Department of Regional NSW

Lithgow





Investregional.nsw.gov.au

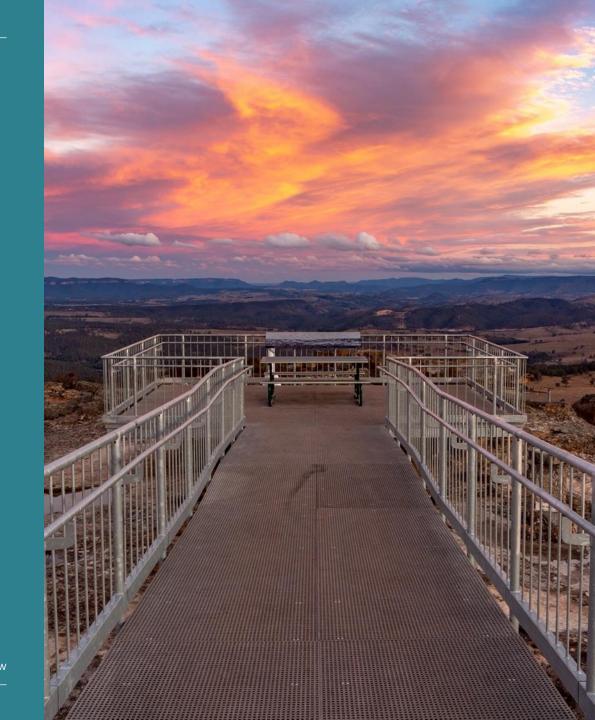


The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

'On Country', Charmaine Mumbulla, 2022

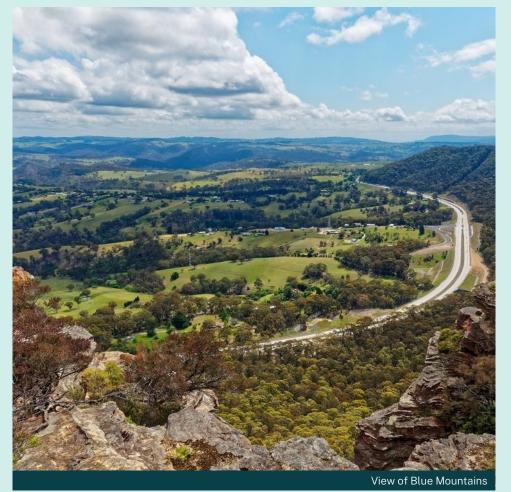
About Lithgow

Hassans Walls Lookout, Lithgow



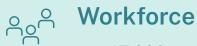
Lithgow, a great place to live and do business





Connectivity

- Situated along the Great Western Highway, just 2 hours from Sydney
- Perfectly situated to take advantage of opportunities in Western Sydney (east) and the Central West Orana region (west)
- Rail connection to Sydney and Port Botany in the east, and critical mineral, renewable energy and agriculture growth sectors to the west



- 47,000 strong workforce within a 1-hour drive, including from nearby Bathurst (45-minute drive)
- Large technician and trade workforce
- High proportion of workers with Engineering or related qualifications



Opportunity and Ecosystem

- Large industrial zoned sites
- Home to Ferrero, Thales, Emirates Wolgan Valley Resort and Energy Australia



Lithgow, a great place to live and do business







One of NSW's largest outdoor playgrounds

- Nestled in a valley overlooked by the Blue Mountains escarpment
- Two thirds of the area is listed as World Heritage National Park
- Unlimited outdoor activities hiking, camping, horse riding, off road 4WDing, mountain biking, fishing, sailing, water skiing/wakeboarding



Arts, culture and education

- Attend vibrant events including Lithgow Halloween, Lithglow, Iron Fest, art shows and twilight markets, or relax in the Japanese Bath House
- Training and lecture space available at the Maldhan Ngurr Ngurra Lithgow Transformation Hub (part of Western Sydney University)
- Private school options nearby at Bathurst and the Blue Mountains
- Charles Sturt University at nearby Bathurst (45 minutes to the west)



• Median house price less than half the Sydney median

Note: All dollar amounts shown in Australian Dollars (AUD)



Lithgow, a great place to live and do business





Former Wallerawang Power Station. Image credit: Greenspo



Economy in transition

- Significant opportunities as the global economy transitions away from coal, freeing up large, well-serviced power station and mine sites.
- Short term opportunity at the Greenspot-owned Former Wallerawang Power Station site, currently going through the rezoning process.



Infrastructure and transitioning workforce

- Large, well serviced industrial zoned sites across the Lithgow region, including at Wallerawang.
- Heavy industry infrastructure, including high voltage transmission infrastructure.
- Large, highly skilled mining workforce transitioning due to the closure of mines and power stations, with over 1,800 employed across these industries within a 1-hour drive of Lithgow.



About the Lithgow opportunity





Large industrial zoned sites across the Lithgow region



Opportunity

Brownfield and Greenfield industrial land opportunities are available across the Lithgow region.

