

Preamble to break-out discussions



An Energy and Mining Strategy for *Growth State – Plan for Prosperity*

Key directions for resource sectors:

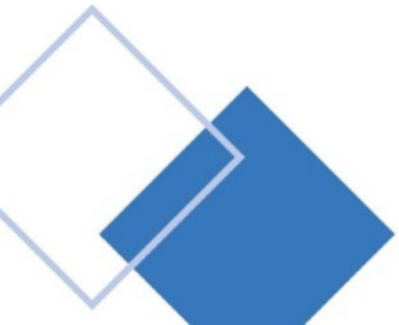
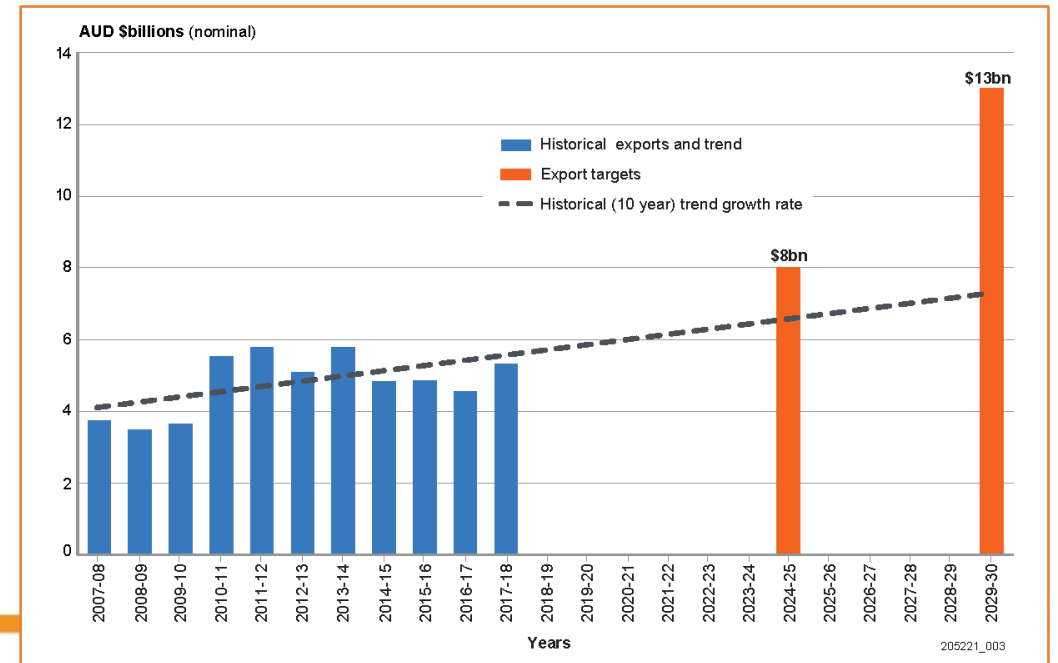
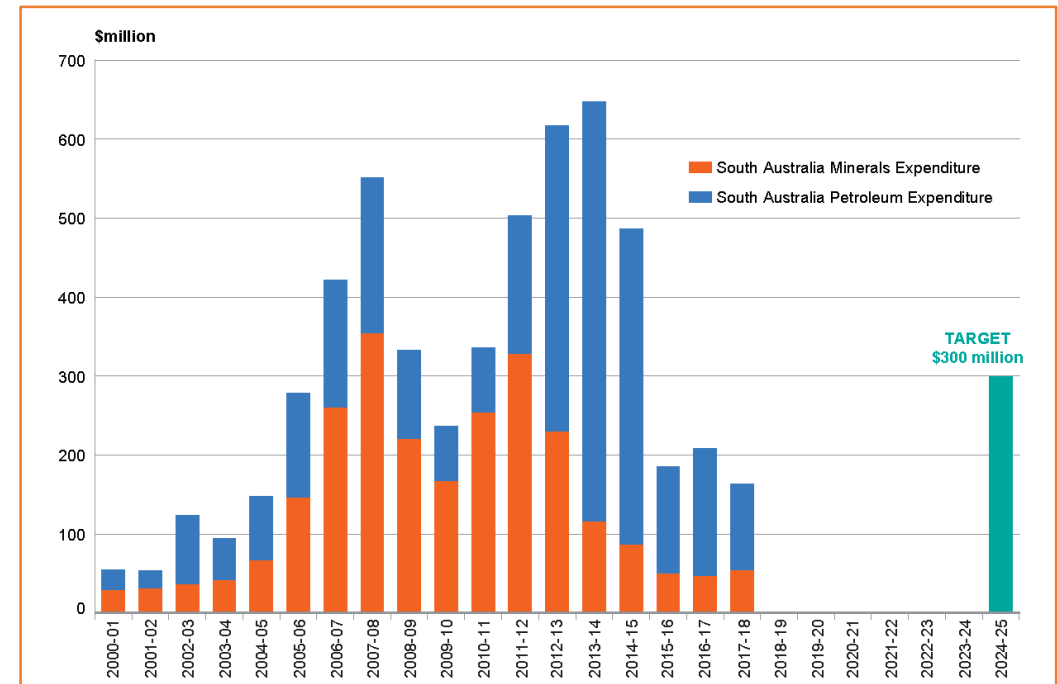
- Build trust in responsible minerals and petroleum projects;
- Assure land access for responsible minerals and energy resource projects;
- Improve productivity and competitiveness;
- Increase production and local content in value-chains
- Underpin reliable and affordable energy supplies;
- Maximise community benefits from profitable private investment;
- Integrate and innovate; and
- Adapt to and benefit from the inevitable transition to a low GHG emissions future.

