APA
Australia's energy infrastructure partner

Draft Engagement Summary Report

Roma Brisbane Pipeline 2027–32 Access Arrangement

17 April 2026

About this document

APA has prepared this draft Engagement Summary Report to accompany the Overview of the Draft Access Arrangement (**Draft Overview**) for the 1 July 2027 to 30 June 2032 (**2027–32**) regulatory period to solicit stakeholder feedback ahead of submitting the Roma Brisbane Pipeline (**RBP**) Access Arrangement to the Australian Energy Regulator (**AER**) in June this year.

This document summarises the engagement journey APA has undertaken with stakeholders to prepare the 2027–32 RBP Access Arrangement including:

- the engagement approach
- the timeline of engagement activities to date and the next steps in relation to stakeholder engagement
- what was heard from stakeholders during the engagement activities and how APA responded to this feedback in developing the Access Arrangement
- a summary of the available evaluation results from RBP's engagement activities.

We welcome customers and stakeholders' views on the draft package.

Please share any feedback with us by emailing yoursay@apa.com.au by 5pm 5 June 2026.

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Engagement approach

APA is committed to embedding quality stakeholder engagement into our business. Our aim is to ensure the RBP Access Arrangement appropriately reflects the views of the consumers and communities we serve. To meet this expectation, we adopted a multiphase approach to our engagement:

Planning	Phase 1	Phase 2	Phase 3	Phase 4	Submission
Feb 25 – Mar 25	**Apr 25– Jul 25**	**Aug 25 – Oct 25**	**Nov 25 – Apr 26**	**May 26 – Jun 26**	**June 26**
Plan engagement approach and preliminary plan	Develop key themes and customer priorities	Gather insights to inform options / decision making and pricing preferences	Deep dive into areas that matter and develop pricing strategies	Develop and test a draft Access Arrangement	Submit the Access Arrangement with support from customers and stakeholders

The key activity in Phase 1 was a Co-creation workshop, held virtually with stakeholders in April 2025. More than 60 individual stakeholders from over 40 different organisations were invited to participate. We received 12 acceptances and, on the day, 10 participants from nine organisations were able to attend and contribute to the co-creation workshop.

The outputs of the Co-creation workshop directly informed the final engagement objectives and the key themes and priorities for the review. A stakeholder reference group was subsequently formed to assist APA in understanding the needs and expectations of different customer segments, including vulnerable groups.

Overview of the stakeholder reference group

The primary role of the stakeholder reference group is to provide input and challenge to APA's proposed plans to ensure the Access Arrangement appropriately addresses the needs and preferences of customers. The secondary role relates to approving the initial engagement plan and continuing the co-design of the ongoing engagement program.

Along with an independent consumer advocate, representatives from the below organisations participated in the stakeholder reference group at various times and at varying levels. Staff from the AER were also invited to observe the engagement process.

Organisation	Stakeholder group	Organisation	Stakeholder group
AGL	Shipper	CSR Limited	Large customer
Alinta Energy	Shipper	Glencore Limited	Producer
Arrow Energy	Producer	Jemena	Gas distributor
Brickworks Building Products	Large customer	Maranoa Regional Council	Local government
Cadesi	Renewable energy	Queensland Farmers Federation	Landholders
CleanCo Queensland	Generator	Origin Energy	Shipper
Coexistence Queensland	State government	Shell Energy	Producer
Council on the Ageing, QLD	Customer advocate	St Vincent De Paul	Customer advocate
CS Energy	Gentailer	VFRenewables	Renewable energy
Energy Users Association of Australia	Large business advocate	Western Downs Regional Council	Local government

Engagement objectives

The agreed engagement objectives following the Co-creation workshop are shown below.

