2020 GBB (WA) Zones Review

Presented to WA Gas Consultative Forum

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Agenda

1. Introduction & Background
2. Analysis
3. Findings & Recommendations
4. Next Steps

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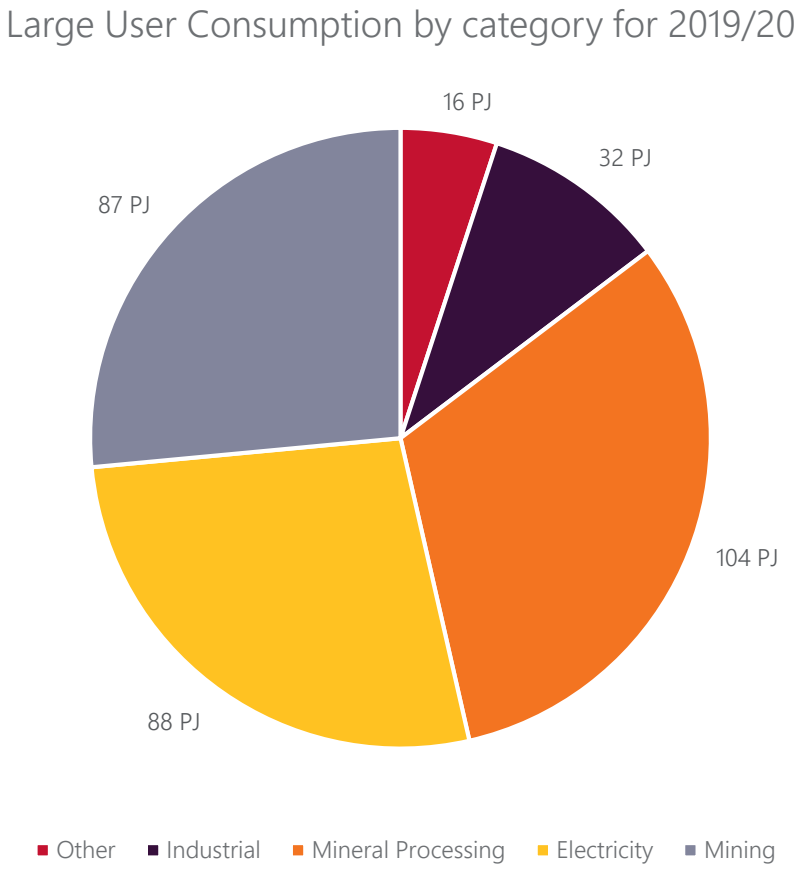
Introduction & Background

Objectives and Purpose of the GBB (WA)

- The **objectives** of the Gas Bulletin Board (GBB) are to promote the long term interests of consumers of natural gas in relation to [GSI Rule 2(1)]:
  - (a) the security, reliability and availability of the supply of natural gas in the State;
  - (b) the efficient operation and use of natural gas services in the State;
  - (c) the efficient investment in natural gas services in the State; and
  - (d) the facilitation of competition in the use of natural gas services in the State.
- The **primary purpose** of the GBB is to include information relating to short and near term natural gas supply and demand and natural gas transmission and storage capacity in the State; [GSI Rule 2(2)]

