

Appendix W

Economic Impact Assessment

Tarong West Wind Farm

Economic Impact Assessment (EIA)



'Gura Bulga'

Liz Belanjee Cameron

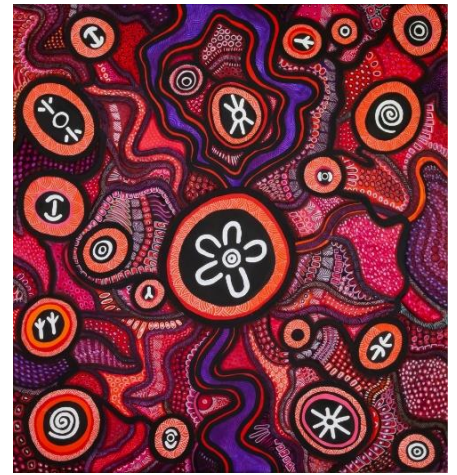
'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.



'Dagura Buumarri'

Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.



'Gadalung Djarri'

Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We pay our respects to their Elders past, present and emerging. In supporting the Uluru Statement from the Heart, we walk with Aboriginal and Torres Strait Islander people in a movement of the Australian people for a better future.

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Version No.	Date of issue	Prepared By	Approved by
1.0 Final Report	09/02/2024	AW	JN

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Executive Summary

RES Australia Pty Ltd (the Proponent) have commissioned Ethos Urban to prepare an Economic Impact Assessment (EIA) for the proposed Tarong West Wind Farm (the Project) to be located near Ironpot, in the South Burnett region of Queensland. The proposed development will be situated on a 17,500 hectares (ha) site (Project Site) which comprises six private landholdings. The Project's Development Footprint is approximately 1,062.14 ha.

The Project is proposed to have an installed capacity of up to 436.5 MW powered by up to 97 turbines. Subject to planning approval and financing, the construction phase of the Project is anticipated to start in Q4 2024 and be completed by Q1 2027.

Regional Economic Context

1. The Study Area (comprising the Local Government Areas of South Burnett, Western Downs and Toowoomba) had a resident population of 248,610 persons (2023), which is projected to reach 271,900 persons by 2036. This represents a modest annual growth rate of +0.7% over the period, compared to the Queensland growth rate of +1.4% p.a.
2. The Study Area currently has an unemployment rate of 4.3%, which is notably higher than the unemployment rate for Queensland of 3.8% (June 2023). The Study Area currently includes approximately 5,260 persons who are unemployed. South Burnett LGA's unemployment rate is 6.7%, with 1,000 persons unemployed. In this regard, construction of the Project may provide new short-term employment opportunities for the region's labour force participants (including those who are currently unemployed – subject to appropriate skills match), with a small amount of ongoing employment also supported once the facility is operational.
3. The Study Area's occupational and business structures indicate a good base exists to service the needs of the Project, including 36,480 construction-related workers (based on occupation). Additionally, 3,585 construction businesses and a further 6,565 businesses are associated with retail trade, accommodation and food services, rental, hiring and real estate services, health care and social assistance are located in the Study Area and may play important roles in supporting the needs of project workers.
4. The major regional cities/townships of Toowoomba, Dalby and Kingaroy have the capacity and labour force to service many aspects of the Project, with smaller settlements such as Jandowae, Kumbia, Nanango and Wondai are also likely to provide labour, accommodation and other general services to the Project.

Economic Impact Assessment

5. The construction phase of the Project will involve approximately \$1.5 billion in investment, of which \$150 million is estimated to be retained in the Study Area. Construction of the Project will support 170 direct and 270 indirect Full Time Equivalent (FTE) positions over the construction period. Study Area employment is estimated to average 155 FTE jobs (direct and indirect) for each month of 30-month construction phase.
6. Once operational, approximately 47 direct and indirect FTE jobs will be supported by the Project, including 19 FTE jobs located in the Study Area (for the 30-year operational phase).
7. Allowing for the Project to be carefully managed around the region's peak times for harvesting, tourism etc, and having regard for potentially concurrent infrastructure projects, accessing adequate labour supply should not present a major issue for the Project (although noting cumulative impacts below). The local employment requirement of around 155 direct and indirect FTE positions represents less than 1% of workers occupied in construction-related activities in the Study Area.
8. In terms of cumulative impacts, it is noted there are a number of planned and approved major renewable energy projects located in the Study Area. Some of these projects are scheduled to be completed or will be close to completion by the time the Project's construction phase commences; however, there is still likely to be overlap with a number of major projects (assuming they proceed with their anticipated timeframes).
9. The Project will provide participation opportunities for businesses and workers located in the Study Area, in view of the construction sector skills and resources available. This may include new opportunities for local businesses and workers previously involved in the now completed Coopers Gap Wind Farm project and the Wambo Wind Farm currently under construction.

10. The 'external' project labour requirement would be expected to generate an accommodation requirement for 70 project workers (on average) and 140 workers at the peak of construction. Currently the Study Area has capacity to house some workers in commercial accommodation (hotels, motels, cabins etc) and short-term rentals (Airbnb). However, the Study Area also has a very constrained long term rental market, with a 0.8% vacancy rate and just 18 properties currently available to the market. It is recommended that that long-term rentals be avoided as an option to accommodate project workers to ensure this limited supply remain available and affordable to local communities.
11. This accommodation analysis indicates capacity in the Study Area will be stretched to cater for 140 FTE construction workers at the Project's peak, as well as construction workers from concurrent projects seeking accommodation in the region. In view of this situation, it is recommended that the Proponent considers the development of a dedicated workers camp (which could be on-site or at a nearby location) to accommodate the majority of construction workers.
12. Non-local construction workers living in the Study Area would be expected to inject approximately \$9.7 million in additional spending to the regional economy over the 30-month construction phase.
13. The Project will only marginally affect agricultural land use, with existing farm activities continuing as normal. Approximately 127 km of new internal roads will be delivered as part of the Project, benefiting host landowners.
14. Ongoing economic stimulus associated with the operation of the Project is estimated at approximately \$185 million (over 30 years, CPI adjusted) associated with host landowner returns, operational wage stimulus and Community Fund payments. Additionally, financial benefits will accrue to South Burnett Regional Council through a significant uplift in rates returns associated with the Project Site's change in land use.
15. The Project has the capacity to supply sufficient clean energy to power approximately 170,000 homes and reduce CO₂ emissions by approximately 1M Tonnes pa.
16. The Project could also potentially support small-scale tourism initiatives, such as viewing opportunities for visitors to the region. In the longer-term, potential exists for the Project form part of organised tours to renewable facilities in the broader South Burnett region.

Net Economic Benefit Assessment

A summary of net economic outcomes is included in Table A.

Table A: Tarong West Wind Farm – Net Economic Benefit Assessment

Factor	Value
Negative Economic Outcomes	
Temporary loss of agricultural land (30 years) (Development Footprint)	1,062.14 ha
Loss of employment (includes direct and indirect jobs)	0 jobs
Positive Economic Outcomes	
Construction Phase (30-Months)	
Capital investment	+\$1.5 billion
Study Area investment (including wage stimulus)	+\$150 million (assumes 10% of total investment)
	440 FTE
	<i>Study Area jobs</i>
Construction employment (direct plus indirect jobs)	100 FTE direct on-site 55 FTE indirect off-site Total: 155 FTE
Operational Phase (30 Years)	
	47 FTE total
	<i>Study Area jobs</i>
Operational employment (direct and indirect jobs)	12 FTE direct on-site 7 FTE indirect off-site Total: 19 FTE
Operational Economic Stimulus	
Total net local economic stimulus (operational wage stimulus, Community Fund payments, landowner and neighbour lease payments) <u>Excludes</u> increased rates returns to Council).	+\$185 million (rounded)
Total Economic Benefits (Construction and Operational Phases)	+\$335 million (rounded)

Introduction

Background

RES Australia Pty Ltd (the Proponent) have commissioned Ethos Urban to prepare an Economic Impact Assessment (EIA) for the proposed Tarong West Wind Farm (the Project) to be located near Ironpot, in the South Burnett region of Queensland.