APA's engagement objectives are to deliver an access arrangement that is capable of acceptance and:

- Brings the outside in' by educating and directly responding to the needs and preferences of our customers, their communities and other key stakeholders
- Provides sustainable returns for shareholders and investors
- Delivers a reliable, safe and secure supply of gas
- Supports decarbonisation of the energy supply chain
- Appropriately addresses the changing policy objectives of state and federal governments

Stakeholders' priorities for the 2027–32 Access Arrangement

The Co-creation workshop identified stakeholders' priorities for the 2027–32 Access Arrangement. These were combined with the requirements of the AER's 'Better Resets Handbook to form a checklist for the engagement program.

Reliability

- ❑ Historic performance
- ❑ Ageing pipeline risks
- ❑ Influence of competing pipelines

Costs & prices

- ❑ Expenditure governance
- ❑ Step changes in forecast expenditure
- ❑ Actual expenditure over the current period
- ❑ Value of the RAB
- ❑ Corporate costs
- ❑ Revenue/price path
- ❑ Ageing pipeline costs
- ❑ Decommissioning costs
- ❑ Incentive schemes
- ❑ Tariff variation mechanism

Customer & community risk

- ❑ Demand forecasts
- ❑ Step changes in demand forecasts
- ❑ Form of control
- ❑ Impacts on local councils plans & strategies
- ❑ Asset stranding / accelerated depreciation
- ❑ Prudent discounts (relate to potential loss of large industrial customers)

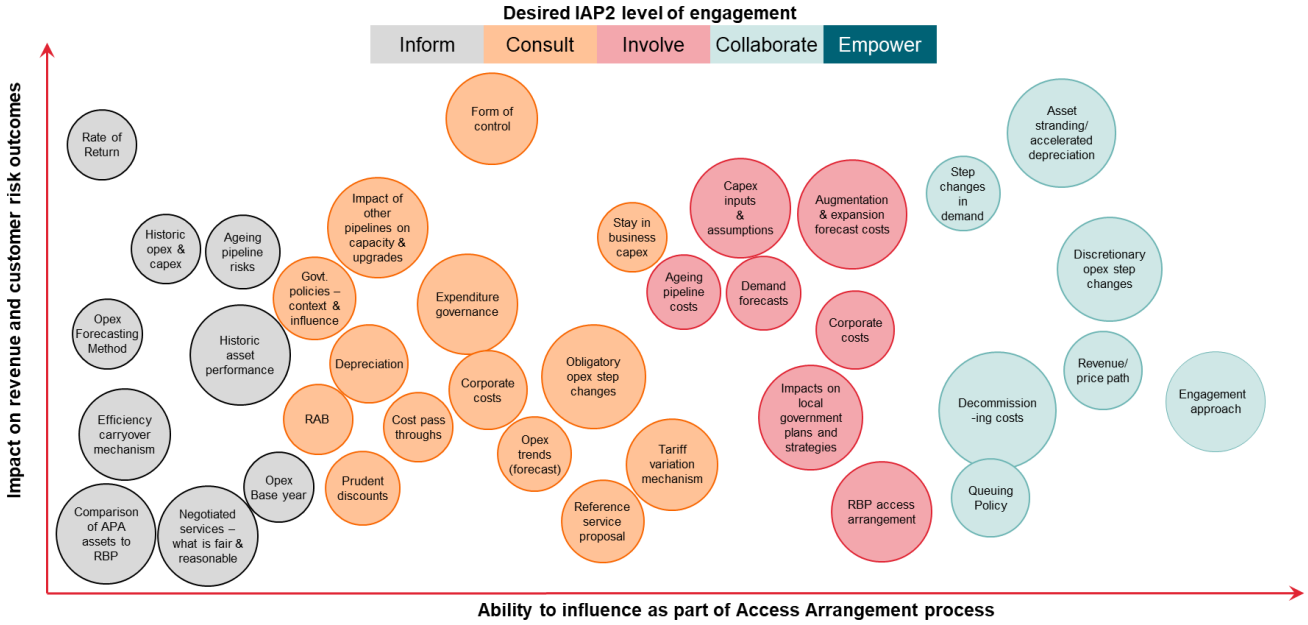
Other topics of interest

- ❑ Queuing arrangements
- ❑ Negotiated services (fair and reasonable in a negotiate/arbitrate environment)
- ❑ Similarities and differences in the issues facing APA's assets
- ❑ Reference Service Proposal

Influenced by Local, State and Federal government policies

The engagement plan, that was subsequently reviewed and approved by the stakeholder reference group addressed these priorities. Engagement was focused on the issues where stakeholders could have the greatest impact and where their opinion would genuinely influence and guide the development of the Access Arrangement.

