

From: s 22(1)(a)(ii) on behalf of s 22(1)(a)(ii)
To: s 22(1)(a)(ii)
Subject: FW: ACIL|DCEEW - Updated results for GPG and gas infrastructure modelling [SEC=OFFICIAL]
Attachments: [RE Urgent request for meeting - GPG and gas infrastructure modelling SE... \(456 KB\).msg](#)

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-----Original Appointment-----

From: [s 22\(1\)\(a\)\(ii\)](#)
Sent: Wednesday, June 19, 2024 5:11 PM
To: [s 22\(1\)\(a\)\(ii\)](#); [s 22\(1\)\(a\)\(ii\)](#) ; Pankowski, Andrew; [s 22\(1\)\(a\)\(ii\)](#); [s 22\(1\)\(a\)\(ii\)](#) [s 47F](#) ; [s 47F](#) ; [s 47F](#) [s 47F](#) ; [s 22\(1\)\(a\)\(ii\)](#); [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#)
Cc: [s 22\(1\)\(a\)\(ii\)](#); [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#) ; [s 22\(1\)\(a\)\(ii\)](#)
Subject: ACIL|DCEEW - Updated results for GPG and gas infrastructure modelling [SEC=OFFICIAL]
When: Friday, 21 June 2024 12:30 PM-1:30 PM (UTC+09:30) Adelaide.
Where: Microsoft Teams Meeting

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Hi all, this is a time for us to discuss ACIL's updated results for the Base Case and Alternate Scenarios under its GPG and gas infrastructure modelling, which we hope to receive by mid-week. The aim is to discuss any issues DCCCEW staff identify with the updated results, so that we can confirm the results to commence the further gas scenarios (see attached).

Kind regards

s 22(1)(a)(

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[illegible]

Meeting ID: 458 488 478 951

Passcode: wL4oru

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Video ID: 132 929 474 0

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For organizers: Meeting options <https://teams.microsoft.com/meetingOptions/?organizerId=bf2f9f1a-709f-4ecc-819d-19c312eb6716&tenantId=2be67eb7-400c-4b3f-a5a1-1258c0da0696&threadId=19_meeting_OTIzDFiMjEtMTdjNy00NTdiLTlYlTQtMDJkNzdmZDBkZmYy@thread.v2&messageId=0&language=en-US> | Reset dial-in PIN <<https://dialin.teams.microsoft.com/usp/pstnconferencing>>

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s 22(1)(a)(ii)

From: s 22(1)(a)(ii)
Sent: Friday, 26 July 2024 10:05 AM
To: Harris, Peter; Gas Economics; Fitzmyers, Shevaun; s 22(1)(a)(ii); s 22(1)(a)(ii);
 s 22(1)(a)(ii)
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling
 [SEC=OFFICIAL]

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Thanks Peter. s 47C

- The maximum daily quantity a supply solution can deliver gas at was behind most of their thinking and investment decisions.
 - o Some sources of supply simply don't get you're the MDQ required to service demand (particularly GPG). Hence s 47C .

Cheers

s 22(1)(a)(ii)

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From: Harris, Peter
Sent: Friday, July 26, 2024 10:01 AM
To: Gas Economics ; Fitzmyers, Shevaun ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii) ; s22(1)(a)(ii)
Subject: FW: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Team – meeting with ACIL (at very very short notice) today to discuss new gas mitigation scenarios [Attached]. They have modelled the not unrealistic scenarios gas from Narrabri and Beetaloo does not happen. I have not had time to digest impact of changes.

But I agree with Shev that we know market is short and AMEO is stressing the need for additional supply chain resilience. To quote AEMO s47C (whether that be storage / terminals / new supply). If supply gap is 2027 and 2028 it does not matter. You need solutions to fill a range of demand and supply scenarios and ensure reliability of gas supply. Focus on solutions not cause.

Will let you know what ACIL says.

Cheers

H

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From: s22 <@dcceew.gov.au>
Sent: Friday, July 26, 2024 9:33 AM
To: Harris, Peter <s 47F @industry.gov.au>; s22 @industry.gov.au>; s22 @dcceew.gov.au>; s22 @dcceew.gov.au>; s22 @dcceew.gov.au>
Cc: s22 (Guest) <s22 @dcceew.gov.au>; s22 <s22 @dcceew.gov.au>; Andrew PANKOWSKI <s22 @dcceew.gov.au>
Subject: FW: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

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[SEC=OFFICIAL]

Hi everyone

FYI – ACIL Allen has completed its modelling of additional gas infrastructure scenarios for the GPG work and provided an ‘addendum report’ (attached) that is separate to the report ACIL have already delivered with the core scenario results.

The alternate gas scenarios covered in the addendum report are:

- Restricted gas supply
- Low electrification
- Hydrogen power generation.

The report also includes some ‘mini-scenarios’ to 2030 covering: LNG timing and near term demand (3 scenarios); and supply requirements to 2030 (4 scenarios).

We have a regular catchup with the ACIL team scheduled for 10.30 this morning and I have asked them to walk us through these latest modelling results. In case you are interested / available at short notice I will forward you the meeting invitation. If you can’t make it feel free to forward any questions over the coming week and we can follow up with ACIL (or arrange a subsequent meeting).

Regards

s22

s22

Director A/g | Gas Infrastructure and Reliability

Gas Transformation Strategy Branch | Gas and Liquid Fuels Division | DCCEEW

s22

Australia

M s22

@dcceew.gov.au

DCCEEW.gov.au ABN 63 573 932 849



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From: s47F @acilallen.com.au

Sent: Thursday, July 25, 2024 4:52 PM

To: <@dcceew-migration.gov.au>; s22

<@dcceew-migration.gov.au>

Cc: <@dcceew-migration.gov.au>; s47F

<s47F @acilallen.com.au>; s47F @acilallen.com.au>; s47F

@acilallen.com.au>; s22 <@dcceew-migration.gov.au>

Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Hi and s22

Since we've last had contact with you we've been busy working through the various scenarios and mini-scenarios you've requested – thanks to s47F and s47F for their hard work on this.