The Project will be situated on a 17,500 hectares (ha) site (Project Site), comprised of six private landholdings. The Project is proposed to have an installed capacity of up to 436.5 MW powered by up to 97 turbines, and represents a total anticipated project investment of \$1.5 billion. Subject to planning approval and financing, construction of the Wind Farm is anticipated to start in Q4 2024 and be completed by Q1 2027.

Objective

The objectives of this EIA are:

- To highlight likely local and regional economic benefits arising from the Project.
- To identify potential economic impacts associated with the Project.

This Report

This report contains the following chapters:

- Chapter 1:** Project Context
- Chapter 2:** Regional Economic Profile
- Chapter 3:** Economic Impact Assessment

1.0 Project Context

1.1 Site Location

The Project is proposed for development on large site (Project Site) located at Ironpot, some 30km west of Kingaroy in Queensland's South Burnett region.

Comprising an area of approximately 17,500 ha across five rural land holdings (with a Development Footprint of approximately 1,062.14 ha), the Project Site is situated to the east of the Diamondy State Forest and includes land in the vicinity of Chahpingah (to the north), Mannuem (to the east), and Boyneside (to the south). The Project Site is generally undulating with areas of woodland and is currently used for agricultural grazing activities. Land from the six different owners will be leased by the operator for the duration of the Wind Farm's operating period (30 years).

Kingaroy and Dalby, both regional service centres in the South Burnett and Western Downs region respectively, are located approximately 45 minutes' east and 75 minutes' south respectively (by road) from the Project Site, while Chinchilla is situated approximately 85 minutes' to the west. Toowoomba, the major service centre of the wider Darling Downs region is some 2 hours 15 minutes' by road to the south-east.

1.2 Project Description

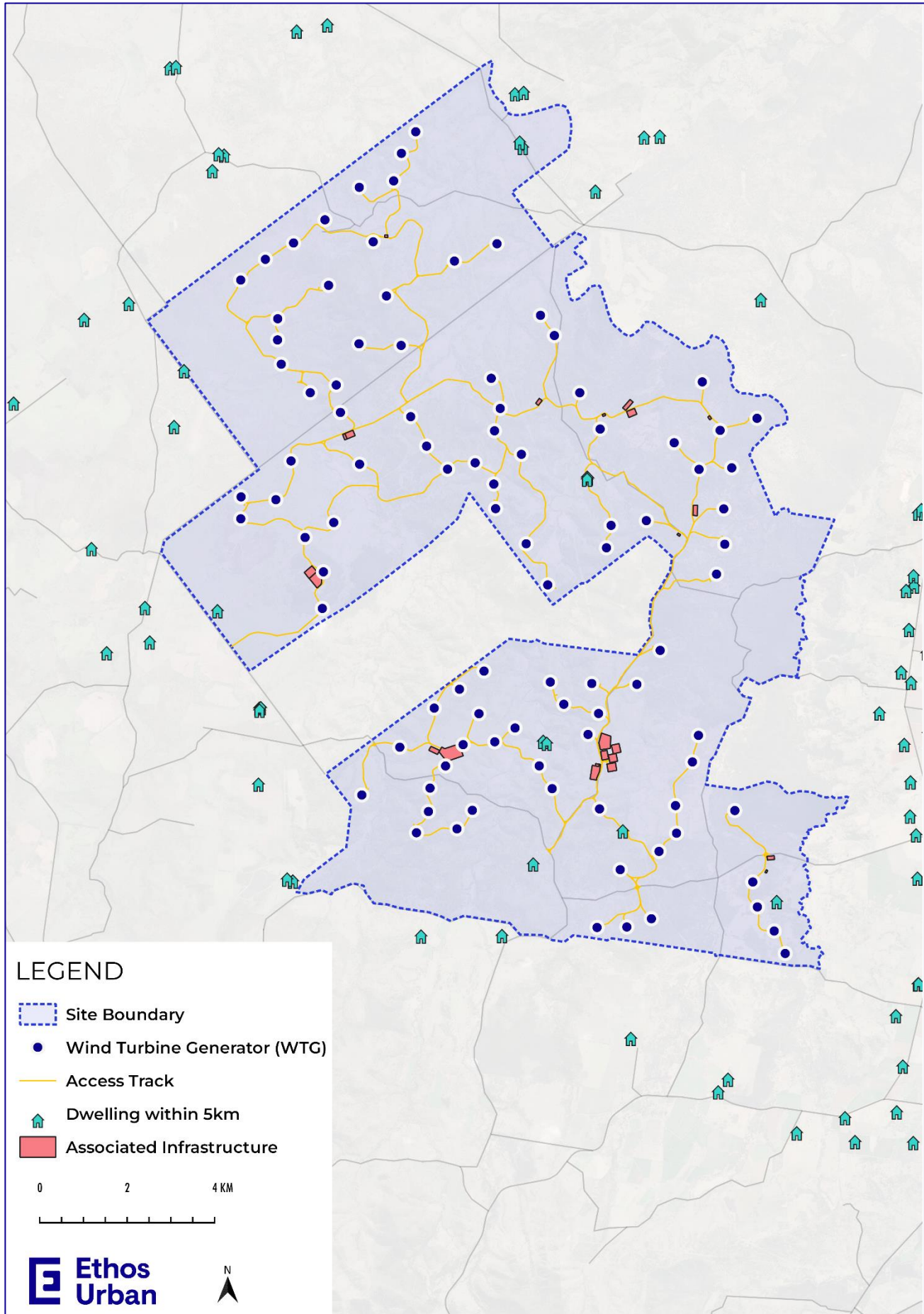
Plans for the Project include the following:

- Total installed capacity of 436.5 MW (assumed for the purposes of this report)
- Up to 97 turbines, with an operating capacity of up to 4.5 MW each
- BESS with a 100 MW capacity
- Other project infrastructure will include:
 - Approximately 127 km of access tracks
 - Overhead and underground electrical cabling
 - Wind turbine foundation and hardstand areas
 - 3 onsite substations
 - Switching station
 - 3 collector stations
 - 7 wind monitoring masts (3 permanent and 4 temporary)
 - 2 operation and maintenance facilities
- During construction temporary infrastructure will include:
 - Construction compound
 - 2 batch plants
 - 2 borrow pits
 - 6 laydown area
 - 2 washdown areas
 - Temporary site office buildings and facilities
- Turbines to be spread across land held by the six host landowners
- Construction estimated to commence in Q4 2024 (subject to planning approval and financing)
- Construction period of approximately 30 months
- Operational lifespan estimated at 30 years + two years decommissioning.

Note, the parameters outlined above may change subject to planning approval guidelines, while project financing may also influence the final project plan.

The proposed Project Site layout is outlined in Figure 1.