Mapping of priorities and topics against the IAP2 spectrum



Subsequent consultation took place over a 12-month period to deliver a draft Access Arrangement for the 2027–32 period that reflects consumer and stakeholder priorities and preferences and is capable of acceptance.

Kogan North Compressor Station

Engagement journey to date and next steps

To date, our Draft Overview has been informed by five meetings with our stakeholder reference group.

We have two further meetings planned ahead of submitting our Access Arrangement to the AER at the end of June – the first to gather feedback on the draft Overview and the second to gather qualitative insights to the Stakeholder Reference Group Survey results. These meetings will inform any final changes to the Access Arrangement and the summary write-up of the survey results.

We will also reconnect with stakeholders following the AER's Draft Decision if it raises major issues that warrant further discussion or if there are other significant changes to our forecasts.

Wallumbilla Gas Hub

Timeline of engagement interactions to date

30 April 2025	Co-creation workshop	– Overview of the RBP – Identification of core issues and priorities – Agree evaluation and feedback loops
15 May 2025	Shared output from the co-creation workshop and a draft engagement plan	
4 June 2025	Stakeholder meeting 1	– Confirm engagement approach and plan – Overview of the regulatory framework, government policy context and operating context for the RBP – Understand whether changes are needed to the current reference services – Performance of RBP over the current period and future challenges and opportunities
20 June 2025	Shared draft Reference Service Proposal for comments and feedback	
12 August 2025	Stakeholder meeting 2	– Expenditure governance – The risks and costs of an ageing pipeline and the impact of other nearby pipelines – Introduction to AA terms and conditions – Overview of the building block approach and form of control
25 November 2025	Stakeholder meeting 3	– Explain the efficiency carryover mechanism – Outline stay-in-business capital expenditure programs – Future of the DN250 pipeline – Appetite to shorten asset lives – Appetite to reform the current queuing arrangements – Stakeholder survey questions and approach
10 February 2026	Stakeholder meeting 4	– Demand outlook and the impact on local government plans and strategies in light of the Queensland Energy Roadmap & Brigalow GPG – First look at operating expenditure and the output from the efficiency carryover mechanism – First look at capital expenditure, a proposed new 'Pipeline Integrity' asset class and why a Capital Expenditure Sharing Scheme should not apply to the RBP – Indicative revenue requirement and RAB and how different asset lives would impact revenue – Feedback on initial queuing arrangement changes
31 March 2026	Stakeholder meeting 5	– Corporate costs – Capital expenditure overspends and the impact of a potential Capital Expenditure Sharing Scheme – Updates to expenditure, the RAB, revenue requirement and APA's view of RBP's economic life – Demand forecasts, the preferred price path, prudent discounts, the tariff variation mechanism & rebateable services – Proposed changes to queueing arrangements – Review of the stakeholder survey questions

