

2022 WA GSOO FIR preliminary data analysis & 2021 WA GSOO survey response



Presented to WA gas Consultative Forum
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Background and context

- Each year, AEMO issues a formal information request (FIR) to Gas Market Participants and non-GSI participants seeking data to assist with compiling the WA GSOO.
- This presentation covers AEMO's preliminary analysis of the data received from the 2022 FIR process.
- Data reconciliation is still underway, so findings are likely to change.
- Further analysis will be presented in the 2022 WA GSOO.

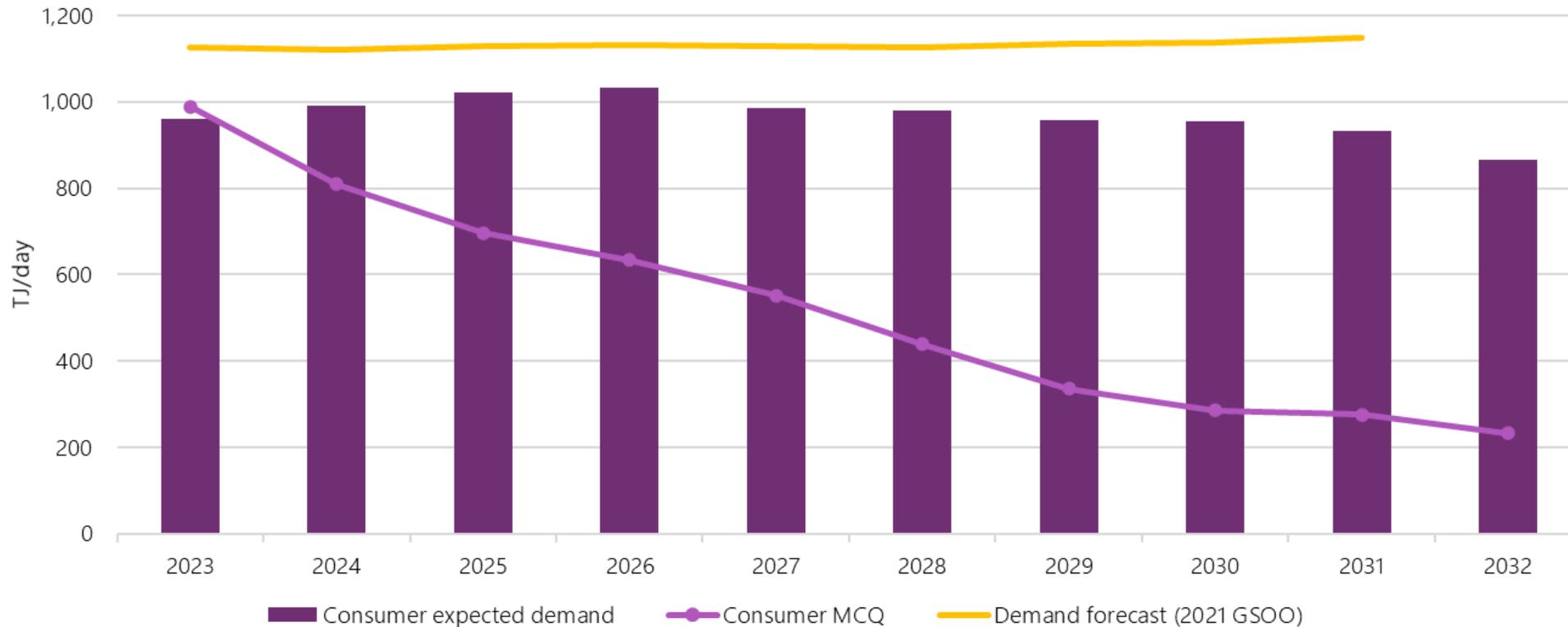
Response rate

Participants	Number of requests issued	Responses received	Response rate 2022	Response rate 2021
Gas Market Participants	56	53	95%	93%
Non-GSI participants*	17	12	71%	78%
Total	73	65	89%	90%

* Non-GSI participants voluntarily provide data.

AEMO continues to seek data from Gas Market Participants who are yet to respond and will include additional data received in the 2022 WA GSOO.