Figure 1 Tarong West Wind Farm - Proposed Project Site Layout



Source: Ethos Urban using QGIS

1.3 Study Area

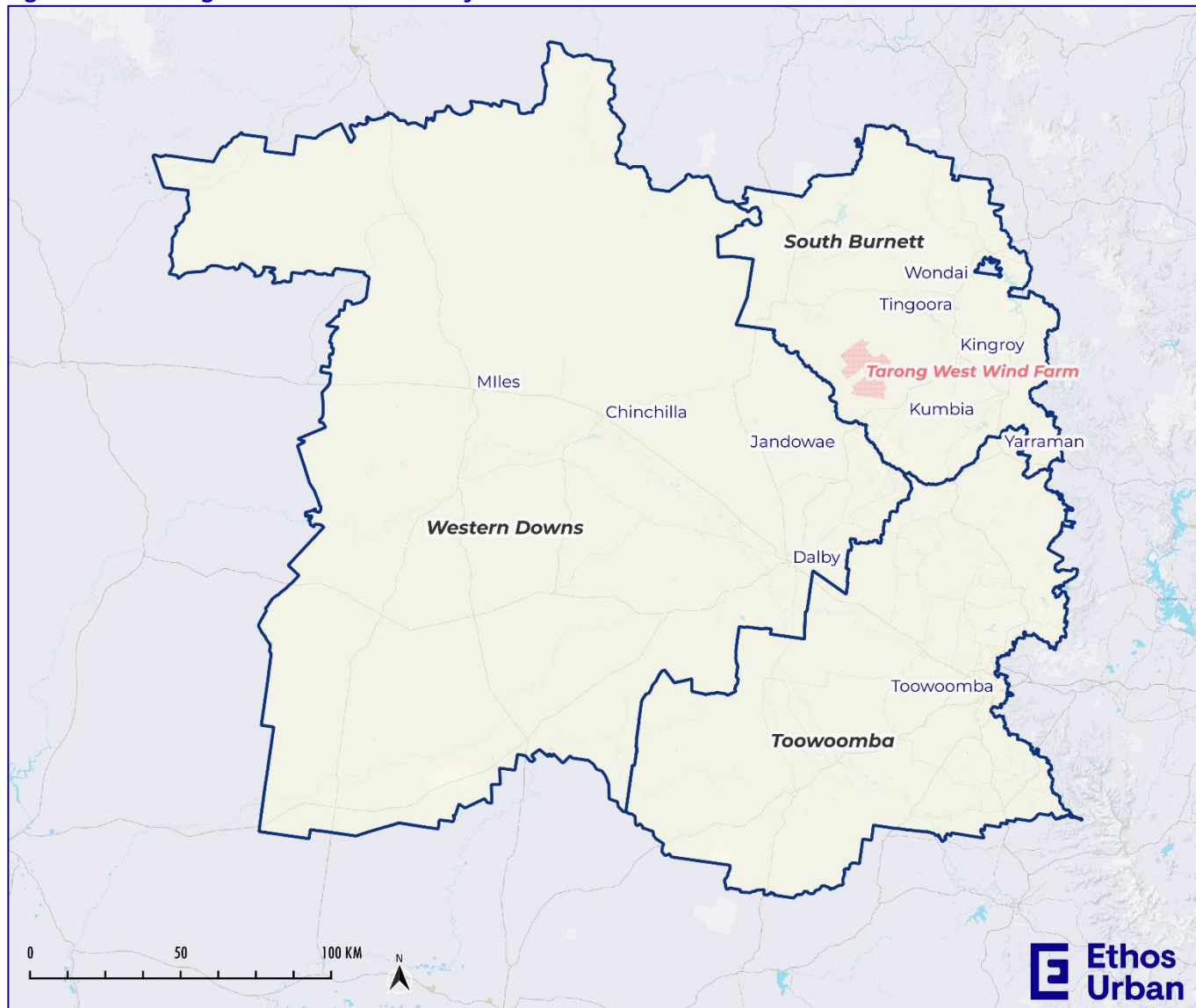
For the purposes of this assessment, a Study Area has been identified which comprises the Local Government Areas (LGAs) of South Burnett, Western Downs and Toowoomba. The Study Area includes the following townships located within a 2 hour 20 minute drive-time from the Project Site (listed in order of distance):

- Jandowae (35km)
- Kingaroy (44km)
- Tingoorra (49km)
- Wondai (56km)
- Nanango (61km)
- Dalby (68km)
- Yarraman (66km)
- Chinchilla (76km)
- Toowoomba (123km)

These townships, to varying extents, all have potential to contribute to the Project and derive economic benefits from both the construction and operational phases of the Project.

The Study Area is illustrated in Figure 2.

Figure 2 Tarong West Wind Farm Study Area



Source: Ethos Urban using QGIS

2.0 Regional Economic Profile

2.1 Population

The population of the Study Area is estimated at approximately 248,610 persons in 2023. Over the period 2023-2036 population growth in the Study Area is expected to be relatively modest at +0.7% pa (or +1,790 persons pa over 13 years), which is approximately half (52%) the growth rate forecast for Queensland as a whole over the period (+1.4% pa). Forecast population growth in the Study Area will be largely focused in and around the regional centre of Toowoomba.

These estimates, which are shown in Table 1, are based on official population forecast growth rates prepared by the Queensland Government Statisticians Office.

Table 1 Population Trends and Projections

	2016	2021	2023	2026	2031	2036	2023 to 2036
Population (no.)							
South Burnett	32,630	33,330	33,940	34,280	35,100	35,890	+1,950
Toowoomba	164,170	175,320	179,990	184,250	192,190	199,950	+19,960
Western Downs	34,050	34,360	34,670	34,950	35,560	36,060	+1,390
Study Area	230,840	243,000	248,610	253,480	262,840	271,900	+23,290
Average Annual Growth (no.)							
South Burnett		+140	+310	+110	+160	+160	+150
Toowoomba		+2,230	+2,340	+1,420	+1,590	+1,550	+1,540
Western Downs		+60	+160	+90	+120	+100	+110
Study Area		+2,430	+2,810	+1,620	+1,870	+1,810	+1,790
Average Annual Growth (%)							
South Burnett		+0.4%	+0.9%	+0.3%	+0.5%	+0.4%	+0.4%
Toowoomba		+1.3%	+1.3%	+0.8%	+0.8%	+0.8%	+0.8%
Western Downs		+0.2%	+0.5%	+0.3%	+0.3%	+0.3%	+0.3%
Study Area		+1.0%	+1.1%	+0.6%	+0.7%	+0.7%	+0.7%
Queensland		+1.5%	+1.9%	+1.7%	+1.4%	+1.3%	+1.4%

Source: ABS Regional Population Growth (Cat:3218.0) 2023 release, ABS; Queensland Government population projections, 2023 edition

Note: Figures rounded

2.2 Labour Force

The Study Area's labour force totalled 122,930 persons in June 2023, including 5,260 persons who were unemployed, as shown in Table 2. At that time, the Study Area had an unemployment rate of 4.3%, which is notably higher than the Queensland unemployment rate of 3.8%. South Burnett LGA's unemployment rate (6.7%) is significantly above the state average, with 1,000 persons registered as unemployed.

The Project will require an average of approximately 170 Full Time Equivalent (FTE) workers during the 30-month construction period, with many of these positions likely to be sourced locally, where possible. The Project therefore provides new short-term employment opportunities for The Study Area's labour force participants, including existing unemployed persons, subject to appropriate skills match.

Labour supply factors are further explored in Chapter 3.

Table 2 Study Area Labour Force, June 2023

LGA/Area	Labour Force	Unemployed	Employed	Unemployment Rate
South Burnett	14,980	1,000	13,980	6.7%
Toowoomba	89,390	3,650	85,740	4.1%
Western Downs	18,560	610	17,950	3.3%
Total Study Area	122,930	5,260	117,670	4.3%
Queensland	2,893,100	109,100	2,784,000	3.8%

Source: *Small Area Labour Markets 2023*, Australian Government (Jobs and Skills Australia), June 2023

Note: Figure rounded

2.3 Occupational Structure

The skills base of the Study Area is reflected in its occupational structure, as shown in Table 3. ABS Census data for 2021 shows 34.4% of Study Area workers were occupied in activities generally associated with the types of skills required for the construction of wind farm projects. These occupations include technicians and trades workers, machinery operators & drivers, and labourers.