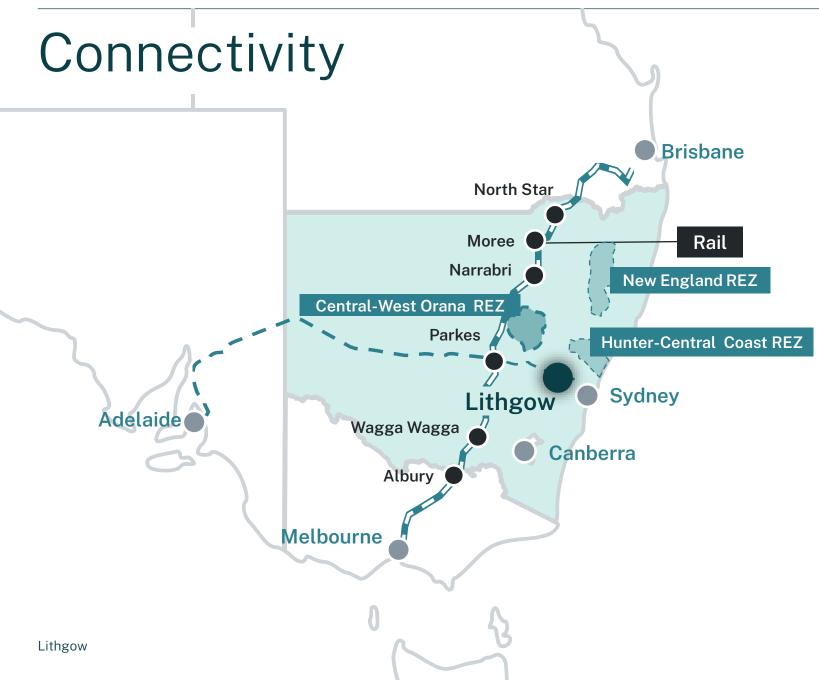
The Greenspot-owned former Wallerawang Power Station site is the largest short-term opportunity, with over 100 hectares of E5 (Heavy Industrial) and over 15 hectares of E4 (General Industrial) lands zoned. Planning is currently underway to rezone up to a further 100 hectares of the site for employment uses. The site has access to high voltage transmission infrastructure.

Former mine site opportunities will also arise as the region transitions away from coal mining. The site also has access to major road and rail networks.



Connectivity







- The \$14.5 billion North Star Inland Rail will link Melbourne and Brisbane via regional Victoria, New South Wales and Queensland.
- The 1,700 kilometre fast freight backbone will connect Australia north, south, east and west.
- Inland Rail will better link businesses, farmers and producers to national and global markets – giving them overnight access to international ports.
- Plans are underway for a \$4.5 billion upgrade of the Great Western Highway between Lithgow and Katoomba.
- Proposed direct rail connectivity to future Western Sydney Airport, due for completion in 2026.



Workforce



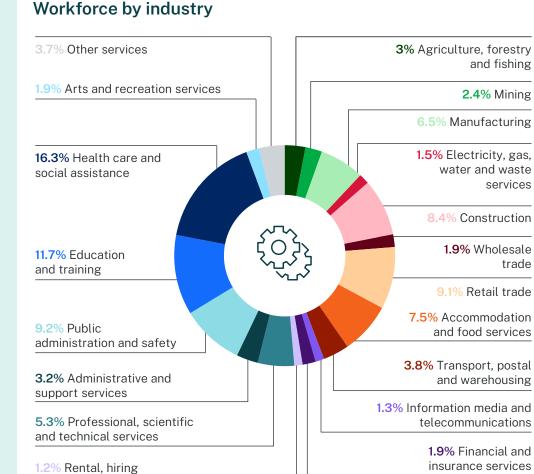
Lithgow



47,000 Total available

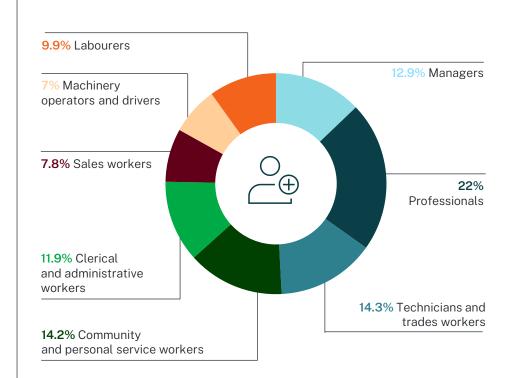
workforce within a 1-hour drive

2 hour



and real estate services

Workforce by occupation





Large engineer and trade workforce

Workforce qualification*

NSW GOVERNMENT

In Lithgow



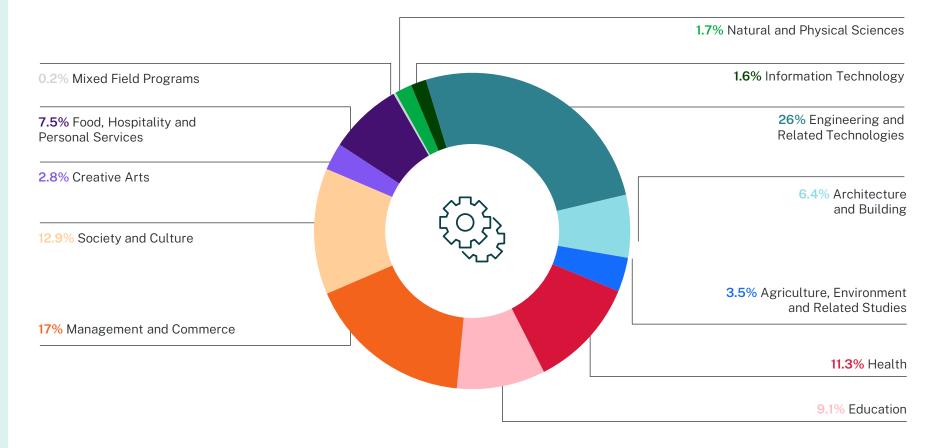
26%

of Lithgow's educated workforce have engineering or related qualifications compared to the NSW average of 10%