Visit [www.energymining.sa.gov.au/growth strategy](http://www.energymining.sa.gov.au/growth_strategy)

Energy and Mineral Strategy for Growth State – Plan for Prosperity

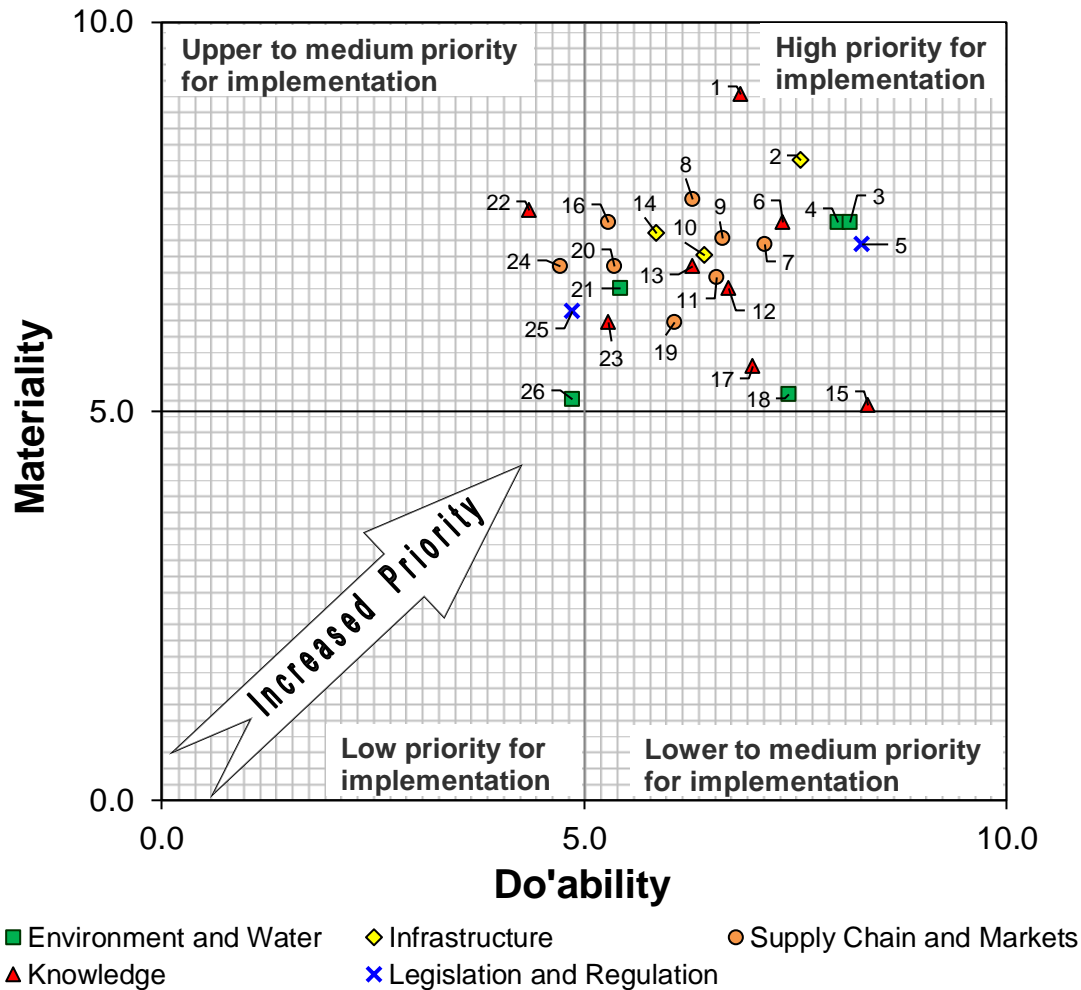
Key targets for 3 per cent GSP growth

- Minerals + petroleum exploration and appraisal to \$300m a year by 2025;
- Minerals + petroleum exports from \$5.3b in 2018 to \$8b in 2025 and \$13b in 2030;
- Energy + petroleum + mineral resource CAPEX sum \$18B 2019-25; and
- SA energy supplies nationally competitive by 2025; internationally competitive by 2030.