The Study Area's representation in these occupations is well above the State average of 30.8%, indicating a generally suitable occupational base for the proposed Project.

In total, 36,480 workers in the Study Area are involved in construction-related activities, highlighting the strong worker base available to support the Project.

Table 3 Study Area Occupational Structure, 2021

Occupation	Study Area		Queensland
	(no.)	(%)	(%)
Managers	14,290	13.5%	12.6%
Professionals	18,960	17.9%	21.6%
Technicians and Trades Workers	15,460	14.6%	13.8%
Community and Personal Service Workers	13,640	12.9%	12.4%
Clerical and Administrative Workers	12,670	12.0%	12.8%
Sales Workers	8,910	8.4%	8.7%
Machinery Operators and Drivers	7,510	7.1%	6.9%
Labourers	13,510	12.7%	10.2%
Inadequately described	1,040	1.0%	1.1%
Total	105,990	100.0%	100.0%

Source: ABS Census of Population and Housing 2021; TableBuilder Pro

Note: Figures rounded

2.4 Business Structure

A tangible benefit of a major investment project, is the extent to which local businesses can participate through project contracts and other service provision.

ABS Business Count data for June 2023 (latest available) shows the Study Area includes 3,585 construction businesses or 14.3% of all businesses located in the Study Area. This data, which is outlined in Table 4, indicates a reasonable presence in the Study Area of the types of firms that are likely to be well-placed to service aspects of the Project. This opportunity is explored in more detail in Chapter 3.

Although construction-related businesses will likely be the main beneficiaries of the Project, businesses in other sectors supporting the Project (directly and indirectly) are also likely to benefit. These include businesses associated with retail trade, accommodation and food services, rental, hiring and real estate services, and health care and social assistance. These sectors make up approximately 26.2% or 6,565 businesses located in the Study Area and their services will play an important role in supporting the needs of project workers, especially those relocating to the Study Area to work on the Project.

Table 4 Business Structure – Study Area, 2022

Industry	Non employing	1-19 Employees	20-199 Employees	200+ Employees	Total Business (no.)	Total Business (%)
Agriculture, Forestry and Fishing	6,005	1,063	214	43	7,325	29.3%
Mining	44	28	10	6	88	0.4%
Manufacturing	458	207	159	66	890	3.6%
Electricity, Gas, Water and Waste Services	26	11	10	0	47	0.2%
Construction	1,938	1,253	343	51	3,585	14.3%
Wholesale Trade	314	153	93	21	581	2.3%
Retail Trade	561	373	312	50	1,296	5.2%
Accommodation and Food Services	202	259	196	69	726	2.9%
Transport, Postal and Warehousing	1,097	334	112	26	1,569	6.3%
Information Media and Telecommunications	64	32	6	3	105	0.4%
Financial and Insurance Services	500	186	47	4	737	2.9%
Rental, Hiring and Real Estate Services	2,111	243	81	11	2,446	9.8%
Professional, Scientific and Technical Services	852	520	176	39	1,587	6.3%
Administrative and Support Services	428	207	79	47	761	3.0%
Public Administration and Safety	15	13	7	13	48	0.2%
Education and Training	118	76	39	12	245	1.0%
Health Care and Social Assistance	676	440	179	65	1,360	5.4%
Arts and Recreation Services	166	65	31	10	272	1.1%
Other Services	624	529	150	15	1,318	5.3%
Currently Unknown	23	3	0	0	26	0.1%
Total	16,222	5,995	2,244	551	25,012	100.0%

Source: Counts of Australian Businesses June 2022 (Cat: 8165.0), ABS

Note: Figures rounded

2.5 Township Services Capacity

Accommodation

An audit has been undertaken of commercial and private accommodation located within the Study Area's major townships. These townships generally represent a maximum drivetime of 75-minute from the Project Site.

These selected townships have a good supply and mix of accommodation including motels, hotels, guest houses, caravan/holiday parks (including cabins). Most accommodation options are located in Dalby and Kingaroy (refer to Table 5), which are within reasonable proximity to the Project Site and provide regional-level services; however, there are also more limited options in smaller townships located closer to the Project Site including Nanango, Wondai and Yarraman. The following accommodation was available in the surrounding townships as of February 2024:

- 650 hotel, motel and serviced apartment rooms
- 130 cabins (caravan/holiday parks)

Table 5 Commercial Accommodation in the Study Area, February 2024

Surrounding township	Establishments	Rooms	Cabins	Total
Dalby	15	288	29	317
Kingaroy	14	232	57	289
Nanango	6	74	30	104
Wondai	7	38	0	38
Yarraman	2	20	17	37
Total	44	652	133	785

Source: Ethos Urban; Trip Advisor

Private Accommodation

Private accommodation is often used to support construction worker needs for major projects. This could be through leasing of holiday homes and investment properties, either privately (including Airbnb), or through real estate agents.

The Study Area has a slightly higher share of unoccupied dwellings (10.5%) when compared to the average for Queensland (9.3%). Western Downs and South Burnett municipalities have a significant share of unoccupied dwellings (17.9% and 13.7% respectively) or a total of 4,600 dwellings (rounded). Shared private housing accommodation is one potential option for project workers, with some of the Study Area's unoccupied dwellings having the potential to enter the housing market to support the construction phase of the Project.

Table 6 Unoccupied Dwellings – Study Area, 2021

LGA / Area	Occupied Dwellings		Unoccupied Dwellings	
	no.	%	no.	%
South Burnett	12,685	86.3%	2,010	13.7%
Toowoomba	64,650	91.7%	5,848	8.3%
Western Downs	11,901	82.1%	2,595	17.9%
Total Study Area	89,236	89.5%	10,453	10.5%
Queensland	1,869,462	90.7%	192,393	9.3%

Source: ABS, Census of Population and Housing, 2021

Note: Figures rounded

Large renewable energy projects, such as the proposed Project, tend to harness the local rental market with a majority of day-to-day workers living in shared accommodation. As a result, local rental markets tend to reach or almost reach full utilisation and at times require further supply be brought to the market. This can be achieved through homeowners offering their fully furnished homes for rent during the construction phase. It is likely this situation would occur to some extent during the construction phase of the Project, based on the constrained nature of the local rental market.

Data sourced from www.airdna.co shows approximately 425 active short-term rentals are currently advertised on Airbnb and Vrbo (or have been actively advertised in the past month) in the Study Area as of February 2024. These active rentals have an average of 2.3 bedrooms per rental. Therefore, in the order of 978 rooms are currently present in the Study Area through the short-term rental market. Generally, Airbnb and similar offerings generate a 65% annual occupancy rate, indicating 150 rentals and 340 rooms could be available to the market at any one time.

However, the long-term rental market is very tight with just 177 properties available for rent in the Study Area representing a vacancy rate of just 0.8%. According to SQM Research data, only 19 properties are available in Kingaroy, Nanango and Dalby (combined) as of December 2023. In view of this situation, the use of long-term rental accommodation for project workers could result in a shortage of established (long-term) rental supply putting upward pressure prices and the potential for local renters to be priced out of the market.

Township services

Kumbia

Kumbia is a small village of approximately 200 persons (2021) located 35 minutes' drive from the Project Site. The limited provision of services includes the Kumbia Hotel (pub), Kumbia Newsagency and General Store, and a United Service Station.