32%

of Lithgow's local workforce hold a certificate level qualification – 10% higher than the rest of NSW

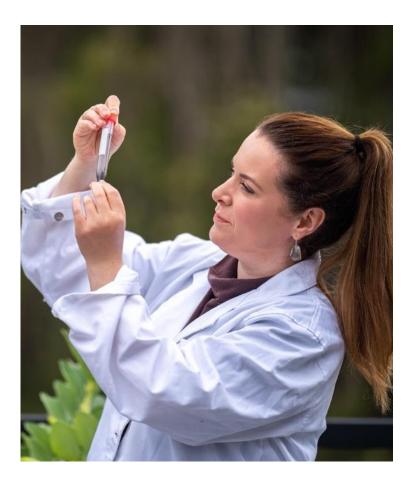


*where they have a qualification



Research and development

NSW research capability



Wide ranging research and redevelopment underway

🗦 Autonomous drone technology

Greenhouse innovations



Flavourtech



Precision fermentation

Department of Primary Industries (DPI)

- Globally ranked as a top 1% plant, animal and environmental sciences research organisation.
- Over 600 researchers and 13,000 hectares of trial farms.
- Access to research infrastructure, weather and soil data, and NSW's diverse agriculture products.
- Gives AgTech developers a unique opportunity to test and develop livestock, horticulture, fisheries and forestry products across its 25 research stations.





Lithgow, choice of education



Top facilities

Lithgow is serviced by three universities as well as top-quality technical training facilities and higher education institutions



Charles Sturt University



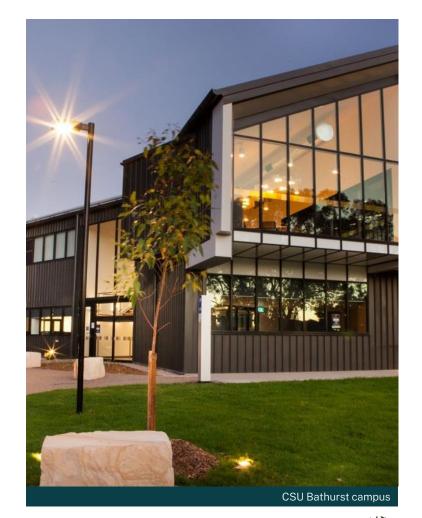




Local institutions

- Western Sydney University Maldhan Ngurr Ngurra Lithgow Transformation Hub
- **NSW TAFE** Lithgow Campus
- The University of Notre Dame Lithgow Clinical School
- The Charles Sturt University
 Bathurst campus only a
 45-minute drive
- Western Sydney University
 Penrith Campus 1.5-hour drive and under 2 hours via fast train







Charles Sturt University





Bathurst Campus

Charles Sturt University is Australia's largest regional university with the Bathurst campus only a 45-minute drive from Lithgow.

Specialities

- Engineering
- Cyber Security, Data Science and IT
- Communications
- Exercise Science

Graduates

43,000+ graduate pipeline, with over 1,500 studying at the Bathurst Campus (Charles Sturt University, 2022)

Industry collaborations

IBM Client Innovation Centre

Charles Sturt University has partnered with IBM to open the Bathurst IBM Client Innovation Centre – bringing cutting edge tech innovation to the Central West. This partnership provides opportunities for researchers and industry to collaborate on projects, particularly in cybersecurity and data and digital services.

Engineering Cadetships

Charles Sturt University Engineering has rapidly gained a reputation with industry partners for providing skilled cadets who add value to the workplace and act as graduate engineers.



Major projects





Projects with estimated value greater than \$5 million

Map #	Investment	Estimated total project value
1	Great Western Highway upgrades – Katoomba to Lithgow	\$4.5 billion
2	Thales Lithgow Arms and Advanced Manufacturing Hub	\$6.5 million
3	Former Wallerawang Power Station Redevelopment (including 'Wallerawang 9' battery)	~\$700 million
4	Central West Pumped Hydro project	\$500 million
5	Great Western Battery project	~\$400 million
6	Ecotourism investments, including Gardens of Stone	\$50 million
7	Wallerawang Railway Station reopening	\$7 million
8	Fixing Country Bridges Program - Glen Davis Rd, Rydal and Upper Turon	\$6.2 million
9	Zig Zag Railway restoration	~\$6 million
10	Lake Lyell Pumped Hydro Project	tbc
11	NSW Forestry Sunny Corner Wind Farm	tbc



Source: Lithgow Regional Economic Development Strategy – 2023 update

Lithgow

Central West, world-class agriculture



\$2.4 billion

Agricultural produce grown in the Central West Region, 2020-21



Grown in the Central West region (2021):

tonnes of oat crops

) **1.7 million** tonnes of wheat crops

>2 million

 \bigotimes

hectares of dryland cropping

Other Central West contributions to agricultural output:

21% of NSW's canola

20% of NSW's wool

59% of NSW's cauliflower

25%

of NSW's eggs



Lithgow Employment Lands





Employment lands provided across the Lithgow region

Brownfield and Greenfield industrial land opportunities are available at Wallerawang and elsewhere throughout the Lithgow region.

