	0	0	0	0
Health & Community Services	0	0	0	0	0	0
Cultural & Recreational Services	0	0	0	0	0	0
Personal & Other Services	0	0	0	0	0	0
<b>Total</b>	<b>69</b>	<b>0</b>	<b>0</b>	<b>69</b>	<b>126</b>	<b>195</b>

Source: Australian Bureau of Statistics (2007)

## Barcaldine RC

As of June 2007, there were an estimated 567 businesses in Barcaldine RC including 243 employing businesses and 324 non-employing businesses (sole traders). Small businesses (with between one and nineteen employees) accounted for over 90% of employing businesses and approximately 40% of total businesses in 2007. The number of businesses by size in Barcaldine RC as at June 2007 is presented in Table 3.7.

**Table 3.7: Number of Businesses, Barcaldine RC, June 2007**

	Number of Employees			Employing Businesses	Number of Businesses	
	1-19	20-199	200+		Non-Employing Businesses	Total Businesses
Agriculture, Forestry & Fishing	114	12	0	126	252	378
Mining	3	0	0	3	3	6
Manufacturing	12	0	0	12	6	18
Electricity, Gas & Water Supply	0	0	0	0	0	0
Construction	24	0	0	24	15	39
Wholesale Trade	6	0	0	6	6	12
Retail Trade	18	0	0	18	9	27
Accom, Cafes & Restaurants	15	3	0	18	0	18
Transport & Storage	15	0	0	15	9	24
Communications Services	3	0	0	3	0	3
Finance & Insurance	0	0	0	0	0	0
Property & Business Services	9	0	0	9	18	27
Education	0	0	0	0	0	0
Health & Community Services	0	0	0	0	3	3
Cultural & Recreational Services	6	0	0	6	0	6
Personal & Other Services	3	0	0	3	3	6
<b>Total</b>	<b>228</b>	<b>15</b>	<b>0</b>	<b>243</b>	<b>324</b>	<b>567</b>

Source: Australian Bureau of Statistics (2007)

In 2007, agriculture, forestry & fishing businesses accounted for over half of the businesses within Barcaldine RC and Central West SD including Aramac SLA (74.1%), Barcaldine SLA (51.4%) and Jericho SLA (76.9%).

The number of businesses in Barcaldine RC, Central West SD and Queensland is presented in Table 3.8.

**Table 3.8: Number of Businesses, Barcaldine RC, Central West SD and Queensland, June 2007**

	Aramac SLA	Barcaldine SLA	Jericho SLA	Barcaldine RC	Central West SD	Queensland
Agriculture, Forestry & Fishing	74.1%	51.4%	76.9%	66.7%	58.8%	11.6%
Mining	3.7%	0.0%	0.0%	1.1%	0.9%	0.4%
Manufacturing	1.9%	4.3%	3.1%	3.2%	1.8%	5.3%
Electricity, Gas & Water Supply	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Construction	7.4%	10.0%	3.1%	6.9%	7.6%	17.7%
Wholesale Trade	0.0%	4.3%	1.5%	2.1%	3.0%	4.0%
Retail Trade	3.7%	5.7%	4.6%	4.8%	8.1%	11.0%
Accom, Cafes & Restaurants	1.9%	4.3%	3.1%	3.2%	3.0%	2.7%
Transport & Storage	3.7%	4.3%	4.6%	4.2%	4.0%	5.9%
Communications Services	0.0%	0.0%	1.5%	0.5%	1.2%	1.2%
Finance & Insurance	0.0%	0.0%	0.0%	0.0%	0.6%	5.7%
Property & Business Services	3.7%	8.6%	1.5%	4.8%	6.3%	24.3%

	Aramac SLA	Barcaldine SLA	Jericho SLA	Barcaldine RC	Central West SD	Queensland
Education	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%
Health & Community Services	0.0%	1.4%	0.0%	0.5%	1.3%	4.3%
Cultural & Recreational Services	0.0%	2.9%	0.0%	1.1%	1.6%	2.1%
Personal & Other Services	0.0%	2.9%	0.0%	1.1%	1.5%	3.0%
<b>Total</b>	<b>162</b>	<b>210</b>	<b>195</b>	<b>567</b>	<b>2,010</b>	<b>389,775</b>

Source: Australian Bureau of Statistics (2007)

## 3.5 Agricultural Activity

### 3.5.1 Horticulture

Horticultural activity was not significant within Barcaldine RC between 2000-01 and 2005-06 with limited or no land occupied by horticultural commodities. Sweet corn was the only significant horticultural commodity within Barcaldine RC and was located within Barcaldine SLA. In 2005-06, there was 178 hectares of land occupied by sweet corn in Barcaldine SLA, producing 1,554 tonnes. The value of sweet corn was \$2.26 million in 2005-06, accounting for 6.3% of Queensland production by value.

### 3.5.2 Cropping

There were only limited crop commodities within Barcaldine RC accounting for only a small proportion of Queensland production. Within Barcaldine RC, crop commodities included:

- Hay: Aramac SLA (\$0.22 million), Barcaldine SLA (\$0.01 million) and Jericho SLA (\$0.05 million) accounting for less than 1% of Queensland production by value;
- Legumes for grain: Barcaldine SLA (\$0.12 million); and
- Cereals for grain: Jericho SLA (\$0.04 million).

### 3.5.3 Livestock

#### Livestock (Production)

In Barcaldine RC, the most significant livestock commodities were sheep (excluding lambs) (420,017 sheep or 9.3% of Queensland production), lambs (333,131 lambs or 9.6% of Queensland production) and meat cattle (86,698 head or 3.7% of Queensland production).

Within Barcaldine RC, sheep (excluding lambs) was the most significant commodity in Aramac SLA (243,654 sheep) followed by meat cattle (149,739 head). Barcaldine SLA recorded 31,068 meat cattle and 88,859 sheep while Jericho SLA recorded 239,210 meat cattle.

Between 2000-01 and 2005-06, there was a decline in the number of lambs and meat cattle in Barcaldine RC and an increase in the number of sheep. Livestock production is described in Table 3.9.

**Table 3.9: Livestock ('000), Barcaldine RC, Central West SD and Queensland, 2000-01 and 2005-06**

Commodity	Aramac SLA		Barcaldine SLA		Jericho SLA		Barcaldine RC		Central West SD		Queensland	
	2000-01	2005-06	2000-01	2005-06	2000-01	2005-06	2000-01	2005-06	2000-01	2005-06	2000-01	2005-06
<b>Number ('000)</b>												
Sheep <sup>1</sup>	380	244	290	89	9	618	399	420	3,083	1,506	7,192	3,566
Lambs	79	63	64	24	-	-	679	333	655	371	1,468	899
Meat cattle	78	150	60	31	261	239	143	87	1,411	1,256	11,088	11,354
<b>% of QLD</b>												
Sheep	5.3%	6.8%	4.0%	2.5%	0.1%	0.0%	9.4%	9.3%	42.9%	42.2%	100.0%	100.0%
Lambs	5.4%	7.0%	4.4%	2.6%	-	-	9.8%	9.6%	44.6%	41.2%	100.0%	100.0%
Meat cattle	0.7%	1.3%	0.5%	0.3%	2.4%	2.1%	3.6%	3.7%	12.7%	11.1%	100.0%	100.0%

Note 1: Excluding lambs

Source: Australian Bureau of Statistics (2006-07)

### Livestock Slaughtered (Value)

In 2005-06, the total value of slaughtered livestock in Barcaldine RC was \$97.01 million, including:

- Aramac SLA: \$32.90 million;
- Barcaldine SLA: \$10.77 million; and
- Jericho SLA: \$53.34 million.

In all regions slaughtered cattle and calves accounted for the majority of the total livestock slaughtered value.

**Table 3.10: Livestock Slaughtered Value, Barcaldine RC, Central West SD and Queensland, 2005-06**

Commodity	Aramac SLA		Barcaldine SLA		Jericho SLA		Barcaldine RC		Central West SD		QLD
	\$m	% QLD	\$m	% QLD	\$m	% QLD	\$m	% QLD	\$m	% QLD	\$m
Cattle and calves	30.92	0.9%	9.19	0.3%	53.29	1.5%	93.40	2.6%	306.12	8.5%	3,606.68
Sheep and lambs	1.78	3.6%	1.58	3.2%	0.00	0.0%	3.35	6.9%	20.79	42.6%	48.75
Other	0.21	0.0%	0.00	0.0%	0.05	0.0%	0.26	0.1%	3.11	0.7%	469.73
<b>Total Value</b>	<b>32.90</b>	<b>0.8%</b>	<b>10.77</b>	<b>0.3%</b>	<b>53.34</b>	<b>1.3%</b>	<b>97.01</b>	<b>2.4%</b>	<b>330.02</b>	<b>8.0%</b>	<b>4,125.16</b>

Source: Australian Bureau of Statistics (2006-07)

### Livestock Products (Value)

The total value of livestock products in 2005-06 was \$9.93 million in Barcaldine RC, with wool accounting for all of the livestock products value. Wool production in Barcaldine RC accounted for 9.3% of Queensland production by value, including:

- Aramac SLA: \$7.26 million or 6.8% of Queensland production by value;
- Barcaldine SLA: \$2.65 million or 2.5% of Queensland production by value; and
- Jericho SLA: \$0.02 million, less than 1% of Queensland production by value.

**Table 3.11: Livestock Products Value, Barcaldine RC, Central West SD and Queensland, 2005-06**

Commodity	Aramac SLA		Barcaldine SLA		Jericho SLA		Barcaldine RC		Central West SD		Queensland
	\$m	% of QLD	\$m	% of QLD	\$m	% of QLD	\$m	% of QLD	\$m	% of QLD	\$m
Wool	7.26	6.8%	2.65	2.5%	0.02	0.0%	9.93	9.3%	44.87	42.2%	106.29
Other	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.00	0.0%	309.51
<b>Total Value</b>	<b>7.26</b>	<b>1.7%</b>	<b>2.65</b>	<b>0.6%</b>	<b>0.02</b>	<b>0.0%</b>	<b>9.93</b>	<b>2.4%</b>	<b>44.88</b>	<b>10.8%</b>	<b>415.80</b>

Source: Australian Bureau of Statistics (2006-07)

### 3.5.4 Summary of Agricultural Activity

Within the study area horticulture and cropping were not major agricultural industries. Livestock commodities were recorded in all regions with major commodities including sheep and meat cattle. The value of horticulture, cropping and livestock commodities in Barcaldine RC accounted for less than 10% of the Queensland production by value in 2005-06.

## 3.6 Summary

Over the past nine years, the size of the labour force has remained relatively steady throughout Barcaldine RC, with the labour force participation rate averaging 77.8%. The unemployment rate within Barcaldine RC and its component SLAs has been consistently lower than the Queensland average.

There were a total of 567 businesses identified in Barcaldine RC as of June 2007, with Barcaldine SLA having the most with 210 businesses. Agriculture, forestry and fishing was the dominant business type across all SLAs within Barcaldine RC, accounting for between 51.4% and 76.9% of total businesses. There were fifteen businesses identified within Barcaldine RC that employed over twenty persons, with twelve agriculture, forestry and fishing businesses and three accommodation, cafes and restaurant businesses.

Livestock was the major agricultural activity in Barcaldine RC, with the total value of livestock slaughtered estimated at \$97.01 million in 2005-06. The majority of livestock slaughtered were cattle and calves, accounting for \$93.40 million or 96.3% of total livestock slaughtered. Horticulture and cropping were not identified as significant agricultural industries in Barcaldine RC.

The preceding analysis suggests that the local and regional economic environment of the Barcaldine RC and Central West SD has improved considerably over the last five to ten years, with labour force participation increasing and unemployment rates decreasing. However, livestock production, the region's most significant form of agricultural production, has experienced significant decline. Agricultural production has traditionally been a foundation of the Barcaldine local economy. The region has faced challenging climatic conditions over the past five to ten years including drought and extreme flooding. In the future, agriculture will face growing competition for labour from mining. Furthermore, as the local and regional economies grow, agriculture will face competition from the services sectors.

## 4 AVAILABILITY OF ACCOMMODATION AND HOUSING WITHIN THE KEVIN'S CORNER STUDY AREA

The following assessment of the Kevin's Corner study area accommodation and housing markets relates to:

- Stock and availability of commercial accommodation, including:
  - Hotel and motel rooms and serviced apartments with five or more rooms;
  - Caravan park sites;
  - Holiday flats, units and houses; and
  - Hostels; and
- Sales of houses, units and townhouses, commercial and industrial.

The Tourist Accommodation, Small Area Data, Queensland publication (ABS, various years) identifies one hotel, motel and serviced apartment establishment in Jericho SLA and six hotel, motel and serviced apartment establishments in Barcaldine SLA. However, there is only data available in regards to the performance of accommodation establishments within Barcaldine Regional Council with 15 or more rooms. As a result, occupancy rates for hotels, motels and serviced apartments with 15 or more room were used to determine the average number of vacancies per night.

### 4.1 Commercial Accommodation in Barcaldine Regional Council

In the March quarter 2010, there were an estimated seven hotels, motels and serviced apartments in Barcaldine RC with a total of 100 rooms. There were two caravan parks in Barcaldine RC with a total capacity of 95 sites. In the March quarter 2010, there were an estimated 73 hotels, motels and serviced apartments and 19 caravan parks within the Outback Tourism Region (TR). This is shown in Table 4.1.

**Table 4.1: Summary of Tourism Establishments, Barcaldine RC and Outback TR, March Quarter 2010**

	Hotels, Motels & Serviced Apartments <sup>1</sup>		Caravan Parks	
	No.	Rooms	No.	Total Capacity
Barcaldine RC	7	100	2	95
Outback TR	73	1,513	19	2,282
Queensland	1,554	65,690	318	38,371

Note: Data is not available for holiday flats, units and houses and hostels as there were no establishments in Barcaldine RC

Note 1: Establishments with five or more rooms

Source: Australian Bureau of Statistics (various years)

The room occupancy rate of hotels, motels and serviced apartments with five or more rooms in Barcaldine RC fluctuated between 30.1% (March quarter 2005) and 57.2% (September quarter

2009). Over the past five years room occupancy rates for hotels, motels and serviced apartments in Barcaldine RC were generally lower than in the Outback TR and Queensland.

Data for the site occupancy rate of caravans in Barcaldine RC was unavailable due to the limited number of caravan parks. In the Outback TR, the site occupancy rate of caravans was highest in the September quarter 2009 at 59.2%. The average site occupancy rate over the past five years was 37.1% in the Outback TR, significantly below the Queensland average of 56.7%.

The occupancy rate trends in Barcaldine RC and the Outback TR from the March quarter 2005 to the March quarter 2010, benchmarked against Queensland are presented in Table 4.2.

**Table 4.2: Occupancy Rate Trends, Barcaldine RC, Outback TR and Queensland, Mar Q 05 to Mar Q 10**

	Barcaldine RC			Outback TR			Queensland		
	Hotels, Motels & Serviced Apartments <sup>1</sup> (room occupancy)	Caravan Parks (site occupancy)	-	Hotels, Motels & Serviced Apartments <sup>1</sup> (room occupancy)	Caravan Parks (site occupancy)	-	Hotels, Motels & Serviced Apartments <sup>1</sup> (room occupancy)	Caravan Parks (site occupancy)	-
Mar Q 05	30.1%	-	-	39.7%	17.8%	-	61.0%	49.8%	-
Jun Q 05	54.6%	-	-	55.0%	45.1%	-	61.3%	55.5%	-
Sep Q 05	43.4%	-	-	61.6%	51.9%	-	71.3%	65.7%	-
Dec Q 05	33.1%	-	-	49.7%	21.0%	-	66.8%	51.1%	-
Mar Q 06	32.4%	-	-	42.9%	20.7%	-	62.8%	47.1%	-
Jun Q 06	41.1%	-	-	59.8%	42.7%	-	62.4%	55.8%	-
Sep Q 06	43.1%	-	-	64.0%	50.6%	-	72.5%	65.1%	-
Dec Q 06	35.1%	-	-	49.6%	19.4%	-	68.4%	51.7%	-
Mar Q 07	31.0%	-	-	43.7%	21.1%	-	64.0%	49.4%	-
Jun Q 07	47.4%	-	-	58.0%	47.8%	-	62.4%	58.8%	-
Sep Q 07	54.3%	-	-	64.3%	57.8%	-	71.7%	67.9%	-
Dec Q 07	39.6%	-	-	50.8%	27.9%	-	67.4%	54.7%	-
Mar Q 08	38.0%	-	-	43.8%	22.6%	-	60.6%	49.4%	-
Jun Q 08	56.9%	-	-	61.5%	50.9%	-	60.9%	58.3%	-
Sep Q 08	56.7%	-	-	65.7%	54.2%	-	68.9%	68.1%	-
Dec Q 08	53.4%	-	-	51.6%	29.1%	-	64.8%	54.7%	-
Mar Q 09	43.4%	-	-	43.3%	22.1%	-	57.8%	49.8%	-
Jun Q 09	54.9%	-	-	55.7%	48.4%	-	57.3%	58.1%	-
Sep Q 09	57.2%	-	-	63.1%	59.2%	-	66.7%	68.1%	-
Dec Q 09	53.9%	-	-	49.0%	31.6%	-	63.2%	54.4%	-
Mar Q 10	36.3%	-	-	41.0%	28.3%	-	56.6%	48.4%	-
<b>Average, Mar Q 05 to Mar Q 10</b>	<b>45.0%</b>	<b>-</b>	<b>-</b>	<b>53.6%</b>	<b>37.1%</b>	<b>-</b>	<b>64.6%</b>	<b>56.7%</b>	<b>-</b>

Note 1: Establishments with five or more rooms  
Source: Australian Bureau of Statistics (various years)

Over the March quarter 2005 to the March quarter 2010 period the average number of vacant rooms / beds per night in Barcaldine RC ranged between:

- 39-67 vacant hotel / motel rooms and serviced apartments; and
- 33-77 vacancies at caravan sites<sup>5</sup>.

<sup>5</sup> The site occupancy rate of caravan parks in Barcaldine RC was unavailable due to the limited number of caravan parks; hence the Outback TR site occupancy rates were used to estimate the average number of vacant caravan sites.

Vacancy data indicates accommodation demand for hotels, motels and serviced apartments, and caravan parks in Barcaldine RC was higher in the June and September quarters of each year.

A summary of the average number of vacant rooms / beds per night in Barcaldine RC and the Outback TR between March quarter 2005 and March quarter 2010 is provided in Table 4.3.

**Table 4.3: Average Number of Vacancies per Night, Barcaldine RC, Outback TR and Queensland, Mar Q 05 to Mar Q 10**

	Barcaldine RC		Outback TR	
	Hotels, Motels & Serviced Apartments <sup>1</sup> (vacant rooms)	Caravan Parks (vacant sites)	Hotels, Motels & Serviced Apartments <sup>1</sup> (vacant rooms)	Caravan Parks (vacant sites)
Mar Q 05	61	33	1,245	2,406
Jun Q 05	39	52	932	1,699
Sep Q 05	55	46	800	1,485
Dec Q 05	64	75	1,053	2,425
Mar Q 06	65	75	1,195	2,459
Jun Q 06	57	54	846	1,805
Sep Q 06	53	47	742	1,555
Dec Q 06	60	77	1,040	2,533
Mar Q 07	67	75	1,156	2,450
Jun Q 07	50	50	872	1,682
Sep Q 07	44	40	741	1,343
Dec Q 07	59	68	1,018	2,296
Mar Q 08	64	74	1,169	2,471
Jun Q 08	44	47	799	1,575
Sep Q 08	43	44	705	1,491
Dec Q 08	46	67	998	2,297
Mar Q 09	58	74	1,195	2,455
Jun Q 09	45	49	933	1,677
Sep Q 09	43	39	765	1,346
Dec Q 09	47	65	1,059	2,202
Mar Q 10	64	68	893	1,636
<b>Average, Mar Q 05 to Mar Q 10</b>	<b>54</b>	<b>58</b>	<b>963</b>	<b>1,983</b>

Note 1: Establishments with five or more rooms  
Source: Australian Bureau of Statistics (various years)

## 4.2 Building Activity within Central West SD

### 4.2.1 Number of Approvals

Residential building activity in the Central West SD ranged from ten approvals (2003-04) to 33 approvals (2001-02 and 2008-09). In Barcaldine RC, building approvals ranged from two approvals (2005-06) to twelve approvals (2009-10).

New houses accounted for the majority of total residential approvals in Barcaldine RC and Central West SD between 2001-02 and 2009-10.

Table 4.4 below summarises the number of residential building approvals by type in Barcaldine RC, Central West SD and Queensland between 2001-02 and 2009-10.

**Table 4.4: Number of Residential Building Approvals by Type, 2001-02 to 2009-10**

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
<b>New Houses</b>									
Barcaldine RC	9	2	3	5	2	6	3	9	12
Central West SD	31	22	8	24	14	18	21	31	18
Queensland	26,597	27,626	29,780	25,182	27,700	28,723	30,223	19,884	22,764
<b>New other residential building</b>									
Barcaldine RC	0	2	0	2	0	0	0	2	0
Central West SD	2	2	2	2	0	2	5	2	0
Queensland	9,529	13,745	15,309	14,021	13,882	12,693	14,668	9,001	10,844
<b>Total Residential</b>									
Barcaldine RC	9	4	3	7	2	6	3	11	12
Central West SD	33	24	10	26	14	20	26	33	18
Queensland	36,126	41,371	45,089	39,203	41,582	41,416	44,891	28,885	33,608

Note: New other residential building comprises attached dwellings, i.e. flats, units and townhouses.  
Source: Australian Bureau of Statistics (2010)

### 4.2.2 Value of Approvals

According to various construction cost indices (e.g. Rawlinson's 2010) building prices in Central West SD are approximately 20% to 40% higher than Metropolitan Brisbane.

In 2009-10, the total value of residential approvals in Central West SD was \$6.4 million, including \$3.6 million in Barcaldine RC.

The value of non-residential building approvals in Central West SD was \$22.8 million in 2009-10, including \$7.8 million in Barcaldine RC. The value of non-residential building approvals in Central West SD has consistently increased since 2005-06. Prior to 2009-10, the value of non-residential building approvals in Barcaldine RC was below \$1 million.

Table 4.5 below summarises the value of residential and non-residential building approvals in Barcaldine RC, Central West SD and Queensland between 2001-02 and 2009-10.