Kingaroy

Kingaroy is the commercial service centre for South Burnett Region and is situated approximately 45 minutes' drive from of the Project Site. The township had a population of 10,380 persons (rounded) in 2021. Kingaroy is likely to play an important role in accommodating Project workers and may also provide other small-scale services to support the Project. Kingaroy's services include:

- Numerous **accommodation options**, including motels and caravan parks, as well as bed and breakfasts (refer to Table 5).
- A range of **retail services**, including the internal shopping centre Kingaroy Shopping World, which includes a BIG W, a full-line Woolworths supermarket and 45 speciality stores; as well as the supermarkets Aldi and IGA SUPA.
- **Industry and construction services**, including freight operators – Kingaroy Freight Express and South Burnett Transport; Auto mechanics (various); Hy-Tec Concrete and Aggregates (construction aggregate provider); Hams Crane Hire (hire company); AMG Electrical (industrial and commercial electricians); John Proven Building (industrial and commercial builder).
- **Medical services**, Kingaroy Hospital, which includes accident and emergency, maternity, outpatient, pathology, renal dialysis, surgery and X-ray services.

Nanango

Nanango, with a population of around 3,710, is located approximately a 40 minutes' drive from the Project Site. The township provides a limited range of services, including:

- **Accommodation**, Nanango Star Hotel, Nanango Fitzroy Hotel, Twin Gums Caravan Park and Nanango Caravan & Motorhome Park.
- **Retail services**, including a SUPA IGA (supermarket) and some speciality retailers (cafes, bakery's etc).
- **Industry and construction services**, including Offyaroka Mini Excavator Hire (construction hire); auto mechanics; South Burnett Earth Moving and English Wayne Earthmoving (earthmoving companies).
- **Medical services**, including a small hospital (Nanango Hospital) with an emergency department, general wards and limited X-ray.
- A small **airport** (Nanango Airport).

Jandowae

Jandowae, with a population of 1,200 persons (rounded) is a small township located approximately 45 minutes' drive from the Project Site. The township's relatively limited range of services includes a SPAR (supermarket), Jandowae Hotel Motel, Exchange Hotel (pub), AAOK Jandowae Accommodation Park, Jandowae Pharmacy and a limited range of cafes and other speciality retailers.

Wondai

Wondai, located approximately 60 minutes' drive from the Project Site, is a township of 1,810 residents (rounded) which provides a limited range of services principally serving the local catchment. Services include:

- **Accommodation**, Wondai Colonial Motel, Wondai Accommodation Units & Villas, Warana Hotel Motel and Burnett South's Up Country B&B.
- **Restaurants**, Wondai Hotel and Cellar.
- **Retail services**, including a small IGA (supermarket), Wondai Bakery, Ryan's Butchery amongst other speciality retailers.

- A limited range of **Industry and construction services**, including Hy-Tec Concrete and Aggregate (construction materials) and Wondai Electrical Services (commercial electricians).
- **Medical services**, Wondai Hospital, small hospital with a primary level emergency department.
- A small **airport** (Wondai Airport).

Dalby

Dalby, with a population of approximately 12,800 persons (2021), is the regional centre for the Western Downs Region and has potential to provide some key services to support the Project. Dalby is located approximately 68km south of the Project Site, or a 75 minutes' drive. Dalby's services include:

- A broad range of **accommodation** options, including O'Sheas Windsor Hotel, Dalby Manor Motor Inn, Dalby Parkview Motel, The Australian Hotel Motel, Dalby Tourist Accommodation and Dalby Homestyle Accommodation, amongst others.
- **Retail services**, including the internal shopping centre Dalby Shopping World which is anchored by Big W and a full-line Woolworths (supermarket) as well as 40 speciality stores; cafes and restaurants;
- **Entertainment facilities**, hotels, clubs, sports and recreational facilities.
- **Commercial services**, major banks and financial institutions, real estate agents, employment agencies
- A broad range of **industry and construction services**, including freight and transport services (40 providers); auto mechanics; steel fabricators; construction equipment hire (Brooks Hire Services, Dalby Price-Rite Hire, Bowden's Transport & Crane Hire), concreters (Hansons concrete), engineering services (Drewsy's Engineering, RMA Engineers), trade supplies (Mitre Ten) and fuel supplies (United Petroleum).
- **Medical and emergency services**, including Dalby Hospital, with a 24-hour accident and emergency department.

Chinchilla

The township of Chinchilla, with a population of 7,160 persons, is located 76km east of the Project Site or approximately 85 minutes' drive time. Chinchilla has a regional service role geared to supporting the surrounding agricultural and CSG industries. The township benefited from CSG construction boom which peaked from 2012 to 2015, supporting businesses in accommodation and retail, and construction/CSG- aligned businesses located in the town. CSG projects in the Chinchilla area have been primarily undertaken by QGC and/or Origin Energy.

Key services are outlined as follows:

- A range of **accommodation options** including a number of motels, caravan parks/tourist parks, and three hotels (The Commercial Hotel, Tattersalls Hotel, and the Club Hotel). Note: at 1 hour 25 minutes' drive time from the Project Site, Chinchilla is likely too far away to be a primary location for non-local workers to seek accommodation.
- **Retail services**, including two full-line supermarkets (Woolworths and Drakes) and a small FoodWorks; as well as a range of food catering outlets including cafes, restaurants, fast food restaurants (Domino's Pizza, MacDonald's and KFC).
- **Commercial services**, of various functions including legal (solicitors) and real estate agents.
- An **expanded range of service industry** geared to CSG, mining and construction, including the following:
 - QGC (offices and depot)
 - CSH Mining (depot)
 - Boral Concrete (depot)
 - CPB (depot)
 - Weatherford (geotechnical and construction)
 - Hire businesses: Avis and Coates Hire
 - DFI (energy and construction)
 - A range of additional business aligned to construction, fabrication/engineering, earthmoving, agriculture etc.
- **Chinchilla Hospital**, which provides a broad range of general services, a limited range of specialist services, and a range community and allied health aspects.
- A small **airport** (Chinchilla Airport).

Toowoomba

Toowoomba is one of Queensland's major regional centres with a population of approximately 110,040 persons in 2021. Toowoomba is located approximately 123km to the south-east of the Project Site – a drive time of approximately 2 hours and 15 minutes. Given its large scale and resources, Toowoomba would be expected to provide significant labour and support services to the Project.

Toowoomba's services include the following:

- Significant **accommodation services** (although noting these would be located too far to service the Project Site)
- **Regional-level retail services**, including Grand Central Shopping Mall, Clifford Gardens Shopping Centre and High Street Shopping Centre.
- **Entertainment** – hotels, clubs, sports and recreational facilities.
- **Region level commercial services**, including all major banks and financial institutions, major real estate agents, and a wide range of employment agencies.
- **Industry and construction services** including a significant number of civil contractors, freight and transport services, auto mechanics, steel fabricators, construction firms, concreters and engineering services etc, major trade suppliers, major fuel outlets
- **Regional-level medical and emergency services**, including Toowoomba Hospital (with a 24-hour accident and emergency department), and full ambulance, police fire and rescue services
Toowoomba Regional Airport (which has daily flights to/from Brisbane, Sydney and Melbourne).