The largest of these include:

Former Wallerawang Power Station

Greenspot owned

- Brownfield
- 100 hectares of E5 (Heavy Industrial)
- 15 hectares of E4 (General Industrial)
- Possible further 100 hectares of employment lands (rezoning underway)

Lithgow Arms Site

Thales owned

- Brownfield
- Former Small Arms Factory
- Over 5 hectares of infill E3 (Productivity Support) land
- Fully secured site



Industrial and Business Park Zoned Lands



Zig Zag

Station

Lithgow To Bathurst (50 mins by car) Great Western Hwy Chifley Rd Lithgow Station Mort St Hartley Valley Rd Main St Great Western Hwy To Sydney (2 hours 20 mins by car) Lithgow Arms



Lithgow

E4

E5

F3

Industrial and Business Park Zoned Lands







Lithgow

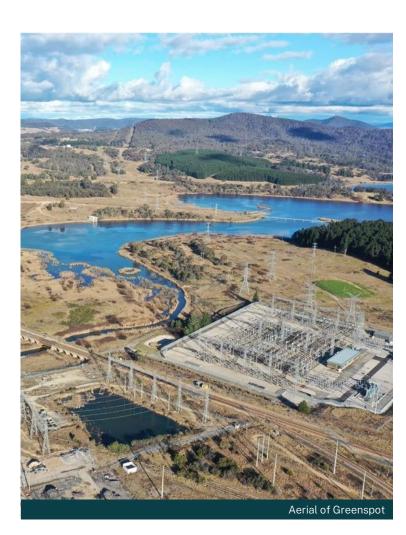
Greenspot Wallerawang



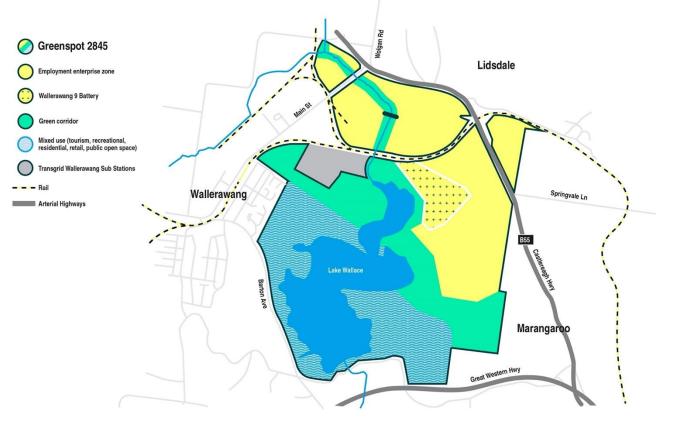
Site details	
Ownership	• Greenspot
Land Zoning	 100 hectares IN3 (Heavy Industrial) 15 hectares IN1 (General Industrial) Approx 500 hectares - Site remainder SP2 (Infrastructure)
Rezoning	 Working with Lithgow City Council to rezone a further 100 hectares of employment lands Planning proposal to be submitted Q4 2023
Road access	Easy access from both the Great Western Highway and Castlereagh Highway
Rail access	Private rail siding into site, providing access to the Main Western Railway Line
Electricity	 330kV and 132 kV substations immediately adjacent to site 330 kilovolt transmission line through site, with 500 kilovolt transmission line just north of site
Data	Close proximity to high integrity data networks
Wallerawang 9 Battery	 Approved 500 megawatt/1000 megawatt-hour Battery Energy Storage System To be developed by Shell Energy Connected to the adjacent 330 kilovolt sub-station



Greenspot Wallerawang



Indicative concept plan for the Greenspot-owned Wallerawang Power Station







Grants and programs





\$110 million

Regional Investment Activation Fund

Grant program focused on projects that will deliver significant economic, social and/or environmental benefits for a priority industry or location in regional NSW.



\$30 million Future Industries Investment Program

Grant program focused on attracting and growing innovative, high growth businesses in priority industries and driving productivity growth in emerging high value technologies, such as digital technology, medical technology and the clean economy. Support existing businesses or those interested in relocating to regional NSW to drive regional economic investment.

\$240 million

Regional Job

Creation Fund



\$250 million Renewable Manufacturing Fund

Grant program focused on the manufacturing of plant, equipment and processes needed to produce renewable energy and low carbon products (including electric vehicles) using commercialised technology. Focus on technologies that are commercially viable and ready for scaling up. Funding timeframes: 2023 to 2027.



\$300 million

Low Carbon Manufacturing Fund

Grant program will help expand and establish local manufacturing in low carbon sectors with focus on technologies that are commercially viable and ready for scaling up.



\$703.4 million

Future Economy Fund

Grant program focused on high growth businesses in priority sectors and driving productivity in emerging high value industries, such as digital technology, medical technology and the clean economy.

Fund information

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Lithgow

Grants and programs





\$55 million

Clean Manufacturing Precincts

Development of Clean Manufacturing Precincts (CMPs) in NSW, with a focus on the Hunter and Illawarra regions. A CMP is created when businesses and other groups in regional industrial clusters work together to access clean infrastructure and technology.



\$25 million Royalties for Rejuvenation

\$25 million each year from mining royalties to support coal mining communities in NSW through the Royalties for Rejuvenation Fund. The funding will ensure that coal mining communities can make targeted investments towards strategic planning, workforce development programs, constructing enabling infrastructure, and establishing new industries and employment opportunities.

\$12,500 / person Regional Skills Relocation Grant

Funding is available to assist with the relocation costs of eligible skilled workers they employ who move from metropolitan areas to regional NSW.



\$25,000 -\$200,000 MVP Ventures Program

MVP Ventures is one of a suite of initiatives funded by the NSW Government under the Future Economy Fund's Commercialisation Pathways Program, to drive commercialisation success in NSW.