What we heard and how we have responded

Priority	What we heard	How we have responded
Reliability	**Deliverability** Stakeholders queried whether APA is experiencing labour, materials and supply chain cost pressures and whether deliverability of RBP projects is at risk given the work programs taking place in Queensland and the impending Olympic Games.	We confirmed that cost pressures are an issue, along with new events or threats, but the monthly governance process ensures continued prudence, with the performance, cost or schedule of projects reconsidered if costs rise.
	Competition Stakeholders wanted to understand where RBP experienced competition from other pipelines.	We confirmed the competition comes from producers in the Surat Basin who could use the Darling Downs Pipeline or the RBP to get the gas to Wallumbilla. The RBP is the only pipeline taking gas into Brisbane.
	Pipeline integrity Stakeholders wanted to know whether there are any other remaining older sections of RBP pipeline using the same, now failing, pipeline coating as the DN250.	There is 50km of DN300 pipeline (slightly larger diameter than the DN250) that is still operational in Brisbane with the same type of coating.
Affordability	**Expenditure governance** – APA was asked to present on RBP's capital expenditure against budget and any post implementation reviews to demonstrate the effectiveness of governance processes. – Stakeholders asked whether expenditure governance processes and the gateway teams are APA wide and whether projects compete for capital. – A stakeholder was interested to know the AACE class approval level for projects that are not stay-in-business i.e. one-off.	– There have not yet been any Post Implementation Reviews undertaken for RBP as no one-off projects have yet been completed. We are in the process of extracting data on budget to actuals expenditure for projects completed in this period. – We confirmed that expenditure governance processes are APA wide, that gateway teams are established for each asset and that each project does compete for funding. – We confirmed the AACE class approval varies on a project-to-project basis and is refined at each stage it is presented to the Gateway team and Steering Committee. Level 2 is the target for a Final Investment Decision, but Level 3 may be reached depending on the project.
	Operating expenditure – A stakeholder was interested to know what Security Posture (SP) level APA targets in relation to Security of Critical Infrastructure (SOCI) compliance. – Stakeholders were interested to know whether RBP's insurance covered natural disasters and the extent to which these costs are covered by insurance. – Other than asking why a later base year was not proposed stakeholders raised no other concerns with our operating expenditure forecast.	– We shared that APA aims to meet level SP2 for SOCI compliance under the Australian Energy Sector Cyber Security Framework. – We confirmed RBP is covered for natural disasters under APA's Group insurance. No specific exclusions pertain and the standard $2.5 million excess applies. – We explained we have adopted 2024–25 as the base year as this is the most recent audited data available at the time our proposal will be lodged with the AER in June 2026.

Priority	What we heard	How we have responded
Affordability continued	**Capital expenditure** – A stakeholder queried why integrity inspections are treated as capital rather than operating expenditure as it seems the costs are more akin to maintenance activities. – A stakeholder was interested to understand what liability shippers have in relation to meeting the gas specification and the damages they pay if they do not deliver gas to the required specification. – Other than clarifying what happens if the conditions change and further subsidence occurs at the Toowoomba Ranges over the 2027–32 period (for which expenditure has been proposed), stakeholders raised no concerns with the proposed capital expenditure forecast.	– We explained that capitalisation of these costs is consistent with the applicable Accounting Standards and aligned with APA's audited annual statutory accounts. – We outlined that, under their Gas Transportation Agreement, shippers have liability for any damage caused should they inject gas outside the required specification. – We confirmed we are unable to include the Toowoomba Ranges slope stabilisation as a contingent project. If instability does emerge in the 2027–32 period, we will either conduct repairs and the expenditure will be an ex-post negotiation with the AER at the next reset period or, if the project can be deferred, the costs will form part of the expenditure discussions for the next (2032–37) reset.
	Capital expenditure overspends Stakeholders wanted to understand more about why capital expenditure overspends occur and whether forecasting accuracy was easier 10 to 15 years ago.	We explained that we forecast expected stay-in-business expenditure and no contingency is made for unexpected events/projects, which have been the primary driver of historic overspends. We also shared how nuances and project features can lead to overspends as forecasts are based on an assumed corrosion rate and level of features for a planned number of digs, and there is always variability in the degree and extent of damage that cannot be determined until the pipeline is excavated. Just one complex dig can throw out an entire estimate. Uncertainty has also increased with asset age, and we are now experiencing time dependent defect growth that was not an issue 10 years ago. Advances in In-line Inspection (ILI) technology have improved detection capability and feature accuracy but also increased compliance and safety requirements and lead to more excavations and inspections. As a small share of the international market, Australia's bargaining power in relation to ILI is limited and heavily influenced by changes to overseas regulations – this means we are vulnerable to price increases. Changes in the pipeline's demand and flow has driven the need to upgrade pig launchers/receivers and this then drives other costs as the change necessitates a need to uplift compliance to meet today's standards.