2.6 Conclusions

The key findings of this Regional Economic Profile are as follows:

1. The Study Area (comprising the Local Government Areas of South Burnett, Western Downs and Toowoomba) had a resident population of 248,610 persons (2023), which is projected to reach 271,900 persons by 2036. This represents a modest annual growth rate of +0.7% over the period, compared to the Queensland growth rate of +1.4% p.a.
2. The Study Area currently has an unemployment rate of 4.3%, which is notably higher than the unemployment rate for Queensland of 3.8% (June 2023). The Study Area currently includes approximately 5,260 persons who are unemployed. South Burnett LGA's unemployment rate is 6.7%, with 1,000 persons unemployed. In this regard, construction of the Project may provide new short-term employment opportunities for the region's labour force participants (including those who are currently unemployed – subject to appropriate skills match), with a small amount of ongoing employment also supported once the facility is operational.
3. The Study Area's occupational and business structures indicate a good base exists to service the needs of the Project, including 36,480 construction-related workers (based on occupation). Additionally, 3,585 construction and a further 6,565 businesses are associated with retail trade, accommodation and food services, rental, hiring and real estate services, and health care and social assistance all of which are likely play important roles in supporting the needs of project workers.
4. Worker accommodation may need to be sourced from a number of markets including commercial accommodation (motels, hotels, cabins) and short-term private accommodation (Airbnb) where some capacity exists. However, the long-term private rental market is very constrained (less than 1.0% vacancy rate) and is unlikely to form part of the accommodation mix.
5. The major regional cities/townships of Toowoomba, Dalby and Kingaroy have the capacity and labour force to service many aspects of the Project, with smaller settlements such as Jandowae, Kumbia, Nanango and Wondai likely to provide labour, accommodation and other general services to the Project.

3.0 Economic Impact Assessment

3.1 Project Investment

The Proponent estimates the Capital Investment Value of the Project to be approximately \$1.5 billion. Major investment costs are associated with the purchase of towers, turbines and associated equipment; although significant investment is also required for civil, electrical and grid connection works.

A review of confidential information from constructed renewable energy projects in Australia (based on unpublished Engineering, Procurement and Construction (EPC) data) shows approximately 10%-15% of construction investment is generally retained within the host Study Area for these types of projects. Applying the lower end of this range (10%), \$150 million in wages, contracts and other service provision may be generated for the Study Area's economy over 30 months.

3.2 Project Employment

Construction Phase

Project employment is assessed in terms of direct jobs (i.e., site-related) and indirect (or flow-on) jobs in the local and wider economies (i.e., jobs that are generated through the industrial and consumption impacts of the initial investment).

Direct Construction Employment

The Proponent indicates an average of 170 direct FTE jobs will be supported every month over the construction phase, which is expected to be approximately 30-months. At the construction peak (which is likely to last for several months), on-site employment could be as high as 340 FTE workers.

Construction-related jobs are expected to be associated with a wide-range of on and off-site activities, including:

- Structural concrete foundations
- Earthworks
- Roads and access tracks
- Fencing
- Landscaping
- Vehicle and equipment hire
- Trade services
- Security
- Office cleaning
- Waste disposal
- Building maintenance
- Foundation laying
- Electrical transformer installation
- Crane works
- Cabling
- Temporary site facilities (power, water, telecommunications)
- Transport of components/workers.
- Local/ regional professional services might include:
 - Civil engineering
 - Mechanical engineering
 - Environmental engineering and specialist consultants
 - Employment agencies
 - Electrical engineering
 - Legal and financial services.

As indicated in Chapter 2, the business structure of the Study Area indicates that a good mix of these types of services is available, principally in Kingaroy, Dalby, Chinchilla and Toowoomba. It is reasonable to expect,

therefore, that local and regional businesses will be well-positioned to secure contracts during the construction phase of the Project.

Indirect Construction Employment

In addition to direct employment, significant employment will be generated indirectly through the employment multiplier effect. By applying an industry-standard multiplier for the construction industry of 1.6 (based on ABS Type B multipliers), the Project is estimated to generate an additional 270 FTE jobs (on average) over the construction period.

Indirect or flow-on jobs (which captures industry and consumption effects) include those supported locally and in the wider economy (including in other states), as the economic effects of the capital investment flow through the economy. Indirect employment creation in local and regional economies would include jobs supported through catering, accommodation, trade supplies, fuel supplies, transportation, food and drink etc. For the purposes of this assessment, it is assumed 20% of indirect jobs or 55 FTE jobs (rounded) are supported in the Study Area.

Total Construction Employment

In summary, approximately 440 FTE jobs (170 FTE direct jobs and 270 FTE indirect jobs) are expected to be supported (on average) for every month by the Project across the 30-month construction phase.

The amount of direct local employment required for the Project is estimated by the Proponent to be approximately 100 FTE jobs (60% of total direct employment), with a further 55 FTE jobs supported indirectly within the Study Area (155 FTE jobs in total). This number of workers represents less than 1% of the Study Area's labour force occupied in construction-related activities (34,630 workers) and this should not present a constraint to labour supply for the Project.

Operational Phase

Direct Operational Employment

The Proponent indicates 12 FTE jobs will be supported locally on an ongoing basis through the operation and maintenance of the Project. These local jobs will include civil maintenance, electricians, land management and security.

Indirect Operational Employment

A number of additional jobs will also be supported indirectly through the employment multiplier effect. By applying an industry-standard multiplier for the electricity industry of 2.9 (based on ABS Type B multipliers) to the direct operational and maintenance jobs, a further 35 permanent FTE jobs (rounded) would be generated in the wider State and national economies, with some of these jobs would be generated locally through existing supply chains.

For the purposes of this assessment, it is assumed that 20% of indirect operational jobs are created in the Study Area. This equates to approximately 7 ongoing FTE positions.

Operational-related employment is for the lifetime of the Project (i.e., 30 years) and represents new long-term employment opportunities at a local, regional and national level.

Total Operational Employment

In summary, approximately 47 FTE operational jobs (12 FTE direct and 35 FTE indirect) will be supported by the Project, including 19 FTE jobs (12 FTE direct and 7 FTE indirect) in the Study Area.

3.3 Cumulative Effects Assessment

The Project may need to compete for labour, accommodation and other resources with other proposed major infrastructure projects in the Study Area. Identified projects are included in Table 8.

It is important to note that the expected year of completion is subject to change but some of the projects listed in Table 8 may be completed or close to completion by the time the construction phase of the Tarong West Wind Farm project commences (late 2024). This will reduce the potential for significant cumulative impacts; however, some overlap with other projects is likely resulting in competition for labour, accommodation and project services.

Table 7 Study Area Major Energy Projects

Project Name	Capacity	Expected Year of Completion
Bulli Creek Solar Farm	2.5 GW	2028
Macintyre Wind Farm	1,026 MW	2024
Warhook Solar Farm	200MW	2026
Wambo Wind Farm	500MW & 50MW/200mWh of battery storage	2025
Edenvale Solar Park	204 MW	2024
Kumbarilla Renewable Energy Park Stage 2	100MWp solar farm & utility scale green H2 production facilities with 80MW electrolysis.	2025
Everleigh Solar Park	139MW	2025

Source: Cordell Connect

New Acland Open Cut Coal Mine Expansion. A \$560 million (Stage-3) expansion of the New Acland Coal mine was recently approved by the Queensland State Government (August 26th, 2022). It is expected that 5.1 mega tonnes pa will be extracted. 300 construction and 400 ongoing jobs will be required to support the project. The construction phase of the mine expansion project started in late 2022 and is likely to be completed prior to the Tarong West project construction phase commencing. Operational workers are likely to be sourced from those already working/or formerly working at the mine.