Please find attached a write up of all of these additional scenarios in the form of a supplementary report, as well as key data outputs. Please let us know if you have any feedback or questions on this work.

Best regards

s47F

s47F

[@acilallen.com.au](mailto:acilallen.com.au)

ACIL ALLEN

s47F

acilallen.com.au

Brisbane | Canberra | Melbourne | Perth | Sydney | Adelaide

I acknowledge and respect the traditional owners past, present and emerging across the country where I work, rest and live.



ACIL Allen is a place where people of diverse genders and sexual orientations are welcomed and supported.

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s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Tuesday, 25 June 2024 2:44 PM
To: s 22(1)(a)(ii) Jameson, Lauren; s 22(1)(a)(ii); s 22(1)(a)(ii); Fitzmyers, Shevaun; s 22(1)(a)(ii); s 22(1)(a)(ii) s 22(1)(a)(ii)
Cc: Pankowski, Andrew; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: RE: ACTION: Gas demand and supply scenarios suggestions [SEC=OFFICIAL]
Attachments: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]; RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Hi s 22(1)(a)(ii) and team,

Thank you for sending your feedback through yesterday on the ACIL modelling. Following our meeting on Friday, ACIL have provided:

1. An **updated version of the slides** they presented with the complete infrastructure upgrades across the scenarios, as well as the **levelized costs** across the three updated scenarios – see attached
2. Detailed **breakdown of Queensland gas production** – see attached

FYI, I have prepared the following list of feedback/request for further info that I'll send to ACIL. This includes your point about having ACIL provide commentary around the status of Qld projects. Regarding the other points in your email, please see our responses in green below. Happy to discuss further 😊

s 47C

Please let us know if you have any questions.

Kind regards

s 22(1)(a)(ii) (s 22(1)(a)(ii))

Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW

DCCEEW.gov.au ABN 63 573 932 849



We acknowledge the Traditional Owners of country throughout Australia and recognise their continuing connection to land, waters and culture. We pay our respects to their Elders past and present.

From: s 22(1)(a)(ii)

Sent: Monday, June 24, 2024 9:08 AM

To: s 22(1)(a)(ii) ; s 22(1)(a)(ii) @protected.dcceew.gov.au; s 22(1)(a)(ii)

Cc: Jameson, Lauren ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; Fitzmyers, Shevaun ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)

Subject: ACTION: Gas demand and supply scenarios suggestions [SEC=OFFICIAL]

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s 22(1)(a)(ii)

Hope you had a nice weekend and thanks for giving us the opportunity to speak with ACIL on Friday.

Looking forward to seeing a more detailed breakdown of the ACIL numbers. Especially QLD supply. We need the basics of demand and supply scenarios:

- **Demand** – matched to AEMO forecasts and a breakdown of LNG contracted V uncontracted demand forecasts. s 47G(1)(a)
. We don't expect ACIL will have this breakdown as they're drawing the LNG demand assumptions from the GSOO. The GSOO provides the firm contracted and firm uncontracted quantities for all producers, including LNG producers, in comparison to forecast demand (see Figure 29) but no further detail. The ACCC publishes expected volumes to meet contracts and expected spot volumes with the latter declining to zero in the next few years. It might be worth us comparing, as we could mock up a scenario. But more broadly, given the scenario is likely to be similar to AEMO's (and we also have a low LNG scenario that ACIL has modelled from the original (incorrect) scenario runs) we think there is a question as to what a more nuanced export scenario would add.
- **Narrabri out + Beetaloo slow ramp up or out** – two obvious supply shocks to model. Can be discrete scenarios. Assume gas filled by import + storage, plus QLD gas? s 47C
. As previously flagged, we can use the breakdown of supply volume numbers ACIL has provided to make any further assessments ourselves (e.g. if we seek to assess the implications of a more drawn-out delay, delays to other sources being developed etc).
- **Infrastructure constraint** – QLD gas needed to fill gap. s 47C
Existing scenarios already factor in expansions to these pipelines. We think that, with the range of scenarios we've got/still on the way, we will have a clear sense of the key moving parts regarding infrastructure for us to be able to assess the implications of delays to specific projects.
- **A detailed breakdown of QLD supply by basin and company** – QLD gas supplies over 80% of east coast supply in ACIL model. I think some sort of breakdown of field-by-field contribution to supply is essential.

Included in a qualitative analysis would be technical difficulty (for example Taroom Trough is a new type of play so you would put a lower % chance of success), what approvals are needed for new supply, what infrastructure needed (including compression) and what company (so we can go and ask them if we are modelling what can be achieved accurately). We can also investigate costs and what flow rates / drilling costs make each field viable. **s 47C**

s 47C

s 47C

- a long-run LNG price of A\$11/GJ delivered to Asia, which in turn is based on assumptions of:
 - an oil price of US\$65 per barrel
 - an LNG to oil price 'slope' of 13%
 - an AUD:USD exchange rate of 0.75
 - shipping costs of US\$0.25/mmbtu from Australia to Asia.