Up to \$2 million High Impact Partnership Grant

Grants to support emissions reduction in agriculture or sequestration in soils or vegetation, with an emphasis on immediate implementation. All partnerships will explore ways to deliver additional benefits alongside carbon abatement and will be required to share information and build capacity within the sector.



\$500,000 -\$10 million

Infrastructure Build Out Program

Applicants can seek funding between \$500,000 to \$10 million to deliver initiatives that build and support new, shared research and innovation infrastructure. Infrastructure must be open access to public and private technology developers and researchers, and support collaborative R&D and innovation.

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> Fund information



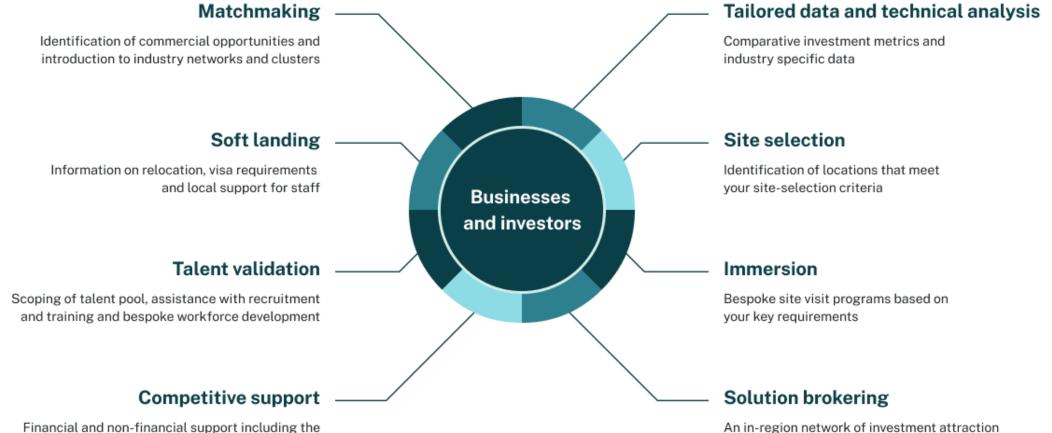


How we can help

\$110m Regional Investment Activation Fund



Dedicated team in based in the region to look after investment over the long term



An in-region network of investment attraction specialists to help you navigate government



NSW Government Assistance



We connect government, business, industry, education providers and community with opportunities for growth

Our business model is to work in meaningful, long-term partnerships with:





Controlled Environment Horticulture





Industry snapshot





Controlled growing environments

Such as greenhouses to generate greater yields, more consistent supply and faster growth than outdoor alternatives.



Modern greenhouse structures and hydroponic farming

Allow for mixed crops and can integrate hydroponic techniques, which involves producing soilless plants grown in nutrient rich water.



Australian farmers shifting to undercover vegetable growing

With the domestic industry forecast to continue to expand at an accelerated rate of 4.9% between 2022-2027.



Key success factors for controlled horticulture

Access to major markets, reliable electrical infrastructure and an adequate supply of water.





Opportunity in Lithgow for Controlled Environmental Horticulture





Access to major markets

Lithgow is only 2 hours from Sydney, 1.5 hours from the future Western Sydney Airport and 4 hours from Canberra.



Electrical infrastructure

Situated along 500 kilovolt and 330 kilovolt transmission lines, Lithgow has significant gas and electrical infrastructure.



Cool climate

Ideal for the cultivation of crops that require cool temperatures, such as leafy greens, herbs, berries, and flowers.



Year-round rainfall

Lithgow enjoys consistent, year-round rainfall, averaging over 1,000 millimetres per year.





Supporting ecosystem



Lithgow



Relevant workforce

Lithgow has nearly 1,400 agriculture, forestry and fishing workers, living within a 1-hour drive of the region.



Transport and logistics

Positioned near the intersection of the Great Western Highway and Castlereagh Highway, Lithgow is strategically located to access both the Sydney and regional NSW markets.

The Main Western Railway Line provides freight connection to the ports.



Global food manufacturers

(7)

The Central West is home to global food manufacturers, including Ferrero, Simplot, Nestle, Mars and Devro.

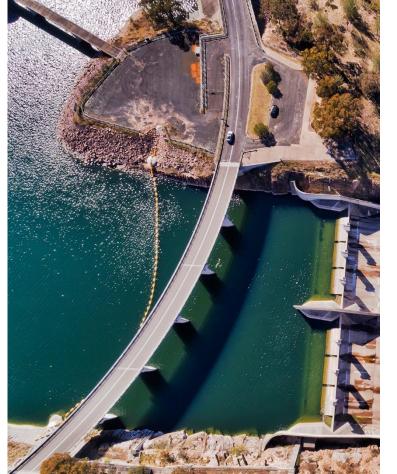


Manufacturing of Componentry for Renewable Energy



Industry snapshot





Shifting consumer sentiment driving growth

Concern for the environment is driving investment in projects that shift away from fossil fuels. Manufacturers of inputs designed for wind, solar and hydroelectricity generation are increasing in demand.



Significant government commitment

The state is set to attract more than **\$37 billion** in renewable energy investment by 2030.