**Table 4.5: Value of Residential & Non-Residential Building Approvals (\$m), 2001-02 to 2009-10**

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
<b>New Houses</b>									
Barcaldine RC	1.2	0.3	0.4	0.6	0.3	2.7	0.9	2.4	3.1
Central West SD	3.6	2.8	1.1	4.1	2.4	4.7	3.9	6.9	4.5

	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Queensland	3,725.8	4,335.2	5,421.6	5,171.0	6,054.8	6,659.3	7,633.5	5,225.0	5,979.9
<b>New other residential building</b>									
Barcaldine RC	0.0	0.2	0.0	0.4	0.0	0.0	0.0	0.2	0.0
Central West SD	0.4	0.2	0.2	0.4	0.0	0.5	1.6	0.2	0.0
Queensland	1,389.9	2,315.6	2,827.9	2,944.9	2,883.2	2,656.8	3,860.5	2,557.4	2,186.4
<b>Alterations &amp; Additions to residential buildings</b>									
Barcaldine RC	0.3	0.1	0.1	0.0	0.1	0.6	0.4	0.6	0.5
Central West SD	2.5	1.2	1.0	0.8	0.9	1.1	2.0	1.9	1.8
Queensland	541.4	684.4	889.5	962.3	1,147.4	1,201.6	1,247.0	1,132.7	1,290.9
<b>Total Residential</b>									
Barcaldine RC	1.5	0.6	0.5	1.1	0.4	3.2	1.4	3.2	3.6
Central West SD	6.4	4.2	2.3	5.3	3.3	6.3	7.6	9.0	6.4
Queensland	5,657.1	7,335.1	9,139.0	9,078.2	10,085.4	10,517.6	12,741.0	8,915.1	9,457.2
<b>Total Non-Residential</b>									
Barcaldine RC	0.1	0.3	0.5	0.9	0.1	0.2	0.1	0.6	7.8
Central West SD	2.0	6.8	4.1	9.9	4.7	3.7	8.6	7.3	22.8
Queensland	2,471.6	3,003.8	3,272.7	4,321.7	6,874.2	6,760.7	8,186.0	9,213.8	8,461.5
<b>Total Value of Approvals</b>									
Barcaldine RC	1.6	0.9	1.0	2.0	0.5	3.4	1.4	3.7	11.4
Central West SD	8.4	11.0	6.4	15.2	8.0	10.0	16.2	16.3	29.2
Queensland	8,128.7	10,338.9	12,411.7	13,399.9	16,959.6	17,278.4	20,926.9	18,129.0	17,918.7

Source: Australian Bureau of Statistics (2009-10)

## 4.3 Central West SD Housing Market

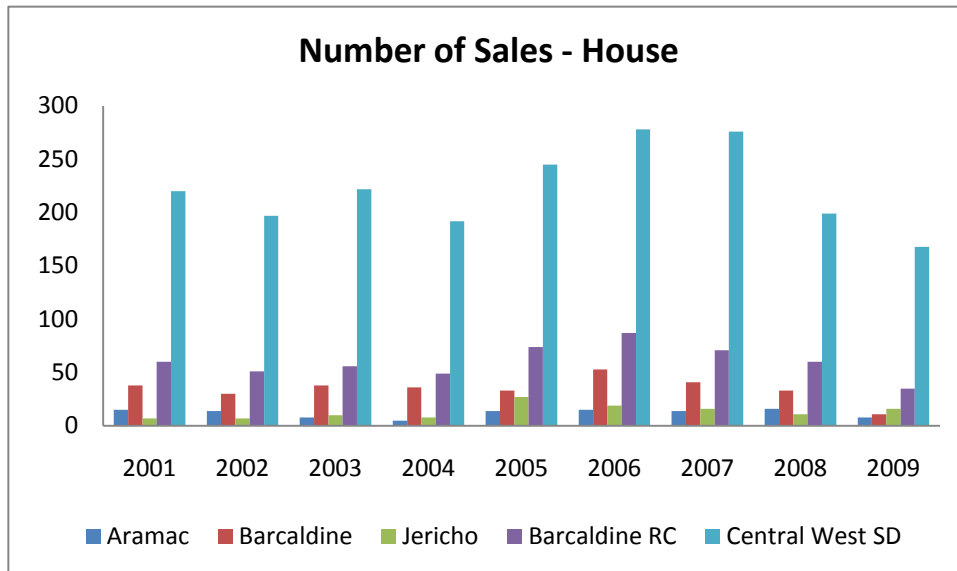
### 4.3.1 Houses

#### Volume of Sales

Within Barcaldine RC, the volume of house sales fluctuated between 2001 and 2009, peaking in 2006 with 87 sales. Within Barcaldine RC, approximately half of the total house sales were located in Barcaldine SLA. The volume of house sales in Barcaldine RC accounted for between 25% and 32% of sales in Central West SD.

The volume of house sales in Barcaldine RC and Central West SD between 2001 and 2009 are shown in Figure 4.1.

**Figure 4.1: Volume of House Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

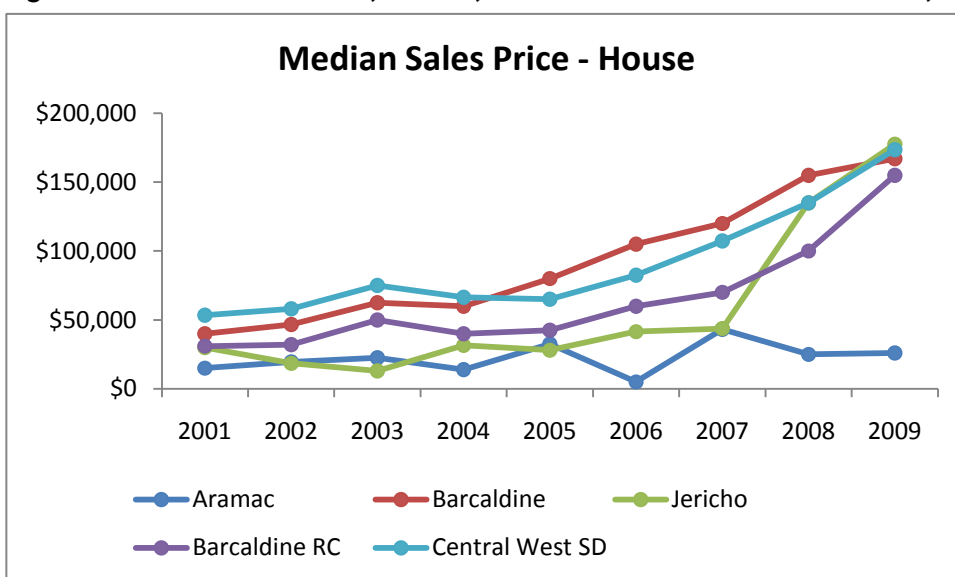
## Median Sale Price

The median sale price of houses in Barcaldine RC increased from \$31,000 in 2001 to \$155,000 in 2009. The median sale price of houses in Barcaldine RC was consistently below the Central West SD median between 2001 and 2009.

Within Barcaldine RC, the median sale price of houses was highest in Barcaldine SLA increasing from \$40,000 in 2001 to \$167,000 in 2009. In Jericho SLA, the median sale price of houses increased significantly between 2007 and 2009 from \$43,750 to \$177,500.

The median sale price for houses in Barcaldine RC and Central West SD between 2001 and 2009 is shown in Figure 4.2.

**Figure 4.2: Median Sale Price, Houses, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

## 4.3.2 Units and Townhouses

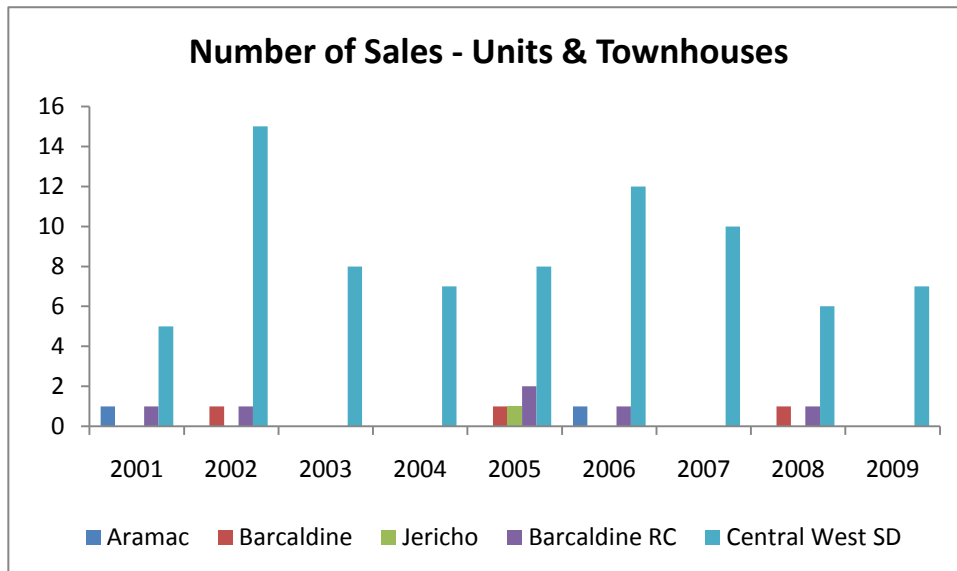
### Volume of Sales

There were only a small number of unit and townhouse sales within Barcaldine RC between 2001 and 2009 with two sales recorded in 2005 and one sale recorded in 2001, 2002, 2006 and 2008.

The volume of unit and townhouse sales within Central West SD was significantly lower than the volume of house sales in the 2001 to 2009 period. In Central West SD, the volume of unit and townhouse sales ranged from five sales in 2001 to 15 sales in 2002. Since the peak in 2002, sales were down approximately 47% the following year and have yet to recover to 2002 levels.

The volume of unit and townhouse sales in Barcaldine RC and Central West SD between 2001 to 2009 are illustrated in Figure 4.3.

**Figure 4.3: Volume of Unit and Townhouse Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

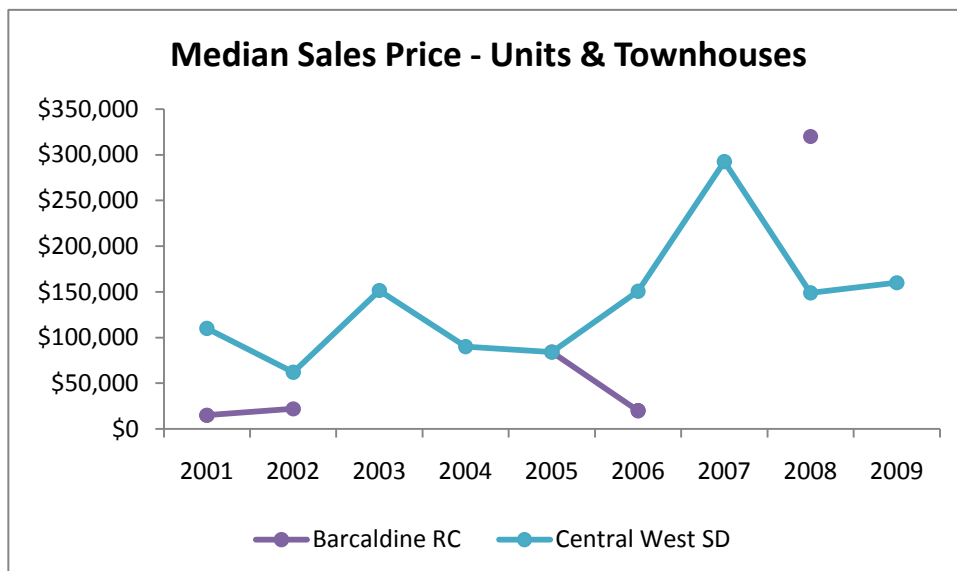
## Median Sale Price

The median sale price of units and townhouses in Barcaldine RC was \$320,000 in 2008 significantly above the Central West SD median. However, the median sales price of units and townhouses in Barcaldine RC is based on only a minimal number of sales.

The median sale price of units and townhouses in Central West SD increased from \$62,500 in 2002 to peak at \$292,500 in 2007, before falling in 2009 to \$160,000. There was a significant increase in the median sale price of units and townhouses in 2006, which was followed by a significant fall in 2007. Price decreases were recorded in 2003, 2004 and 2007.

Figure 4.4 shows the median price of units and townhouses in Barcaldine RC and Central West SD between 2001 and 2009.

**Figure 4.4: Median Sale Price, Units and Townhouses, Barcaldine RC and Central West SD 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

### 4.3.3 Commercial

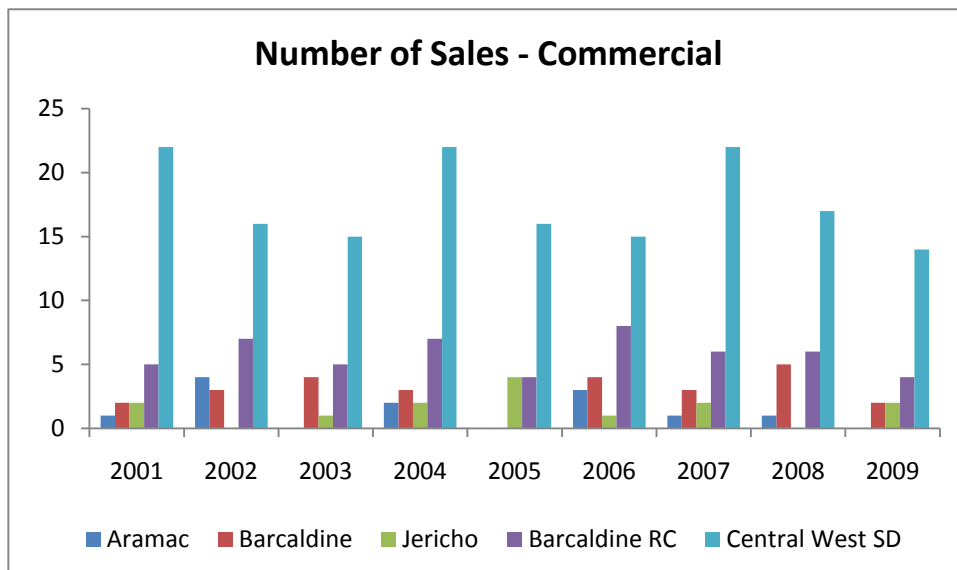
#### Volume of Sales

Within Barcaldine RC, there were between four commercial property sales (2005 and 2009) and eight commercial property sales (2006) per year. Within Barcaldine RC, Barcaldine SLA accounted for approximately half of the total commercial sales between 2001 and 2009.

Within Central West SD, the volume of commercial property sales fluctuated considerably between 2001 and 2009, peaking in 2001 at 22 sales, and again reaching this peak in 2004 and 2007 sales. In the data sample, the commercial sales tend to follow a cycle where sales peak every three years with a reduction in sales in the following two years.

Figure 4.5 below shows the volume of commercial property sales in Barcaldine RC and Central West SD between 2001 and 2009.

**Figure 4.5: Volume of Commercial Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

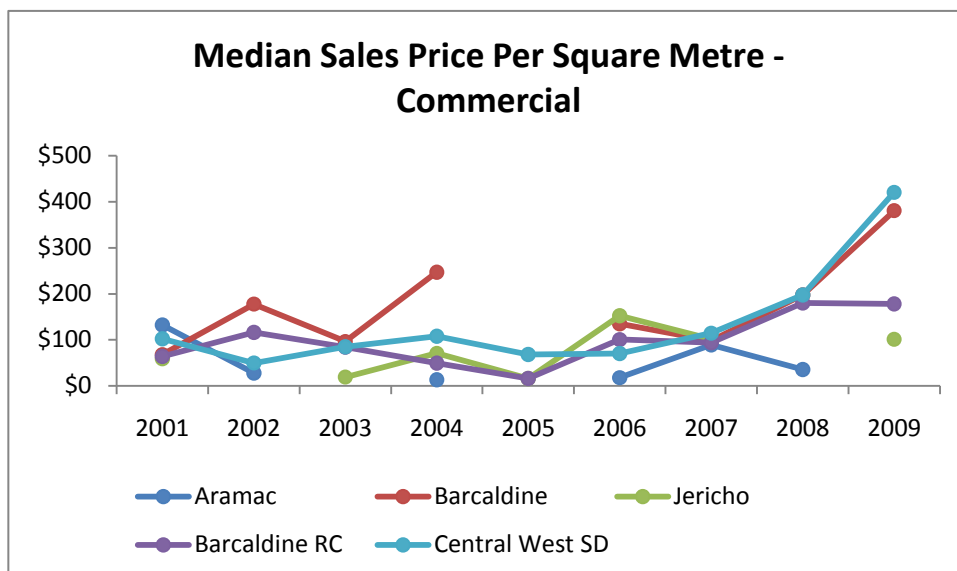
## Median Sale Price

The median commercial property sale price per square metre in Barcaldine RC fluctuated between \$64 per square metre (2001) and \$180 per square metre (2008). Within Barcaldine RC, Barcaldine SLA generally recorded a higher median sale price per square metre for commercial property than Aramac SLA and Jericho SLA.

The median sale price per square metre for commercial property in Central West SD increased from \$102 per square metre in 2001 to \$421 per square metre in 2009. The average annual growth rate of the median sale price of commercial property was significantly higher between 2006 and 2009 (167% per annum) than between 2001 and 2006 (-6.3% per annum).

Figure 4.6 shows the median sale price per square metre for commercial property in Barcaldine RC and Central West SD between 2001 and 2009.

**Figure 4.6: Median Sale Price, Commercial, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010  
 Note: Data is for the year ended 31st December of each year  
 Source: Property Data Solutions (2010)

### 4.3.4 Industrial

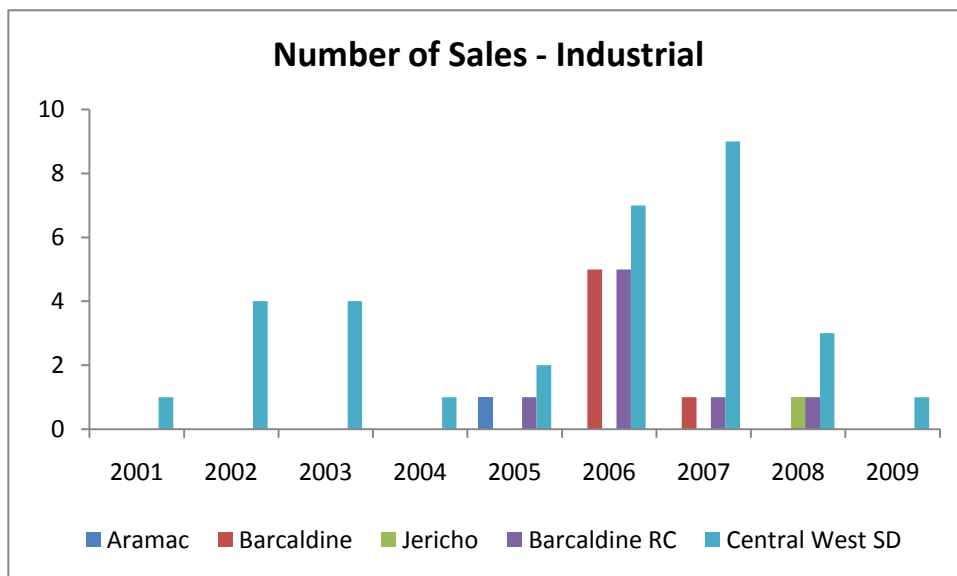
#### Volume of Sales

There were eight industrial property sales in Barcaldine RC, five of which were in 2006 in Barcaldine SLA.

Within Central West SD, the volume of industrial property sales fluctuated significantly between 2001 and 2009, however sales have been in single figures, peaking in 2007 at nine sales.

Figure 4.7 below shows the volume of industrial property sales in Barcaldine RC and Central West SD between 2001 and 2009.

**Figure 4.7: Volume of Industrial Land Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

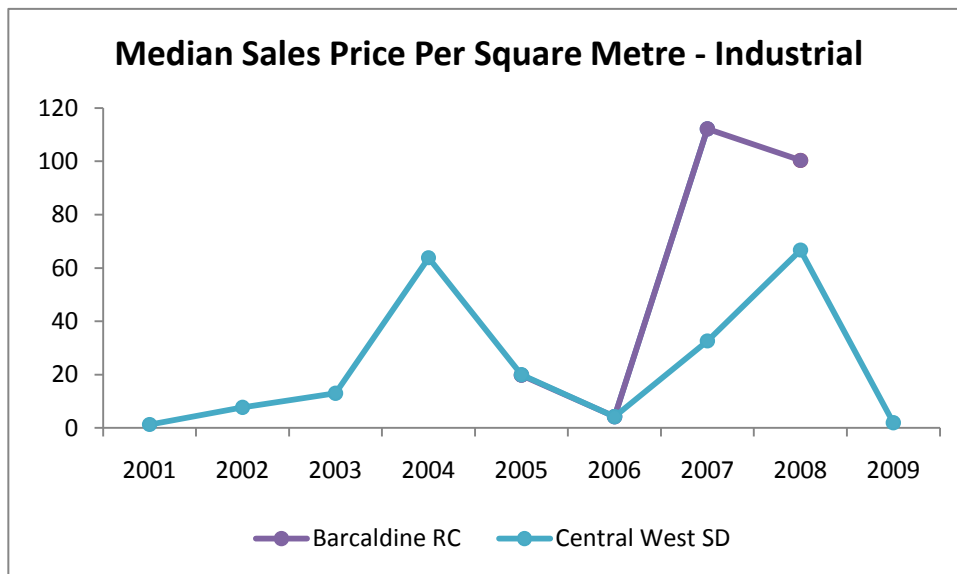
## Median Sale Price

The median sale price per square metre of industrial property in Barcaldine RC was between \$4 per square metre (2006) and \$112 per square metre (2007). The area of industrial properties sold in Barcaldine RC ranged from 1,373 square metres to 113,080 per square metres and sold for under \$250,000.

In Central West SD, the median sale price of industrial property peaked in 2008 at \$67 per square metre and was lowest at \$1 per square metre in 2001.

The median sale price for industrial property between 2001 and 2009 is presented in Figure 4.8.

**Figure 4.8: Median Sale Price, Industrial, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

Source: Property Data Solutions (2010)

### 4.3.5 Vacant Land

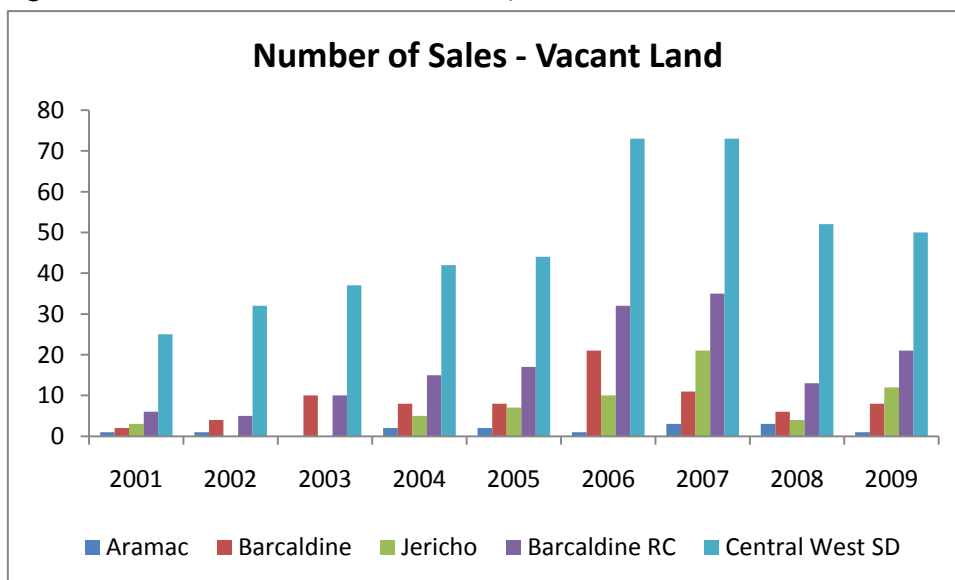
#### Volume of Sales

Vacant land sales classified as vacant urban land and vacant large housesite have been included in this assessment. Vacant land allotments classified this way are likely to be taken up with urban development (e.g. houses, commercial, industrial etc.). Vacant land allotments classified as vacant rural land have been excluded as they are large allotments ( $>65,000\text{m}^2$ ) and are unlikely to be taken up by urban development.