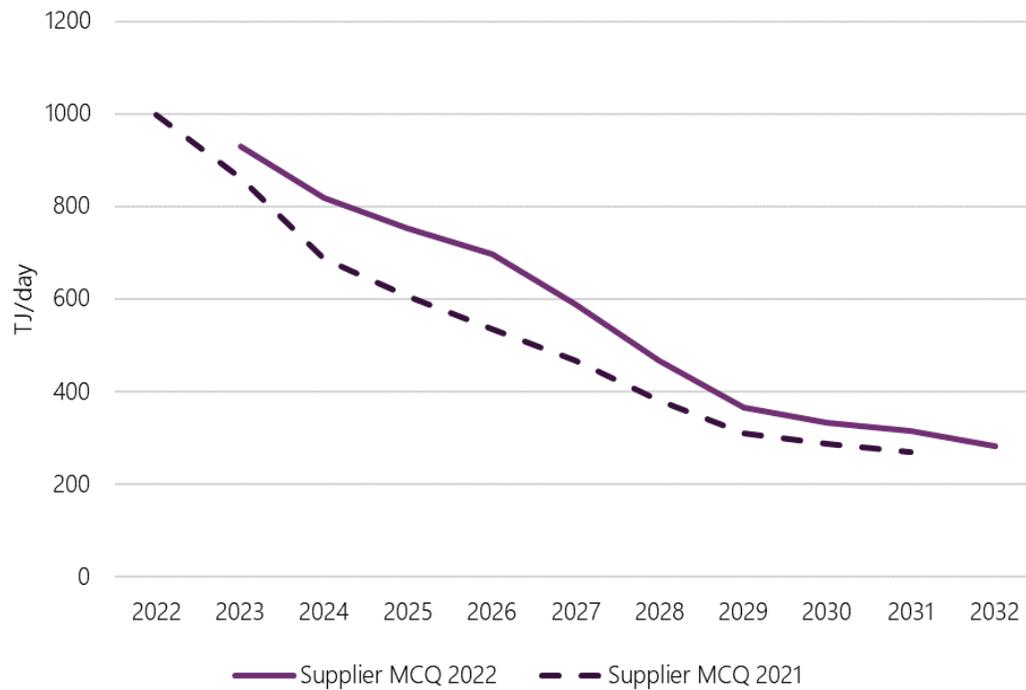
Expected demand and MCQ - consumers



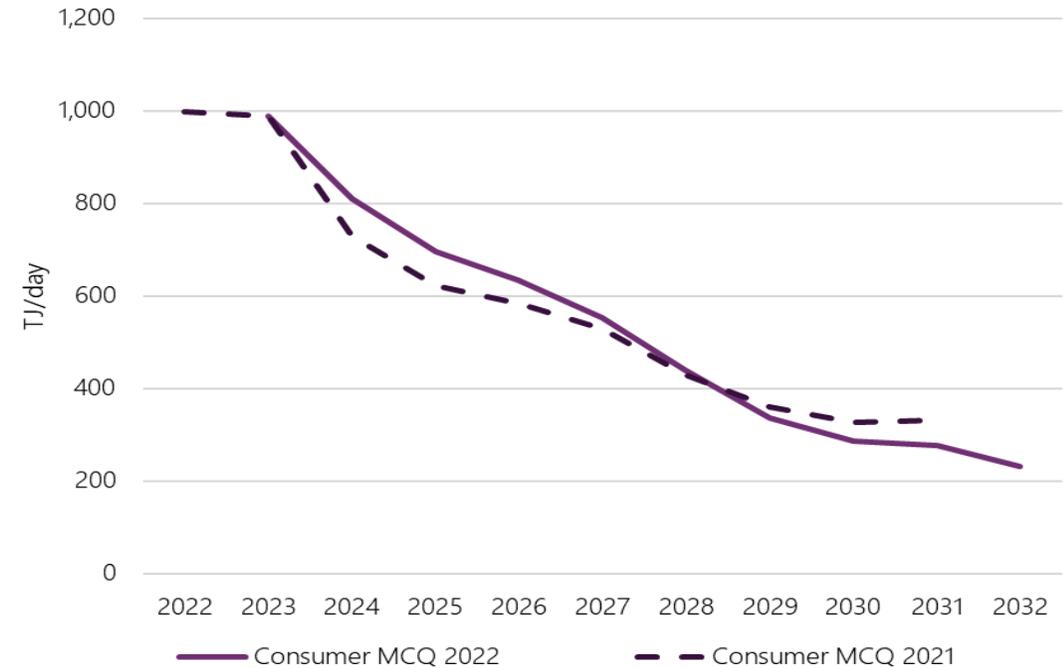
Note: FIR data does not cover all gas demand in WA (excludes distribution connected consumers and other demand less than 10 TJ/day).

Comparison of 2021 and 2022 FIR data – MCQ

Supplier MCQ



Consumer MCQ



- MCQ from suppliers has increased for the outlook period.
- MCQ from consumers has increased in the first half of the outlook period.

Key takeaways

- The FIR data indicates that there will be sufficient processing capacity to supply the expected demand between 2023 and 2032*.
- Next steps are to develop the medium- and long-term WA domestic gas demand and potential supply forecasts as part of the 2022 WA GS00 report.
- Additional follow-up with individual Gas Market Participants may be required to resolve some outstanding queries and finalise the data.