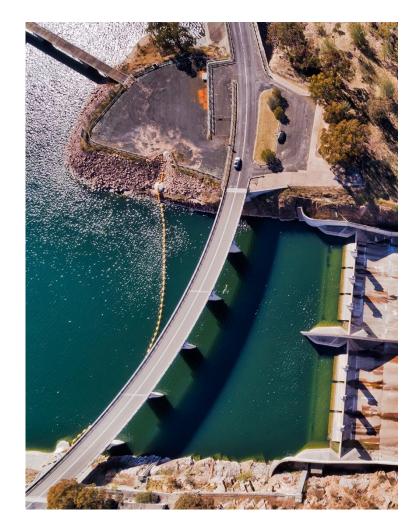
Large pipeline of domestic projects projected

Renewable energy construction projects in Australia are forecast to continue to increase, with plans for a 19.7% increase in solar and 7.2% increase in wind powered generation by 2026. Under the NSW Electricity Infrastructure Roadmap, NSW plans to build at least 12 gigawatts of renewable energy generation by 2030.



Industry snapshot





Concern for the environment is driving investment in projects that shift away from fossil fuels. Manufacturers of inputs designed for wind, solar and hydroelectricity generation are increasing in demand.



\$37 billion

in renewable energy investment in NSW expected by 2030



19.7%

increase in solar renewable generation project construction by 2026



12GW

of renewable energy generation by 2030 in NSW



7.2%

increase in wind renewable generation project construction by 2026



Opportunity in Lithgow for Manufacturing of Componentry for Renewable Energy



Close to renewable energy projects

Lithgow is located just south of the Central West Orana Renewable Energy Zone (REZ), where an estimated \$5.2 billion of investment in renewable energy is projected, including investment in solar, wind and battery storage.

The region is also home to two proposed pumped hydro projects - Central West Pumped Hydro and Lake Lyell Pumped Hydro – and an approved 500 megawatts grid scale battery.

Access to major markets

Lithgow is only 2 hours from Sydney, 1.5 hours from the future Western Sydney Airport and 4 hours from Canberra.

Electrical infrastructure

Situated along 500 kilovolt and 330 kilovolt transmission lines, Lithgow has significant gas and electrical infrastructure.

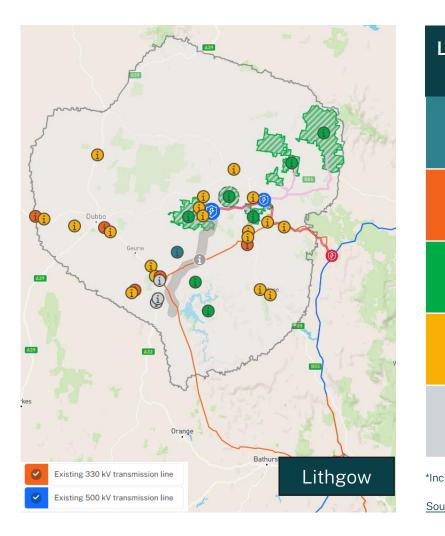


Wallerawang 9 Battery, Greenspot Wallerawang



Major renewable energy projects in REZ*





Legend	Project Type	Number of projects	Potential project scope	
	Existing wind farms	1	NA	
	Existing solar farms	5	457 MW	
	Planned wind farms	7	4,790 MW	
	Planned solar farms	18	NA	
	Planned Battery Energy Storage System	3	1,640 MWh	
cludes only projects within the Central West Orana REZ				

Source: EnergyCo Central West Orana REZ interactive map



Supporting ecosystem

Lithgow has a substantial manufacturing workforce, with significant capacity to grow:

3,000 People

Living within 1 hour of Lithgow work in the manufacturing sector.

Over 16% Lithgow Workforce

Have an engineering or related qualification, which is higher than the NSW average of 10%.

6,700 Technicians and trades

Highly skilled labour market employed within a 1-hour drive of Lithgow.

1,800+ Highly skilled energy sector workers

Living in the region, who have transferable skills in manufacturing as transition to clean energy with coal mine and power stations close by.





Greenspot Wallerawang



620 ha

Total size of site



330kV

High voltage transmission line

115 ha

zoned for industrial use, with further planned



500MW

Shell Energy grid-scale battery approved

Rail

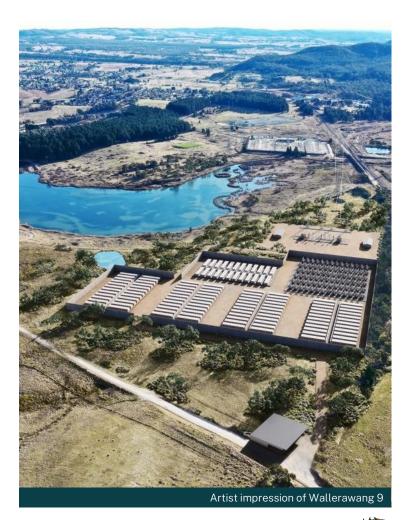
Private rail spur into site



10-15%

cost of nearby industrial land compared to Sydney



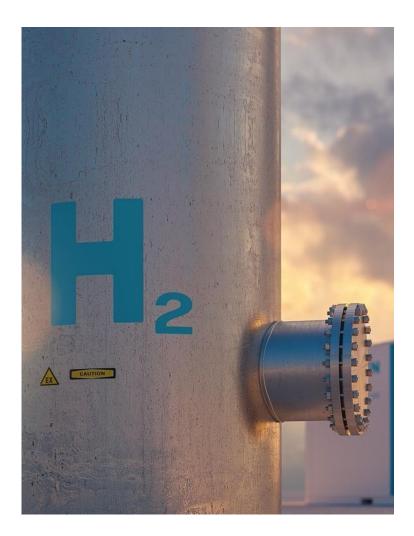




Hydrogen Production and Associated Activities









World leader

Global demand for hydrogen is estimated to increase exponentially from 94 million tonnes per annum in 2021 to 180 million tonnes per annum by 2030 as governments across the globe seek to decarbonise. Commitments to develop Green Hydrogen Hubs will make regional NSW a world leader in hydrogen technology.