Between 2001 and 2009, there were 154 vacant land sales in Barcaldine RC, including 78 sales in Barcaldine SLA and 62 sales in Jericho SLA. The number of vacant land sales peaked in 2007 in Barcaldine RC (35 sales) and 2006 and 2007 in Central West SD (both 73 sales).

Figure 4.9 below shows the volume of vacant land sales in Barcaldine RC and Central West SD between 2001 and 2009.

**Figure 4.9: Volume of Vacant Land Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010

Note: Data is for the year ended 31st December of each year

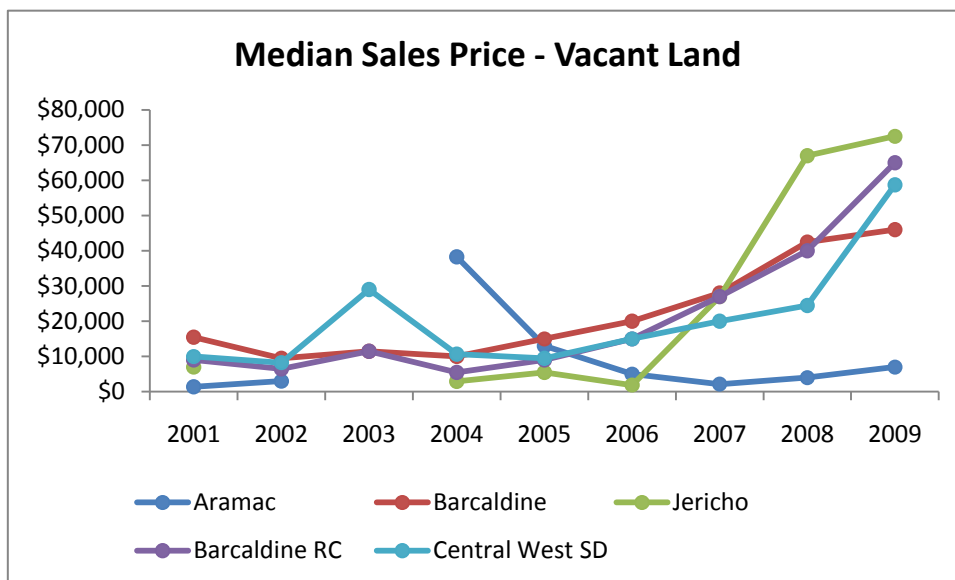
Source: Property Data Solutions (2010)

## Value of Sales

The median sale price of vacant land in Barcaldine RC increased from \$5,500 in 2004 to \$65,000 in 2009. In 2009, the median sale price of vacant land was higher in Jericho SLA (\$72,500) than in Barcaldine SLA (\$46,000) and Aramac SLA (\$7,000).

The median sale price for vacant land between 2001 and 2009 is presented in Figure 4.10.

**Figure 4.10: Value of Vacant Land Sales, Barcaldine RC and Central West SD, 2001 to 2009**



Note: The data was collected in June 2010  
 Note: Data is for the year ended 31st December of each year  
 Source: Property Data Solutions (2010)

### 4.3.6 Rental Housing Market

Alpha is located within Jericho SLA and as of the 2006 Census recorded a population of 609 persons. Within the Alpha State Suburb, the number of households increased from 191 households in 2001 to 216 households in 2006. The number of households renting increased from 45 households in 2001 to 69 households in 2006. Average weekly rents decreased from \$73 in 2001 to \$61 in 2006.

Rental Bonds data from the Residential Tenancies Authority is unavailable for Alpha and Barcaldine because of the limited number of bonds lodged.

Between July 2009 and February 2011, there have been 20 rental listings<sup>6</sup> in Alpha and three listings in Barcaldine. In Alpha, the weekly rent for a three bedroom house was between \$160 per week and \$180 per week, with two listings at \$200 per week in 2010. In Barcaldine, there was one rental listing was for \$200 per week with two rental listings for \$220 per week for a three bedroom house. Discussions with real estate agents indicate that due to the limited supply of rental properties and short term demand, rental properties in Barcaldine range between \$200 per

<sup>6</sup> Rental data obtained from Property Data Solutions includes rental listings and does not indicate whether the property was rented or not. Duplicate rentals were removed where known.

week and \$400 per week. Based on the paucity of rental bond data and the limited rental listings data, it is clear that the rental housing market in Alpha and Barcaldine is thin.

## 4.4 Summary

The room occupancy rate of hotels, motels and serviced apartments with five or more rooms in Barcaldine RC fluctuated between 30.1% (March quarter 2005) and 57.2% (September quarter 2009). Over the past five years room occupancy rates for hotels, motels and serviced apartments in Barcaldine RC were generally lower than in the Outback TR and Queensland.

Data for the site occupancy rate of caravans in Barcaldine RC was unavailable due to the limited number of caravan parks. In the Outback TR, the site occupancy rate of caravans was highest in the September quarter 2009 at 59.2%. The average site occupancy rate over the past five years was 37.1% in the Outback TR, significantly below the Queensland average of 56.7%.

In Barcaldine RC, the average number of vacant rooms / beds per night ranged between:

- 39-67 vacant hotel / motel rooms and serviced apartments; and
- 33-77 vacancies at caravan sites.

The volume of house sales in Barcaldine RC accounted for approximately 25% to 32% of sales in Central West SD. The median price of house sales in Barcaldine RC was consistently below Central West SD.

There were four to eight commercial property sales per annum in Barcaldine RC, with the median sales price fluctuating between \$64 per square metre and \$180 per square metre.

There was limited data in regards to unit and townhouse, and industrial property sales in Barcaldine RC, so it was difficult to determine the trend in prices over the past nine years.

The volume of vacant land sales in Barcaldine RC accounted for approximately 16% to 48% of sales in Central West SD. Between 2007 and 2009, the median sale price of vacant land was consistently higher in Barcaldine RC than in Central West SD.

There was only limited data on rental properties in Alpha suburb and Barcaldine suburb. In Alpha suburb, the weekly rent for a three bedroom house was between \$160 per week and \$180 per week, with two listings at \$200 per week in 2010. In Barcaldine suburb, there was one rental listing was for \$200 per week with two rental listings for \$220 per week for a three bedroom house.

## 5 ECONOMIC ASSESSMENT OF PROJECT IMPACTS

The purpose of this stage of the analysis is to understand the scale of the proposed development's economic impact and effect relative to the size of the Queensland economy. The economic assessment will entail an economic impact assessment to estimate the scale of output, income, employment and value added impacts of the Project on the Queensland economy, identification of the Project's opportunity cost and the cumulative impacts of major projects within the region.

### 5.1 Economic Impact Assessment

Economic impact assessment is used to estimate the direct and indirect impacts of a particular economic stimulus or activity, in this case the construction and operation of the Kevin's Corner Project. The economic impact analysis is based on input-output tables which describe inter-industry transactions for a given region. National input-output tables for 2005-06<sup>7</sup> are prepared by the Australian Bureau of Statistics based on the Australian National Accounts. Queensland tables are then imputed using Queensland State Accounts and Census data.

The total economic impact of a particular stimulus or activity comprises the following effects.

- Direct or initial effect: being the stimulus for the economic impact, typically described as the change in sales or contribution to final demand by the stimulus or activity.
- Flow on effects, comprising production-induced effects and consumption-induced effects, these being:
  - First-round production effects: being those purchases of inputs required from other industry sectors in the economy to produce the additional output generated by the stimulus or activity;
  - Industrial support production effects: being those second, third and subsequent-round industrial flow on effects stimulated by the purchases made in the first round; and
  - Consumption induced effects: being those purchases made by households upon receiving additional income from labour payments stemming from the production of additional output generated by the stimulus or activity under assessment.

The extent of these impacts can be represented by multipliers calculated in aggregate for various regional, state or national economies. There are commonly four multipliers used to measure impact - output, income, employment and value added.

Two sets of the above multipliers can be generated, namely:

- Type 1 Multipliers, which estimate the direct and production induced impacts of a stimulus or activity; and
- Type 2 Multipliers, which estimate the direct, production induced and consumption induced impacts of a stimulus or activity.

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<sup>7</sup> ABS (2009) Australian National Accounts: Input-Output Tables Catalogue No. 5209.0.55.001

Type 1 Multipliers would be used in the analysis of the Kevin's Corner Project. Queensland Treasury's preference is for use of only Type 1 Multipliers, given that Type 2 Multipliers typically overstate the extent of consumption-induced impacts of any given stimulus or activity.

It is also important to note that value added is the measure of economic impact resulting from a stimulus that is preferred by economists.

The various impact measures used in economic impact assessment are described in Table 5.1.

**Table 5.1: Measures of Economic Impact**

Impact Measure	Description
Output	The output impact measures the increase in gross sales throughout the entire economy by aggregating all individual transactions (direct and indirect) resulting from the economic stimulus. The output impact provides an indication of the degree of structural dependence between sectors of the economy. However, output impacts are regarded as overstating the impact on the economy as they count all goods and services used in one stage of production as an input to later stages of production, hence counting their contribution more than once.
Household income	The household income impact measures the additional wages, salaries and supplements paid to households associated with the industry under consideration and with other industries benefiting from the stimulus to the economy. It is important to note that the input-output tables on which this analysis is based relate to 2005-06. The input-output tables represent the structural dependence of industry sectors within the regional economy. Since 2005-06 there may have been changes in the composition of real wages. While the input-output tables have been augmented to reflect changes in relative incomes between industries, they have not been augmented such that they reflect relative differences between regions on an inter-industry basis.
Employment	The employment impact measures the number of full time equivalent (FTE) positions for one year created directly and indirectly by the stimulus <sup>8</sup> . However, the short-term response to increased demand may be that existing employees work overtime. Consequently, actual levels of employment generated (in terms of persons employed) will tend to be lower than those estimated by the input-output analysis. This short-term employment response (of working additional overtime) will be more prevalent where the demand stimulus is likely to be temporary and short lived, or where there is limited spare capacity in the economy (that is, when the economy is at or near full employment).
Value added	The value added or Gross Regional Product (GRP) impact measures only the net activity at each stage of production resulting from a stimulus. GRP is defined as the addition of consumption, investment and government expenditure, plus net exports (exports minus imports) from a region. The value added (or GRP) impact is the preferred measure for the assessment of contribution to the economy from a stimulus or impact, and as such should be used to describe the net impact of the event.

Source: Jensen, R. & West, G. (2001) Community Economic Analysis, Department of Primary Industries: Brisbane, Qld

### 5.1.1 Limitations of the Input-Output Approach

The input-output approach has a number of limitations, which may result in overestimation of impacts.

- The absence of capacity constraints such that the supply of each good is perfectly elastic, implying that each industry can supply whatever quantity is demanded of it and there are no budget constraints.

<sup>8</sup> Therefore, if impacts are to be spread over a number of years, the FTE estimate (which relates to the annual equivalent) should be divided by the number of years over which the impact will be spread (in the absence of a clearly defined staging program) to provide an indicative ongoing employment estimate over the life of the impact.

- The assumed linearity and homogeneity of the input function, which implies constant returns to scale and no substitution between inputs. This occurs because the approach assumes inputs purchased by each industry are a function only of the level of output of that industry.
- Each commodity, or type of commodity, is supplied by a single industry sector, implying there is only one method used to produce each commodity and each sector has only a single primary output.
- Multipliers are derived from the 2005-06 Input-Output tables and reflect the structural dependence of the economy at that time. These tables have been augmented to reflect broad level structural change across the national economy by industry sector. The Queensland tables prepared for this analysis reflect regional variation from the national tables as at 2006. As such, the tables do not reflect any intensification or deterioration in regional competitive advantage in specific industry sector that may have occurred since 2005-06.
- The assumption that the economy is in equilibrium at given prices and that the economy is not subject to other external influences.
- The additivity assumption suggests the total effect of carrying on several types of production is the sum of the separate effects, which is not a true reflection of economic systems.

The economic impact analysis contained in this report presents results which are indicative of the scale of the economic impact resulting from the proposed Project.

### 5.1.2 Construction & Capital Impacts

Table 5.2 – Table 5.5 below provide a breakdown of construction and capital costs associated with the Kevin's Corner project. Construction and capital works associated with the Kevin's Corner project are anticipated to commence in 2013 and be completed in 2043<sup>9</sup>. Construction and capital works between 2013 and 2043 are anticipated to cost approximately \$6,952.1 million, with expenditure peaking in 2015 at \$770 million.

Capital imports are estimated to account for approximately 48% of total capital costs and have an estimated value of \$3,320.53 million. Imports do not stimulate the domestic economy and are hence not dealt with any further.

All domestic capital costs are assumed to be incurred within Queensland.

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<sup>9</sup> Replacement capital works are dealt with in the economic impact assessment of ongoing and operational expenditure.

**Table 5.2: Construction and Capital Works Associated with the Kevin's Corner Project - Initial Costs (\$M), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>Initial Costs (QLD)</b>																
Drill & Blast	\$0.0	\$0.0	\$0.7	\$0.7	\$1.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$56.9	\$56.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$71.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$28.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$0.0	\$17.9	\$3.0	\$0.3	\$0.5	\$0.0	\$0.7	\$0.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CHPP and Mobile Equipment	\$27.7	\$180.0	\$123.5	\$49.1	\$73.7	\$16.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$126.7	\$63.0	\$78.1	\$14.8	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams and Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$56.6	\$37.7	\$24.4	\$20.9	\$13.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp and Airstrip	\$50.7	\$46.4	\$1.4	\$0.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$5.7	\$13.2	\$13.9	\$8.3	\$5.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$0.0	\$0.6	\$39.0	\$95.2	\$150.5	\$181.5	\$188.1	\$58.2	\$38.3	\$5.4	\$6.5	\$2.0	\$6.5	\$6.1	\$4.1	\$10.1
Land Acquisition	\$20.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$99.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$386.8</b>	<b>\$340.9</b>	<b>\$399.1</b>	<b>\$192.6</b>	<b>\$244.6</b>	<b>\$198.2</b>	<b>\$188.1</b>	<b>\$115.7</b>	<b>\$95.9</b>	<b>\$5.4</b>	<b>\$6.5</b>	<b>\$2.0</b>	<b>\$6.5</b>	<b>\$6.1</b>	<b>\$4.1</b>	<b>\$10.1</b>
<b>Initial Costs (Overseas)</b>																
Drill & Blast	\$0.0	\$0.0	\$1.1	\$1.1	\$1.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$85.3	\$85.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$107.9	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$42.5	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$0.0	\$41.8	\$6.9	\$0.7	\$1.1	\$0.0	\$1.6	\$1.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CHPP and Mobile Equipment	\$27.7	\$180.0	\$123.5	\$49.1	\$73.7	\$16.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams and Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp and Airstrip	\$50.7	\$46.4	\$1.4	\$0.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$5.7	\$13.2	\$13.9	\$8.3	\$5.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$0.0	\$0.6	\$39.0	\$95.2	\$150.5	\$181.5	\$188.1	\$58.2	\$38.3	\$5.4	\$6.5	\$2.0	\$6.5	\$6.1	\$4.1	\$10.1
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$84.2</b>	<b>\$240.2</b>	<b>\$371.0</b>	<b>\$161.3</b>	<b>\$231.9</b>	<b>\$198.8</b>	<b>\$188.1</b>	<b>\$145.1</b>	<b>\$125.3</b>	<b>\$5.4</b>	<b>\$6.5</b>	<b>\$2.0</b>	<b>\$6.5</b>	<b>\$6.1</b>	<b>\$4.1</b>	<b>\$10.1</b>

**Table 5.3: Construction and Capital Works Associated with the Kevin's Corner Project - Initial Costs (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
<b>Initial Costs (QLD)</b>															
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$21.4	\$2.8	\$0.0	\$0.0	\$0.0	\$15.7	\$0.0	\$0.0	\$0.0	\$0.0	\$4.5	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$2.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$2.4	\$0.0	\$2.4	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CHPP and Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams and Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp and Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$1.6	\$7.2	\$3.4	\$4.0	\$1.8	\$3.6	\$0.3	\$5.0	\$6.3	\$1.9	\$1.4	\$6.7	\$0.0	\$0.2	\$0.0
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$1.6</b>	<b>\$28.6</b>	<b>\$6.2</b>	<b>\$6.4</b>	<b>\$1.8</b>	<b>\$3.6</b>	<b>\$17.3</b>	<b>\$5.0</b>	<b>\$6.3</b>	<b>\$1.9</b>	<b>\$3.8</b>	<b>\$11.2</b>	<b>\$2.4</b>	<b>\$0.2</b>	<b>\$0.0</b>
<b>Initial Costs (Overseas)</b>															
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$32.1	\$4.2	\$0.0	\$0.0	\$0.0	\$23.5	\$0.0	\$0.0	\$0.0	\$0.0	\$6.7	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$3.6	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.6	\$0.0	\$3.6	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
CHPP and Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams and Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp and Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$1.6	\$7.2	\$3.4	\$4.0	\$1.8	\$3.6	\$0.3	\$5.0	\$6.3	\$1.9	\$1.4	\$6.7	\$0.0	\$0.2	\$0.0
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$1.6</b>	<b>\$39.3</b>	<b>\$7.6</b>	<b>\$7.6</b>	<b>\$1.8</b>	<b>\$3.6</b>	<b>\$27.0</b>	<b>\$5.0</b>	<b>\$6.3</b>	<b>\$1.9</b>	<b>\$5.0</b>	<b>\$13.5</b>	<b>\$3.7</b>	<b>\$0.2</b>	<b>\$0.0</b>

**Table 5.4: Construction and Capital Works Associated with the Kevin's Corner Project - Replacement Costs (\$M), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b>Replacement Costs (QLD)</b>																
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$26.2	\$0.0	\$5.4	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$25.0
Ancillary Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$3.5	\$1.9	\$0.8	\$2.4	\$2.8	\$0.7	\$2.8	\$0.0	\$1.9
CHPP & Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams & Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp & Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$40.0	\$9.3	\$21.8	\$34.0	\$58.0	\$32.6	\$53.2	\$46.0	\$66.3
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0
<b>Total</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$1.0</b>	<b>\$44.5</b>	<b>\$12.2</b>	<b>\$23.6</b>	<b>\$37.4</b>	<b>\$88.0</b>	<b>\$34.3</b>	<b>\$62.4</b>	<b>\$47.0</b>	<b>\$94.2</b>
<b>Replacement Costs (Overseas)</b>																
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$39.2	\$0.0	\$8.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$37.5
Ancillary Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$8.3	\$4.5	\$1.8	\$5.7	\$6.6	\$1.6	\$6.6	\$0.0	\$4.5
CHPP & Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams & Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp & Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$40.0	\$9.3	\$21.8	\$34.0	\$58.0	\$32.6	\$53.2	\$46.0	\$66.3
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$0.0</b>	<b>\$48.3</b>	<b>\$13.8</b>	<b>\$23.7</b>	<b>\$39.7</b>	<b>\$103.8</b>	<b>\$34.3</b>	<b>\$67.9</b>	<b>\$46.0</b>	<b>\$108.3</b>

**Table 5.5: Construction and Capital Works Associated with the Kevin's Corner Project - Replacement Costs (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
<b>Replacement Costs (QLD)</b>															
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$26.2	\$5.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$14.5	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$2.4	\$1.5	\$3.5	\$0.7	\$1.4	\$1.9	\$0.0	\$1.7	\$3.5	\$0.8	\$0.8	\$1.4	\$0.0	\$0.0
CHPP & Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams & Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp & Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$53.7	\$42.6	\$63.2	\$42.7	\$46.0	\$86.9	\$23.5	\$47.5	\$49.2	\$102.9	\$103.6	\$75.6	\$16.8	\$25.0	\$30.5
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$1.0	\$0.0	\$0.0
<b>Total</b>	<b>\$54.7</b>	<b>\$46.0</b>	<b>\$65.6</b>	<b>\$47.2</b>	<b>\$47.7</b>	<b>\$115.5</b>	<b>\$31.8</b>	<b>\$48.5</b>	<b>\$51.9</b>	<b>\$107.4</b>	<b>\$105.3</b>	<b>\$77.4</b>	<b>\$33.7</b>	<b>\$25.0</b>	<b>\$30.5</b>
<b>Replacement Costs (Overseas)</b>															
Drill & Blast	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Draglines	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Prestrip Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$39.2	\$8.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Coal Mining Fleets	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$21.8	\$0.0	\$0.0
Ancillary Fleets	\$0.0	\$5.7	\$3.5	\$8.3	\$1.6	\$3.4	\$4.5	\$0.0	\$3.9	\$8.3	\$1.8	\$1.8	\$3.2	\$0.0	\$0.0
CHPP & Mobile Equipment	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Access Road	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Dams & Diversions	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Infrastructure & Power	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Camp & Airstrip	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other Infrastructure	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Underground	\$53.7	\$42.6	\$63.2	\$42.7	\$46.0	\$86.9	\$23.5	\$47.5	\$49.2	\$102.9	\$103.6	\$75.6	\$16.8	\$25.0	\$30.5
Land Acquisition	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
BFS	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Other	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
<b>Total</b>	<b>\$53.7</b>	<b>\$48.3</b>	<b>\$66.6</b>	<b>\$50.9</b>	<b>\$47.6</b>	<b>\$129.5</b>	<b>\$36.0</b>	<b>\$47.5</b>	<b>\$53.1</b>	<b>\$111.1</b>	<b>\$105.4</b>	<b>\$77.4</b>	<b>\$41.8</b>	<b>\$25.0</b>	<b>\$30.5</b>

Project purchases by year and type of expenditure are allocated against up to 109 industry sectors identified in the input-output tables for each of the impact measures, which include:

- Output (or consumption);
- Household income;
- Employment (FTEs); and
- Value added.

The extent of the total impact for each of these measured will be distributed across a broad range of industry sectors.

The allocation of Project purchases to industry sectors is based on the nature of the activity, as opposed to the nature of the enterprises involved in the transaction. For example, earthworks activities are defined by the ABS as ‘construction trade services’, although the firm undertaking the earthworks may be a ‘mining’ company. Similarly, the construction of roads or other forms of infrastructure is defined by the ABS as ‘other construction’. The rationale for allocating purchases based on the type of activity is that the inputs to support a particular Project purchase will be determined by the activity, rather than the entity undertaking the activity.

### **Output or Consumption Effects**

The output (or consumption) impacts of construction and capital works associated with the Kevin’s Corner Project are detailed in Tables 5.6 and 5.7 below. The most significant output (or consumption) impacts associated with these works are anticipated to arise in 2013, 2014 and 2015. These three years account for approximately 29% of output (or consumption) effects resulting from the Project.

In 2013, total output (or consumption) impacts of construction and capital works associated with the Kevin’s Corner Project are estimated to be approximately \$959.05 million, comprising \$386.76 million in direct output (or consumption) effects and \$572.29 million in indirect output (or consumption) effects. The construction and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$313.96 million and \$176.25 million respectively.

In 2014, total output (or consumption) impacts of construction and capital works associated with the Kevin’s Corner Project are estimated to be approximately \$808.89 million, comprising \$340.88 million in direct output (or consumption) effects and \$468.02 million in indirect output (or consumption) effects. The manufacturing and construction sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$345.38 million and \$150.56 million respectively.