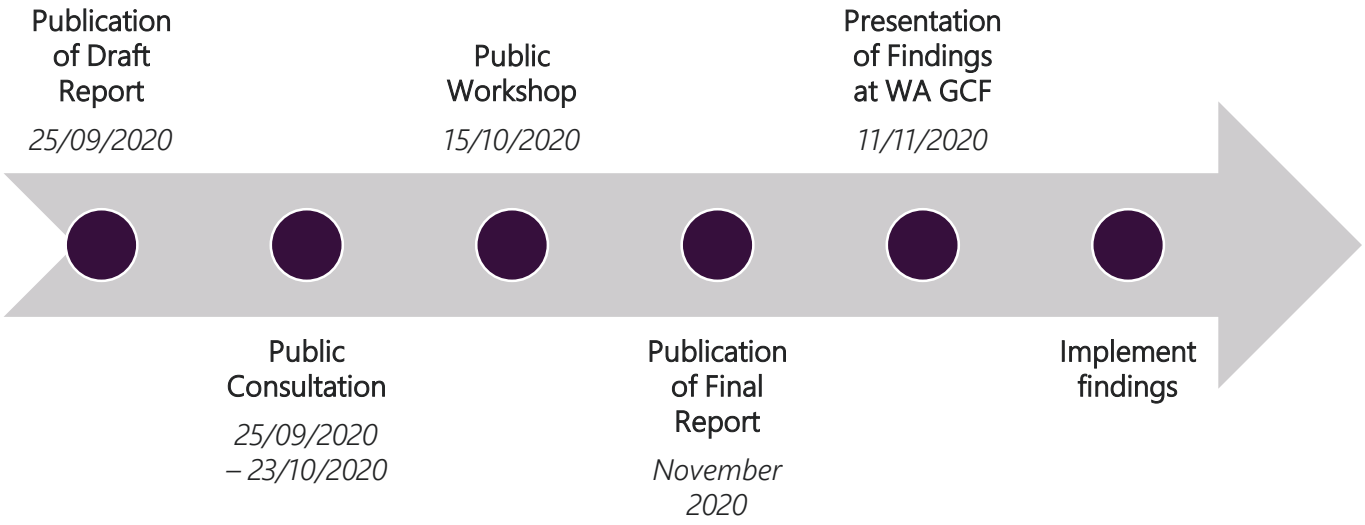


Purpose of the Zones

- Participants have obligations to submit data to AEMO in accordance with GSI Rules.
- AEMO has obligations to publish that data on the GBB:
  - Some information is published specifically by Facility whereas other information must be aggregated by Zone.
  - Data is published in accordance with specified time periods
- The Zones:
  - Maintain the confidentiality of information, by publishing aggregated information.
  - Represent data to reflect changes at an adequate regional scale.
  - Provide quick snapshots of changes to the gas landscape/security on a zonal basis.

Purpose and structure of the review

- AEMO must review the Zones at least once every five years. The last review was conducted in 2015.
- AEMO has therefore commenced and is concluding the 2020 five yearly review of the GBB Zones.



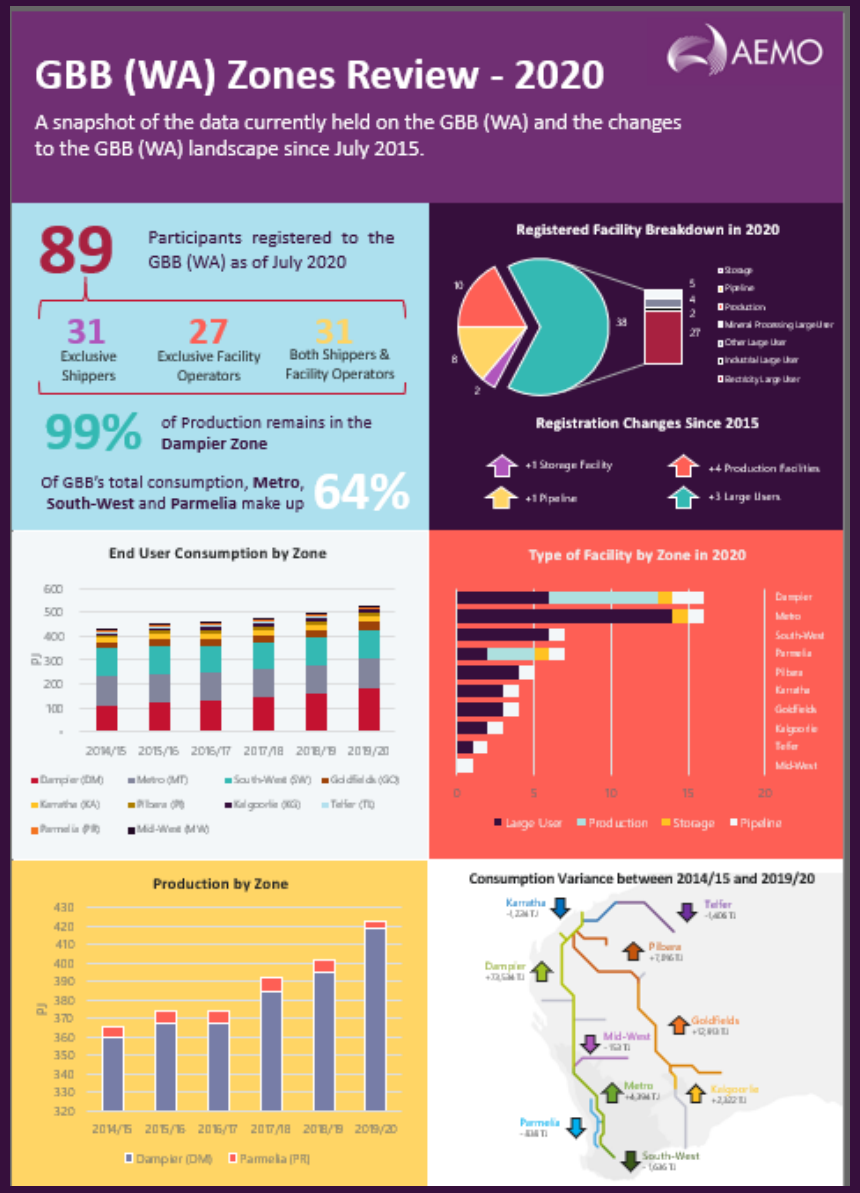
Do the Zones meet the obligations of the GSI Rules and Objectives?

