

Lunchtime series

Provocations and Inspirations

Australia's energy security: Technology options in an uncertain world

Tim Buckley

Founder of the public interest think tank, Climate Energy Finance

Date: Tuesday 14 July 2026

12:15 pm for a 12:30 start.

Finishes 2:00 pm.

Venue: Union University and Schools Club, 25 Bent Street, Sydney (corner of Bent and Phillip Streets)

Registration: Registration at [this link](#) is required **before 2.00 pm on Thursday 9 July 2026**. Numbers are limited.

Cost: \$75 (RSNSW or UUSC members); \$85 (non-members/guests). *A warm meal and wine will be served for lunch.*

Dress: Business Dress. To avoid embarrassment, please note that a jacket and tie is required. Denim, trainers and shoes with white soles are not permitted. Attendees not dressed appropriately may be refused entry by the Club.

Australia's energy security: Technology options in an uncertain world

The war in the Middle East has brought the dependence on fossil fuels into very sharp focus. Despite the seemingly endless optimism of financial markets, global economy is likely to be substantially disrupted over the next several months, regardless of what peace terms can be negotiated between the US, Iran and Israel. The uncertainty about ship movements through the Strait of Hormuz, depletion of international reserves and the damage and disruption to refining capacity in the Persian Gulf will almost certainly cause sharp fluctuations in the cost and availability of liquid fuels, particularly diesel.

Diesel accounts for around 70% of Australia's total liquid fuel demand. If our supply chain for diesel were to be seriously disrupted for a long period, there would be major economic consequences to both the domestic economy and to agricultural and mineral exports.

This series started as an exploration of the *Future Made in Australia* (FMiA) program that will see investment of \$22.7 billion over the next decade focused on two major streams: *Net zero transformation*; and *Economic security and resilience*. Nothing could have greater relevance in the current geopolitical circumstances.

Tim will explore the accelerating global energy system transformation options, with a focus on China's growing leadership role, particularly in light of these energy security challenges and the other trade headwinds caused by the Trump administration's policies.

About the Speaker



Tim Buckley, Founder of the public interest think tank, Climate Energy Finance.

Climate Energy Finance (CEF) is an independent, non-partisan, and philanthropically funded Australian think tank established in 2022 that works *pro bono* in the public interest to accelerate the transition in Australia to net zero in line with the climate science.

CEF conducts research and analyses on the current strategic, financial and geopolitical issues that are shaping the global energy transition and their implications for the Australian economy, with a focus on the challenges and opportunities for Australian investments, industry and exports. This involves tracking and providing independent commentary on developments in China and other key trading partners in the Asia Pacific region, as well as advocating for stronger mutually beneficial collaboration with these partners. CEF also examines the convergence of global technology trends in power, transport, mining and industry in accelerating decarbonisation.

Tim has 35 years of financial market experience covering the Australian, Asian and global equity markets and is a highly influential energy finance commentator. He has written more than 100 reports on the global energy transition and the roles of finance and policy in accelerating critical decarbonisation trends.

Tim was previously the Australasian Director of the global Institute for Energy Economics and Financial Analysis, 2013-2021. Prior to this, he was a top-rated equity research analyst, including Head of Equity Research in Singapore at Deutsche Bank, Managing Director, Head of Equity Research at Citigroup for 17 years, Head of Institutional Equities at Shaw & Partners and co-Managing Director of Arkx Investment Management Pty Ltd, a global, listed clean energy investment start-up, jointly owned with Westpac.