In 2015, total output (or consumption) impacts of construction and capital works associated with the Kevin’s Corner Project are estimated to be approximately \$928.55 million, comprising \$399.07 million in direct output (or consumption) effects and \$529.49 million in indirect output (or consumption) effects. The manufacturing and construction sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$413.50 million and \$126.93 million respectively.

**Table 5.6: Distribution of Output or Consumption effects - Kevin's Corner Project, Construction and Capital Expenditure, (\$M), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$3.28	\$2.48	\$2.84	\$1.70	\$2.18	\$1.95	\$1.92	\$1.40	\$0.87	\$0.30	\$0.45	\$0.81	\$0.42	\$0.68	\$0.52	\$0.96
Mining	\$42.18	\$37.52	\$46.75	\$19.67	\$23.56	\$18.56	\$17.44	\$16.11	\$11.08	\$2.78	\$4.38	\$9.02	\$3.85	\$6.77	\$4.71	\$10.21
Manufacturing	\$176.25	\$345.38	\$413.50	\$138.32	\$192.57	\$106.85	\$84.58	\$134.85	\$111.94	\$12.78	\$18.99	\$69.04	\$18.05	\$35.94	\$22.84	\$74.42
Electricity, Gas, Water & Waste Services	\$5.78	\$5.59	\$6.52	\$3.08	\$3.99	\$3.13	\$2.95	\$2.63	\$1.82	\$0.45	\$0.68	\$1.46	\$0.64	\$1.08	\$0.80	\$1.68
Construction	\$313.96	\$150.56	\$126.93	\$184.60	\$249.62	\$263.34	\$273.72	\$145.85	\$72.56	\$40.96	\$60.21	\$89.34	\$58.04	\$87.71	\$73.93	\$113.08
Wholesale Trade	\$26.76	\$26.93	\$49.50	\$16.79	\$17.93	\$13.85	\$12.44	\$15.92	\$10.88	\$2.68	\$5.29	\$9.24	\$3.37	\$7.42	\$3.36	\$9.27
Retail Trade	\$14.91	\$9.29	\$11.12	\$4.34	\$4.30	\$3.75	\$3.68	\$2.78	\$1.76	\$0.57	\$0.86	\$1.60	\$0.79	\$1.31	\$0.99	\$1.88
Accommodation & Food Services	\$6.33	\$5.64	\$6.80	\$3.01	\$3.72	\$2.94	\$2.77	\$2.49	\$1.71	\$0.43	\$0.66	\$1.39	\$0.60	\$1.04	\$0.75	\$1.59
Transport, Postal & Warehousing	\$160.16	\$91.73	\$112.46	\$31.94	\$21.61	\$18.05	\$17.37	\$14.29	\$9.41	\$2.71	\$4.16	\$8.10	\$3.78	\$6.38	\$4.69	\$9.40
Information Media and Telecommunications	\$9.23	\$7.57	\$9.00	\$4.28	\$5.28	\$4.36	\$4.19	\$3.49	\$2.32	\$0.65	\$0.99	\$1.97	\$0.91	\$1.53	\$1.13	\$2.28
Financial & Insurance Services	\$25.00	\$16.45	\$18.31	\$12.23	\$15.71	\$14.61	\$14.61	\$9.87	\$5.85	\$2.23	\$3.36	\$5.78	\$3.14	\$5.03	\$3.95	\$6.95
Rental, Hiring & Real Estate Services	\$81.60	\$39.25	\$44.96	\$27.40	\$34.94	\$31.71	\$31.42	\$22.36	\$13.66	\$4.84	\$7.34	\$12.99	\$6.79	\$11.03	\$8.49	\$15.46
Professional, Scientific & Technical Services	\$18.01	\$13.81	\$15.22	\$9.39	\$12.21	\$10.91	\$10.77	\$7.71	\$4.79	\$1.63	\$2.43	\$4.45	\$2.30	\$3.70	\$2.91	\$5.32
Administrative & Support Services	\$59.85	\$45.48	\$51.82	\$29.21	\$37.27	\$32.59	\$31.95	\$23.88	\$15.11	\$4.89	\$7.35	\$13.70	\$6.87	\$11.21	\$8.63	\$16.22
Public Administration & Safety	\$1.75	\$1.12	\$1.28	\$0.65	\$0.75	\$0.69	\$0.69	\$0.47	\$0.28	\$0.10	\$0.16	\$0.27	\$0.15	\$0.24	\$0.19	\$0.33
Education & Training	\$2.03	\$1.98	\$2.32	\$1.04	\$1.34	\$1.02	\$0.95	\$0.89	\$0.63	\$0.15	\$0.22	\$0.49	\$0.20	\$0.35	\$0.26	\$0.56
Health Care & Social Assistance	\$0.19	\$0.15	\$0.17	\$0.09	\$0.11	\$0.10	\$0.09	\$0.07	\$0.05	\$0.01	\$0.02	\$0.04	\$0.02	\$0.03	\$0.03	\$0.05
Arts & Recreation Services	\$10.62	\$7.30	\$8.38	\$4.76	\$6.00	\$5.33	\$5.25	\$3.85	\$2.40	\$0.81	\$1.22	\$2.22	\$1.13	\$1.85	\$1.42	\$2.63
Other Services	\$1.16	\$0.67	\$0.65	\$0.64	\$0.85	\$0.85	\$0.87	\$0.51	\$0.28	\$0.13	\$0.19	\$0.31	\$0.19	\$0.28	\$0.24	\$0.38
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$386.76	\$340.88	\$399.07	\$192.60	\$244.56	\$198.18	\$189.08	\$160.28	\$108.09	\$29.05	\$43.92	\$89.92	\$40.77	\$68.52	\$51.07	\$104.33
Indirect	\$572.29	\$468.02	\$529.49	\$300.53	\$389.39	\$336.41	\$328.59	\$249.14	\$159.30	\$50.06	\$75.06	\$142.30	\$70.48	\$115.04	\$88.75	\$168.35
Total	\$959.05	\$808.89	\$928.55	\$493.13	\$633.94	\$534.59	\$517.68	\$409.42	\$267.40	\$79.11	\$118.98	\$232.22	\$111.24	\$183.56	\$139.82	\$272.68

Source: Economic Associates estimates

**Table 5.7: Distribution of Output or Consumption Effects - Kevin's Corner Project, Construction and Capital Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$0.57	\$0.67	\$0.72	\$0.54	\$0.50	\$1.10	\$0.42	\$0.54	\$0.59	\$1.11	\$1.10	\$0.88	\$0.30	\$0.26	\$0.31
Mining	\$5.18	\$7.49	\$6.87	\$5.45	\$4.65	\$11.53	\$5.25	\$4.93	\$5.59	\$10.56	\$10.20	\$8.34	\$3.74	\$2.32	\$2.81
Manufacturing	\$25.14	\$56.89	\$34.92	\$25.75	\$21.95	\$82.49	\$44.86	\$23.93	\$25.57	\$47.95	\$51.35	\$44.48	\$34.96	\$11.24	\$13.64
Electricity, Gas, Water & Waste Services	\$0.88	\$1.21	\$1.13	\$0.83	\$0.77	\$1.92	\$0.81	\$0.84	\$0.90	\$1.70	\$1.71	\$1.39	\$0.60	\$0.39	\$0.48
Construction	\$81.37	\$74.47	\$98.04	\$69.24	\$70.70	\$133.55	\$36.86	\$77.43	\$81.90	\$153.37	\$153.49	\$120.83	\$26.46	\$36.37	\$44.14
Wholesale Trade	\$3.70	\$7.76	\$6.25	\$7.06	\$3.92	\$9.81	\$6.91	\$3.52	\$5.46	\$10.68	\$8.01	\$6.70	\$4.09	\$1.65	\$2.01
Retail Trade	\$1.09	\$1.33	\$1.39	\$1.04	\$0.96	\$2.16	\$0.84	\$1.04	\$1.14	\$2.14	\$2.11	\$1.70	\$0.60	\$0.49	\$0.59
Accommodation & Food Services	\$0.82	\$1.15	\$1.07	\$0.82	\$0.73	\$1.81	\$0.79	\$0.78	\$0.87	\$1.63	\$1.61	\$1.31	\$0.57	\$0.37	\$0.45
Transport, Postal & Warehousing	\$5.16	\$6.73	\$6.65	\$5.07	\$4.58	\$10.72	\$4.44	\$4.91	\$5.43	\$10.22	\$10.04	\$8.13	\$3.20	\$2.31	\$2.80
Information Media and Telecommunications	\$1.24	\$1.64	\$1.60	\$1.21	\$1.10	\$2.61	\$1.08	\$1.18	\$1.30	\$2.45	\$2.42	\$1.96	\$0.78	\$0.56	\$0.68
Financial & Insurance Services	\$4.34	\$4.81	\$5.41	\$3.99	\$3.82	\$8.06	\$2.84	\$4.13	\$4.47	\$8.40	\$8.32	\$6.64	\$2.04	\$1.94	\$2.36
Rental, Hiring & Real Estate Services	\$9.34	\$10.81	\$11.76	\$8.78	\$8.24	\$17.83	\$6.61	\$8.89	\$9.69	\$18.23	\$17.97	\$14.39	\$4.73	\$4.18	\$5.07
Professional, Scientific & Technical Services	\$3.20	\$3.69	\$3.99	\$2.89	\$2.80	\$6.15	\$2.22	\$3.05	\$3.26	\$6.13	\$6.14	\$4.92	\$1.63	\$1.43	\$1.74
Administrative & Support Services	\$9.50	\$11.38	\$11.95	\$8.82	\$8.34	\$18.68	\$7.07	\$9.04	\$9.78	\$18.37	\$18.29	\$14.70	\$5.15	\$4.24	\$5.15
Public Administration & Safety	\$0.20	\$0.23	\$0.25	\$0.19	\$0.18	\$0.38	\$0.14	\$0.19	\$0.21	\$0.39	\$0.39	\$0.31	\$0.10	\$0.09	\$0.11
Education & Training	\$0.28	\$0.41	\$0.36	\$0.27	\$0.25	\$0.64	\$0.28	\$0.27	\$0.29	\$0.55	\$0.55	\$0.45	\$0.21	\$0.13	\$0.15
Health Care & Social Assistance	\$0.03	\$0.03	\$0.04	\$0.03	\$0.02	\$0.06	\$0.02	\$0.03	\$0.03	\$0.05	\$0.05	\$0.04	\$0.02	\$0.01	\$0.02
Arts & Recreation Services	\$1.56	\$1.85	\$1.97	\$1.46	\$1.37	\$3.03	\$1.14	\$1.48	\$1.61	\$3.04	\$3.00	\$2.41	\$0.83	\$0.70	\$0.85
Other Services	\$0.26	\$0.25	\$0.31	\$0.22	\$0.23	\$0.45	\$0.14	\$0.25	\$0.26	\$0.49	\$0.49	\$0.39	\$0.10	\$0.12	\$0.14
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$56.21	\$74.62	\$71.88	\$53.57	\$49.48	\$119.15	\$49.12	\$53.49	\$58.15	\$109.33	\$109.15	\$88.58	\$36.14	\$25.12	\$30.49
Indirect	\$97.68	\$118.19	\$122.79	\$90.09	\$85.64	\$193.81	\$73.59	\$92.95	\$100.20	\$188.14	\$188.11	\$151.39	\$53.98	\$43.66	\$52.99
Total	\$153.89	\$192.82	\$194.67	\$143.67	\$135.12	\$312.96	\$122.70	\$146.44	\$158.35	\$297.47	\$297.25	\$239.98	\$90.11	\$68.78	\$83.48

Source: Economic Associates estimates

## Household Income Effects

The household income impacts of construction and capital works associated with the Kevin's Corner Project are detailed in Tables 5.8 and 5.9 below. The most significant household income impacts associated with these works are anticipated to arise in 2013, 2014 and 2015. These three years account for approximately 34% of household income effects resulting from the Project.

In 2013, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$232.05 million, comprising \$87.78 million in direct household income effects and \$144.27 million in indirect household income effects. The transport, postal & warehousing and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$65.75 million and \$51.66 million respectively.

In 2014, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$234.60 million, comprising \$112.69 million in direct household income effects and \$121.91 million in indirect household income effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$122.35 million and \$37.18 million respectively.

In 2015, total household income impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$279.40 million, comprising \$141.19 million in direct household income effects and \$138.21 million in indirect household income effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$147.56 million and \$45.60 million respectively.

**Table 5.8: Distribution of Household Income Effects - Kevin's Corner Project, Construction and Capital Expenditure (\$M), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$0.36	\$0.26	\$0.29	\$0.19	\$0.24	\$0.22	\$0.22	\$0.15	\$0.09	\$0.03	\$0.05	\$0.09	\$0.05	\$0.08	\$0.06	\$0.11
Mining	\$3.44	\$3.25	\$3.97	\$1.73	\$2.15	\$1.68	\$1.58	\$1.45	\$1.00	\$0.25	\$0.38	\$0.81	\$0.35	\$0.60	\$0.43	\$0.92
Manufacturing	\$51.66	\$122.35	\$147.56	\$46.01	\$65.21	\$32.75	\$24.14	\$46.39	\$39.85	\$3.65	\$5.42	\$23.34	\$5.15	\$11.00	\$6.52	\$24.71
Electricity, Gas, Water & Waste Services	\$0.42	\$0.39	\$0.46	\$0.21	\$0.27	\$0.21	\$0.20	\$0.18	\$0.12	\$0.03	\$0.05	\$0.10	\$0.04	\$0.07	\$0.05	\$0.11
Construction	\$32.18	\$15.57	\$13.28	\$18.94	\$25.61	\$26.89	\$27.94	\$14.94	\$7.46	\$4.18	\$6.15	\$9.15	\$5.93	\$8.96	\$7.55	\$11.56
Wholesale Trade	\$6.88	\$6.93	\$12.97	\$4.36	\$4.61	\$3.56	\$3.19	\$4.15	\$2.83	\$0.70	\$1.39	\$2.41	\$0.87	\$1.94	\$0.86	\$2.41
Retail Trade	\$4.97	\$3.04	\$3.64	\$1.39	\$1.34	\$1.18	\$1.16	\$0.86	\$0.54	\$0.18	\$0.27	\$0.50	\$0.25	\$0.41	\$0.31	\$0.59
Accommodation & Food Services	\$1.32	\$1.18	\$1.42	\$0.63	\$0.77	\$0.61	\$0.58	\$0.52	\$0.36	\$0.09	\$0.14	\$0.29	\$0.13	\$0.22	\$0.16	\$0.33
Transport, Postal & Warehousing	\$65.75	\$37.18	\$45.60	\$12.53	\$7.93	\$6.60	\$6.35	\$5.24	\$3.46	\$0.99	\$1.52	\$2.97	\$1.38	\$2.33	\$1.72	\$3.44
Information Media and Telecommunications	\$1.28	\$1.05	\$1.25	\$0.59	\$0.73	\$0.61	\$0.58	\$0.48	\$0.32	\$0.09	\$0.14	\$0.27	\$0.13	\$0.21	\$0.16	\$0.32
Financial & Insurance Services	\$9.46	\$6.15	\$6.80	\$4.67	\$6.01	\$5.63	\$5.65	\$3.76	\$2.21	\$0.86	\$1.30	\$2.21	\$1.21	\$1.93	\$1.53	\$2.66
Rental, Hiring & Real Estate Services	\$15.45	\$7.43	\$8.52	\$5.19	\$6.62	\$6.01	\$5.95	\$4.24	\$2.59	\$0.92	\$1.39	\$2.46	\$1.29	\$2.09	\$1.61	\$2.93
Professional, Scientific & Technical Services	\$7.40	\$5.67	\$6.25	\$3.85	\$5.01	\$4.48	\$4.42	\$3.17	\$1.97	\$0.67	\$1.00	\$1.83	\$0.95	\$1.52	\$1.19	\$2.18
Administrative & Support Services	\$25.09	\$19.58	\$22.31	\$12.46	\$15.99	\$13.85	\$13.53	\$10.27	\$6.55	\$2.07	\$3.11	\$5.87	\$2.91	\$4.76	\$3.65	\$6.94
Public Administration & Safety	\$0.84	\$0.54	\$0.61	\$0.32	\$0.36	\$0.33	\$0.33	\$0.23	\$0.14	\$0.05	\$0.08	\$0.13	\$0.07	\$0.11	\$0.09	\$0.16
Education & Training	\$1.43	\$1.39	\$1.63	\$0.73	\$0.94	\$0.72	\$0.67	\$0.62	\$0.44	\$0.10	\$0.15	\$0.34	\$0.14	\$0.25	\$0.18	\$0.39
Health Care & Social Assistance	\$0.11	\$0.09	\$0.10	\$0.05	\$0.07	\$0.06	\$0.05	\$0.04	\$0.03	\$0.01	\$0.01	\$0.02	\$0.01	\$0.02	\$0.01	\$0.03
Arts & Recreation Services	\$2.46	\$1.66	\$1.89	\$1.14	\$1.45	\$1.31	\$1.30	\$0.92	\$0.56	\$0.20	\$0.30	\$0.53	\$0.28	\$0.45	\$0.35	\$0.64
Other Services	\$1.54	\$0.90	\$0.87	\$0.85	\$1.13	\$1.13	\$1.16	\$0.68	\$0.37	\$0.17	\$0.26	\$0.41	\$0.25	\$0.38	\$0.31	\$0.51
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Direct</b>	<b>\$87.78</b>	<b>\$112.69</b>	<b>\$141.19</b>	<b>\$39.28</b>	<b>\$46.89</b>	<b>\$23.05</b>	<b>\$16.60</b>	<b>\$34.37</b>	<b>\$29.49</b>	<b>\$2.69</b>	<b>\$4.30</b>	<b>\$17.39</b>	<b>\$3.71</b>	<b>\$8.37</b>	<b>\$4.48</b>	<b>\$18.09</b>
<b>Indirect</b>	<b>\$144.27</b>	<b>\$121.91</b>	<b>\$138.21</b>	<b>\$76.55</b>	<b>\$99.54</b>	<b>\$84.78</b>	<b>\$82.40</b>	<b>\$63.92</b>	<b>\$41.41</b>	<b>\$12.55</b>	<b>\$18.79</b>	<b>\$36.34</b>	<b>\$17.66</b>	<b>\$28.95</b>	<b>\$22.25</b>	<b>\$42.85</b>
<b>Total</b>	<b>\$232.05</b>	<b>\$234.60</b>	<b>\$279.40</b>	<b>\$115.84</b>	<b>\$146.44</b>	<b>\$107.83</b>	<b>\$99.00</b>	<b>\$98.29</b>	<b>\$70.90</b>	<b>\$15.24</b>	<b>\$23.10</b>	<b>\$53.73</b>	<b>\$21.37</b>	<b>\$37.33</b>	<b>\$26.74</b>	<b>\$60.94</b>

Source: Economic Associates estimates

**Table 5.9: Distribution of Household Income Effects - Kevin's Corner Project, Construction and Capital Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$0.07	\$0.07	\$0.08	\$0.06	\$0.06	\$0.12	\$0.04	\$0.06	\$0.07	\$0.13	\$0.13	\$0.10	\$0.03	\$0.03	\$0.04
Mining	\$0.47	\$0.67	\$0.61	\$0.48	\$0.42	\$1.04	\$0.47	\$0.45	\$0.50	\$0.94	\$0.92	\$0.75	\$0.34	\$0.21	\$0.25
Manufacturing	\$7.18	\$19.21	\$10.35	\$7.68	\$6.26	\$27.18	\$15.72	\$6.83	\$7.30	\$13.68	\$14.99	\$13.32	\$12.33	\$3.21	\$3.89
Electricity, Gas, Water & Waste Services	\$0.06	\$0.08	\$0.08	\$0.06	\$0.05	\$0.13	\$0.05	\$0.06	\$0.06	\$0.12	\$0.12	\$0.09	\$0.04	\$0.03	\$0.03
Construction	\$8.30	\$7.62	\$10.01	\$7.07	\$7.22	\$13.66	\$3.78	\$7.90	\$8.36	\$15.66	\$15.67	\$12.34	\$2.72	\$3.71	\$4.50
Wholesale Trade	\$0.95	\$2.03	\$1.62	\$1.86	\$1.02	\$2.54	\$1.82	\$0.90	\$1.42	\$2.79	\$2.07	\$1.73	\$1.07	\$0.42	\$0.51
Retail Trade	\$0.34	\$0.41	\$0.43	\$0.33	\$0.30	\$0.67	\$0.26	\$0.33	\$0.36	\$0.67	\$0.66	\$0.53	\$0.19	\$0.15	\$0.19
Accommodation & Food Services	\$0.17	\$0.24	\$0.22	\$0.17	\$0.15	\$0.38	\$0.16	\$0.16	\$0.18	\$0.34	\$0.34	\$0.27	\$0.12	\$0.08	\$0.09
Transport, Postal & Warehousing	\$1.89	\$2.47	\$2.43	\$1.85	\$1.67	\$3.93	\$1.62	\$1.80	\$1.98	\$3.73	\$3.67	\$2.97	\$1.17	\$0.84	\$1.02
Information Media and Telecommunications	\$0.17	\$0.23	\$0.22	\$0.17	\$0.15	\$0.36	\$0.15	\$0.16	\$0.18	\$0.34	\$0.34	\$0.27	\$0.11	\$0.08	\$0.09
Financial & Insurance Services	\$1.68	\$1.84	\$2.09	\$1.53	\$1.47	\$3.09	\$1.08	\$1.60	\$1.73	\$3.24	\$3.21	\$2.56	\$0.77	\$0.75	\$0.91
Rental, Hiring & Real Estate Services	\$1.77	\$2.05	\$2.23	\$1.66	\$1.56	\$3.38	\$1.25	\$1.68	\$1.84	\$3.45	\$3.40	\$2.73	\$0.90	\$0.79	\$0.96
Professional, Scientific & Technical Services	\$1.31	\$1.52	\$1.64	\$1.19	\$1.15	\$2.53	\$0.91	\$1.25	\$1.34	\$2.52	\$2.52	\$2.02	\$0.67	\$0.59	\$0.71
Administrative & Support Services	\$4.02	\$4.88	\$5.07	\$3.74	\$3.53	\$7.98	\$3.05	\$3.83	\$4.14	\$7.78	\$7.75	\$6.24	\$2.23	\$1.80	\$2.18
Public Administration & Safety	\$0.10	\$0.11	\$0.12	\$0.09	\$0.09	\$0.18	\$0.06	\$0.09	\$0.10	\$0.19	\$0.19	\$0.15	\$0.05	\$0.04	\$0.05
Education & Training	\$0.20	\$0.28	\$0.26	\$0.19	\$0.17	\$0.45	\$0.19	\$0.19	\$0.20	\$0.38	\$0.39	\$0.32	\$0.14	\$0.09	\$0.11
Health Care & Social Assistance	\$0.02	\$0.02	\$0.02	\$0.02	\$0.01	\$0.03	\$0.01	\$0.02	\$0.02	\$0.03	\$0.03	\$0.02	\$0.01	\$0.01	\$0.01
Arts & Recreation Services	\$0.39	\$0.44	\$0.48	\$0.36	\$0.34	\$0.74	\$0.27	\$0.37	\$0.40	\$0.75	\$0.74	\$0.59	\$0.19	\$0.17	\$0.21
Other Services	\$0.35	\$0.34	\$0.42	\$0.30	\$0.30	\$0.59	\$0.18	\$0.33	\$0.35	\$0.65	\$0.65	\$0.52	\$0.13	\$0.15	\$0.19
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$4.93	\$14.34	\$7.54	\$6.18	\$4.47	\$19.71	\$12.13	\$4.70	\$5.41	\$10.25	\$10.56	\$9.46	\$9.25	\$2.21	\$2.68
Indirect	\$24.49	\$30.17	\$30.85	\$22.61	\$21.47	\$49.27	\$18.97	\$23.31	\$25.11	\$47.14	\$47.22	\$38.07	\$13.96	\$10.95	\$13.29
Total	\$29.43	\$44.51	\$38.39	\$28.80	\$25.93	\$68.97	\$31.10	\$28.01	\$30.51	\$57.38	\$57.78	\$47.53	\$23.21	\$13.15	\$15.96

Source: Economic Associates estimates

## Employment Effects

The total employment impacts of construction and capital expenditure associated with the Kevin's Corner Project are detailed in Tables 5.10 and 5.11 below. The most significant employment impacts associated with these works are anticipated to arise in 2013, 2014 and 2015. These three years account for approximately 32% of employment effects resulting from the Project.