Does the information aggregation/segregation of the current Zones provide meaningful information?

Do the Zones maintain the confidentiality of business-critical information?

Are there any future gas developments that may impact the future accuracy and/or granularity of information provided by the current Zones?

Analysis



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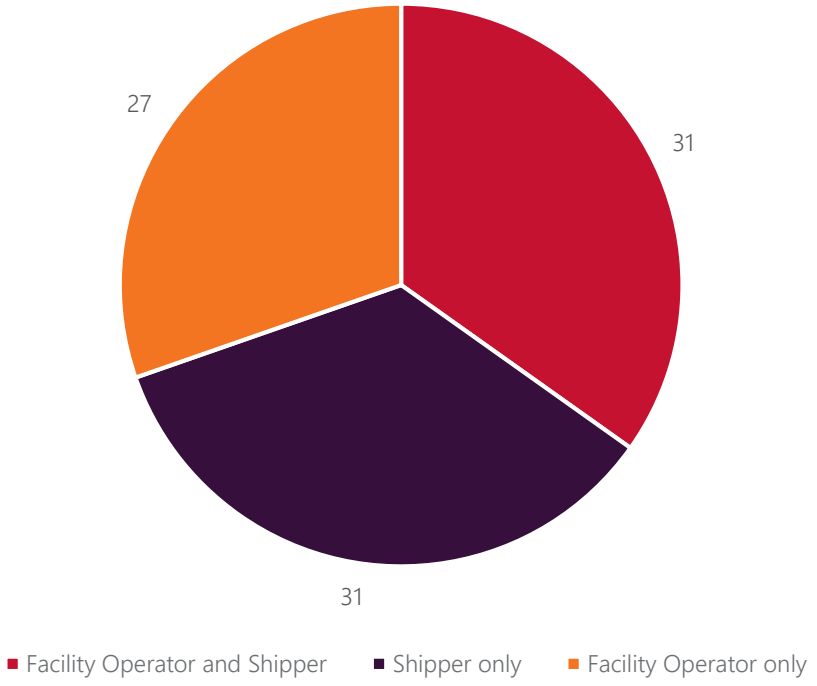
Registration Changes

- There are now 89 Participants registered to the GBB.
- Since the 2015 review Participants have increased as follows:
  - +11 Shippers
  - +2 Facility Operators
- Since the 2015 review Facilities have increased as follows:
  - +1 Storage Facility
  - +1 Pipeline
  - +4 Production Facilities
  - +3 Large Users