Cheers and please shout out if you have any questions. We can provide some further input once we see more info from ACIL.

s 22(1)(a)(ii)

s 22(1)(a)(ii)

Special Adviser

Future Gas Strategy

Department of Industry, Science and Resources

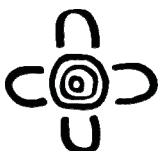
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M: **s 22(1)(a)(ii)**

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s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Monday, 20 May 2024 3:05 PM
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii); s 22(1)(a)(ii) Pankowski, Andrew; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: RE: CONFIDENTIAL: Draft report - ACIL Allen's GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Hi s 22(1)(a)(ii),

Thanks for reaching out! Yes, happy to receive feedback next week. As part of the meeting tomorrow we will provide a short overview of the work ACIL has done so far, and the additional scenarios we are currently negotiating to support the mitigating shortfall risk project and discuss what input DISR may be able to provide to support that work.

Looking forward to discussing further tomorrow.

Regards
s 22(1)(a)(ii)

From: s 22(1)(a)(ii)
Sent: Monday, May 20, 2024 12:36 PM
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: RE: CONFIDENTIAL: Draft report - ACIL Allen's GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Hi s 22(1)(a)(ii),

Thanks for sending through the report, and looking forward to the chat tomorrow.

The team is a bit stretched this week between leave and various conferences including AEP. Is it possible to provide feedback on the ACIL report next week? We'll have more people on board then and give sufficient time to the work.

Happy to discuss, and thanks!
s 22(1)(a)(ii)

s 22(1)(a)(ii)
Manager

Analysis & Insights | Resources & Energy Insights | Gas Economics
s 22(1)(a)(ii)
Department of Industry, Science and Resources

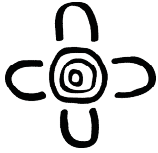
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From: Fitzmyers, Shevaun <s 22(1)(a)(ii) @industry.gov.au>

Sent: Monday, May 20, 2024 10:02 AM

To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Lawrence, David <s 22(1)(a)(ii) @industry.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @ga.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>

Cc: Pankowski, Andrew <s 47F @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Svarcas, Paula <s 47F @dcceew.gov.au>

Subject: RE: CONFIDENTIAL: Draft report - ACIL Allen's GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Hi s 22(1)(a)(ii)

Needs to be tomorrow (Tuesday) from my perspective. Either of the nominated times work for me.

-Shevaun

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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Sent: Friday, May 17, 2024 5:46 PM

To: Lawrence, David <s 22(1)(a)(ii) @industry.gov.au>; Fitzmyers, Shevaun <s 22(1)(a)(ii) @industry.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @ga.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>

Cc: Pankowski, Andrew <s 47F @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Svarcas, Paula <s 47F @dcceew.gov.au>

Subject: CONFIDENTIAL: Draft report - ACIL Allen's GPG and gas infrastructure modelling [SEC=OFFICIAL]

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Hi DISR colleagues,

As discussed at the meeting on Wednesday, please see attached the draft report from ACIL Allen, outlining the analysis they have done so far. As discussed, we are currently negotiating further analysis which will support the Mitigating Gas Shortfall Risks project, and have a limited window of opportunity for you to influence this work. We would therefore appreciate if you could nominate which of the times below would suit you for an initial project team meeting.

Project team meeting times:

- Tuesday 10am, or 4:30pm
- Wednesday 2:30pm
- Friday: 4pm

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s 47C

s 47C

Happy to discuss.

Regards

s 22(1)(a)(ii)

s 22(1)(a)(ii)

Assistant Manager | Market Analysis

Gas and Liquid Fuels Division | Gas Security

s 22(1)(a)(ii)

Australia

Department of Climate Change, Energy, the Environment and Water

P s 22(1)(a)(ii) | s 22(1)(a)(ii) | E s 22(1)(a)(ii) @dcceew.gov.au | Protected Email

s 22(1)(a)(ii) @protected.dcceew.gov.au

Pronouns: she/her

DCCEEW.gov.au ABN 63 573 932 849

Assistant Manager | Supply and Transparency

Gas & Liquid Fuels Division, DCCEEW

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s 22(1)(a)(ii)

From: s 22(1)(a)(ii)
Sent: Friday, 12 January 2024 8:59 AM
To: Ossolinski, Crystal; s 22(1)(a)(ii)
Cc: RSG - AISD - REII - Gas Economics
Subject: RE: DCCEEW's RFQ for analysis/modelling of gas-powered generation [SEC=OFFICIAL]

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Morning Crystal,

The ISP generally provides high level figures of GPG that is required by 2050 – 10GW in the 2022 version (current capacity of GPG and diesel is 11GW, so thinking to date was that questions around GPG need are really a matter of gas supply/fuel rather than generation capacity). The latest draft version of the ISP indicated a 5GW increase is required.

Beyond these headline figures, GPG is a bit of a blind spot, so this analysis is meant to provide a more detailed understanding of GPG: which generators are reaching end of life, will it be economic for GPG operators to maintain/build new facilities given gas prices, what are the forecasts for fuel supply given shortfall forecasts, etc. This will inform an understanding of energy security, whether other sources of firming can perform this role and whether government action is needed.

Not sure about how the consultant would engage with the ISP modelling. All AEMO's modelling is publicly available, I think, and I would presume that the consultancy would engage with this work.

Happy to discuss, s 22(1)(a)(ii)

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From: Ossolinski, Crystal
Sent: Thursday, 11 January 2024 6:04 PM
To: s 22(1)(a)(ii); s 22(1)(a)(ii)
Cc: RSG – AID – REI – Gas Economics
Subject: RE: DCCEEW's RFQ for analysis/modelling of gas-powered generation [SEC=OFFICIAL]

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Hi s 22(1)(a)(ii)

How does this relate to the ISP that AEMO puts together and the modelling work that underpins that? Do you know?

Cheers
Crystal.