3.4 Industry and Business Participation Opportunities

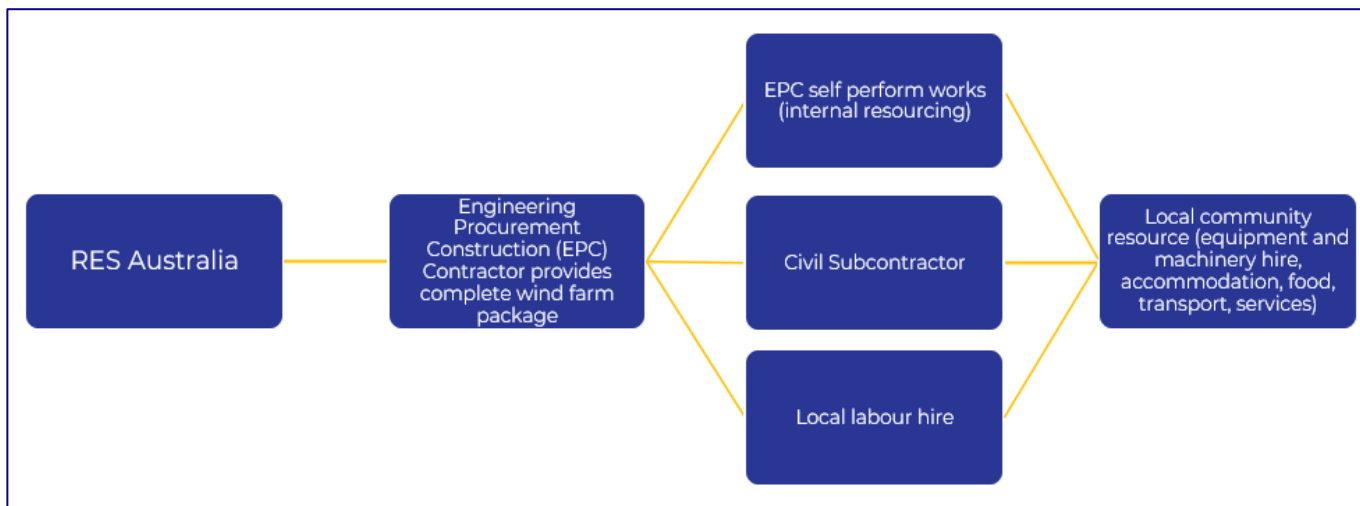
In terms of cost efficiencies (lower transport, labour costs etc), many large construction projects located in regional areas are, where possible, serviced locally or from within the immediate region.

As identified above, the Study Area comprises approximately 3,585 construction firms and many other businesses associated with activities likely to be required for the Project, including transport operators, electrical engineers, trade suppliers, vehicle and machinery hire, auto mechanics etc.

Quarry material is proposed to be sourced from local quarries (exact quarries are to be confirmed and other material/items will be sourced locally where applicable and achievable. However, many specialist services will need to be sourced from outside the Study Area (e.g. Brisbane, interstate), which is typical with major utility-scale renewable energy projects, where capacity does not exist in the immediate region. Overall, direct and supply chain services to support the construction phase of the Project are expected to be widely dispersed.

While procurement will be decided once the Project has been fully approved and financed, the Proponent's general approach is outlined in Figure 3.

Figure 3 RES Australia's General Procurement Approach (Example only)



Source: RES Australia

3.5 Housing and Accommodation Sector Assessment

Information provided by the Proponent indicates that up to 70 FTE non-local staff (on average) may need to be accommodated in the region during the Project's construction phase. However, at the Project's peak double this number (140 FTE workers) may need to be temporarily accommodated. These staff will include occupations such as general management, project management, supervising engineers and other specialist employees. Contract lengths will vary. This highlights the need for a number of types of accommodation which would be expected to range from higher-end options for professional staff on longer contracts, to convenient low-cost options for those on short-term contracts.

As highlighted in Chapter 2, the Study Area has a capacity of 785 commercial accommodation rooms/cabins in locations within a 75 minute drive of the Project site (i.e. excluding Chinchilla and Toowoomba). Assuming each non-local worker (140 FTE workers) requires individual accommodation, 18% of this more localised accommodation stock would be required at peak times to service the Project. It is estimated 25% of rooms (200 rooms) are vacant in the Study Area throughout the year, however, this is likely to be lower during key holiday seasons. This 140 room peak requirement may be lower, noting some construction workers will prefer to share private short/ long-term rentals or stay caravan parks or with family or friends. However, when considered with potential concurrent infrastructure projects in the region, the Project does pose a risk of consuming valuable commercial accommodation needed to support tourism and other key visitor sectors (business, agriculture etc).

Currently the Study Area has 425 active short-term rentals, yielding approximately 980 rooms. Assuming a typical occupancy rate of 70% for this type of accommodation, 150 rentals and 340 rooms might be available to the market at any one time. However, this available supply may be much less during peak visitor seasons which could lead to a shortage of accommodation should project workers occupy these short-term rentals in large numbers.

The Study Area also has a very constrained long term rental market, with a 0.8% vacancy rate and just 19 properties currently available to the market. It is recommended that that long-term rentals be avoided as an option to accommodate project workers to ensure this limited supply remain available and affordable to local communities.

Overall, this data indicates that accommodation capacity in the Study Area will be stretched to cater for 140 FTE construction workers at the Project's peak as well as construction workers from concurrent projects seeking accommodation in the region.

In view of this situation, it is recommended that the Proponent consider the development of a dedicated workers camp (which could be on-site or at a nearby location) to accommodate the majority of construction workers.

Should a worker's camp be developed to service the Project, this would result in further investment and jobs during the facility's construction. Importantly, the camp's operation is likely to significantly reduce pressure on the Study Area's commercial accommodation and rental markets.

3.6 Local Wage Spending Stimulus

The Proponent estimates that 40% of the 170 FTE direct construction jobs (i.e. 70 FTE jobs) are likely to be sourced from outside the Study Area, particularly specialist and management positions.

This level of employment would equate to \$12.9 million in post-tax wages (2023 dollars) on the basis that each non-local worker is employed for 30 months (on average) and earns the average construction wage of \$101,000 pa (source: ABS, *Average Weekly Earnings 6302.0 – Construction Industry, Full Time Adult Ordinary Time Earnings*, November 2022) and a tax rate of 25%.

A considerable portion of these wages would be spent in the Study Area, where the workers will be based. An estimated \$9.7 million in wages (2023 dollars) would likely be directed to local and regional businesses and service providers during the construction period. This estimate is based on reference to the ABS *Household Expenditure Survey* which indicates that approximately 75% of post-tax wages are likely to be spent by workers in the regional economy in view of the wide range of goods and services available in the Study Area. This spending would include the following:

- Housing expenditure, including spending on accommodation at hotels, motels, caravan/holiday parks, B&Bs, and private rental dwellings
- Retail expenditure, including spending on supermarket items, clothing, books, homewares etc
- Recreation spending associated with day trips and excursions, gaming (lottery, sports betting, etc), purchases in pubs and clubs (although noting that expenditures at restaurants is included in the retail category)
- Personal, medical and other services, such as GP fees and local prescriptions, fuel, vehicle maintenance and so on.

This level of personal spending would generate the equivalent of approximately 48 FTE jobs in the services sector (based on 1 job allocated for every \$200,000 of induced spending), supporting jobs in the Study Area associated with retail, accommodation, trade supplies, cafes and restaurants etc. These jobs are included in the 'indirect employment' estimates outlined in Section 3.2 above.

3.7 Agricultural Assessment

The impact of the Tarong West Wind Farm on agricultural activity is likely to be small, due to the following factors:

- Only a very small proportion of agricultural land, approximately 6% of the 17,500ha site area, will be lost to permanent infrastructure e.g. internal access roads, siting of turbines and other infrastructure requirements.
- The land is principally used for grazing associated with beef production, and this activity can continue as normal within the Project Site (minus the share of land required for permanent infrastructure).
- An Aviation Assessment has been completed for the Project and identified no material issues.