In 2013, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 4,105 full time equivalent positions, comprising direct employment effects of 1,802 full time equivalent positions and indirect employment effects of 2,303 full time equivalent positions. Employment effects are anticipated to be most significant in the transport, postal & warehousing and construction sectors, where construction and capital expenditure is anticipated to generate 1,254 full time equivalent positions and 1,163 full time equivalent positions respectively.

In 2014, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 3,553 full time equivalent positions, comprising direct employment effects of 1,748 full time equivalent positions and indirect employment effects of 1,805 full time equivalent positions. Employment effects are anticipated to be most significant in the manufacturing and transport, postal & warehousing sectors, where construction and capital expenditure is anticipated to generate 1,493 full time equivalent positions and 692 full time equivalent positions respectively.

In 2015, total employment impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately 4,131 full time equivalent positions, comprising direct employment effects of 2,126 full time equivalent positions and indirect employment effects of 2,005 full time equivalent positions. Employment effects are anticipated to be most significant in the manufacturing and transport, postal & warehousing sectors, where construction and capital expenditure is anticipated to generate 1,807 full time equivalent positions and 849 full time equivalent positions respectively.

**Table 5.10: Distribution of Employment Effects - Kevin's Corner Project, Construction and Capital Expenditure (FTEs), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	21	16	18	11	14	12	12	9	6	2	3	5	3	4	3	6
Mining	37	38	46	20	26	20	19	18	12	3	4	10	4	7	5	11
Manufacturing	608	1,493	1,807	545	773	372	265	553	482	40	59	277	56	125	71	291
Electricity, Gas, Water & Waste Services	6	6	7	3	4	3	3	3	2	0	1	2	1	1	1	2
Construction	1,163	568	489	685	926	969	1,006	540	270	151	222	330	213	323	272	417
Wholesale Trade	93	93	175	59	62	48	43	56	38	9	19	32	12	26	12	32
Retail Trade	147	89	107	41	39	35	34	25	16	5	8	15	7	12	9	17
Accommodation & Food Services	31	28	33	15	18	14	14	12	8	2	3	7	3	5	4	8
Transport, Postal & Warehousing	1,254	692	849	221	122	102	98	80	53	15	23	45	21	36	26	53
Information Media and Telecommunications	32	26	31	15	18	15	14	12	8	2	3	7	3	5	4	8
Financial & Insurance Services	85	56	63	41	52	48	48	33	20	7	11	19	10	17	13	23
Rental, Hiring & Real Estate Services	99	48	55	33	42	38	38	27	17	6	9	16	8	13	10	19
Professional, Scientific & Technical Services	111	85	94	58	75	67	66	47	29	10	15	27	14	23	18	33
Administrative & Support Services	317	242	276	155	198	173	169	127	81	26	39	73	36	59	46	86
Public Administration & Safety	12	8	9	5	5	5	5	3	2	1	1	2	1	2	1	2
Education & Training	23	22	26	12	15	11	11	10	7	2	2	5	2	4	3	6
Health Care & Social Assistance	1	1	1	1	1	1	1	0	0	0	0	0	0	0	0	0
Arts & Recreation Services	44	29	33	21	27	25	25	17	10	4	6	10	5	9	7	12
Other Services	21	12	12	12	15	15	16	9	5	2	4	6	3	5	4	7
Ownership of Dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Direct</b>	<b>1,802</b>	<b>1,748</b>	<b>2,126</b>	<b>737</b>	<b>856</b>	<b>576</b>	<b>508</b>	<b>585</b>	<b>443</b>	<b>79</b>	<b>120</b>	<b>313</b>	<b>110</b>	<b>201</b>	<b>137</b>	<b>348</b>
<b>Indirect</b>	<b>2,303</b>	<b>1,805</b>	<b>2,005</b>	<b>1,215</b>	<b>1,578</b>	<b>1,398</b>	<b>1,378</b>	<b>998</b>	<b>623</b>	<b>209</b>	<b>312</b>	<b>574</b>	<b>295</b>	<b>475</b>	<b>372</b>	<b>685</b>
<b>Total</b>	<b>4,105</b>	<b>3,553</b>	<b>4,131</b>	<b>1,952</b>	<b>2,435</b>	<b>1,974</b>	<b>1,886</b>	<b>1,583</b>	<b>1,066</b>	<b>288</b>	<b>432</b>	<b>888</b>	<b>405</b>	<b>676</b>	<b>509</b>	<b>1,034</b>

Note: Figures may not add due to rounding

Source: Economic Associates estimates

**Table 5.11: Distribution of Employment Effects - Kevin's Corner Project, Construction and Capital Expenditure (FTEs), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	4	4	5	3	3	7	3	3	4	7	7	6	2	2	2
Mining	6	8	7	6	5	12	6	5	6	11	11	9	4	2	3
Manufacturing	79	227	116	86	69	319	189	75	80	150	166	150	147	35	43
Electricity, Gas, Water & Waste Services	1	1	1	1	1	2	1	1	1	2	2	2	1	0	1
Construction	299	275	361	255	260	492	137	285	301	564	564	444	93	134	162
Wholesale Trade	13	27	22	25	14	34	24	12	19	38	28	23	14	6	7
Retail Trade	10	12	13	10	9	20	8	10	11	20	20	16	5	5	5
Accommodation & Food Services	4	6	5	4	4	9	4	4	4	8	8	6	3	2	2
Transport, Postal & Warehousing	29	38	37	28	26	60	25	28	30	57	56	46	17	13	16
Information Media and Telecommunications	4	6	5	4	4	9	4	4	4	8	8	7	3	2	2
Financial & Insurance Services	14	16	18	13	13	27	10	14	15	28	28	22	7	6	8
Rental, Hiring & Real Estate Services	11	13	14	11	10	22	8	11	12	22	22	17	6	5	6
Professional, Scientific & Technical Services	20	23	25	18	17	38	14	19	20	38	38	30	10	9	11
Administrative & Support Services	50	61	63	47	44	99	38	48	52	97	97	78	27	23	27
Public Administration & Safety	1	2	2	1	1	3	1	1	1	3	3	2	1	1	1
Education & Training	3	5	4	3	3	7	3	3	3	6	6	5	2	1	2
Health Care & Social Assistance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Arts & Recreation Services	7	8	9	7	6	14	5	7	8	14	14	11	3	3	4
Other Services	5	5	6	4	4	8	2	4	5	9	9	7	2	2	3
Ownership of Dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Direct	151	259	202	154	134	391	191	144	158	297	301	251	140	68	82
Indirect	410	477	511	372	358	792	289	390	418	785	786	631	205	183	222
Total	561	736	713	526	492	1,182	480	534	576	1,082	1,087	881	346	251	304

Note: Figures may not add due to rounding

Source: Economic Associates estimates

## Value Added Effects

The value added impacts of construction and capital works associated with the Kevin's Corner Project are detailed in Tables 5.12 and 5.13 below. The most significant value added impacts associated with these works are anticipated to arise in 2013, 2014 and 2015. These three years account for approximately 32% of value added effects resulting from the Project.

In 2013, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$399.24 million, comprising \$142.45 million in direct value added effects and \$256.79 million in indirect value added effects. The transport, postal & warehousing and manufacturing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$90.75 million and \$78.42 million respectively.

In 2014, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$359.84 million, comprising \$150.48 million in direct value added effects and \$209.37 million in indirect value added effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$154.11 million and \$51.62 million respectively.

In 2015, total value added impacts of construction and capital works associated with the Kevin's Corner Project are estimated to be approximately \$424.40 million, comprising \$185.38 million in direct value added effects and \$239.02 million in indirect value added effects. The manufacturing and transport, postal & warehousing sectors are anticipated to benefit from the greatest stimulus, equating to approximately \$185.42 million and \$63.30 million respectively.

**Table 5.12: Distribution of Value Added Effects - Kevin's Corner Project, Construction and Capital Expenditure (\$M), 2013-28**

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$1.67	\$1.25	\$1.43	\$0.86	\$1.11	\$0.99	\$0.98	\$0.71	\$0.44	\$0.15	\$0.23	\$0.41	\$0.21	\$0.35	\$0.27	\$0.49
Mining	\$31.17	\$26.71	\$33.40	\$14.18	\$16.81	\$13.45	\$12.72	\$11.48	\$7.80	\$2.04	\$3.21	\$6.46	\$2.81	\$4.93	\$3.43	\$7.33
Manufacturing	\$69.29	\$154.11	\$185.42	\$59.28	\$83.58	\$43.52	\$32.97	\$59.13	\$50.21	\$4.98	\$7.40	\$29.94	\$7.03	\$14.63	\$8.91	\$31.90
Electricity, Gas, Water & Waste Services	\$2.63	\$2.48	\$2.89	\$1.37	\$1.76	\$1.39	\$1.32	\$1.16	\$0.80	\$0.20	\$0.30	\$0.65	\$0.28	\$0.48	\$0.36	\$0.75
Construction	\$78.42	\$37.91	\$32.31	\$46.15	\$62.38	\$65.54	\$68.09	\$36.41	\$18.17	\$10.19	\$14.99	\$22.28	\$14.44	\$21.84	\$18.39	\$28.18
Wholesale Trade	\$10.56	\$10.63	\$20.01	\$6.70	\$7.07	\$5.47	\$4.90	\$6.39	\$4.36	\$1.08	\$2.15	\$3.72	\$1.35	\$3.00	\$1.32	\$3.70
Retail Trade	\$5.95	\$3.72	\$4.45	\$1.74	\$1.74	\$1.52	\$1.48	\$1.12	\$0.71	\$0.23	\$0.35	\$0.65	\$0.32	\$0.53	\$0.40	\$0.76
Accommodation & Food Services	\$2.24	\$2.00	\$2.41	\$1.07	\$1.32	\$1.04	\$0.98	\$0.88	\$0.60	\$0.15	\$0.24	\$0.49	\$0.21	\$0.37	\$0.27	\$0.56
Transport, Postal & Warehousing	\$90.75	\$51.62	\$63.30	\$17.73	\$11.65	\$9.74	\$9.38	\$7.70	\$5.07	\$1.46	\$2.24	\$4.37	\$2.04	\$3.44	\$2.53	\$5.06
Information Media and Telecommunications	\$3.89	\$3.19	\$3.80	\$1.80	\$2.23	\$1.84	\$1.77	\$1.47	\$0.98	\$0.27	\$0.42	\$0.83	\$0.38	\$0.65	\$0.48	\$0.96
Financial & Insurance Services	\$16.66	\$11.04	\$12.38	\$8.05	\$10.31	\$9.53	\$9.51	\$6.50	\$3.88	\$1.46	\$2.19	\$3.80	\$2.05	\$3.28	\$2.57	\$4.56
Rental, Hiring & Real Estate Services	\$37.30	\$17.94	\$20.55	\$12.53	\$15.97	\$14.49	\$14.37	\$10.22	\$6.25	\$2.21	\$3.36	\$5.94	\$3.10	\$5.04	\$3.88	\$7.07
Professional, Scientific & Technical Services	\$9.27	\$7.11	\$7.83	\$4.83	\$6.28	\$5.61	\$5.54	\$3.97	\$2.46	\$0.84	\$1.25	\$2.29	\$1.18	\$1.90	\$1.50	\$2.74
Administrative & Support Services	\$31.44	\$24.41	\$27.82	\$15.56	\$19.95	\$17.31	\$16.92	\$12.80	\$8.16	\$2.59	\$3.89	\$7.33	\$3.64	\$5.95	\$4.57	\$8.66
Public Administration & Safety	\$0.95	\$0.60	\$0.69	\$0.35	\$0.41	\$0.37	\$0.37	\$0.25	\$0.15	\$0.06	\$0.08	\$0.15	\$0.08	\$0.13	\$0.10	\$0.18
Education & Training	\$1.54	\$1.50	\$1.76	\$0.79	\$1.02	\$0.77	\$0.72	\$0.67	\$0.48	\$0.11	\$0.17	\$0.37	\$0.15	\$0.27	\$0.19	\$0.43
Health Care & Social Assistance	\$0.13	\$0.10	\$0.12	\$0.06	\$0.08	\$0.07	\$0.07	\$0.05	\$0.03	\$0.01	\$0.02	\$0.03	\$0.01	\$0.02	\$0.02	\$0.03
Arts & Recreation Services	\$3.78	\$2.57	\$2.92	\$1.73	\$2.19	\$1.97	\$1.95	\$1.40	\$0.86	\$0.30	\$0.45	\$0.81	\$0.42	\$0.68	\$0.53	\$0.96
Other Services	\$1.59	\$0.93	\$0.90	\$0.88	\$1.17	\$1.17	\$1.20	\$0.70	\$0.38	\$0.18	\$0.27	\$0.42	\$0.26	\$0.39	\$0.32	\$0.52
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Direct</b>	<b>\$142.45</b>	<b>\$150.48</b>	<b>\$185.38</b>	<b>\$62.61</b>	<b>\$75.54</b>	<b>\$48.14</b>	<b>\$41.21</b>	<b>\$52.81</b>	<b>\$41.10</b>	<b>\$6.49</b>	<b>\$10.07</b>	<b>\$28.00</b>	<b>\$9.03</b>	<b>\$17.12</b>	<b>\$11.13</b>	<b>\$30.61</b>
<b>Indirect</b>	<b>\$256.79</b>	<b>\$209.37</b>	<b>\$239.02</b>	<b>\$133.06</b>	<b>\$171.48</b>	<b>\$147.67</b>	<b>\$144.03</b>	<b>\$110.23</b>	<b>\$70.69</b>	<b>\$22.02</b>	<b>\$33.13</b>	<b>\$62.92</b>	<b>\$30.96</b>	<b>\$50.75</b>	<b>\$38.90</b>	<b>\$74.24</b>
<b>Total</b>	<b>\$399.24</b>	<b>\$359.84</b>	<b>\$424.40</b>	<b>\$195.67</b>	<b>\$247.02</b>	<b>\$195.82</b>	<b>\$185.24</b>	<b>\$163.04</b>	<b>\$111.80</b>	<b>\$28.51</b>	<b>\$43.20</b>	<b>\$90.92</b>	<b>\$39.99</b>	<b>\$67.87</b>	<b>\$50.03</b>	<b>\$104.85</b>

Source: Economic Associates estimates

**Table 5.13: Distribution of Value Added Effects - Kevin's Corner Project, Construction and Capital Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$0.29	\$0.34	\$0.37	\$0.27	\$0.26	\$0.56	\$0.21	\$0.28	\$0.30	\$0.57	\$0.56	\$0.45	\$0.15	\$0.13	\$0.16
Mining	\$3.78	\$5.37	\$5.00	\$3.98	\$3.40	\$8.28	\$3.74	\$3.60	\$4.08	\$7.72	\$7.43	\$6.06	\$2.65	\$1.69	\$2.05
Manufacturing	\$9.80	\$24.65	\$13.94	\$10.32	\$8.56	\$35.18	\$19.92	\$9.33	\$9.97	\$18.69	\$20.30	\$17.86	\$15.59	\$4.38	\$5.32
Electricity, Gas, Water & Waste Services	\$0.39	\$0.54	\$0.50	\$0.37	\$0.34	\$0.85	\$0.36	\$0.37	\$0.40	\$0.76	\$0.76	\$0.62	\$0.26	\$0.18	\$0.21
Construction	\$20.24	\$18.57	\$24.40	\$17.24	\$17.59	\$33.28	\$9.22	\$19.26	\$20.38	\$38.16	\$38.19	\$30.07	\$6.62	\$9.05	\$10.98
Wholesale Trade	\$1.46	\$3.12	\$2.50	\$2.88	\$1.56	\$3.90	\$2.81	\$1.39	\$2.19	\$4.30	\$3.17	\$2.66	\$1.65	\$0.65	\$0.79
Retail Trade	\$0.44	\$0.54	\$0.56	\$0.42	\$0.39	\$0.87	\$0.34	\$0.42	\$0.46	\$0.86	\$0.85	\$0.69	\$0.24	\$0.20	\$0.24
Accommodation & Food Services	\$0.29	\$0.41	\$0.38	\$0.29	\$0.26	\$0.64	\$0.28	\$0.28	\$0.31	\$0.58	\$0.57	\$0.47	\$0.20	\$0.13	\$0.16
Transport, Postal & Warehousing	\$2.79	\$3.63	\$3.59	\$2.73	\$2.47	\$5.78	\$2.39	\$2.65	\$2.93	\$5.51	\$5.42	\$4.39	\$1.72	\$1.25	\$1.51
Information Media and Telecommunications	\$0.52	\$0.69	\$0.67	\$0.51	\$0.46	\$1.10	\$0.46	\$0.50	\$0.55	\$1.03	\$1.02	\$0.83	\$0.33	\$0.23	\$0.28
Financial & Insurance Services	\$2.83	\$3.16	\$3.53	\$2.61	\$2.49	\$5.28	\$1.88	\$2.69	\$2.92	\$5.48	\$5.42	\$4.33	\$1.35	\$1.26	\$1.53
Rental, Hiring & Real Estate Services	\$4.27	\$4.94	\$5.37	\$4.01	\$3.76	\$8.15	\$3.02	\$4.06	\$4.43	\$8.33	\$8.21	\$6.58	\$2.16	\$1.91	\$2.32
Professional, Scientific & Technical Services	\$1.65	\$1.90	\$2.05	\$1.49	\$1.44	\$3.17	\$1.14	\$1.57	\$1.68	\$3.15	\$3.16	\$2.53	\$0.84	\$0.74	\$0.89
Administrative & Support Services	\$5.03	\$6.09	\$6.34	\$4.67	\$4.42	\$9.96	\$3.80	\$4.79	\$5.18	\$9.73	\$9.69	\$7.80	\$2.77	\$2.25	\$2.73
Public Administration & Safety	\$0.11	\$0.12	\$0.14	\$0.10	\$0.10	\$0.21	\$0.07	\$0.11	\$0.11	\$0.21	\$0.21	\$0.17	\$0.05	\$0.05	\$0.06
Education & Training	\$0.21	\$0.31	\$0.28	\$0.20	\$0.19	\$0.48	\$0.21	\$0.20	\$0.22	\$0.41	\$0.42	\$0.34	\$0.16	\$0.10	\$0.12
Health Care & Social Assistance	\$0.02	\$0.02	\$0.02	\$0.02	\$0.02	\$0.04	\$0.02	\$0.02	\$0.02	\$0.04	\$0.04	\$0.03	\$0.01	\$0.01	\$0.01
Arts & Recreation Services	\$0.58	\$0.67	\$0.73	\$0.54	\$0.51	\$1.11	\$0.41	\$0.55	\$0.60	\$1.12	\$1.11	\$0.89	\$0.30	\$0.26	\$0.31
Other Services	\$0.36	\$0.35	\$0.43	\$0.31	\$0.31	\$0.62	\$0.19	\$0.34	\$0.36	\$0.68	\$0.68	\$0.54	\$0.14	\$0.16	\$0.19
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$12.25	\$23.16	\$16.81	\$13.13	\$10.92	\$34.09	\$17.67	\$11.66	\$13.01	\$24.55	\$24.67	\$20.81	\$13.23	\$5.48	\$6.65
Indirect	\$42.81	\$52.27	\$53.99	\$39.85	\$37.60	\$85.37	\$32.80	\$40.74	\$44.07	\$82.80	\$82.55	\$66.48	\$23.97	\$19.14	\$23.22
Total	\$55.06	\$75.43	\$70.80	\$52.98	\$48.52	\$119.46	\$50.46	\$52.40	\$57.09	\$107.35	\$107.22	\$87.29	\$37.20	\$24.61	\$29.87

Source: Economic Associates estimates

### 5.1.3 Operating Expenditure Impacts

Table 5.14 and 5.15 below provide a breakdown of operating costs associated with the Kevin's Corner project. Operating costs associated with the Kevin's Corner project are anticipated to commence in 2014. Total operating expenditure between 2014 and 2043 is estimated at \$22,895.9 million, with expenditure peaking in 2020 at \$946.9 million. Annual operating expenditure associated with the Kevin's Corner project is anticipated to remain above \$800 million between 2019 and 2040.

As with construction and capital expenditure, operating expenditure by year and type of expenditure are allocated against up to 109 industry sectors identified in the input-output tables for each of the impact measures, which include:

- Output (or consumption);
- Household income;
- Employment (FTEs); and
- Value Added.

The extent of the total impact for each of these measured will be distributed across a broad range of industry sectors.

The allocation of Project operating expenses to industry sectors is based on the nature of the activity, as opposed to the nature of the enterprises involved in the transaction.

Tables 5.16 to 5.23 provide detailed summaries of the direct and indirect output (or consumption), household income, employment and value added impacts of the operating expenditure associated with the Kevin's Corner Project.