Ambitious government targets

By 2030, the NSW Government is targeting hydrogen production of 110,000 tonnes per annum at a price under \$2.80/kilogram, with plans to fuel some 10,000 vehicles at more than 100 refuelling stations.



Ammonia opportunity

Ammonia production is one of two key end uses for current hydrogen production, and decarbonising fertiliser is an opportunity for NSW/Australian farmers to decarbonise. Current hydrogen production for ammonia in NSW is 40,000 tonnes per annum.



Decarbonisation

If produced using low or zero emissions sources, hydrogen can enable decarbonisation across the hard-to-abate segments of the energy, transport and industrial sectors that currently account for around 18% of NSW's annual emissions.





Commitments to develop Green Hydrogen Hubs will make regional NSW a world leader in hydrogen technology.

18% of emissions

Potential to decarbonise state's transport and industrial sectors

2030 Hydrogen NSW targets:

110,000 tpa

at a price under \$2.80/kg

10,000

vehicles fuelled at more than **100** refuelling stations

Ammonia production is one of two key end uses for current hydrogen production, used primarily for decarbonising fertiliser.

65%

growth in global demand for green ammonia by 2050

\$102 million

value of every percentage point of global market share in green ammonia captured by NSW





Opportunity in Lithgow for Hydrogen and Associated Activities







Access to major markets

Lithgow is only 2 hours from Sydney, 1.5 hours from the future Western Sydney Airport and 4 hours from Canberra.





Repurpose of infrastructure

Home to some of NSW's largest transmission lines and substations, Lithgow has significant existing gas and electrical infrastructure that could be repurposed for hydrogen.



Abundance of Water

Future closure of mines will free up significant water supply for hydrogen production activities.



High voltage transmission

Situated along 500 kilovolts and 330 kilovolts transmission lines, Lithgow has significant gas and electrical infrastructure.



Proximity major agriculture markets

Lithgow is located close to the major agriculture centres of the Central West a significant market for decarbonised fertiliser.



Supporting ecosystem

Lithgow has a substantial manufacturing workforce, with significant capacity to grow:

3,000 People

Living within 1 hour of Lithgow work in the manufacturing sector.

Over 16% Lithgow Workforce

Have an engineering or related qualification, which is higher than the NSW average of 10%.

6,700 Technician and trade

Highly skilled labour market employed within a 1-hour drive of Lithgow.

1,800+ Highly skilled energy sector workers

Living in the region, who have transferable skills in manufacturing as transition to clean energy sees coal mine and power stations close by.







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Total size of site



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500MW

330kV

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High voltage transmission line



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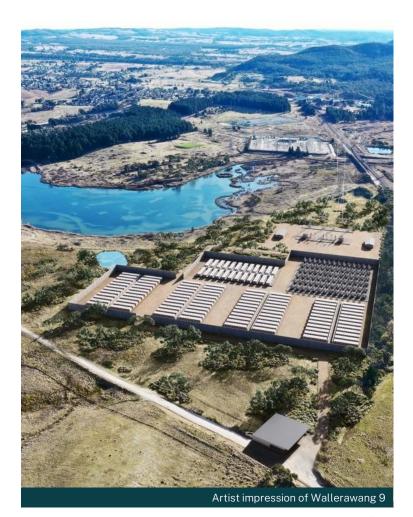
Private rail spur into site



10-15%

cost of nearby industrial land compared to Sydney







Green Construction Materials Manufacturing









Leader in Green Construction

Australia is a global leader in sustainable property development, with more than **12** million sqm of Green Star certified or registered green building space.

Growing domestic market

The Australian green building materials market was valued at **US\$2.32 billion** in 2019 and is projected to grow at an **average annual rate of 8.23%** from 2020 to 2027.

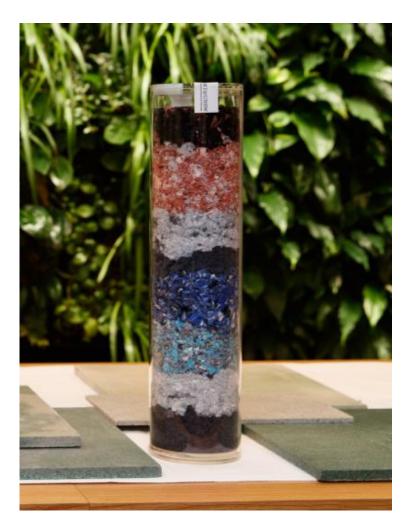


Growing demand led by major developers

Buildings account for nearly a quarter of Australia's carbon emissions. Demand in Australia is expected to increase, as the major property developers – including Lendlease, Mirvac, Stockland and The GPT Group - work to achieve ambitious net zero targets.







Australia is a global leader in sustainable property development leading to a rapidly developing demand for green construction materials.

12 million sqm

Green Star certified or registered green building space

Demand in Australia is expected to increase, as the major property developers – including Lendlease, Mirvac, Stockland and The GPT Group - work to achieve ambitious net zero targets.



25%

of Australia's carbon emissions are contributed to by buildings



US\$2.32 billion

Value of Australian green building materials market in 2019



8.23%

Average annual growth of the Australian green building materials market between 2020 and 2027



Opportunity in Lithgow for Green Construction Materials Manufacturing





Access to major markets

Lithgow is only 2 hours from Sydney, 1.5 hours from the future Western Sydney Airport and 4 hours from Canberra.