Priority	What we heard	How we have responded
Affordability continued	**Impact of a potential Capital Expenditure Sharing Scheme (CESS)** Stakeholders wanted to understand more about: – What the tariff impacts would be had a Capital Expenditure Sharing Scheme (CESS) been applied to RBP for the 2022–27 period. – How many RBP customers are on the reference tariff versus a negotiated tariff and if there is a particular 'type' of customer that prefers the reference tariff. – The revenue split from reference service tariffs and negotiated tariffs. – How a CESS would apply to customers on negotiated tariffs.	– RBP would incur a penalty of $6.8 million if a CESS was applied in the current period. This would result in an average reduction to the annual nominal reference service price in the 2027–32 period of 2.1%, which would lower the average reference service tariff by two cents. – Some RBP customers hold more than one contract for different purposes. Currently, two customers have a reference service contracted. Both of these contracts are for shippers. – Less than 10% of revenue is derived from customers on reference service tariffs. – Customers on negotiated contracts would only receive any benefit/loss of a CESS at the time of their next contract negotiation.
	Corporate costs Other than clarifying whether the corporate cost allocation methodology has been approved by the AER and whether the AER will assess the prudency and efficiency of RBP's share of the IT program, stakeholders raised no concerns with the proposed forecast of corporate costs.	Our forecast corporate costs are expected to be significantly lower given the SOCI and Information Technology upgrades undertaken in recent years will be completed.
	Tariffs One stakeholder questioned whether the structure of tariffs is appropriate, particularly whether there is a capacity demand component.	We confirmed that the reference service is a capacity tariff and that the forecast demand is based on Maximum Daily Quantity, not average volume, as customers are buying capacity.
	Price path Stakeholders generally preferred continuous price increases and the avoidance of a large first-year price shock. It was expected that GPG customers (of which more are expected in the outer years of the period) will be able to pass through the higher prices and the higher demand forecast in the outer years would help share a greater portion of the higher prices across more customers.	We have targeted the same price rise in cents to avoid a price shock in any year.
Customer & community risk	**Price cap versus revenue cap** Stakeholders were curious to know whether RBP should move from a price cap to a revenue cap model, like some gas distribution networks are doing.	We explained that as a contract carriage pipeline, moving to a revenue cap would entail a wholesale change to how APA contracts to shippers. The dynamics of transmission networks differ from that of distribution networks, so the drivers for changes to the form of control do not exist at the transmission level.