**Table 5.14: Operating Expenditure Impacts (\$M), Kevin's Corner Project, 2014-28**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
<b><u>Opencut Waste Removal</u></b>															
Clearing, Grubbing & Top Soil	0.0	4.6	0.0	1.2	2.0	0.2	0.7	0.6	0.6	0.9	0.6	1.5	0.4	0.1	0.9
Drill & Blast	0.0	6.5	11.1	16.9	16.7	13.2	16.5	10.2	11.1	11.1	11.6	12.5	12.2	12.2	12.3
Dragline Waste (Excl.D&B)	0.0	0.0	0.0	0.0	0.0	0.0	12.2	19.2	19.6	23.5	24.5	24.4	23.9	24.8	23.4
Truck-Shovel/Excavator Waste (Excl.D&B)	0.0	77.4	99.7	111.2	112.6	113.9	117.0	45.5	42.1	35.0	34.3	29.9	34.7	33.8	31.3
Secondary Waste (Excl.D&B)	0.0	0.4	0.9	1.2	1.0	0.8	0.9	0.4	0.4	0.1	0.1	0.2	0.1	0.4	0.7
<b><u>Opencut Mining</u></b>															
Coal Mining (Excl.D&B)	0.0	3.9	9.0	14.1	15.9	7.4	11.1	8.4	7.0	5.6	5.8	6.0	5.8	6.0	6.9
Coal Preparation & Stockpile Management	0.0	1.4	3.2	4.8	4.6	2.0	3.6	2.7	2.3	1.8	1.7	1.9	1.7	1.7	1.8
<b><u>Underground</u></b>															
Underground - Development	0.0	3.0	105.5	159.0	168.0	163.2	172.0	155.8	155.6	155.3	145.3	150.1	139.7	138.5	136.9
Underground - Production	0.0	0.1	0.7	46.4	76.0	124.3	167.4	180.8	187.4	195.5	185.4	191.3	186.9	188.8	196.8
Underground - Outbye	0.0	1.3	38.4	95.1	105.2	129.3	151.9	156.0	154.5	155.6	157.2	157.7	157.3	156.8	155.6
Underground - Other	0.0	2.4	22.1	59.1	49.7	59.9	61.4	61.3	58.6	57.5	58.1	57.7	57.3	56.8	56.5
<b><u>CHPP</u></b>															
CHPP (excl Reject Haulage)	0.0	37.4	50.4	66.0	85.9	87.8	107.4	105.4	97.9	107.2	134.2	103.0	111.3	118.5	102.5
CHPP Reject Haulage	0.0	0.4	0.7	1.1	1.1	0.6	0.8	0.6	0.5	0.4	0.4	0.4	0.4	0.5	0.6
<b><u>Overheads</u></b>															
Mine Rehabilitation	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0
Road Maintenance	0.0	13.6	15.5	17.9	18.4	16.0	15.7	7.5	8.2	6.0	5.9	5.8	5.9	5.9	6.1
Workshop	0.0	6.0	8.5	8.5	8.5	8.5	6.9	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1
Management & Supervision	0.0	10.3	13.3	12.6	12.4	12.3	12.4	12.1	12.2	12.1	12.1	12.1	12.1	12.1	12.1
Technical Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b><u>MIA</u></b>															
MIA Buildings	1.2	2.8	3.0	3.2	3.4	3.3	3.4	3.4	3.4	3.3	3.3	3.3	3.3	3.3	3.3
Accommodation	0.0	4.4	7.4	12.0	14.5	14.0	14.2	14.2	14.3	14.0	13.8	13.9	13.7	13.8	13.7
Airport	0.5	3.3	5.4	8.7	10.5	10.9	10.3	10.3	10.4	10.1	10.8	10.1	9.9	10.0	9.9
Road and Earthworks	0.4	0.2	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Site Services	10.9	10.3	12.4	17.9	27.0	33.6	55.5	61.0	58.9	57.9	58.2	59.0	58.3	58.5	58.8
MIA Electrical Consumption	0.0	0.9	1.6	2.6	3.1	3.0	3.1	3.1	3.1	3.0	3.0	3.0	3.0	3.0	3.0
Safety Levies	0.0	0.5	0.9	1.5	1.9	1.9	1.9	1.9	1.9	1.9	1.8	1.9	1.8	1.8	1.8
<b>Total</b>	<b>12.9</b>	<b>190.9</b>	<b>410.3</b>	<b>661.8</b>	<b>739.0</b>	<b>807.3</b>	<b>946.9</b>	<b>868.0</b>	<b>857.8</b>	<b>865.6</b>	<b>877.1</b>	<b>853.6</b>	<b>847.7</b>	<b>855.2</b>	<b>842.6</b>

**Table 5.15: Operating Expenditure Impacts (\$M), Kevin's Corner Project, 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
<b><u>Opencut Waste Removal</u></b>															
Clearing, Grubbing & Top Soil	0.4	0.8	0.4	0.6	0.6	0.6	0.9	0.6	0.5	0.6	0.7	0.0	0.0	0.0	0.0
Drill & Blast	11.9	14.6	18.5	17.8	17.3	15.1	18.5	19.1	17.8	18.6	20.1	19.5	19.3	19.3	13.2
Dragline Waste (Excl.D&B)	21.3	19.4	25.1	25.2	24.6	18.7	24.4	23.0	24.0	23.3	23.4	25.9	26.8	27.3	28.0
Truck-Shovel/Excavator Waste (Excl.D&B)	32.6	54.1	58.8	50.9	56.9	58.8	87.1	83.0	84.8	84.3	76.3	81.8	62.1	81.5	27.8
Secondary Waste (Excl.D&B)	0.8	0.8	0.8	0.8	0.6	0.6	0.9	1.3	0.9	1.0	1.1	1.1	0.7	0.6	0.4
<b><u>Opencut Mining</u></b>															
Coal Mining (Excl.D&B)	6.6	7.2	8.5	9.9	8.5	7.8	9.8	10.5	9.9	9.6	11.9	11.8	12.4	12.6	11.6
Coal Preparation & Stockpile Management	1.7	1.9	2.0	2.4	2.3	2.1	2.7	3.3	3.2	3.1	3.9	3.3	3.2	3.3	2.3
<b><u>Underground</u></b>															
Underground - Development	129.4	131.1	132.3	131.6	118.2	115.2	114.0	109.6	114.2	111.9	114.0	92.5	71.6	69.5	55.6
Underground - Production	188.7	197.2	187.8	186.2	193.7	191.1	158.9	170.0	161.6	170.4	158.5	179.4	158.0	169.0	107.9
Underground - Outbye	153.1	153.8	156.0	155.6	154.5	150.2	144.0	138.4	137.3	139.0	138.2	134.8	130.8	130.6	84.9
Underground - Other	55.3	55.2	55.2	54.4	53.4	53.4	51.4	50.9	50.5	52.8	54.7	55.7	53.3	52.4	34.3
<b><u>CHPP</u></b>															
CHPP (excl Reject Haulage)	110.2	98.3	102.7	112.2	97.4	129.9	117.2	98.2	116.5	110.1	97.9	95.2	107.0	102.7	84.4
CHPP Reject Haulage	0.5	0.6	0.7	0.8	0.7	0.7	0.8	0.9	0.9	0.8	1.0	1.0	1.0	1.1	1.0
<b><u>Overheads</u></b>															
Mine Rehabilitation	0.3	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Road Maintenance	6.1	8.0	8.8	8.4	9.0	9.0	11.8	12.2	12.1	11.9	12.6	12.3	12.2	11.8	5.4
Workshop	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	7.1	5.2
Management & Supervision	12.1	12.2	12.2	12.2	12.2	12.1	12.3	12.2	12.2	12.2	12.1	12.1	12.0	12.1	9.5
Technical Services	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b><u>MIA</u></b>															
MIA Buildings	3.3	3.3	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.3	3.2	3.2
Accommodation	13.7	14.1	14.6	14.4	14.8	14.8	14.7	14.6	14.5	14.4	14.2	14.4	13.1	11.5	10.6
Airport	10.7	10.2	10.6	10.5	10.7	11.5	10.6	10.6	10.5	10.4	11.1	10.4	9.5	8.3	7.7
Road and Earthworks	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7
Site Services	56.6	58.1	59.6	60.2	58.8	57.0	56.4	57.4	55.5	55.8	57.8	57.0	57.0	56.9	47.3
MIA Electrical Consumption	3.0	3.1	3.1	3.1	3.2	3.2	3.2	3.2	3.1	3.1	3.1	3.1	2.8	2.5	2.3
Safety Levies	1.8	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.7	1.5	1.4
<b>Total</b>	<b>828.0</b>	<b>853.7</b>	<b>870.9</b>	<b>870.2</b>	<b>850.5</b>	<b>865.3</b>	<b>852.5</b>	<b>832.1</b>	<b>843.0</b>	<b>846.4</b>	<b>825.5</b>	<b>824.3</b>	<b>765.8</b>	<b>785.5</b>	<b>545.4</b>

## Output or Consumption Effects

The output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are detailed in Tables 5.16 and 5.17 below. The economic impacts resulting from operating expenditure increase from generally minimal impacts in the first year of operation, peaking in 2020 and remaining significant for the remaining life of the project.

In the first year of operation (2014), total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$35.04 million, comprising \$12.88 million in direct output (or consumption) effects and \$22.16 million in indirect output (or consumption) effects. The most significantly impacted sector at this stage of the Project is construction, accounting for over half of all direct impacts (\$17.97 million or 51% of total impacts).

By 2020, total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$1,997.79 million, comprising \$946.87 million in direct output (or consumption) effects and \$1,050.92 million in indirect output (or consumption) effects. The three most significantly impacted sectors at this stage of the Project are:

- Manufacturing, with output (or consumption) impacts of \$888.00 million;
- Mining, with output (or consumption) impacts of \$449.92 million; and
- Construction, with output (or consumption) impacts of \$146.01 million.

In 2031, total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$1,838.16 million, comprising \$870.93 million in direct output (or consumption) effects and \$967.23 million in indirect output (or consumption) effects. The three most significantly impacted sectors at this stage of the Project include:

- Manufacturing, with output (or consumption) impacts of \$806.51 million;
- Mining, with output (or consumption) impacts of \$415.08 million; and
- Construction, with output (or consumption) impacts of \$139.20 million.

In the final year of operation (2043), total output (or consumption) impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$1,154.95 million, comprising \$545.39 million in direct output (or consumption) effects and \$609.56 million in indirect output (or consumption) effects. The three most significantly impacted sectors at this stage of the Project include:

- Manufacturing, with output (or consumption) impacts of \$481.99 million;
- Mining, with output (or consumption) impacts of \$261.55 million; and
- Construction, with output (or consumption) impacts of \$104.03 million.

**Table 5.16: Distribution of Output or Consumption Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2014-28**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$0.13	\$1.58	\$3.20	\$5.10	\$5.81	\$6.11	\$6.92	\$6.57	\$6.50	\$6.49	\$6.57	\$6.43	\$6.37	\$6.42	\$6.32
Mining	\$1.27	\$123.60	\$179.57	\$279.98	\$323.06	\$367.62	\$449.92	\$377.81	\$380.11	\$384.67	\$376.18	\$377.25	\$374.82	\$377.73	\$382.79
Manufacturing	\$5.75	\$105.96	\$390.92	\$669.72	\$728.22	\$781.91	\$888.00	\$852.05	\$832.87	\$845.05	\$874.25	\$833.31	\$827.66	\$836.14	\$807.29
Electricity, Gas, Water & Waste Services	\$0.20	\$3.55	\$7.90	\$12.87	\$14.54	\$15.35	\$17.37	\$16.44	\$16.26	\$16.30	\$16.53	\$16.12	\$15.98	\$16.11	\$15.81
Construction	\$17.97	\$46.65	\$61.67	\$83.61	\$100.70	\$110.52	\$146.01	\$138.48	\$136.21	\$131.92	\$133.99	\$132.73	\$131.68	\$132.27	\$132.50
Wholesale Trade	\$0.85	\$10.56	\$27.74	\$45.89	\$50.70	\$54.87	\$63.49	\$59.58	\$58.57	\$59.17	\$60.58	\$58.39	\$57.98	\$58.53	\$57.13
Retail Trade	\$0.25	\$2.44	\$5.37	\$8.62	\$9.64	\$10.35	\$12.02	\$11.25	\$11.09	\$11.13	\$11.34	\$11.01	\$10.93	\$11.02	\$10.83
Accommodation & Food Services	\$0.19	\$6.97	\$13.39	\$21.58	\$25.10	\$25.45	\$27.53	\$26.64	\$26.57	\$26.31	\$26.41	\$26.14	\$25.82	\$25.99	\$25.66
Transport, Postal & Warehousing	\$1.69	\$19.83	\$40.21	\$64.66	\$73.00	\$78.68	\$90.06	\$83.17	\$82.32	\$82.52	\$84.17	\$81.54	\$80.90	\$81.63	\$80.68
Information Media and Telecommunications	\$0.28	\$2.65	\$6.73	\$10.98	\$12.14	\$13.08	\$15.14	\$14.31	\$14.06	\$14.16	\$14.52	\$14.00	\$13.90	\$14.02	\$13.69
Financial & Insurance Services	\$0.97	\$7.81	\$15.56	\$24.46	\$27.52	\$29.96	\$35.50	\$32.81	\$32.40	\$32.50	\$32.96	\$32.15	\$31.92	\$32.18	\$31.76
Rental, Hiring & Real Estate Services	\$2.11	\$17.73	\$37.34	\$58.99	\$65.93	\$71.57	\$84.20	\$78.31	\$77.22	\$77.57	\$78.92	\$76.70	\$76.17	\$76.81	\$75.57
Professional, Scientific & Technical Services	\$0.72	\$5.77	\$12.90	\$20.66	\$23.03	\$25.01	\$29.41	\$27.45	\$27.02	\$27.18	\$27.72	\$26.87	\$26.68	\$26.91	\$26.41
Administrative & Support Services	\$2.14	\$28.01	\$54.63	\$79.10	\$86.30	\$92.17	\$105.67	\$99.76	\$98.32	\$98.80	\$100.73	\$97.82	\$97.24	\$97.98	\$96.20
Public Administration & Safety	\$0.05	\$0.85	\$1.63	\$2.70	\$3.23	\$3.32	\$3.63	\$3.49	\$3.49	\$3.45	\$3.45	\$3.42	\$3.38	\$3.40	\$3.37
Education & Training	\$0.06	\$0.90	\$2.23	\$3.59	\$3.95	\$4.26	\$4.91	\$4.62	\$4.54	\$4.58	\$4.69	\$4.52	\$4.49	\$4.54	\$4.43
Health Care & Social Assistance	\$0.01	\$0.06	\$0.14	\$0.23	\$0.25	\$0.27	\$0.32	\$0.30	\$0.29	\$0.30	\$0.30	\$0.29	\$0.29	\$0.29	\$0.29
Arts & Recreation Services	\$0.35	\$3.81	\$7.82	\$12.07	\$13.44	\$14.39	\$16.62	\$15.62	\$15.41	\$15.46	\$15.72	\$15.30	\$15.19	\$15.31	\$15.05
Other Services	\$0.06	\$0.26	\$0.47	\$0.72	\$0.82	\$0.90	\$1.09	\$1.02	\$1.00	\$1.00	\$1.01	\$0.99	\$0.98	\$0.99	\$0.98
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$12.88	\$190.94	\$410.31	\$661.84	\$739.04	\$807.30	\$946.87	\$867.99	\$857.76	\$865.56	\$877.09	\$853.61	\$847.74	\$855.21	\$842.56
Indirect	\$22.16	\$198.05	\$459.11	\$743.70	\$828.35	\$898.50	\$1,050.92	\$981.67	\$966.49	\$972.99	\$992.95	\$961.39	\$954.62	\$963.08	\$944.20
<b>Total</b>	<b>\$35.04</b>	<b>\$388.99</b>	<b>\$869.41</b>	<b>\$1,405.54</b>	<b>\$1,567.39</b>	<b>\$1,705.80</b>	<b>\$1,997.79</b>	<b>\$1,849.66</b>	<b>\$1,824.25</b>	<b>\$1,838.55</b>	<b>\$1,870.04</b>	<b>\$1,814.99</b>	<b>\$1,802.36</b>	<b>\$1,818.28</b>	<b>\$1,786.76</b>

Source: Economic Associates estimates

**Table 5.17: Distribution of Output or Consumption Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$6.25	\$6.39	\$6.54	\$6.54	\$6.43	\$6.54	\$6.44	\$6.30	\$6.36	\$6.36	\$6.25	\$6.20	\$5.79	\$5.66	\$4.32
Mining	\$370.89	\$406.95	\$415.08	\$405.92	\$415.27	\$407.02	\$413.57	\$418.88	\$411.62	\$420.74	\$401.90	\$430.65	\$382.12	\$416.57	\$261.55
Manufacturing	\$799.57	\$791.65	\$806.51	\$817.55	\$771.48	\$808.85	\$776.77	\$733.22	\$764.28	\$758.11	\$743.72	\$705.12	\$672.48	\$664.73	\$481.99
Electricity, Gas, Water & Waste Services	\$15.62	\$15.94	\$16.29	\$16.32	\$15.95	\$16.29	\$15.97	\$15.54	\$15.77	\$15.75	\$15.44	\$15.25	\$14.23	\$13.97	\$10.49
Construction	\$129.18	\$135.11	\$139.20	\$139.25	\$137.52	\$135.99	\$138.13	\$139.47	\$136.92	\$137.41	\$140.05	\$138.95	\$135.90	\$136.21	\$104.03
Wholesale Trade	\$56.37	\$57.01	\$58.15	\$58.50	\$56.27	\$58.03	\$56.53	\$54.39	\$55.77	\$55.68	\$54.56	\$53.17	\$50.07	\$50.40	\$35.90
Retail Trade	\$10.68	\$10.90	\$11.14	\$11.17	\$10.86	\$11.10	\$10.90	\$10.61	\$10.77	\$10.77	\$10.60	\$10.44	\$9.81	\$9.85	\$7.14
Accommodation & Food Services	\$25.47	\$26.13	\$26.81	\$26.72	\$26.64	\$26.97	\$26.58	\$26.16	\$26.24	\$26.18	\$25.75	\$25.70	\$23.76	\$22.24	\$18.29
Transport, Postal & Warehousing	\$80.27	\$82.07	\$83.92	\$83.83	\$82.44	\$84.43	\$82.63	\$81.13	\$81.78	\$81.96	\$81.18	\$80.39	\$74.61	\$75.17	\$54.40
Information Media and Telecommunications	\$13.51	\$13.64	\$13.92	\$14.01	\$13.47	\$13.89	\$13.53	\$13.03	\$13.35	\$13.32	\$13.09	\$12.72	\$12.04	\$12.05	\$8.71
Financial & Insurance Services	\$31.20	\$32.17	\$32.86	\$32.85	\$32.13	\$32.60	\$32.22	\$31.58	\$31.87	\$31.98	\$31.40	\$31.27	\$29.31	\$29.84	\$21.18
Rental, Hiring & Real Estate Services	\$74.35	\$76.18	\$77.78	\$77.92	\$75.84	\$77.28	\$76.10	\$74.21	\$75.21	\$75.34	\$74.02	\$73.19	\$68.83	\$69.80	\$49.75
Professional, Scientific & Technical Services	\$26.00	\$26.53	\$27.08	\$27.17	\$26.33	\$26.92	\$26.43	\$25.68	\$26.11	\$26.13	\$25.67	\$25.25	\$23.80	\$24.09	\$17.18
Administrative & Support Services	\$94.99	\$96.36	\$98.11	\$98.50	\$95.57	\$97.63	\$95.99	\$93.24	\$94.86	\$94.77	\$93.33	\$91.56	\$87.16	\$87.71	\$63.89
Public Administration & Safety	\$3.34	\$3.43	\$3.51	\$3.49	\$3.49	\$3.52	\$3.48	\$3.44	\$3.43	\$3.43	\$3.37	\$3.39	\$3.12	\$2.96	\$2.46
Education & Training	\$4.37	\$4.42	\$4.51	\$4.53	\$4.37	\$4.50	\$4.39	\$4.22	\$4.33	\$4.32	\$4.23	\$4.13	\$3.90	\$3.92	\$2.81
Health Care & Social Assistance	\$0.28	\$0.29	\$0.29	\$0.29	\$0.28	\$0.29	\$0.29	\$0.28	\$0.28	\$0.28	\$0.28	\$0.27	\$0.26	\$0.26	\$0.19
Arts & Recreation Services	\$14.85	\$15.15	\$15.46	\$15.50	\$15.10	\$15.40	\$15.15	\$14.76	\$14.97	\$14.97	\$14.72	\$14.52	\$13.68	\$13.71	\$10.01
Other Services	\$0.96	\$0.99	\$1.02	\$1.02	\$1.00	\$1.00	\$1.00	\$0.98	\$0.99	\$0.99	\$0.98	\$0.98	\$0.93	\$0.94	\$0.68
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$828.00	\$853.73	\$870.93	\$870.22	\$850.47	\$865.30	\$852.48	\$832.13	\$843.02	\$846.45	\$825.48	\$824.29	\$765.85	\$785.49	\$545.39
Indirect	\$930.13	\$947.57	\$967.23	\$970.88	\$939.97	\$962.95	\$943.61	\$914.98	\$931.89	\$932.02	\$915.07	\$898.83	\$845.95	\$854.58	\$609.56
<b>Total</b>	<b>\$1,758.13</b>	<b>\$1,801.30</b>	<b>\$1,838.16</b>	<b>\$1,841.10</b>	<b>\$1,790.43</b>	<b>\$1,828.25</b>	<b>\$1,796.09</b>	<b>\$1,747.11</b>	<b>\$1,774.91</b>	<b>\$1,778.46</b>	<b>\$1,740.55</b>	<b>\$1,723.11</b>	<b>\$1,611.80</b>	<b>\$1,640.08</b>	<b>\$1,154.95</b>

Source: Economic Associates estimates

## Household Income Effects

The household income impacts of operating expenditure associated with the Kevin's Corner Project are detailed in Tables 5.18 and 5.19 below.

In the first year of operation (2014), total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$6.84 million, comprising \$1.29 million in direct household income effects and \$5.55 million in indirect household income effects.

By 2020, total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$546.78 million, comprising \$270.87 million in direct household income effects and \$275.90 million in indirect household income effects.

By 2031, total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$500.90 million, comprising \$247.24 million in direct household income effects and \$253.66 million in indirect household income effects.

In the final year of operation (2043), total household income impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$309.24 million, comprising \$149.94 million in direct household income effects and \$159.30 million in indirect household income effects.