Crystal Ossolinski
General Manager

Analysis and Insights Division | Resources and Energy Insights Branch

s 47F

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Department of Industry, Science and Resources

P s 47F | M s 47F s 47F | E s 47F [@industry.gov.au](mailto:s 47F@industry.gov.au)

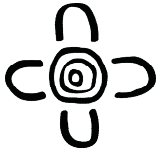
Please note that I work M, Tu, Th, Fri. On Wednesday, please contact a/g GM s 22(1)(a)(ii) (s 22(1)(a)(ii) @industry.gov.au)

Executive Assistant | s 22(1)(a)(ii)

's 22(1)(a)(ii) | ✉ s 22(1)(a)(ii) @industry.gov.au

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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>

Sent: Thursday, 11 January 2024 4:58 PM

To: Ossolinski, Crystal <s 47F @industry.gov.au>

Cc: RSG – AID – REI – Gas Economics <s 22(1)(a)(ii) @industry.gov.au>

Subject: FW: DCCEEW's RFQ for analysis/modelling of gas-powered generation [SEC=OFFICIAL]

OFFICIAL

FYI – DCCEEW RFQ on GPG modelling (incl. Infrastructure)

s 22(1)(a)(i)

OFFICIALOFFICIAL

From: s 22(1)(a)(ii) s 22(1)(a)(ii) @industry.gov.au>

Sent: Thursday, 11 January 2024 4:57 PM

To: Future Gas Strategy Taskforce <s 22(1)(a)(i) @industry.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>; s 22(1)(a)(i) @industry.gov.au>

Subject: DCCEEW's RFQ for analysis/modelling of gas-powered generation [SEC=OFFICIAL]

OFFICIAL

Hi all,

Sending you a RFQ that DCCEEW have developed to get a consultancy to do some modelling and analysis on gas-powered generation, and related gas supply and infrastructure.

Unfortunately has already gone out so no opportunity for comments/scope change (it explicitly feeds into the Future Gas Strategy), but it does give a sense of what's coming and when. Initial results are expected in Feb/March

which is still helpful for us in terms of FGS development, with the final report arriving in early April, which is likely a bit late.

If you'd like some clarification/ or have any other questions, let me know.

Cheers,

s 22(1)(a)(ii)

Assistant Manager

Future Gas Strategy Taskforce

Department of Industry, Science and Resources

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OFFICIAL

s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Friday, 7 June 2024 3:45 PM
To: s 22(1)(a)(ii)
Cc: Pankowski, Andrew; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii);
 ; s 22(1)(a)(ii).; s 22(1)(a)(ii); s 22(1)(a)(ii);
Subject: RE: Confidential: FOR FEEDBACK - GPG and gas infrastructure modelling by ACIL Allen - scenario breakdown [SEC=OFFICIAL]

OFFICIAL

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Hi s 22(1)(a)(ii),

This is a quick update on where we landed on the ACIL modelling, including your feedback, FYI.

As ^{s 22(1)(a)(ii)} flagged in our catch up this week, ACIL are re-running the Base Case gas infrastructure results, as well as Alternate Scenarios 1 and 2, ^{s 47C}

ACIL will need to update the report that we shared with you. **s 47C**

s 47C

-s 47C

I've noted below where we landed on the assumptions for the additional scenarios (see red text in my original email) – s 47C

Let us know if you have any questions or would like to discuss. Otherwise I'll continue to keep you posted on the ACIL work.

Have a great long weekend!

s 22(1)(a)(ii) (s 22(1)(a)(ii))

Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii) Australia

Ms 22(1)(a)(ii) | Es 22(1)(a)(ii)@dcceew.gov.au

DCCEW.gov.au ABN 63 573 932 849



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From: s 22(1)(a)(ii)

Sent: Tuesday, May 28, 2024 6:11 PM

To: s 22(1)(a)(ii) ; s 22(1)(a)(ii)

Cc: Pankowski, Andrew ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)

Subject: RE: Confidential: FOR FEEDBACK - GPG and gas infrastructure modelling by ACIL Allen - scenario breakdown [SEC=OFFICIAL]

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[Learn why this is important](#)

OFFICIAL

Hi s 22(1)(a)(ii),

Thanks for the opportunity to provide input on this. We are thinking about this by trying to take a pragmatic approach while also being prepared for the worst-case scenario(s).

s 47C

s 47C

. This will give us direct feedback on what is possible, but not overstating what can be delivered. I'm not sure what your timing is on this – s 22(1)(a)(ii) is returning 11 June, and given his connections is best to lead on the industry meetings, but if time is of the essence and you're amenable our remaining team can lead this.

More specific thoughts on the individual basins from s 22(1)(a)(ii) which we also discussed in the [FGS Analytical Report](#) in chapters 5-7.

- s47G(1)(a)

Happy to do a bit more work on fleshing out scenarios, but keen to take your lead on how much flexibility you have left and how our feedback matches against your thinking. We're keen to be involved in fleshing out the risks/challenges work.

s 22(1)(a)(ii)

Thanks again, and happy to discuss!

s 22(1)(a)(ii)

s 22(1)(a)(ii)

Manager

Analysis & Insights | Resources & Energy Insights | Gas Economics

Department of Industry, Science and Resources

Phone s 22(1)(a)(ii) | **Extension** s 22(1)(a)(ii) | **Mobile** s 22(1)(a)(ii) | **Emails** s 22(1)(a)(ii) @industry.gov.au

OFFICIAL

From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Sent: Thursday, May 23, 2024 3:06 PM

To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @industry.gov.au>; s 22(1)(a)(ii) s 22(1)(a)(ii) @industry.gov.au>

Cc: Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>

Subject: Confidential: FOR FEEDBACK - GPG and gas infrastructure modelling by ACIL Allen - scenario breakdown [SEC=OFFICIAL]

OFFICIAL

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Hi s 22(1)(a)(ii) and s 22(1)(a)(ii),

Thanks again for the useful discussion the other day on the Mitigating Shortfall Risk project. As promised, here is a breakdown of the modelling ACIL Allen has undertaken for us so far regarding Gas Powered Generation (GPG) and gas infrastructure needs to support the energy transition, as well as further modelling we are considering asking ACIL to run.