Participant make-up as of September 2020



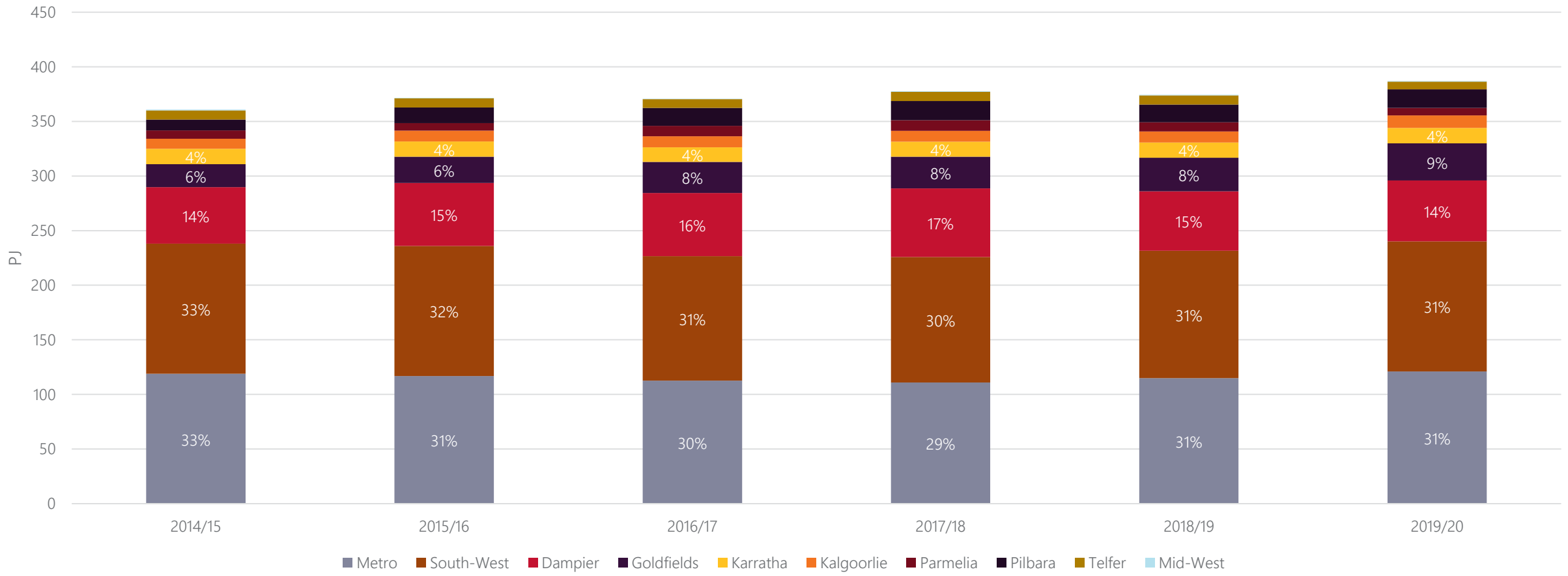
Production by Zone

Summary

A Overall yearly production has increased by 56 PJ from July 2015 to July 2020.

B The Dampier Zone is still producing 99% of domestic gas in the state.