**Table 5.18: Distribution of Household Income Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2014-28**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$0.01	\$0.15	\$0.31	\$0.49	\$0.55	\$0.59	\$0.67	\$0.63	\$0.63	\$0.63	\$0.63	\$0.62	\$0.62	\$0.62	\$0.61
Mining	\$0.11	\$13.56	\$19.41	\$30.20	\$34.90	\$39.80	\$48.82	\$40.83	\$41.11	\$41.61	\$40.62	\$40.80	\$40.54	\$40.85	\$41.45
Manufacturing	\$1.64	\$36.09	\$141.42	\$243.47	\$264.08	\$283.30	\$320.88	\$308.73	\$301.55	\$306.20	\$317.21	\$301.89	\$299.86	\$302.97	\$292.07
Electricity, Gas, Water & Waste Services	\$0.01	\$0.25	\$0.56	\$0.90	\$1.02	\$1.08	\$1.22	\$1.15	\$1.14	\$1.14	\$1.16	\$1.13	\$1.12	\$1.13	\$1.11
Construction	\$1.83	\$4.96	\$6.69	\$9.18	\$11.01	\$12.08	\$15.84	\$14.97	\$14.74	\$14.31	\$14.52	\$14.38	\$14.26	\$14.33	\$14.35
Wholesale Trade	\$0.22	\$2.66	\$7.05	\$11.69	\$12.91	\$13.96	\$16.14	\$15.17	\$14.91	\$15.06	\$15.43	\$14.86	\$14.76	\$14.90	\$14.54
Retail Trade	\$0.08	\$0.75	\$1.64	\$2.62	\$2.93	\$3.15	\$3.67	\$3.42	\$3.38	\$3.39	\$3.45	\$3.35	\$3.33	\$3.36	\$3.30
Accommodation & Food Services	\$0.04	\$1.45	\$2.79	\$4.50	\$5.23	\$5.30	\$5.74	\$5.55	\$5.54	\$5.48	\$5.50	\$5.45	\$5.38	\$5.41	\$5.35
Transport, Postal & Warehousing	\$0.64	\$7.20	\$14.76	\$23.76	\$26.83	\$28.81	\$32.80	\$30.42	\$30.10	\$30.15	\$30.82	\$29.80	\$29.56	\$29.83	\$29.46
Information Media and Telecommunications	\$0.04	\$0.37	\$0.93	\$1.52	\$1.68	\$1.82	\$2.10	\$1.99	\$1.95	\$1.97	\$2.01	\$1.94	\$1.93	\$1.95	\$1.90
Financial & Insurance Services	\$0.38	\$2.90	\$5.73	\$9.00	\$10.13	\$11.03	\$13.09	\$12.10	\$11.95	\$11.98	\$12.15	\$11.85	\$11.77	\$11.86	\$11.71
Rental, Hiring & Real Estate Services	\$0.40	\$3.36	\$7.07	\$11.17	\$12.49	\$13.56	\$15.95	\$14.83	\$14.63	\$14.69	\$14.95	\$14.53	\$14.43	\$14.55	\$14.31
Professional, Scientific & Technical Services	\$0.29	\$2.37	\$5.30	\$8.49	\$9.46	\$10.27	\$12.08	\$11.27	\$11.10	\$11.16	\$11.38	\$11.03	\$10.96	\$11.05	\$10.85
Administrative & Support Services	\$0.90	\$12.97	\$25.00	\$35.74	\$38.84	\$41.39	\$47.24	\$44.69	\$44.05	\$44.27	\$45.14	\$43.84	\$43.58	\$43.91	\$43.11
Public Administration & Safety	\$0.02	\$0.41	\$0.79	\$1.31	\$1.57	\$1.61	\$1.76	\$1.69	\$1.69	\$1.67	\$1.67	\$1.66	\$1.64	\$1.65	\$1.63
Education & Training	\$0.05	\$0.63	\$1.56	\$2.52	\$2.77	\$2.99	\$3.45	\$3.24	\$3.19	\$3.22	\$3.29	\$3.18	\$3.16	\$3.19	\$3.11
Health Care & Social Assistance	\$0.00	\$0.04	\$0.08	\$0.13	\$0.15	\$0.16	\$0.18	\$0.17	\$0.17	\$0.17	\$0.17	\$0.17	\$0.17	\$0.17	\$0.16
Arts & Recreation Services	\$0.09	\$0.85	\$1.73	\$2.66	\$2.97	\$3.19	\$3.70	\$3.47	\$3.42	\$3.43	\$3.49	\$3.40	\$3.37	\$3.40	\$3.35
Other Services	\$0.08	\$0.35	\$0.63	\$0.96	\$1.09	\$1.19	\$1.46	\$1.36	\$1.34	\$1.33	\$1.35	\$1.32	\$1.31	\$1.32	\$1.31
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Direct</b>	<b>\$1.29</b>	<b>\$40.50</b>	<b>\$122.70</b>	<b>\$204.16</b>	<b>\$222.60</b>	<b>\$238.94</b>	<b>\$270.87</b>	<b>\$257.50</b>	<b>\$252.49</b>	<b>\$255.93</b>	<b>\$263.52</b>	<b>\$252.36</b>	<b>\$250.65</b>	<b>\$253.13</b>	<b>\$245.58</b>
<b>Indirect</b>	<b>\$5.55</b>	<b>\$50.82</b>	<b>\$120.76</b>	<b>\$196.15</b>	<b>\$218.01</b>	<b>\$236.33</b>	<b>\$275.90</b>	<b>\$258.20</b>	<b>\$254.06</b>	<b>\$255.93</b>	<b>\$261.43</b>	<b>\$252.84</b>	<b>\$251.07</b>	<b>\$253.32</b>	<b>\$248.09</b>
<b>Total</b>	<b>\$6.84</b>	<b>\$91.32</b>	<b>\$243.46</b>	<b>\$400.32</b>	<b>\$440.61</b>	<b>\$475.27</b>	<b>\$546.78</b>	<b>\$515.70</b>	<b>\$506.56</b>	<b>\$511.86</b>	<b>\$524.96</b>	<b>\$505.20</b>	<b>\$501.73</b>	<b>\$506.45</b>	<b>\$493.66</b>

Source: Economic Associates estimates

**Table 5.19: Distribution of Household Income Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$0.60	\$0.62	\$0.63	\$0.63	\$0.62	\$0.63	\$0.62	\$0.61	\$0.62	\$0.62	\$0.61	\$0.60	\$0.56	\$0.56	\$0.42
Mining	\$40.13	\$44.16	\$45.04	\$44.00	\$45.10	\$44.13	\$44.91	\$45.55	\$44.71	\$45.73	\$43.64	\$46.90	\$41.54	\$45.42	\$28.38
Manufacturing	\$289.41	\$285.71	\$291.01	\$295.30	\$277.90	\$292.05	\$279.90	\$263.44	\$275.29	\$272.83	\$267.62	\$252.75	\$241.44	\$238.13	\$172.94
Electricity, Gas, Water & Waste Services	\$1.10	\$1.12	\$1.15	\$1.15	\$1.12	\$1.15	\$1.12	\$1.09	\$1.11	\$1.11	\$1.09	\$1.08	\$1.00	\$0.98	\$0.74
Construction	\$13.99	\$14.63	\$15.07	\$15.07	\$14.88	\$14.73	\$14.94	\$15.06	\$14.81	\$14.87	\$15.11	\$15.01	\$14.63	\$14.69	\$11.15
Wholesale Trade	\$14.35	\$14.49	\$14.78	\$14.88	\$14.30	\$14.76	\$14.37	\$13.81	\$14.17	\$14.14	\$13.86	\$13.49	\$12.72	\$12.79	\$9.12
Retail Trade	\$3.25	\$3.32	\$3.39	\$3.40	\$3.31	\$3.38	\$3.32	\$3.24	\$3.28	\$3.28	\$3.23	\$3.18	\$2.99	\$3.01	\$2.18
Accommodation & Food Services	\$5.31	\$5.44	\$5.59	\$5.57	\$5.55	\$5.62	\$5.54	\$5.45	\$5.47	\$5.46	\$5.37	\$5.35	\$4.95	\$4.63	\$3.81
Transport, Postal & Warehousing	\$29.38	\$29.93	\$30.61	\$30.60	\$30.06	\$30.87	\$30.14	\$29.57	\$29.83	\$29.86	\$29.66	\$29.25	\$27.20	\$27.26	\$19.92
Information Media and Telecommunications	\$1.87	\$1.89	\$1.93	\$1.94	\$1.87	\$1.93	\$1.88	\$1.81	\$1.85	\$1.85	\$1.82	\$1.76	\$1.67	\$1.67	\$1.21
Financial & Insurance Services	\$11.50	\$11.87	\$12.12	\$12.12	\$11.86	\$12.02	\$11.89	\$11.66	\$11.76	\$11.80	\$11.59	\$11.55	\$10.83	\$11.03	\$7.83
Rental, Hiring & Real Estate Services	\$14.08	\$14.43	\$14.73	\$14.76	\$14.36	\$14.64	\$14.41	\$14.05	\$14.25	\$14.27	\$14.02	\$13.86	\$13.04	\$13.22	\$9.42
Professional, Scientific & Technical Services	\$10.68	\$10.89	\$11.12	\$11.16	\$10.81	\$11.06	\$10.86	\$10.54	\$10.72	\$10.73	\$10.54	\$10.37	\$9.78	\$9.89	\$7.05
Administrative & Support Services	\$42.58	\$43.14	\$43.90	\$44.09	\$42.76	\$43.70	\$42.95	\$41.70	\$42.45	\$42.40	\$41.76	\$40.93	\$39.02	\$39.24	\$28.66
Public Administration & Safety	\$1.62	\$1.66	\$1.70	\$1.69	\$1.69	\$1.71	\$1.69	\$1.67	\$1.67	\$1.66	\$1.64	\$1.64	\$1.51	\$1.43	\$1.19
Education & Training	\$3.07	\$3.11	\$3.17	\$3.18	\$3.07	\$3.16	\$3.08	\$2.97	\$3.04	\$3.03	\$2.97	\$2.90	\$2.74	\$2.75	\$1.97
Health Care & Social Assistance	\$0.16	\$0.16	\$0.17	\$0.17	\$0.16	\$0.17	\$0.16	\$0.16	\$0.16	\$0.16	\$0.16	\$0.16	\$0.15	\$0.15	\$0.11
Arts & Recreation Services	\$3.30	\$3.37	\$3.44	\$3.45	\$3.36	\$3.42	\$3.37	\$3.29	\$3.33	\$3.33	\$3.28	\$3.23	\$3.05	\$3.06	\$2.23
Other Services	\$1.28	\$1.32	\$1.36	\$1.36	\$1.33	\$1.34	\$1.33	\$1.31	\$1.32	\$1.32	\$1.31	\$1.30	\$1.24	\$1.25	\$0.91
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Direct	\$243.19	\$242.72	\$247.24	\$249.72	\$237.89	\$247.80	\$239.24	\$227.69	\$235.71	\$234.44	\$229.72	\$220.58	\$208.88	\$207.98	\$149.94
Indirect	\$244.46	\$248.55	\$253.66	\$254.80	\$246.23	\$252.64	\$247.24	\$239.30	\$244.11	\$244.01	\$239.55	\$234.75	\$221.18	\$223.18	\$159.30
Total	\$487.65	\$491.27	\$500.90	\$504.52	\$484.12	\$500.44	\$486.48	\$466.99	\$479.82	\$478.45	\$469.27	\$455.33	\$430.05	\$431.16	\$309.24

Source: Economic Associates estimates

## Employment Effects

The total employment impacts of operating expenditure associated with the Kevin's Corner Project are detailed in Tables 5.20 and 5.21 below.

In the first year of operation (2014), operating expenditure associated with the Kevin's Corner Project is estimated to support 127 full time equivalent positions, including 35 direct full time equivalent positions and 92 indirect full time equivalent positions.

In 2020, operating expenditure associated with the Kevin's Corner is estimated to support 7,258 full time equivalent positions, including 3,477 direct full time equivalent positions and 3,781 indirect full time equivalent positions.

In 2031, operating expenditure associated with the Kevin's Corner is estimated to support 6,664 full time equivalent positions, including 3,182 direct full time equivalent positions and 3,482 indirect full time equivalent positions.

In the final year of operation (2043), operating expenditure associated with the Kevin's Corner Project is estimated to support 4,160 full time equivalent positions, including 1,955 direct full time equivalent positions and 2,206 indirect full time equivalent positions.

**Table 5.20: Distribution of Employment Effects - Kevin's Corner Project, Operating Expenditure (FTEs), 2014-28**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	1	10	20	32	37	39	44	41	41	41	41	41	40	41	40
Mining	1	160	231	360	415	473	580	486	489	495	483	485	482	486	493
Manufacturing	18	428	1,719	2,965	3,213	3,445	3,899	3,755	3,667	3,724	3,860	3,671	3,647	3,685	3,550
Electricity, Gas, Water & Waste Services	0	4	8	13	15	16	18	17	17	17	17	17	17	17	16
Construction	66	185	255	353	421	463	602	568	559	544	552	546	542	545	545
Wholesale Trade	3	36	95	157	174	188	217	204	201	203	208	200	199	201	196
Retail Trade	2	22	48	77	86	93	108	101	99	100	102	99	98	99	97
Accommodation & Food Services	1	34	66	106	123	125	135	131	131	129	130	129	127	128	126
Transport, Postal & Warehousing	9	98	208	336	377	404	463	430	424	425	434	420	417	421	415
Information Media and Telecommunications	1	9	23	38	42	45	52	49	48	49	50	48	48	48	47
Financial & Insurance Services	3	27	54	84	95	103	122	113	111	112	113	111	110	111	109
Rental, Hiring & Real Estate Services	3	21	45	72	80	87	102	95	94	94	96	93	92	93	92
Professional, Scientific & Technical Services	4	36	79	127	142	154	181	169	166	167	171	165	164	166	163
Administrative & Support Services	11	152	296	427	465	497	569	537	529	532	542	527	524	528	518
Public Administration & Safety	0	6	11	19	23	23	25	24	24	24	24	24	24	24	24
Education & Training	1	10	25	40	44	47	55	51	51	51	52	50	50	50	49
Health Care & Social Assistance	0	0	1	2	2	2	2	2	2	2	2	2	2	2	2
Arts & Recreation Services	2	15	30	45	51	55	64	60	59	59	60	58	58	58	57
Other Services	1	5	9	13	15	16	20	19	18	18	18	18	18	18	18
Ownership of Dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Direct</b>	<b>35</b>	<b>542</b>	<b>1,568</b>	<b>2,597</b>	<b>2,844</b>	<b>3,050</b>	<b>3,477</b>	<b>3,309</b>	<b>3,245</b>	<b>3,281</b>	<b>3,376</b>	<b>3,238</b>	<b>3,216</b>	<b>3,247</b>	<b>3,155</b>
<b>Indirect</b>	<b>92</b>	<b>717</b>	<b>1,655</b>	<b>2,670</b>	<b>2,976</b>	<b>3,225</b>	<b>3,781</b>	<b>3,543</b>	<b>3,486</b>	<b>3,505</b>	<b>3,580</b>	<b>3,466</b>	<b>3,442</b>	<b>3,472</b>	<b>3,403</b>
<b>Total</b>	<b>127</b>	<b>1,259</b>	<b>3,223</b>	<b>5,267</b>	<b>5,820</b>	<b>6,274</b>	<b>7,258</b>	<b>6,852</b>	<b>6,731</b>	<b>6,786</b>	<b>6,956</b>	<b>6,704</b>	<b>6,658</b>	<b>6,719</b>	<b>6,557</b>

Note: Figures may not add due to rounding

Source: Economic Associates estimates

**Table 5.21: Distribution of Employment Effects - Kevin's Corner Project, Operating Expenditure (FTEs), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	39	40	41	41	41	41	41	40	40	40	39	39	37	36	27
Mining	477	525	535	523	536	524	533	541	531	543	518	557	493	539	337
Manufacturing	3,518	3,470	3,534	3,587	3,372	3,547	3,397	3,194	3,341	3,310	3,246	3,061	2,926	2,884	2,096
Electricity, Gas, Water & Waste Services	16	17	17	17	17	17	17	16	16	16	16	16	15	15	11
Construction	532	556	572	572	565	560	567	571	562	564	572	569	553	556	420
Wholesale Trade	193	195	199	200	192	199	193	186	191	190	187	182	171	172	123
Retail Trade	96	98	100	100	98	100	98	95	97	97	95	94	88	89	64
Accommodation & Food Services	125	129	132	131	131	133	131	129	129	129	127	126	117	109	90
Transport, Postal & Warehousing	413	420	430	431	422	433	423	414	419	419	416	409	382	384	280
Information Media and Telecommunications	46	47	48	48	46	48	46	45	46	46	45	44	41	41	30
Financial & Insurance Services	107	111	113	113	110	112	111	108	110	110	108	107	101	102	73
Rental, Hiring & Real Estate Services	90	92	94	94	92	94	92	90	91	91	90	89	83	85	60
Professional, Scientific & Technical Services	160	163	167	167	162	166	163	158	161	161	158	155	147	148	106
Administrative & Support Services	512	519	528	530	514	526	517	502	511	510	502	493	469	472	344
Public Administration & Safety	23	24	25	24	24	25	24	24	24	24	24	24	22	21	17
Education & Training	49	49	50	50	49	50	49	47	48	48	47	46	43	44	31
Health Care & Social Assistance	2	2	2	2	2	2	2	2	2	2	2	2	2	2	1
Arts & Recreation Services	57	58	59	59	58	59	58	57	57	57	56	56	53	53	38
Other Services	17	18	18	19	18	18	18	18	18	18	18	18	17	17	12
Ownership of Dwellings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Direct</b>	3,122	3,122	3,182	3,214	3,066	3,186	3,084	2,943	3,039	3,023	2,969	2,854	2,708	2,692	1,955
<b>Indirect</b>	3,351	3,410	3,482	3,498	3,382	3,465	3,396	3,293	3,354	3,352	3,297	3,231	3,051	3,075	2,206
<b>Total</b>	6,473	6,532	6,664	6,711	6,448	6,651	6,480	6,236	6,393	6,375	6,266	6,086	5,759	5,767	4,160

Note: Figures may not add due to rounding

Source: Economic Associates estimates

## Value Added Effects

The value added impacts of operating expenditure associated with the Kevin's Corner Project are detailed in Tables 5.22 and 5.23 below. The economic impacts resulting from operating expenditure increase from minimal impacts in the first year of operation, peaking in 2020 and remaining significant for the remaining life of the project.

In the first year of operation (2014), total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$12.70 million, comprising \$2.96 million in direct value added effects and \$9.75 million in value added effects. The most significantly impacted sector at this stage of the Project is construction, accounting for over a third of all direct impacts (\$4.47 million or 35% of total impacts).

By 2020, total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to increase to approximately \$984.66 million, comprising \$510.10 million in direct value added effects and \$474.56 million in indirect value added effects. The two most significantly impacted sectors at this stage of the Project are:

- Manufacturing, with value added impacts of \$401.88 million; and
- Mining, with value added impacts of \$290.58 million.

In 2031, total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$905.00 million, comprising \$468.15 million in direct value added effects and \$436.85 million in indirect value added effects. The two most significantly impacted sectors at this stage of the Project include:

- Manufacturing, with value added impacts of \$364.65 million;
- Mining, with value added impacts of \$268.12 million.

In the final year of operation (2043), total value added impacts of operating expenditure associated with the Kevin's Corner Project are estimated to be approximately \$565.11 million, comprising \$289.82 million in direct value added effects and \$275.29 million in indirect value added effects. The two most significantly impacted sectors at this stage of the Project include:

- Manufacturing, with value added impacts of \$217.10 million; and
- Mining, with value added impacts of \$169.02 million.

**Table 5.22: Distribution of Value Added Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2014-28**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Agriculture, Forestry & Fishing	\$0.07	\$0.79	\$1.60	\$2.55	\$2.91	\$3.05	\$3.46	\$3.29	\$3.26	\$3.25	\$3.29	\$3.22	\$3.19	\$3.21	\$3.16
Mining	\$0.93	\$79.52	\$116.18	\$181.24	\$209.04	\$237.65	\$290.58	\$244.47	\$245.87	\$248.77	\$243.47	\$244.02	\$242.43	\$244.32	\$247.46
Manufacturing	\$2.23	\$46.07	\$177.08	\$304.37	\$330.40	\$354.52	\$401.88	\$386.36	\$377.46	\$383.18	\$396.79	\$377.81	\$375.26	\$379.14	\$365.67
Electricity, Gas, Water & Waste Services	\$0.09	\$1.50	\$3.36	\$5.47	\$6.17	\$6.52	\$7.39	\$6.99	\$6.91	\$6.93	\$7.04	\$6.86	\$6.80	\$6.85	\$6.72
Construction	\$4.47	\$12.04	\$16.24	\$22.26	\$26.69	\$29.29	\$38.42	\$36.33	\$35.75	\$34.71	\$35.24	\$34.88	\$34.61	\$34.77	\$34.81
Wholesale Trade	\$0.34	\$4.04	\$10.77	\$17.85	\$19.71	\$21.32	\$24.64	\$23.17	\$22.76	\$23.00	\$23.56	\$22.69	\$22.54	\$22.75	\$22.19
Retail Trade	\$0.10	\$0.99	\$2.18	\$3.50	\$3.92	\$4.20	\$4.88	\$4.57	\$4.50	\$4.52	\$4.60	\$4.47	\$4.44	\$4.48	\$4.40
Accommodation & Food Services	\$0.07	\$2.47	\$4.74	\$7.64	\$8.89	\$9.01	\$9.75	\$9.43	\$9.41	\$9.32	\$9.35	\$9.26	\$9.14	\$9.20	\$9.08
Transport, Postal & Warehousing	\$0.91	\$10.52	\$21.43	\$34.48	\$38.91	\$41.89	\$47.93	\$44.30	\$43.84	\$43.94	\$44.83	\$43.42	\$43.07	\$43.47	\$42.95
Information Media and Telecommunications	\$0.12	\$1.12	\$2.84	\$4.63	\$5.12	\$5.52	\$6.39	\$6.03	\$5.93	\$5.97	\$6.12	\$5.90	\$5.86	\$5.92	\$5.77
Financial & Insurance Services	\$0.64	\$5.24	\$10.53	\$16.59	\$18.65	\$20.30	\$24.01	\$22.20	\$21.92	\$22.00	\$22.31	\$21.75	\$21.60	\$21.78	\$21.48
Rental, Hiring & Real Estate Services	\$0.96	\$8.10	\$17.07	\$26.97	\$30.14	\$32.72	\$38.49	\$35.80	\$35.30	\$35.46	\$36.08	\$35.06	\$34.82	\$35.11	\$34.54
Professional, Scientific & Technical Services	\$0.37	\$2.97	\$6.64	\$10.64	\$11.86	\$12.87	\$15.14	\$14.13	\$13.91	\$13.99	\$14.27	\$13.83	\$13.74	\$13.86	\$13.60
Administrative & Support Services	\$1.13	\$15.97	\$30.86	\$44.20	\$48.07	\$51.24	\$58.54	\$55.35	\$54.56	\$54.83	\$55.91	\$54.29	\$53.98	\$54.39	\$53.39
Public Administration & Safety	\$0.02	\$0.46	\$0.88	\$1.46	\$1.75	\$1.80	\$1.96	\$1.89	\$1.89	\$1.87	\$1.87	\$1.86	\$1.83	\$1.84	\$1.83
Education & Training	\$0.05	\$0.68	\$1.69	\$2.72	\$3.00	\$3.23	\$3.72	\$3.50	\$3.44	\$3.48	\$3.56	\$3.43	\$3.41	\$3.44	\$3.36
Health Care & Social Assistance	\$0.00	\$0.04	\$0.10	\$0.16	\$0.18	\$0.19	\$0.22	\$0.21	\$0.21	\$0.21	\$0.21	\$0.20	\$0.20	\$0.20	\$0.20
Arts & Recreation Services	\$0.13	\$1.32	\$2.69	\$4.15	\$4.63	\$4.97	\$5.75	\$5.40	\$5.33	\$5.34	\$5.43	\$5.29	\$5.25	\$5.29	\$5.21
Other Services	\$0.08	\$0.36	\$0.65	\$0.99	\$1.13	\$1.24	\$1.51	\$1.40	\$1.38	\$1.38	\$1.40	\$1.37	\$1.36	\$1.37	\$1.35
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Direct</b>	<b>\$2.96</b>	<b>\$104.17</b>	<b>\$220.15</b>	<b>\$356.13</b>	<b>\$397.07</b>	<b>\$435.67</b>	<b>\$510.10</b>	<b>\$462.04</b>	<b>\$457.57</b>	<b>\$463.10</b>	<b>\$467.48</b>	<b>\$455.87</b>	<b>\$452.82</b>	<b>\$456.88</b>	<b>\$451.04</b>
<b>Indirect</b>	<b>\$9.75</b>	<b>\$90.06</b>	<b>\$207.39</b>	<b>\$335.75</b>	<b>\$374.07</b>	<b>\$405.86</b>	<b>\$474.56</b>	<b>\$442.78</b>	<b>\$436.06</b>	<b>\$439.04</b>	<b>\$447.85</b>	<b>\$433.76</b>	<b>\$430.70</b>	<b>\$434.51</b>	<b>\$426.15</b>
<b>Total</b>	<b>\$12.70</b>	<b>\$194.23</b>	<b>\$427.54</b>	<b>\$691.88</b>	<b>\$771.14</b>	<b>\$841.52</b>	<b>\$984.66</b>	<b>\$904.82</b>	<b>\$893.63</b>	<b>\$902.14</b>	<b>\$915.33</b>	<b>\$889.62</b>	<b>\$883.52</b>	<b>\$891.39</b>	<b>\$877.19</b>