We'd welcome your views on the further scenarios we're considering or scenarios you think should be considered, including any suggestions you have as to the underpinning assumptions. We'd appreciate your feedback by say **COB Monday if possible** to allow us to get back to ACIL in a timely manner. But let me know if you need further time (I'm conscious you have a number of staff travelling at the moment).

Please don't hesitate to reach out if you have any questions.

Kind regards

s 22(1)(a)(ii)

s 22(1)(a)(ii)

s 22(1)(a)(ii)

s 22(1)(a)(ii)



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S 47C

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S 47C

S 47C

S 47C

s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Thursday, 20 June 2024 12:12 PM
To: Jameson, Lauren; s 22(1)(a)(ii); s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii) Pankowski, Andrew; s 22(1)(a)(ii) s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: FW: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Attachments: GasMark updated All Scenario results - 20 June.xlsx

OFFICIAL

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Hi all,

Further to my email yesterday, please find attached the full set of ACIL's updated core scenario results (the Base Case and Alternate Scenarios 1 and 2). ACIL has let us know they're still pulling together the updated infrastructure mixes.

See you in the meeting tomorrow.

Kind regards,
s 22(1)(a)(ii) (s 22(1)(a)(ii))
Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii)
Ms s 22(1)(a)(ii) | Es s 22(1)(a)(ii)@dcceew.gov.au
Australia

DCCEEW.gov.au ABN 63 573 932 849



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From: s 47F
Sent: Thursday, June 20, 2024 11:24 AM
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii); s 22(1)(a)(ii); Pankowski, Andrew; s 22(1)(a)(ii); s 47F; s 47F; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Hi s 22(1)(a)(ii) and colleagues

Please find attached a full set of updated scenario results, covering the Base Case results sent on Monday and also Alternate Scenarios 1 and 2.

The broad pattern of results is consistent across the three runs, with higher demand draws more heavily on Qld CSG, with higher prices in the near-term but lower long-run prices reflecting the greater development of domestic production.

We look forward to talking you through the results tomorrow.

Best regards

s 47F

s 47F

s 47F @acilallen.com.au

ACIL ALLEN

s 47F

s 47F

acilallen.com.au

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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Sent: Monday, June 17, 2024 12:09 PM

To: s 47F s 47F @acilallen.com.au>

Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew s 47F i@dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; s 47F

@acilallen.com.au>; s 47F

@acilallen.com.au>; s 47F

@acilallen.com.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Thanks very much s 47F, acknowledging receipt. We look forward to the updated alternate scenarios this week.

s 22(1)(a)(ii) (s 22(1)(a)(ii))

Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW

s 22(1)(a)(ii)

Australia

M s 22(1)(a)(ii) | E s 22(1)(a)(ii) @dcceew.gov.au

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From: s 47F @acilallen.com.au>

Sent: Monday, June 17, 2024 11:30 AM

To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; s 47F @acilallen.com.au>; s 47F

@acilallen.com.au>; s 47F @acilallen.com.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii)

<s 22(1)(a)(ii) @dcceew.gov.au>

Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Hi s 22(1)(a)(ii) and colleagues

Please find attached our updated Base Case modelling results. The main changes since last time are:

- s 47C

In terms of infrastructure and supply options, the main changes are:

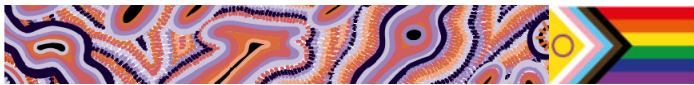
- s 47C

In terms of the timing of further scenarios, you are quite right that I left out the demand sensitivities in that list. In effect that slips the mini-scenarios and subsequent runs by a week, so our schedule broadly becomes:

- Updated core scenarios this week
- Updated demand scenarios next week (indicatively 26 June)
- LNG insurance value mini-scenarios indicatively 3 July
- Short-term outlook mini-scenarios indicatively 10 July
- Further runs to follow depending on scenario design and priority (e.g. timing of GPG-to-HPG scenario desired by hydrogen and electricity teams).

Best regards

s 47F



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S 47C

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s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Wednesday, 19 June 2024 5:10 PM
To: Jameson, Lauren; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii); Pankowski, Andrew; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Subject: Mitigating Gas Shortfall risks project - updated ACIL results [SEC=OFFICIAL]
Attachments: GasMark updated Base Case results - 17 June.xlsx

OFFICIAL

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Good afternoon,

As flagged this morning in the Mitigating Gas Shortfall Risks project meeting, please find attached and below ACIL's updated Base Case results for its gas infrastructure modelling. The attached contains the revised supply mix results; we expect the updated infrastructure results with the other updated core scenarios tomorrow. ACIL has summarised the key changes to the infrastructure results below.

These results reflect the non-GPG demand from AEMO's 2024 GSOO, rather than ACIL's in house demand trajectory that they had previously used (specifically their LNG demand trajectory). In re-running the core scenarios, we also asked ACIL to update any other assumptions taken from the GSOO to the 2024 data, including source/production costs.

We'll forward the remaining updated results to you when they come through. I will also forward you the invite to attend our catch up with ACIL on Friday to discuss these developments.