Electrical infrastructure

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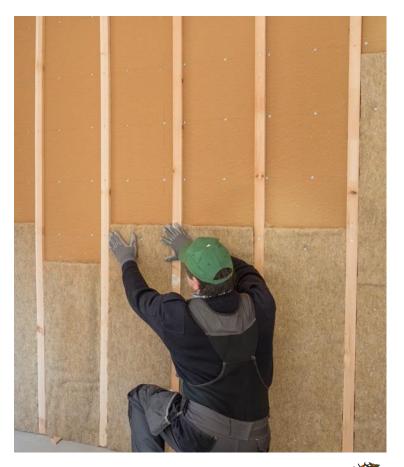
Proximity to booming construction sector

Located only a short drive from the booming Western Sydney corridor, where significant property construction is underway.



Access to raw input

The ecosystem around Lithgow provides easy access to inputs for green building materials, including natural inputs, such as timber, and reusable materials, such as mining tyres and fly ash.





Supporting ecosystem

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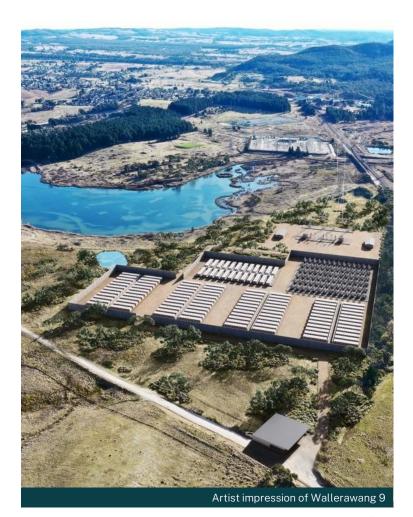
Private rail spur into site



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cost of nearby industrial land compared to Sydney







Advanced Manufacturing related to the Defence Sector









Government commitment to Defence

\$58.7 billion

Government's 10 year Defence budget plan for 2025-26

Increased from budget of \$32.4 billion in 2016-17

\$29.9 billion

additional budget to defence than previously planned

\$195 billion

investment by the Government in Defence capability to 2025-26

High tech industry

Volatile global relationships are driving a desire to ensure sovereign defence capabilities across the world. Manufacturing related to the defence sector typically requires high technical capabilities and is relatively less cost sensitive than other markets, thus allowing developed economies with high labour costs to compete effectively.



Opportunity in Lithgow for Defence related Manufacturing





Defence innovation hub

Thales employs 130 staff in Lithgow to manufacture weaponry that is exported globally. The company also selected Lithgow as the location for its \$6.5 million advanced manufacturing hub.



Electrical infrastructure

Situated along 500 kilovolts and 330 kilovolts transmission lines, Lithgow has significant gas and electrical infrastructure.



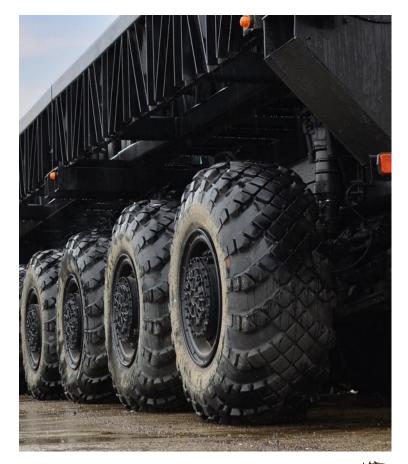
Access to ADF Bases

NSW has the largest number of defence bases and facilities in Australia. Lithgow is only 2 hours 10 minutes to Garden Island Naval Precinct, 2 hours to Holsworthy Barracks or 1 hour 30 minutes to Defence Establishment Orchard Hill.



47,000 Workforce

A workforce of 47,000 lives within a 1-hour drive of Lithgow. Over 16% of Lithgow's workforce have an engineering or related qualification (higher than the NSW average of 10%).





Supporting ecosystem

Lithgow has a substantial manufacturing workforce, with significant capacity to grow:

3,000 People

Living within 1 hour of Lithgow work in the manufacturing sector.

Over 16% Lithgow Workforce

Have an engineering or related qualification, which is higher than the NSW average of 10%. Opportunity to partner with nearby universities to develop skilled labour pipeline.

6,700 Technician and trade

Highly skilled labour market employed within a 1-hour drive of Lithgow.

1,800+ Highly skilled energy sector workers

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500MW

330kV

Shell Energy grid-scale battery approved

High voltage transmission line



Rail

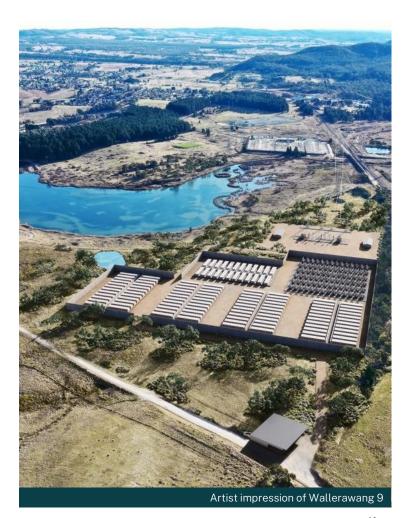
Private rail spur into site



10-15%

cost of nearby industrial land compared to Sydney











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Dedicated team to further investment



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Rob Little Director Investment Attraction - Precincts

constructionc



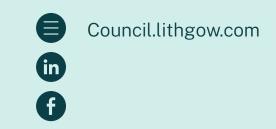
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