Priority	What we heard	How we have responded
Customer & community risk continued	**Redundant/stranded assets** Stakeholders queried whether RBP had any potential stranded assets, given industrial customer closures, and if capital redundancy was an issue for RBP.	We confirmed that in gas transmission, an asset is stranded when it no longer serves customers. All sections of the pipeline still serve customers so, whilst utilisation has dropped, there are no stranded assets. RBP assets that have been taken out of service have all been fully depreciated in the Regulated Asset Base, so capital redundancy is not an issue.
	Shortening asset lives Whilst stakeholders thought there may be an argument to shorten some RBP asset lives to account for the expected decline in gas demand, they also appreciated that any material change would be difficult given there is no explicit Queensland government policy on phasing out gas. However, the group was keen understand APA's view of the economic life of the asset and how much the reference tariff would increase if the asset life were shortened to align with the 2060 accounting life.	We explained that the pipeline asset class will be fully written down in the Regulated Asset Base by 2071 compared to 2060 in APA's financial accounts. Whilst we agree there is significant uncertainty about end-of-life timing we are confident gas will continue to have a role well beyond 2050, so there is no urgency to shorten asset lives in the current Access Arrangement, especially given it would add a further material increase (10 cents on average per annum) to what is already a significant rise in the reference service tariff.
	New asset class Other than clarifying why historical integrity inspection related costs were not being extracted or written-off from the Pipelines asset class and confirming the AER had approved this sort of asset class for other assets, stakeholders raised no issues or concerns with the creation of a new 'Integrity inspections' asset class to capture costs for the 10 yearly In-line inspections, associated validation digs and RBP's share of the costs related to the Pipeline Integrity Management tool (where the inspection data is stored).	We explained the intent of the new asset class is to correct the treatment of costs going forward, rather than attempt to unwind historical decisions and this proposal responds to stakeholders' concerns regarding accelerating depreciation. We confirmed the: – Historical costs have not yet been fully recovered so should not be removed from the Regulated Asset Base – AER has approved the asset class for the Victorian Transmission System and it was approved by the Economic Regulation Authority Western Australia for Goldfields Gas Pipeline.
	Demand Stakeholders were keen to understand the historic pipeline utilisation and peak demand, how this compares to the forecast utilisation and peak demand and how the 'Queensland Energy Roadmap' will impact the RBP. Later in the engagement program we presented our demand forecasts. Other than a stakeholder asking whether the latest Australian Energy Market Operator's 2026 'Gas Statement of Opportunities' had implications for RBP, stakeholders raised no concerns with our forecast approach or outcome.	We shared how demand and utilisation in the current period have fallen short of expectations due to industrial closures and uncertainty surrounding the energy transition increasing the use of shorter-term contracting (day ahead or month ahead). In forecasting demand for 2027–32 we have undertaken a bottom-up build for each customer segment and considered the Queensland Energy Roadmap and the 2026 'Gas Statement of Opportunities'. This sees forecast demand in the first few years largely aligned with the latter half of the current period, before increasing in the latter years as new GPG demand comes online.

Priority	What we heard	How we have responded
Customer & community risk continued	**Landholders and social license** – Stakeholders queried whether social license is a growing risk for RBP. Stakeholders queried whether social license is a growing risk for RBP. – Stakeholders were interested in seeing any redundant easements or pipework associated with the DN250 repurposed to provide a corridor and transport for an alternative resource.	– We confirmed social license is more significant than it was in the past, but landowners are critical partners to the business. There is a dedicated team at APA who manages landholder interactions including safety awareness and other education. – We explained that we are not experts in this area but conceptually there are a few technologies that might be suitable to convert a steel pipeline to a water service.
Other topics of interest	**Queuing arrangements** After we shared the shortfalls in the current process, stakeholders supported adjustments to the queueing arrangements. After we presented our proposed changes, other than clarifying whether customers should pay to be in the queue, to avoid locking up capacity and asking whether Developable Capacity had ever been used in practice, stakeholders raised no concerns with the proposed changes. It was thought that RBP's customers are best placed to comment on these proposed changes.	We have proposed alterations to ensure we can efficiently manage congestion, facilitate new connections, and that prospective users are not unfairly disadvantaged. Whilst some RBP customers are part of our stakeholder group, we are keen to hear what other RBP customers and prospective users think of these changes before we submit out Access Arrangement proposal to the AER in June. We are sharing the Draft Overview documents with all RBP customers and request they contact us to discuss the implications of the proposed changes.
	Reference service Proposal Stakeholders raised no concerns regarding the proposal to revert to just one reference service – long term firm transportation for the 2027–32 period. In response to our draft Reference Service Proposal: – We heard from two stakeholders that they had no concerns with the draft version – One stakeholder requested the final Reference Service Proposal provide further clarification on capacity trading services, current rebateable services and historic demand/revenue for the various services.	Our final Reference Service Proposal: – Clarified the capacity related services – Highlighted current rebateable services, and – Included five years of data for relevant pipeline services, as well as recent rebateable revenue. We will adjust the 2027–32 Access Arrangement to refer to just one reference service – long term firm transportation.
	Negotiated services – A stakeholder was keen to understand whether customers have found the process of asking for other pipeline services, and the prices offered, satisfactory. – Given Negotiated services were listed as a stakeholder priority, we specifically asked what other information stakeholders were after in relation to this topic later in the engagement program, but no other issues or concerns were raised.	– A customer responded that from their perspective, the firm service meets their business' need and, whilst they don't tend to utilise most other services, 'In-pipe trade' had proven helpful and useful.