Kind regards

s 22(1)(a)(ii) (s 22(1)(a)(ii))
Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii) Australia

M s 22(1)(a)(ii) | E s 22(1)(a)(ii)@dcceew.gov.au

DCCEEW.gov.au ABN 63 573 932 849



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s 22(1)(a)(ii)

s 22(1)(a)(ii)

s 22(1)(a)(ii)

S 47C

S 47C

S 47C

From: s 22(1)(a)(ii)
To: s 22(1)(a)
Cc: [Jameson, Lauren](#); s 22(1)(a)(ii)
Subject: FW: Confidential: FOR FEEDBACK - GPG and gas infrastructure modelling by ACIL Allen - scenario breakdown [SEC=OFFICIAL]
Date: Thursday, 20 June 2024 12:37:24 PM
Attachments: [image002.png](#)
[image003.png](#)

OFFICIAL

Hj's 22(1),
Here is some guidance for original modelling by ACIL Allen underestimating gas demand (which DCCEEW felt was considerable). I'm chasing up if we have any updates, I'll revert back if I find something.

Cheers,

s 22(1)(a)(

s 22(1)(a)(ii)

A/g Manager

Gas Economics | Analysis and Insights Division

Department of Industry, Science and Resources

Phones 22(1)(a)(ii) | **Mobiles** 22(1)(a)(ii) | **Emails** 22(1)(a)(ii) [@industry.gov.au](#)

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s 22(1)(a)(ii)

s 22(1)(a)(ii)

s 22(1)(a)(ii)

From: s 22(1)(a)(ii)
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)
Subject: FW: Confidential: FOR FEEDBACK - GPG and gas infrastructure modelling by ACIL Allen - scenario breakdown [SEC=OFFICIAL]
Date: Thursday, 13 June 2024 2:00:49 PM
Attachments: [image001.png](#)
[image002.jpg](#)

OFFICIAL

Some context about the meetings with industry that s 22(1)(a)(ii) flagged.
s 22(1)(a)(ii)

Assistant Manager
Gas Economics | Analysis and Insights Division
Department of Industry, Science and Resources
Phones s 22(1)(a)(ii) | **Mobiles** s 22(1)(a)(ii) | **Emails** s 22(1)(a)(ii) [@industry.gov.au](mailto:industry.gov.au)

s 22(1)(a)(ii)

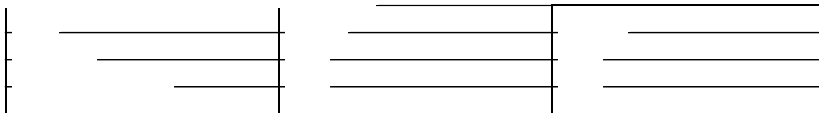
s 22(1)(a)(ii)

s 22(1)(a)(ii)

From: s 47F
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; Pankowski, Andrew ; s 22(1)(a)(ii) ; s 47F ; s 47F ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Date: Monday, 24 June 2024 12:49:14 PM
Attachments: [image001.jpg](#)
[image003.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)
[o365login-o365-7-white_694ccb12-516d-4029-b3a0-a7bcd52b1c28.png](#)
[acilallen-emailbanner_ce676d54-d938-4038-9e93-5dc2b4fafde6.png](#)
[image002.png](#)
[Gas modelling - updated results - 24 June - with infrastructure updates.pdf](#)

Hi s 22(1)(a)

Please find attached the slides we presented on Friday, with updates to include a few pipeline details that we forgot to include (e.g. North Bowen) – to give you a complete picture of the infrastructure upgrades across the scenarios. The updates are on slide 11 and highlighted in yellow. s 47C



Unfortunately we have

some illness in the team today so it is taking a little longer than we hoped, but I expect to have it to you by the end of the day.

Best regards

s 47F

s 47F

s 47F @acilallen.com.au



s 47F

s 47F

acilallen.com.au

Brisbane | Canberra | Melbourne | Perth | Sydney | Adelaide

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From: s 47F

Sent: Thursday, June 20, 2024 12:06 PM

To: s 22(1)(a)(ii)

Cc: s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; Pankowski, Andrew ; s 22(1)(a)(ii) ; s 47F ; s 47F ; s 47F ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)

Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Yes, we'll pull those together s 22(1)(a)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>

Sent: Thursday, June 20, 2024 12:01 PM

To: s 47F @acilallen.com.au>

Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) s 22(1)(a)(ii) @dcceew.gov.au>; s 47F @acilallen.com.au>; s 47F @acilallen.com.au>; s 47F @acilallen.com.au>; s 22(1)(a)(ii) s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) @dcceew.gov.au>

Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]

Thanks s 47F, much appreciated. Will you also be providing us with the updated infrastructure mix results for the Base Case and each alternate scenario?

s 22(1)(a)(ii) s 22(1)(a)(ii)

Assistant Director

Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW

s 22(1)(a)(ii) Australia

Ms s 22(1)(a)(ii) s 22(1)(a)(ii) @dcceew.gov.au

DCCEEW.gov.au ABN 63 573 932 849

s 22(1)(a)(ii)

s 22(1)(a)(ii)

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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Sent: Friday, June 14, 2024 12:15 PM
To: s 47F <s 47F @acilallen.com.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Thanks s 47F. I'll send an invite shortly for 1-2pm next Friday.
I just realised your expected timing for the two demand sensitivity scenarios hasn't been captured below – would appreciate an update on that too, when ready.
Kind regards
s 22(1)(a)(ii) s 22(1)(a)(ii)
Assistant Director
Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii) Australia
Ms 22(1)(a)(ii) | Es 22(1)(a)(ii) @dcceew.gov.au
DCCEEW.gov.au ABN63 573 932 849