Setting Oil and Gas Sector Objectives by Priority

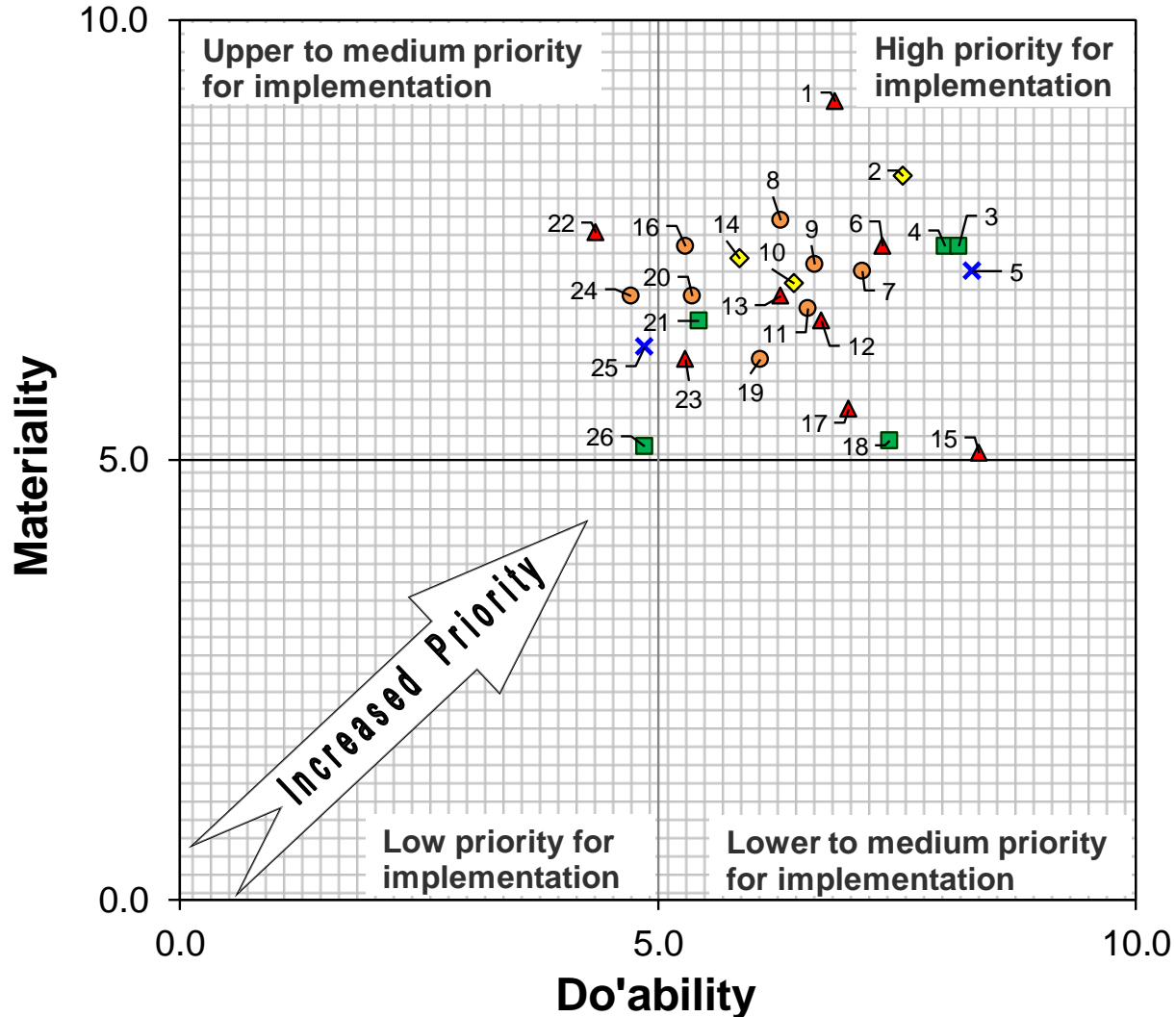
All Recommendations



- SWOT ⇒ BCG Matrix
- 379 opportunities identified by the Roundtable in term 2011 – 18.
- DEM-ERD has:
 - **‘lumped’** 380 opportunities into 26 generalised ‘go forward’ recommendations for growth
 - undertaken preliminary grading of materiality and do’ability as **initial ranking**
- Roundtable to finalise list of ranked recommendations in 2019/20 as part of Roadmap.

Setting Oil and Gas Sector Objectives by Priority

All recommendations



Rank	Synopsis
1	Attract exploration and development investment
2	Just-in-time oil and gas pipeline and processing capacity
3	Assure legislation and regulations enable carbon capture and storage
4	Elucidate opportunities for CCUS-EOR (a technology for growth)
5	Continuous improvement in legislation & regulation (amendments)
6	FAQs to foster realistic, evidence-based perceptions
7	Workforce sustainability
8	Cooperation between Joint Ventures to attain efficiencies
9	World-class training
10	Improve telecommunications at remote locations
11	Sustain competence and capacity of regulators
12	Skills inventories within major employers to guide training subjects
13	Improve data and information accessibility
14	Improve transport infrastructure to and from the Cooper Basin
15	Industry workshops to foster growth
16	Attract gas users to invest upstream
17	Estimate undiscovered resources / reserves
18	Employee inductions to cover engagement skills, cultural heritage, etc
19	Create/forge linkages and clusters of service providers
20	Local content in life-cycle of oil and gas operations.
21	Deliver basin-wide base-line data (e.g. hydro-geologic models)
22	Increase subsurface data resolution/utility
23	Leverage on capabilities in SA's universities
24	Attract investment into highest value end-products
25	Streamline approval of use of imported equipment
26	Optimise use of water co-produced with petroleum.