Engagement evaluation

Overall evaluation of the engagement program will be captured through completion of a detailed survey by the stakeholder reference group following publication of this Draft Overview and ahead of RBP submitting its Access Arrangement to the AER.

The stakeholder reference group has determined the breadth and depth of the questions in this survey, and the results of the survey will be reported in the final Engagement Summary Report to be submitted with the Access Arrangement in June. To avoid any potential misinterpretation of the results, we are holding a meeting with the stakeholder reference group after the survey closes to clarify any uncertainties and to gather qualitative data for any unexpected ratings, comments, or outlying data points. The stakeholder reference group will also review the draft summary write-up with any feedback to be included in the final Engagement Summary Report.

The stakeholder reference group believed this approach appropriately balances efficiency and costs, compared to the alternative of writing their own detailed engagement report, and would provide the AER with an assessment of the engagement program at a level that is appropriate for the size of the asset.

In addition, stakeholder feedback was captured throughout the process through a short evaluation survey that was sent following each meeting. The evaluation survey allowed stakeholder participants to rate the quality and content of the session and provide comments on what was done well and could be improved in future sessions. How APA had taken this feedback on was shared with stakeholders as part of the introduction at the following meeting.

Despite the overwhelming positive ratings and comments and an average response rate of 34%, the number of meeting participants was too small for the results of the surveys to be considered statistically valid. In the absence of the detailed survey results at this stage of the process, we have instead included a summary of the engagement feedback from the evaluation surveys as an indicator of how stakeholders have found our engagement program.

What did you enjoyed most, what was done well?

Participants valued the strong facilitation and structure of the sessions which allowed meaningful opportunities for discussion, feedback, and rich conversation to take place, whilst also keeping the meetings to time.

Our engagement was seen as open and collaborative, with the right mix of presenters in the room, and we demonstrated a genuine willingness to listen. This helped build confidence that participant views would be fairly represented.

We received repeated praise for providing high-quality, clearly presented slides well in advance of meetings. This enabled stakeholders to better prepare and be informed for meetings and ask deeper questions.

Stakeholders also appreciated transparent follow-up through the action list, and our visible responsiveness to feedback from previous meetings. Overall, the sessions were seen as well-run, informative, and engaging.

What could be done better in future sessions?

Sharing the slides for the Co-creation workshop ahead of time would have allowed stakeholders to involve colleagues with a deeper historical knowledge.

There was concern that stakeholders not ‘in the room’ would miss out on engaging on key aspects, like the Reference Service Proposal.

Our attempts to recruit missing stakeholder groups was appreciated, but there was recurring concern about the limited participation from many stakeholders and suggestions to ensure any potential barriers to contributing were removed.

It was also suggested we improve transparency and clarity by clearly signalling where agenda items sit on the IAP2 spectrum.

Glossary

Term	Meaning
2022–27	The current Access Arrangement period beginning 1 July 2022 and ending on 30 June 2027
2027–32	The Access Arrangement period beginning 1 July 2027 and ending on 30 June 2032
AER	Australian Energy Regulator
CESS	Capital Expenditure Sharing Scheme
Draft Overview	The 'Overview of the draft 2027–32 Access Arrangement' and this 'Draft Engagement Summary Report' shared with stakeholders on 17 April 2026 for review and feedback.
GPG	Gas Powered Generation
LNG	Liquefied Natural Gas
RBP	Roma Brisbane Pipeline
SP	Security Posture
SOCI	Security of Critical Infrastructure