From: s 47F <s 47F @acilallen.com.au>
Sent: Friday, June 14, 2024 11:32 AM
To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Thanks for this s 22(1)(a)(ii), I agree that we should catch up next Friday.
We can do 1-2 to accommodate Andrew P, or any time earlier than that (we have a clash from 2pm). Please feel free to send an invite for the time that suits you best.
Best regards
s 47F

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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Sent: Thursday, June 13, 2024 5:38 PM
To: s 47F <s 47F @acilallen.com.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Hi s 47F
Thanks for the below update – much appreciated. Agree with confirming the new scenario results before commencing the additional runs.
Shall we pencil in a catch up for next Friday (21 June)? That should give us time to consider the updated results and identify any issues for discussion ahead of commencing the additional runs. Our team has availability between 10:30am and 3pm that day but if we can make it for 1-2pm Andrew P might be able to make it as well.
Thanks
s 22(1)(a)(ii) s 22(1)(a)(ii)
Assistant Director
Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii) Australia

Ms 22(1)(a)(ii) |Es 22(1)(a)(ii) @dcceew.gov.au
DCCEEW.gov.auABN63 573 932 849



From: s 47F <s 47F @acilallen.com.au>
Sent: Thursday, June 13, 2024 4:25 PM
To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Hi s 22(1)(a)

Just following up on this message to set out our expected timing of the work from here.
Firstly, our apologies as we have been a bit delayed on updating the core scenarios. It has taken a bit of time to recalibrate the new Base Case with the new LNG demand assumptions and the 2024 GSOO assumptions, but we expect to have the new Base Case finalised and a high-level results spreadsheet to you tomorrow. We expect that we'll have spreadsheet results for the two alternate scenarios to you by the middle of next week – indicatively end of Wednesday.
From there we can move on to the additional runs you've requested. However, we would seek to confirm that you are happy with the new scenario results before commencing the additional runs, as these further runs require a fixed reference point to be useful (and any changes to the core scenarios would need to be reflected to the additional runs). The below timing assumes that we are able to discuss and resolve any issues with the additional scenarios by Monday 24 June.

- Insurance benefit of import terminal: spreadsheet results for 3x mini-runs by Friday 28 June
- Short-term outlook sensitivities: spreadsheet results for 4 x min-runs by Friday 3 July
- Pessimistic supply outlook: the timing of this scenario is dependent on the priority of this run relative to a potential GPG-to-HPG conversion scenario under consideration by the electricity team, and how this scenario works given the results of the updated alternate scenario 2 – indicatively mid-July.

Best regards
s 47F



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From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Sent: Friday, June 7, 2024 1:18 PM
To: Guy Dundas <s 47F @acilallen.com.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22 <s 22 @dcceew.gov.au>; s 47F <s 47F @acilallen.com.au>; s 47F <s 47F @acilallen.com.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Hi s 47F

Thanks for the chat this morning. As discussed, we're still keen for ACIL to progress the further gas scenarios, as detailed below. This is in addition to the corrected original scenarios (Base Case and Alternate Scenarios 1 and 2) and demand sensitivity bookend modelling. Confirming that we'd like ACIL to **please use the 2024 GSOO assumptions** for these further scenarios as well. Below I've confirmed the assumptions for the pessimistic supply outlook but perhaps hold off on pressing go on that scenario until we've discussed the updated Base Case and Alt Scenarios, so we can properly understand how the pessimistic supply outlook would compare (to ensure we're getting the value out of that scenario that we're expecting). Once your team is in a position to consider the below, we'd appreciate your indicative timing for completing these scenarios, recognising that your priority at the moment is updating the original scenarios and demand modelling.
As flagged, s 47C, s 47G

We'll follow up on that separately.

Scenario	Assumptions	Price
Insurance benefit of import terminal	Run a series of 'mini-scenarios' that run only to 2030 (inclusive): - Mini run A: Alternate Scenario 1 infrastructure mix but under high demand conditions (electrification as per the low electrification scenario, plus 10% POE weather effects – i.e. higher peak day demand) - Mini run B: Accelerated LNG entry under demand conditions as per Mini run A; Pt Kembla entry in 2026 (consistent with Squadron's public target date) and Viva Geelong entry in 2028. - Mini run C: Accelerated LNG entry under the same demand assumptions as in the Base Case/Alternate Scenario 1. Comparing Alternate scenario 1 and these three mini runs is likely to show the insurance benefit of accelerated entry.	s47G(1)(a)
Short-term outlook sensitivities	To understand the minimum viable combination of investments necessary to reliably meet near-term demand (to 2030), please model all four of the below mini-scenarios to reflect different combinations of 2 early investments, and then use the minimum necessary later investments to balance the market, but only if necessary:	s47G(1)(a)

Pessimistic supply outlook	To explore the price and other implications of a difficult investment environment, under a broader and longer-term scenario (out to 2050), please model a scenario as follows: • Increase the cost of all undeveloped 2P reserves by [25%] and 2C resources by [50%] • Exclude supply from Beetaloo and Narrabri • Exclude LNG terminals (to clearly magnify the impacts of the higher cost domestic production).	s47G(1)(a)
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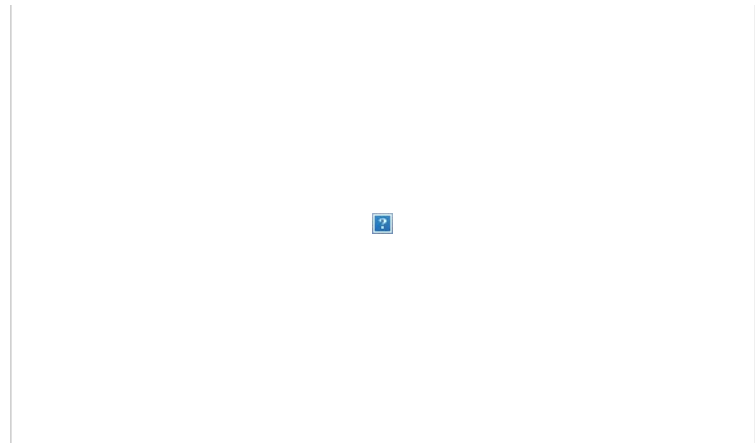
s 47G(1)(a)