It is also important to recognise benefits to host landowner properties from the Project through improved access facilitated by 127 km of new internal roads which will assist in improving farming efficiencies including minimising soil compaction associated with bulk stock movements. The improved access may also reduce bushfire risks across the land landholdings decreasing the likelihood of loss of buildings, machinery, livestock, fencing etc.

3.8 Local Roads

In order to facilitate the construction of the Project, the Proponent anticipates the need to update sections of the following Local roads:

- Mannuem Road,
- Ironpot Road,
- Nord's Road
- Red Tank Road

The Proponent will negotiate a road infrastructure agreement to cover the project's impact to roads.

3.9 Ongoing Economic Stimulus

Landowners

Landowners leasing their land to host wind farm infrastructure will receive annual lease payments from the proponent/operator. Additionally, some neighbouring landowners will also receive annual payments. Details of these payments are confidential between the Proponent and host/neighbouring landowners. These payments will continue for 30 years (indexed to CPI).

A portion of these lease revenues are likely to be reinvested back into local farms and agricultural activities, while other lease revenues are likely to support local and regional businesses through individual and household consumption.

Wage Stimulus

An estimated 19 FTE permanent local jobs (direct and indirect) will be created through the operational phase of the Project (refer to section 3.2), and wage spending associated by these additional jobs will benefit local businesses and communities. The extent of retained local spending has been calculated in line with the methodology outlined in section 3.6 and equates to \$1.2 million pa (2023 dollars) in Year 1 of operations.

Council Rates Revenue

Unlike other states (such as Victoria), Queensland does not currently have in place a legislative framework to guide rates payable for electricity generating facilities. Revenues payable to South Burnett Regional Council associated with the operation of the Project will be guided by Council's Rates Schedule.

Under Council's current rates schedule (for 2022/23), wind farms over 200MW in size (such as the proposed Project) would be required to pay 1.98750 cents in the dollar (based on valuation) compared to 1.08480 in the dollar payable for rural land (based on valuation) used for primary production purposes. The change in land use from primary production to clean energy production, is therefore likely to result in a significant uplift in rates revenue for South Burnett Council, which could be used to invest in infrastructure and services and/or reduce the general rates burden across the municipality.

Community Fund

The Proponent has indicated it will provide community payments for the operating life of the Project (30 years). These payments will be linked to CPI and may take the form of a Community Fund, which will provide grants to local organisations/programs under a formal management arrangement. The value of the community fund is expected to be finalised once approval from the State has been granted.

Total Operational Stimulus

The combined economic stimulus to the Study Area from landowner returns and wage stimulus (plus the final Community Fund once established) is estimated at approximately \$185 million over 30 years (includes adjustment for CPI @ 3.0% PA). Note, this value excludes council rates payments.

3.10 National Grid Supply and Environmental Benefits

With a proposed installed capacity of up to 436.5 MW, the Tarong West Wind Farm has the potential to provide sufficient renewable energy to support the annual electricity needs of the equivalent of approximately 170,000 households, according to information provided by the Proponent.

In a regional context, the Study Area currently contains approximately 100,00 dwellings (ABS Census 2021); therefore, the Tarong West Wind Farm has the potential to provide approximately 2 times the annual electricity requirements of the Study Area, highlighting the importance of the facility from a clean electrical generation perspective.

The Proponent estimates at full operations, the Tarong West Wind Farm will result in the reduction of 1M tonnes of CO₂ pa, compared with the same amount of electricity generated by fossil fuels.

3.11 Tourism Opportunities

The Project Site is situated across a number of private land holdings, somewhat limiting the tourism potential of the facility. However, wind farms have traditionally attracted interest from a range of groups, and longer-term opportunities might be possible if suitable arrangements can be put in place regarding access to the site. It is also noted that there are a number of existing or planned renewable energy facilities in the broader area (e.g. Coopers Gap Wind Farm, Dulacca Wind Farm, Wambo Wind Farm) which may provide opportunities for linked tours to these facilities. Potential visitor types include:

- Environmentalist
- Researchers
- Eco-tourists
- Schools and educational institutions

Benefits of attracting new visitors to the region include increased expenditures on accommodation, food and beverage, fuel, retail, entertainment etc, all of which will support local businesses and employment, especially in townships such as Jandowae, Kumbia and Kingaroy.

3.12 Conclusions

1. The construction phase of the Project will involve approximately \$1.5 billion in investment, of which \$150 million is estimated to be retained in the Study Area. Construction of the Project will support approximately 170 direct and 270 indirect Full Time Equivalent (FTE) positions over the construction period. Study Area employment is estimated to average 155 FTE jobs (direct and indirect) for each month of 30-month construction phase.
2. Once operational, approximately 47 direct and indirect FTE jobs will be supported by the Project, including 19 FTE jobs located in the Study Area (for the 30-year operational phase).
3. Allowing for the Project to be carefully managed around the region's peak times for harvesting, tourism etc, and having regard for potentially concurrent infrastructure projects, accessing adequate labour supply should not present a major issue for the Project (although noting cumulative impacts below). The local employment requirement of around 155 direct and indirect FTE positions represents less than 1% of workers occupied in construction-related activities in the Study Area.
4. In terms of cumulative impacts, it is noted there are a number of planned and approved major renewable energy projects located in the Study Area. Some of these projects are scheduled to be completed or will be close to completion by the time the Project's construction phase commences; however, there is still likely to be overlap with a number of major projects (assuming they proceed with their anticipated timeframes).
5. The Project will provide participation opportunities for businesses and workers located in the Study Area, in view of the construction sector skills and resources available. This may include new opportunities for local businesses and workers previously involved in the now-completed Coopers Gap Wind Farm project.
6. The 'external' project labour requirement would be expected to generate an accommodation requirement for 70 project workers (on average) and 140 workers at the peak of construction. Currently the Study Area has capacity to house some workers in commercial accommodation (hotels, motels, cabins etc) and short-term rentals (Airbnb). However, the Study Area also has a very constrained long-term rental market, with a 0.8% vacancy rate and just 19 properties currently available to the market. It is recommended that that long-term rentals be avoided as an option to accommodate project workers to ensure this limited supply remain available and affordable to local communities.
7. This accommodation analysis indicates capacity in the Study Area will be stretched to cater for 140 FTE construction workers at the Project's peak, as well as construction workers from concurrent projects seeking accommodation in the region. In view of this situation, it is recommended that the Proponent considers the development of a dedicated workers camp (which could be on-site or at a nearby location) to accommodate the majority of construction workers.
8. Non-local construction workers living in the Study Area would be expected to inject approximately \$9.7 million in additional spending to the regional economy over the 30-month construction phase.

9. The Project will only marginally affect agricultural land use, with existing farm activities continuing as normal. Approximately 127 km of new internal roads will be delivered as part of the Project, benefiting host landowners.
10. Ongoing economic stimulus associated with the operation of the Project is estimated at approximately \$185 million (over 30 years, CPI adjusted) associated with host landowner returns, operational wage stimulus (and Community Fund payments once established). Additionally, financial benefits will accrue to South Burnett Regional Council through a significant uplift in rates returns associated with the Project Site's change in land use.
11. The Project has the capacity to supply sufficient clean energy to power approximately 170,000 homes and reduce CO₂ emissions by 1M Tonnes pa.
12. The Project could also potentially support small-scale tourism initiatives, such as viewing opportunities for visitors to the region. In the longer-term, potential exists for the Project form part of organised tours to renewable facilities in the broader South Burnett region.