*** Note: This is not AEMO's forecast of the supply-demand balance.**

2022 WA GSOO timeline

- WA Gas Forecasting Reference Group (FRG) – 5 October
 - Opportunity to provide feedback on draft forecasts
- WAGCF – 2 November
 - Opportunity to provide further feedback on draft forecasts
- 2022 WA GSOO publication – Early-mid December

2021 WA GSOO Survey Response

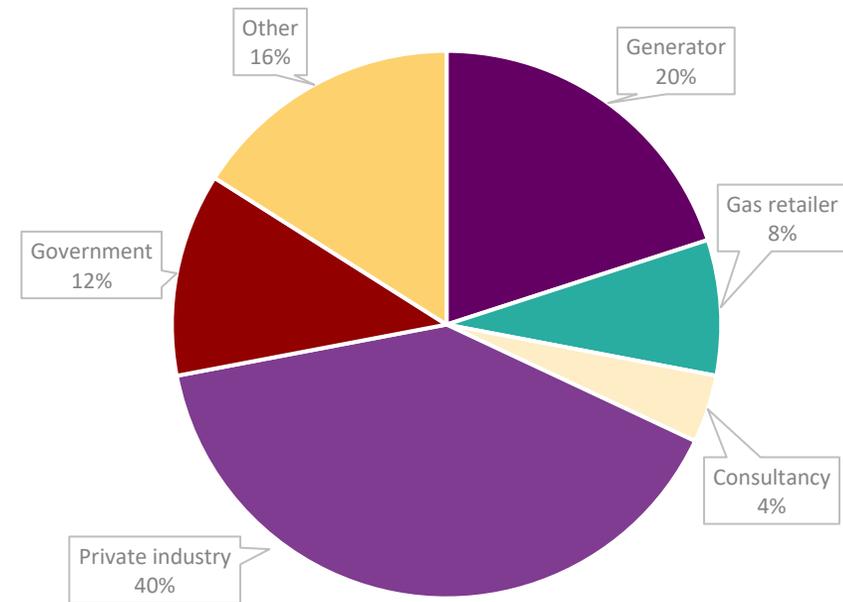


A good mix of respondent profiles

- **25** stakeholders responded to the survey
- **64%** of the respondents have been reading the WA GSOO for over 4 years

AEMO receives feedback throughout the year informally and formally via other channels (consultative forums, 1-1 conversations, FRG, etc.)

Organisation type



Feedback summary

78% of the respondents prefer the 2021 WA GSOO over the past years due to its

- Shortened format
- Content of main and supplementary documents.

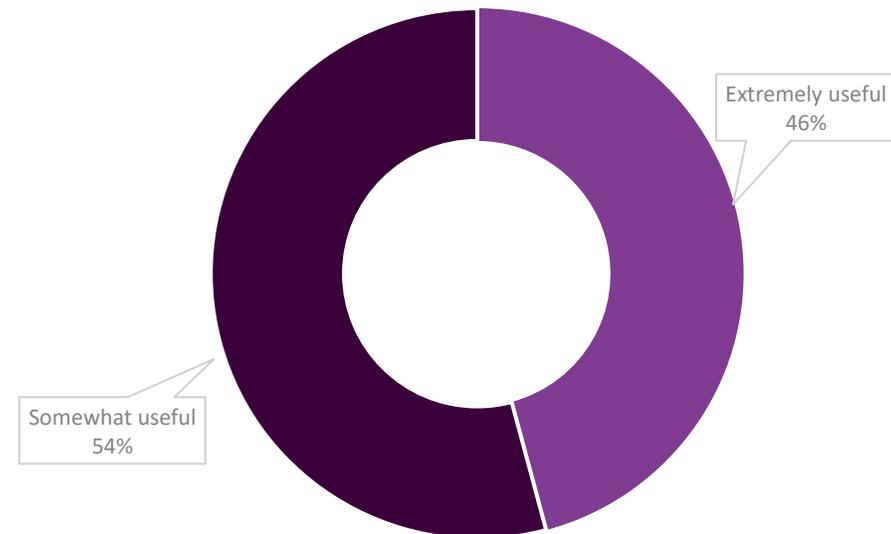
Positive feedback received for:

- Giving an overview of gas supply and use in WA.
- Increased transparency and supporting detail.
- Greater accessibility to non-market participants who may not have commercial knowledge.
- Providing a macro-level overview of the market. Demand (actual and forecast) is given sufficient importance as it can pull supply into the market.