Source: Economic Associates estimates

**Table 5.23: Distribution of Value Added Effects - Kevin's Corner Project, Operating Expenditure (\$M), 2029-43**

	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038	2039	2040	2041	2042	2043
Agriculture, Forestry & Fishing	\$3.13	\$3.20	\$3.28	\$3.28	\$3.22	\$3.27	\$3.22	\$3.15	\$3.18	\$3.18	\$3.13	\$3.10	\$2.90	\$2.83	\$2.16
Mining	\$239.86	\$262.86	\$268.12	\$262.30	\$268.14	\$263.00	\$267.07	\$270.34	\$265.78	\$271.58	\$259.56	\$277.76	\$246.67	\$268.56	\$169.02
Manufacturing	\$362.28	\$357.98	\$364.65	\$369.90	\$348.40	\$365.87	\$350.87	\$330.54	\$345.13	\$342.14	\$335.63	\$317.35	\$303.01	\$299.04	\$217.10
Electricity, Gas, Water & Waste Services	\$6.64	\$6.77	\$6.92	\$6.93	\$6.77	\$6.92	\$6.78	\$6.59	\$6.70	\$6.69	\$6.56	\$6.47	\$6.04	\$5.95	\$4.45
Construction	\$33.95	\$35.50	\$36.55	\$36.56	\$36.10	\$35.74	\$36.25	\$36.55	\$35.93	\$36.07	\$36.66	\$36.42	\$35.50	\$35.64	\$27.07
Wholesale Trade	\$21.91	\$22.12	\$22.57	\$22.71	\$21.82	\$22.53	\$21.93	\$21.08	\$21.63	\$21.58	\$21.16	\$20.58	\$19.41	\$19.51	\$13.92
Retail Trade	\$4.34	\$4.43	\$4.52	\$4.54	\$4.41	\$4.51	\$4.43	\$4.31	\$4.37	\$4.37	\$4.30	\$4.24	\$3.98	\$4.00	\$2.90
Accommodation & Food Services	\$9.02	\$9.25	\$9.49	\$9.46	\$9.43	\$9.55	\$9.41	\$9.26	\$9.29	\$9.27	\$9.12	\$9.10	\$8.41	\$7.87	\$6.47
Transport, Postal & Warehousing	\$42.74	\$43.67	\$44.65	\$44.62	\$43.86	\$44.93	\$43.97	\$43.15	\$43.52	\$43.60	\$43.21	\$42.74	\$39.70	\$39.97	\$28.97
Information Media and Telecommunications	\$5.70	\$5.75	\$5.87	\$5.91	\$5.68	\$5.86	\$5.71	\$5.50	\$5.63	\$5.62	\$5.52	\$5.36	\$5.08	\$5.08	\$3.67
Financial & Insurance Services	\$21.11	\$21.75	\$22.22	\$22.22	\$21.72	\$22.05	\$21.78	\$21.33	\$21.54	\$21.61	\$21.22	\$21.12	\$19.79	\$20.15	\$14.29
Rental, Hiring & Real Estate Services	\$33.99	\$34.82	\$35.55	\$35.62	\$34.67	\$35.33	\$34.79	\$33.92	\$34.38	\$34.44	\$33.84	\$33.46	\$31.47	\$31.91	\$22.74
Professional, Scientific & Technical Services	\$13.38	\$13.66	\$13.94	\$13.99	\$13.55	\$13.86	\$13.61	\$13.22	\$13.44	\$13.45	\$13.22	\$13.00	\$12.25	\$12.40	\$8.84
Administrative & Support Services	\$52.74	\$53.44	\$54.39	\$54.62	\$52.97	\$54.13	\$53.21	\$51.67	\$52.59	\$52.52	\$51.73	\$50.72	\$48.34	\$48.62	\$35.49
Public Administration & Safety	\$1.81	\$1.86	\$1.90	\$1.89	\$1.89	\$1.91	\$1.89	\$1.86	\$1.86	\$1.86	\$1.83	\$1.84	\$1.69	\$1.60	\$1.33
Education & Training	\$3.32	\$3.35	\$3.42	\$3.44	\$3.31	\$3.41	\$3.33	\$3.20	\$3.28	\$3.28	\$3.21	\$3.13	\$2.96	\$2.97	\$2.13
Health Care & Social Assistance	\$0.20	\$0.20	\$0.20	\$0.21	\$0.20	\$0.20	\$0.20	\$0.19	\$0.20	\$0.20	\$0.19	\$0.19	\$0.18	\$0.18	\$0.13
Arts & Recreation Services	\$5.13	\$5.24	\$5.35	\$5.36	\$5.23	\$5.33	\$5.24	\$5.11	\$5.18	\$5.18	\$5.10	\$5.03	\$4.74	\$4.76	\$3.47
Other Services	\$1.33	\$1.37	\$1.40	\$1.40	\$1.37	\$1.39	\$1.38	\$1.36	\$1.36	\$1.37	\$1.36	\$1.35	\$1.28	\$1.30	\$0.94
Ownership of Dwellings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Direct</b>	<b>\$442.76</b>	<b>\$459.25</b>	<b>\$468.15</b>	<b>\$466.62</b>	<b>\$458.04</b>	<b>\$464.85</b>	<b>\$458.75</b>	<b>\$448.76</b>	<b>\$453.95</b>	<b>\$456.78</b>	<b>\$443.11</b>	<b>\$446.42</b>	<b>\$411.16</b>	<b>\$425.88</b>	<b>\$289.82</b>
<b>Indirect</b>	<b>\$419.80</b>	<b>\$427.98</b>	<b>\$436.85</b>	<b>\$438.35</b>	<b>\$424.71</b>	<b>\$434.92</b>	<b>\$426.31</b>	<b>\$413.59</b>	<b>\$421.05</b>	<b>\$421.22</b>	<b>\$413.42</b>	<b>\$406.53</b>	<b>\$382.25</b>	<b>\$386.45</b>	<b>\$275.29</b>
<b>Total</b>	<b>\$862.56</b>	<b>\$887.23</b>	<b>\$905.00</b>	<b>\$904.96</b>	<b>\$882.76</b>	<b>\$899.77</b>	<b>\$885.06</b>	<b>\$862.35</b>	<b>\$875.00</b>	<b>\$878.00</b>	<b>\$856.53</b>	<b>\$852.95</b>	<b>\$793.41</b>	<b>\$812.33</b>	<b>\$565.11</b>

Source: Economic Associates estimates

## 5.2 Value of Coal Exports

The Kevin's Corner Coal Project will produce approximately 856 million tonnes (Mt) of coal for export from Queensland throughout the life of the mine, the value of these exports to the Queensland economy will be approximately \$67.8 billion. Once fully operational the coal mine, will produce between 25 Mtpa and 30 Mtpa of coal exports, equating to a value of \$2.7 billion per annum.

## 5.3 Opportunity Cost of Project

### 5.3.1 Vegetation Communities to be Impacted

Table 5.24 below outlines the extent of vegetation communities present within the project area and the extent of those vegetation communities to be directly impacted by the project.

The project area hosts approximately 38,366 hectares of vegetation communities with the most significant communities in terms of coverage including:

- Silver-leaved Ironbark Open Woodland: 13,320 hectares;
- Non-remnant Grassland: 10,200 hectares; and
- Popular Box Open Woodland: 4,987 hectares.

Together the three most significant vegetation communities (in terms of coverage) account for almost three quarters of vegetation community coverage. Non-remnant Grassland, which is the least significant community in terms of ecological value, accounts for over a quarter of all vegetation community coverage.

The project will directly impact approximately 8,344 hectares of vegetation communities, with the most significant direct impacts sustained by:

- Non-remnant Grassland: 2,988 hectares;
- Silver-leaved Ironbark Open Woodland: 2,185 hectares; and
- Popular-Ironbark Mixed Woodland: 992 hectares.

As noted above, the most significant area to be removed will be 2,988 hectares of Non-remnant Grassland. Of the 8,344 hectares of vegetation communities to be removed as a result of the project, approximately 36% will be non-remnant grasslands. The remaining 64% of vegetation communities directly impacted (approximately 5,356 hectares) by the project are either some form of woodlands or heath.

**Table 5.24: Vegetation communities to be directly impacted by the Kevin's Corner Coal Project**

Vegetation Community	RE or Ecological Community	DERM Biodiversity Status	VMA (1999) Status	Total Area on Site (ha)	Total Disturbed Area (Proposed) (ha)	% of RE to be disturbed (%)
Brigalow Open Woodland	10.3.3a	No Concern at Present	Least Concern	1,036	234	23
	10.4.5	Of Concern	Least Concern	71	0	0
	10.9.3	Endangered	Least Concern	17	0	0
	11.3.5	Of Concern	Least Concern	34	6	17
Silver-leaved Ironbark Open Woodland	10.3.28a	No Concern at Present	Least Concern	559	71	13
	10.5.5a	No Concern at Present	Least Concern	11,870	2,022	17
	10.7.11a	No Concern at Present	Least Concern	693	64	9
	11.8.4	No Concern at Present	Least Concern	198	29	14
Poplar Box Open Woodland	10.3.27a	Of Concern	Least Concern	895	174	20
	10.5.12	No Concern at Present	Least Concern	4,072	542	13
	11.3.2	Of Concern	Of Concern	20	5	22
Poplar-Ironbark Mixed Woodland	-	Not Listed	Least Concern	1,763	992	56
White Cypress Pine Woodland	11.5.5b	No Concern at Present	Least Concern	3	0	0
Gidgee Open Woodland	10.3.4	Of Concern	Least Concern	1	0	0
Fringing Riparian Woodland	10.3.12a	No Concern at Present	Least Concern	342	98	29
	10.3.13a	Of Concern	Least Concern	575	147	26
	10.3.14	Of Concern	Least Concern	1,099	541	49
Weeping Bottlebrush Heath	10.7.7	No Concern at Present	Least Concern	704	120	17
Thozet's Box Open Woodland	10.7.5	Of Concern	Least Concern	229	62	27
Lancewood Woodland	10.7.3b	No Concern at Present	Least Concern	2,168	147	7
	10.10.1b	No Concern at Present	Least Concern	116	0	0
Queensland Yellowjacket Low Woodland	10.5.1c	No Concern at Present	Least Concern	1,235	80	7
Rustyjacket Woodland	10.10.4	Least Concern	Least Concern	297	0	0
Bluegrass Grassland	11.8.11	Of Concern	Of Concern	170	22	13
Non-remnant Grassland	Not Classed	Not Listed	Not Listed	10,200	2,988	29
Total Areas				38,366	8,344	

Source: AARC (2011)

## Total Economic Framework for Valuation

The loss of habitat areas can be categorised as non-market benefits (or disbenefits). Guidelines prepared by the Queensland Government<sup>10</sup> set out a range of tools for estimating the value of such non-market benefits as follows:

- Methods based on market prices, for example taking the value of an externality (such as the loss of habitat areas) as equal to the cost of its prevention, its effect on economic production or its effect on loss of individual income via negative health impacts or the costs of activities necessary to avert a negative impact such as purchasing bottled water or boiling water for drinking;
- Surrogate or proxy market methods, for example, valuing noise impacts by reference to variations in house prices (hedonic pricing), or valuing a wilderness area by inference from the costs individuals incur in travelling to it; and
- Survey-based methods which seek to obtain individuals' valuations of impacts using question and answer and related data modelling techniques. Examples include contingent valuation and choice modelling.

Each of these methods has advantages and disadvantages in terms of simplicity, reliability, cost and certainty. Contingent valuation for example is adaptable to a range of impact scenarios in terms of type and extent, but the process is expensive and the results can be subject to conjecture if respondents are unable to comprehend the impact under investigation or the nature of the questioning. Similarly, proxy methods can be expensive and may be constrained by the explanatory power of the available data (such as data reflecting variations in house prices according to environmental attributes). At the other end of the spectrum, some of the methods based on market prices are simple and inexpensive and may be appropriate where the range of potential mitigation strategies is limited or the necessity to avoid a negative impact is not in dispute<sup>11</sup>.

This study uses the 'benefit transfer' technique in which valuations obtained from primary research conducted for other projects is applied to the project in question.

Environmental values for habitats affected by development can be categorised as being either:

- Use values, being those values derived from physical use of the environmental resource, including commercial activities, such as commercial fishing or tourism, and non-commercial activities, such as recreation; and
- Non-use values, which refer to:
  - Ecological function values: the value of the ecological services or functions provided by an environmental resource, such as provision of fish habitats and biodiversity;
  - Option values: the benefit derived from maintaining the right to use the resource without necessarily doing so;

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<sup>10</sup> IDC-EEC (2003).

<sup>11</sup> A contingent valuation study that places a low value on reliably potable drinking water is of little use if the law and community expectations mandate potable water. In a case such as this, the valuation of the negative impact of a project on drinking water supplies would best be taken as the cost of mitigating the impact or of taking actions to avert the impact such as using bottled water.

- Quasi-option values: the benefit derived from delaying a decision to develop an environmental resource to obtain better information regarding the impacts of that development on the resource;
- Vicarious use values: the value derived by individuals in knowing that others are using the environmental resource;
- Bequest values: the value of maintaining environmental values for the benefit of future generations; and
- Existence values: the value derived by members of the community from the knowledge that areas of environmental value exist.

Literature relating to the economic value of woodland communities is limited to studies that aggregated use and non-use values into a total economic value estimate.

The Sugar CRC (2002) estimated that the non-use value of Tea Tree Woodlands and Herbert Wetlands at \$24/ha/annum and \$3,600/ha/annum respectively (2010 dollars). The study utilised an economic valuation technique known as Choice Modelling to assess the willingness to pay (WTP) of Herbert (North Queensland) residents to preserve the Tea Tree Woodlands and Herbert Wetlands. The study identified that Herbert residents had a higher willingness to pay to preserve local wetlands (the Herbert Wetlands) than local dry land woodlands (the Tea Tree Woodlands).

Pepper et al (2005) undertook a valuation study of urban bushland at Hartfield Park, Forrestfield (Perth) in Western Australia. The study was a contingent valuation study based on the responses of over 500 Perth residents. The urban bushland contained within Hartfield Park represents only one third of the Hartfield Park reserve. The remaining two thirds have been developed for community uses, such as sporting fields, parking and playgrounds. The study suggested that the willingness to pay of respondents to preserve the remaining bushland at Hartfield Park ranged from between \$25 to \$70 depending on assumptions regarding the maximum willingness to pay of any individual<sup>12</sup>.

For the purposes of this assessment, a total economic value of \$200/ha/annum is adopted to value the loss of woodland habitats.

### **Indicative Value of Direct Impact on Vegetation Communities**

Approximately 5,356 hectares of woodland or heath<sup>13</sup> are to be directly impacted by the project. Based on a total economic value of \$200/ha/annum, the annual economic value of direct impacts on woodland and heath vegetation communities would be approximately \$1.1 million per annum. Based on a social opportunity cost of capital of 6%, the capitalised value of these direct impacts on woodland and heath communities would be approximately \$17.9 million.

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<sup>12</sup> The maximum willingness to pay was assumed to be capped at \$300. Other assumptions related to whether those respondents that were unwilling to pay to preserve the bushland are included or not.

<sup>13</sup> This estimate includes a small area of Bluegrass Grassland (13 hectares impacted). The valuation literature does not cover remnant grasslands, hence they have been valued at the same rate as woodlands and heath. Non-remnant Grassland has been excluded from the valuation because it is not considered to provide significant non-market values. The value of the Non-remnant Grassland is implicitly considered in the valuation of lost grazing opportunities within those grasslands.

### 5.3.2 Indicative Agricultural Production Value

The potential agricultural production value of the subject site can be implied by calculating by estimating the potential size of a grazing herd and imputing its value. Table 5.24 indicates that approximately 10,200 hectares of the subject site is non-remnant grassland, of which approximately 2,988 hectares is to be removed as a result of the project. Advice from AARC indicates that this area had been previously cleared for grazing. The remaining woodland and heath areas are unlikely to be suitable for grazing without further clearing.

Cattle would represent the highest value grazing herd. Assuming that no grazing would occur within the project area and a grazing density of one head of cattle per twelve hectares and 10,200 hectares of non-remnant grassland for grazing, the subject site could support approximately 850 head of cattle. Alternatively, assuming that grazing only ceased within Non-remnant Grassland directly impacted by the project (i.e. 2,988 hectares) and the same stocking rate as discussed above, the loss of production would be 249 head of cattle. Hence the loss of grazing production as a result of the project is likely to be between 249 head of cattle and 850 head of cattle.

Data contained in section 3.5.3 indicates a slaughter value of approximately \$1,100 per head of cattle. Based on the above estimates that the loss of potential grazing production is likely to be between 249 head of cattle and 850 head of cattle, representing a potential loss in slaughter value of between \$0.3 million and \$0.9 million per annum. Based on a social opportunity cost of capital of 6%, this represents a capitalised value of between \$4.6 million and \$15.6 million.

## 5.4 Distributional Effects of the Project

Due to the nature of the Kevin's Corner Project, the project creates significant demand for skilled blue collar workers. As such, this will cause inflationary wage prices within these sectors. As a result, competing sectors such as agriculture and population servicing sectors (e.g. automotive industry, general industry etc) are also likely to experience higher incomes. Persons renting within the area are likely to face cost pressures while household owners will benefit from an increase in asset wealth. People receiving government transfer payment and self funding retirees would not significantly benefit from the project.

## 5.5 Localised Inflation

Large resource projects can push demand well ahead of supply for a range of goods and services, leading to localised inflation. Those who remain outside the mining industry or industries servicing mining can be disadvantaged, because of a wide range of affordability issues (e.g. unaffordable rents and housing, higher costs and poor availability of services, and a loss of skilled labour to sectors offering much higher remuneration).

The most significant localised inflationary impact is likely to be felt in housing and accommodation. However, analysis contained in section 4 suggests that property market inflation has already occurred as a result of property market speculation.

Inflation in property prices can be addressed by increasing the supply of residential product. However, the risk of a slow down in the resources sector, similar to that experienced in the 1990s, militates against significant additions to the housing stock.

Localised inflation in everyday items, such as groceries, is likely to be more limited, with higher prices experienced in western communities more likely to be attributable to transport costs, rather than demand pull inflation.

## 5.6 Strategies to Mitigate Impacts

### 5.6.1 Strategies for Local Participation

There are a number of Queensland Government policies which seek to encourage local participation in major government funded projects or projects that are recipients of significant Queensland Government contributions. These policies include:

- Queensland Government Building and Construction Contracts Structured Training Policy (the 10 percent policy);
- Indigenous Employment Policy for Queensland Government Building and Civil Construction Projects (the 20 percent policy); and
- Local Industry Policy (Department of Employment, Economic Development and Innovation, 2008).

These policies typically apply to the following groups:

- Queensland Government departments;
- Recipients of building construction grants; and
- Contractors who successfully tender for Queensland Government projects.

In recognition of these policies, HGPL will provide opportunities for:

- Structured training;
- Participation in construction and operation by trainees and indigenous workers; and
- Participation in construction and operation by local suppliers and contractors.

### 5.6.2 Training & Skills Development

The *Queensland Government Building and Construction Contracts Structured Training Policy* sets a target of 10% of labour hours to be recruited from apprentices and trainees and up-skilling of the workforce.

HGPL will set the following training targets:

- Recruit 10% or more labour hours from apprentices and trainees;
- Require contractors to allocate 10% or more contracted work hours to apprentices and trainees; and
- Encourage and provide opportunities for up-skilling of employees.

### 5.6.3 Local Industry Participation

HGPL will develop a *Local Industry Participation Plan* consistent with the Queensland Government's *Local Industry Policy*. The Local Industry Participation Plan will:

- Provide details of competitive local suppliers that will be invited to tender for contract work associated with the mine construction and operation;
- Provide mechanisms for the provision of project information to local industry in an equitable and timely manner, including in-region project briefings for the procurement of contract services;
- Outline appropriate design and procurement strategies to provide equitable access to local industry; and
- Provide mechanisms for performance measurement, reporting and feedback in relation to local procurement.

## 5.7 Summary of Impacts

The Kevin's Corner Coal Project represents a major potential stimulus to the regional, state and national economies. The Project will generate significant demand for labour in both development and operational phases.

A significant quantum of on-site employment is anticipated to be satisfied by fly-in-fly-out or drive-in-drive-out workers. However, a proportion of the workforce is likely to choose to reside within the region. The demand for labour would not be exclusively limited to mine construction or operation. Project-related expenditure will stimulate significant labour demand throughout Queensland.

The Project is likely to place pressure on local and regional labour and accommodation (both housing and commercial accommodation) markets. The local area and the region have experienced rising property costs associated with growing interest in the development of resource projects within the Galilee Basin.

The Project will generate significant positive economic impacts in the form of additional exports, increased employment and demand for local and regional production. However, the Project will place growing pressure on local and regional social infrastructure and could result in localised inflation particularly in relation to wages, housing and accommodation.

The Kevin's Corner Coal Project will produce approximately 856 million tonnes (Mt) of coal for export from Queensland throughout the life of the mine, the value of these exports to the Queensland economy will be approximately \$67.8 billion. Once fully operational the coal mine, will produce between 25 Mtpa and 30 Mtpa of coal exports, equating to a value of \$2.7 billion per annum

Assuming that no grazing would occur within the project area and a grazing density of two head of cattle per hectare and 10,200 hectares of non-remnant grassland for grazing, the subject site could support approximately 20,400 head of cattle. Alternatively, assuming that grazing only ceased within Non-remnant Grassland directly impacted by the project (i.e. 2,988 hectares) and the same stocking rate as discussed above, the loss of production would be 5,976 head of cattle. Hence the loss of grazing production as a result of the project is likely to be between 5,976 head of cattle and 20,400 head of cattle.

Data contained in section 3.5.3 indicates a slaughter value of approximately \$1,100 per head of cattle. Based on estimates provided in section 5.3.2 of this report, the loss of potential grazing production is likely to be between 5,976 head of cattle and 20,400 head of cattle, representing a

potential loss in slaughter value of between \$6.6 million \$46.2 million per annum. Based on a social opportunity cost of capital of 6%, this represents a capitalised value of between \$110 million and \$374 million. However, these estimates are likely to overstate the actual value of potential production on the subject site, given they assume an optimal stocking rate of two head of cattle per hectare and that all grazing land is contiguous and provides for optimal herd management.

Approximately 5,356 hectares of woodland or heath are to be directly impact by the project. Based on a total economic value of \$3,600/ha/annum, the annual economic value of direct impacts on woodland and heath vegetation communities would be approximately \$19.3 million per annum. Based on a social opportunity cost of capital of 6%<sup>14</sup>, the capitalised value of these direct impacts on woodland and heath communities would be approximately \$321.4 million.

To encourage the development of local and regional industry capability, HGPL will develop an employment and procurement policy guided by industry standards and relevant government guidelines that will reflect:

- Maximising local employment (including work readiness if appropriate);
- Promoting Indigenous employment; and
- Employment of apprentices and trainees (including work readiness if appropriate).

Potential shortages in hard and soft social infrastructure that may result from increased local and regional population (facilitated by increased labour demand) are addressed in the social impact assessment.

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<sup>14</sup> A 6% discount rate is the standard test discount rate for Queensland Government projects.

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