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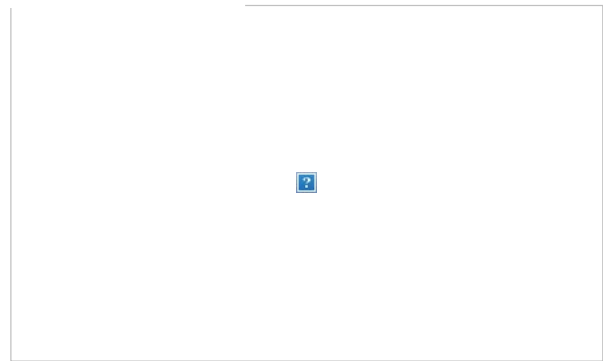
58 of 185

Sent: Wednesday, June 5, 2024 4:27 PM
To: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Cc: s 22(1)(a)(ii) s 22(1)(a)(ii) @dcceew.gov.au; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 47F @acilallen.com.au>
s 47F @acilallen.com.au>
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Hi s 22(1)(a)(ii) apologies, I've been tied up in meetings this afternoon.
s 47F and s 47F are just looking at this now – we'll track this down and get back to you ASAP.
Best regards
s 47F

From: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Sent: Wednesday, June 5, 2024 2:36 PM
To: s 47F <s 47F @acilallen.com.au>
Cc: s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>; Pankowski, Andrew <s 22(1)(a)(ii) @dcceew.gov.au>; s 22(1)(a)(ii) <s 22(1)(a)(ii) @dcceew.gov.au>
Subject: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Hi s 47F
Do you have any availability for a chat with us this afternoon? s 47C



s 47C



s 47C
know your availability (ideally for this afternoon) so we can discuss.
Kind regards
s 22(1)(a)(ii) s 22(1)(a)(ii)
Assistant Director
Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW
s 22(1)(a)(ii) Australia
Ms 22(1)(a)(ii) | Es 22(1)(a)(ii) @dcceew.gov.au
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From: s 22(1)(a)(ii)
To: s 22(1)(a)(ii)
Cc: s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; Pankowski, Andrew; s 22(1)(a)(ii) ; s 47F ; s 47F ; s 47F ; s 22(1)(a)(ii) ; s 22(1)(a)(ii) ; s 22(1)(a)(ii)
Subject: RE: Urgent request for meeting - GPG and gas infrastructure modelling [SEC=OFFICIAL]
Date: Monday, 24 June 2024 5:04:45 PM
Attachments: [image001.jpg](#)
[image003.png](#)
[image004.png](#)
[image005.png](#)
[image006.png](#)
[image007.png](#)
[o365login-o365-7-white_694ccb12-516d-4029-b3a0-a7bcd52b1c28.png](#)
[acilallen-emailbanner_ce676d54-d938-4038-9e93-5dc2b4fafde6.png](#)
[image002.png](#)
[Summary - QLD production.xlsx](#)

Hi s 22(1)(a)(ii) and all
Please find attached the detailed breakdown of Queensland gas production.
Best regards
s 47F

s 47F @acilallen.com.au



s 47F

s 47F
acilallen.com.au
Brisbane | Canberra | Melbourne | Perth | Sydney | Adelaide

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S 47C

s 22(1)(a)(ii)

From: s 22(1)(a)(ii) <s 22(1)(a)(ii)@dcceew.gov.au>
Sent: Thursday, 30 May 2024 11:07 AM
To: Lawrence, David; Fitzmyers, Shevaun; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii)
Cc: Pankowski, Andrew; s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); s 22(1)(a)(ii); Svarcas, Paula; s 22(1)(a)(ii)
Subject: RE: CONFIDENTIAL: Draft report - ACIL Allen's GPG and gas infrastructure modelling [SEC=OFFICIAL]
Attachments: GPG and gas infrastructure - final report - clean.pdf

OFFICIAL

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Good morning DISR colleagues,

Please find attached the final report from ACIL Allen containing the results of the analysis they have completed so far under the GPG and gas infrastructure modelling. This follows the draft report that s 22(1)(a)(ii) circulated earlier this month (see below).

For clarity, the results of the further gas analysis we are considering will be captured in a separate addendum report from ACIL.

CONFIDENTIAL: Not For Further Distribution

s 47C

Kind regards

s 22(1)(a)(ii) (s 22(1)(a)(ii))

Assistant Director

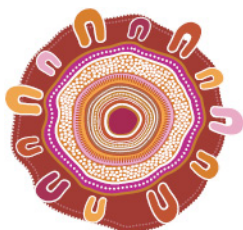
Gas and Liquid Fuels Division | Gas Transformation Strategy Branch | Infrastructure and Reliability DCCEEW

s 22(1)(a)(ii)

Australia

M s 22(1)(a)(ii) | E s 22(1)(a)(ii) [@dcceew.gov.au](mailto:s 22(1)(a)(ii)@dcceew.gov.au)

DCCEEW.gov.au ABN 63 573 932 849



We acknowledge the Traditional Owners of country throughout Australia and recognise their continuing connection to land, waters and culture. We pay our respects to their Elders past and present.

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s 22(1)(a)(ii)

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