End User Consumption by Zone

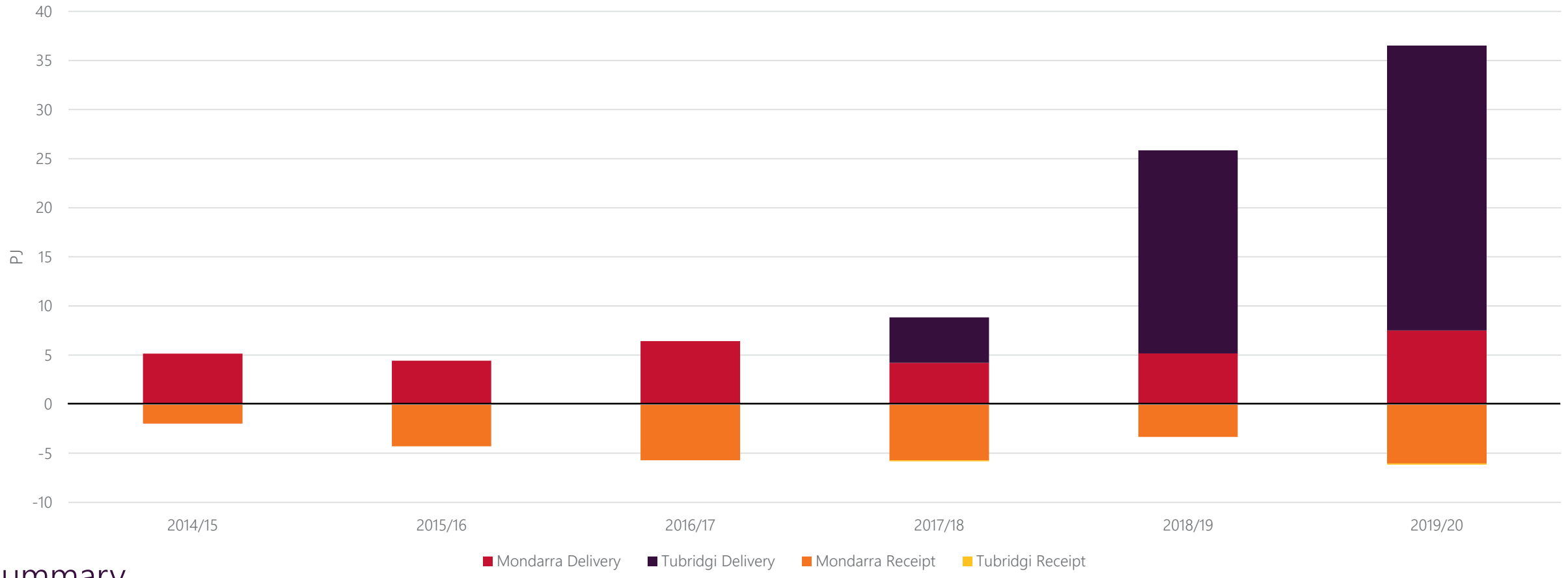


Summary

A Overall yearly consumption has increased by 26 PJ from July 2015 to July 2020.

B Consumption remains heavily focused in the South-West of the State, in the Metro, South-West, and Parmelia Zone.

Storage by Facility



Summary

A Deliveries into Storage Facilities exceed receipts from Storage Facilities.

B More being stored in the Tubridgi Facility each year, with a maximum Storage Capacity of 60,000 TJ.

Findings & Recommendations

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Recap

- AEMO's goals when conducting this review included an assessment of:
  1. Whether the Zones meet the GSI Objectives;
  2. Whether they provide a useful representation of the data, allowing users to interrogate information on the past and near to mid-term future gas landscape in the state;
  3. Whether the current structure of the Zones is adequate to meet oncoming changes to the gas landscape;
  4. Whether the Zones maintain the confidentiality of business-critical information.

Findings

Analysis

- Registration changes and increased participation
- Gas production
- Gas consumption and storage

Findings

- AEMO believes the current GBB Zones provide appropriate reporting to Registered Participants and other users of the GBB.
- Where changes have occurred AEMO considers the information published on the GBB is sufficient in providing data on newly Registered Participants and Facilities.
- The gas landscape has remained consistent to justify the current GBB Zones are consistent with the GSI Objectives.

Recommendations

- AEMO's final recommendation is that the current GBB Zone List is retained, and that **no changes to the current GBB Zone List are made**. AEMO makes this recommendation on the basis of the following.

GSI Rules and Objectives are adequately satisfied

Addition of Participants and Facilities has no material impact

No distinct changes to flow patterns

Data is published at a Facility-level of granularity

No feedback from Gas Market Participants contested these findings

Next Steps

Publication of the draft report (25/09/2020)

Stakeholder Workshop (15/10/2020)

Submissions Due (23/10/2020)

No stakeholder submissions were received.

Final Report (November)

Final report has been published.

WA GCF (11/11/2020)

Present the findings of the final report at the WA GCF (today).

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Questions and Feedback

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