The WA GSOO is useful

Area	Tally of 25 respondents
Investment decisions	6
Market understanding	21
Operations planning	4
Personal interest	5
Other	5

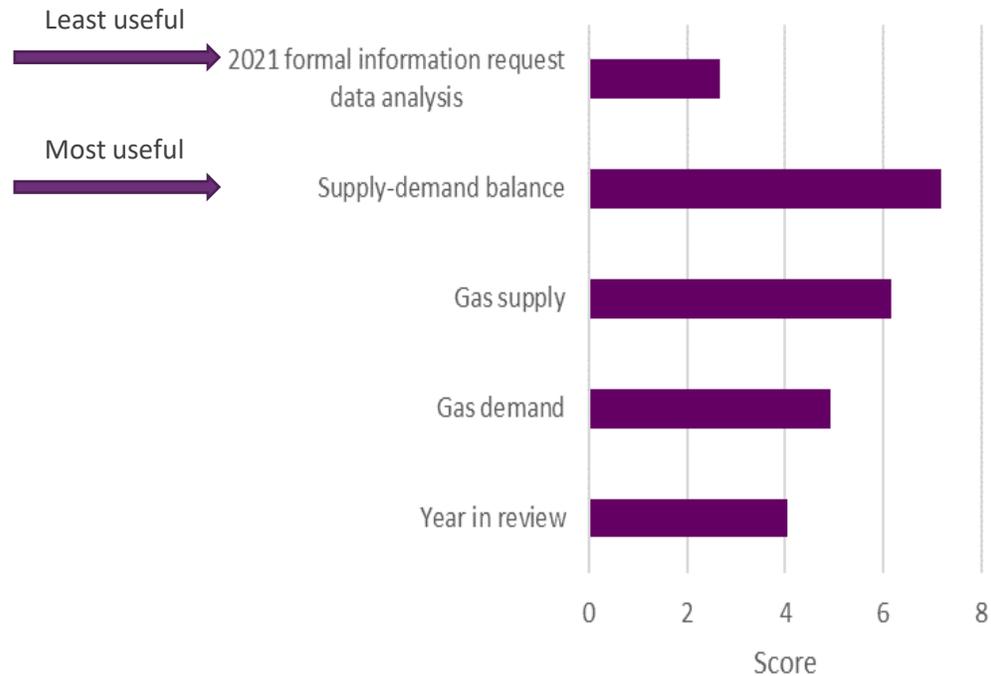
Usefulness to organisation



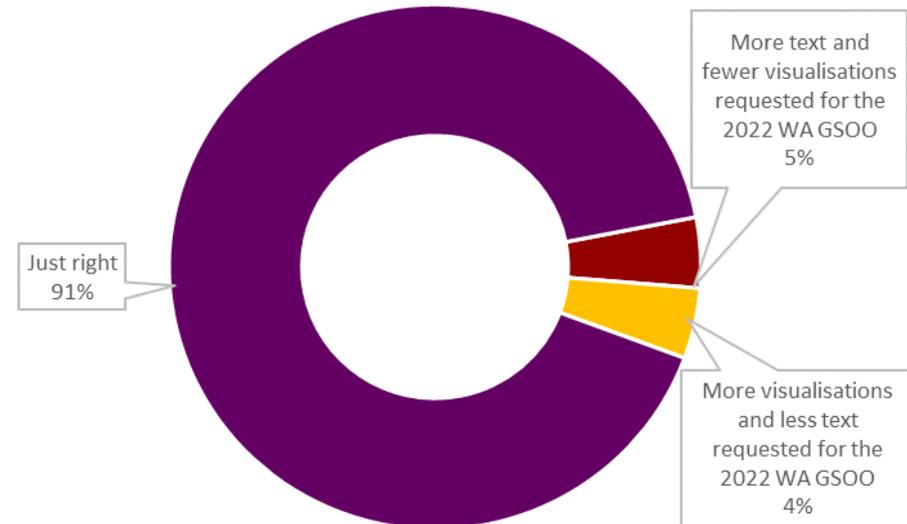
Note: Percentages are calculated based on 25 respondents

General preference summary

Chapter preference



Visualisation preference



Majority support the current visualisations used

Suggested additional analysis and improvements

- Additional explanation of differences between scenarios.
- Commentary or analysis about the energy transition.
- Greater discussion of prospective demand projects.
- Analysis of supply disruptions as part of the "Year in Review" chapter.
- Analysis of contracted vs uncontracted supply/demand.

AEMO will consider feedback received and incorporate it in the 2022 WA GSOO where practical.



AEMO strives for continuous improvement and values stakeholder feedback

For further engagement on the 2022 WA GSOO, please reach out to the Reserve Capacity team at wa.capacity@aemo.com.au