

# Domestic Gas Reservation Scheme

## Draft Design Framework

Manufacturing Australia Response

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## Introduction

Manufacturing Australia is the peak industry body representing Australia's largest energy-intensive manufacturers. Our members are directly dependent on competitively priced, reliably supplied east coast gas — as an irreplaceable industrial feedstock, a fuel source for high-heat manufacturing operations and to firm electricity. The cost and availability of gas plays a direct role in determining whether manufacturing investment occurs in Australia or moves offshore, whether decarbonisation pathways remain viable, and whether strategic industrial capability is preserved for future generations.

Manufacturing Australia has called for domestic gas reservation consistently for many years. The commitment of a new Federal Government to act on this critical reform is welcomed unreservedly. 2026 marks 20 years since the Western Australian Government introduced that State's Domestic Gas Policy, requiring volumes offered to market equivalent to 15% of exports. It bears noting that many of the charges and predictions levelled at that policy are being repeated today in response to the proposed Scheme. In 2024, a Western Australian Parliamentary Inquiry report found that, decades on, the WA Domestic Gas Policy had broad support — including from gas producers. It also made a number of findings in relation to the policy's shortcomings in compliance, enforcement and transparency. In these ways, the WA experience provides both encouragement and lessons for national reform. The announcement of a 20 per cent domestic supply obligation (DSO) linked to export licensing, with an obligation to supply rather than merely offer gas, represents a materially more serious policy response than anything that has preceded it. We acknowledge that the Government has made significant progress with these reforms and we enter this consultation process with genuine appreciation of that progress.

The purpose of this submission is to engage substantively with the design detail now before stakeholders. Design matters enormously. A well-designed reservation scheme that closes loopholes, resources the regulator properly, is clear and consistent across the three separate gas markets, and gives customers a formal voice in its administration will deliver genuine and lasting change. A scheme whose design is compromised under pressure — however incrementally — risks replicating the experience of the ADGSM, the Heads of Agreement, and related instruments: technical compliance without practical effect, leading to persistent projected supply shortfalls and unaffordable and volatile prices.

This submission sets out Manufacturing Australia's positions on the key design elements in the draft framework, identifies the core non-negotiables on which we will not accept dilution, and flags areas where further work is needed before the scheme can be considered fit for purpose.

## Welcoming the Draft Design Framework

Manufacturing Australia welcomes the draft design. The following elements represent meaningful progress that is in the best interests of Australian customers and provide Australia its best opportunity to restore a functional, competitive domestic gas market to Eastern Australia. Such a market is necessary to support investment by both producers and customers into the future.

- A national gas reservation scheme with a 20% DSO applied equitably to all LNG exporters.
- An obligation to physically supply gas to the domestic market — not merely offer it — linked to export licensing.
- Strong commitments to lower domestic prices and structural separation between domestic and international markets.
- An additionality test for third-party gas, including a net contribution requirement for swap arrangements.
- The Australian Energy Regulator (AER) as the responsible regulator.
- Strong enforcement mechanisms including civil penalties and the potential variation or cancellation of export licences.
- Respecting legacy export contracts (entered into before 22 December 2025), through the recognition of legacy contracts as a legitimate reason for the use of flexibility mechanisms, with new export contracts subject to the full obligation.
- Expanded market transparency measures, including real-time gas price publication and a domestic forward price curve reported on the Gas Bulletin Board.

These are necessary and welcome reforms, with a thorough grounding in evidence and observation of the market. They reflect the sustained analysis of the deficiencies in the current gas market structure, which has been undertaken by the ACCC, Federal Government departments and various independent bodies. They demonstrate that the Government is serious about delivering a scheme that works and is designed to deliver on its intention of reducing gas prices for Australian customers.

# Executive summary of recommendations

## Core Non-Negotiables

- The 20 per cent DSO obligation on all exporters must be maintained in the final design. Any reduction — direct or achieved indirectly through generous flexibility provisions — is unacceptable.
- The obligation to physically supply gas must be preserved without qualification. An offer obligation is not a supply obligation.
- LNG bank liabilities must be legally enforceable, publicly reported, and not subject to write-down or forgiveness in the absence of equivalent domestic supply.

## Flexibility Mechanisms

- The high assessment threshold for annual DSO variations must be codified in legislation.
- The demand buffer must be codified and must target genuine modest oversupply in all compliance periods.
- All volumes foregone through DSO variations must be banked, with no annual cap on accumulation of variation-related liabilities.
- AER advice on all variation requests must be published, and reasons for Ministerial departure from that advice must be published contemporaneously.
- Release valve activation conditions must be codified in legislation with a high evidential threshold.
- All volumes released through the release valve must be banked.
- Infrastructure constraint variations must be limited to one year at a time, with a published remediation plan required as a condition of any variation.
- Bank positions must be published regularly by the AER.

## Pricing

- An independently derived domestic gas price series based on production cost estimates should be published alongside market data as a price reference.
- The AER must regularly report on the relationship between DSO compliance and domestic price outcomes, with recommendations to Ministers if the scheme is not delivering the intended price correction.
- The AER must develop and publish clear guidance on what constitutes 'domestically competitive' pricing for the purposes of DSO compliance.

## Western Australia

- The policy objectives of the National Domestic Gas Reservation Scheme will be best served by a scheme that has been designed with Australia's three physically separate gas markets in mind and can be applied equally in those markets.
- Request the Department works with the Western Australian Department of Energy and Economic Diversification and WA gas market buyer and seller participants to resolve key interoperability questions – as a matter of priority before legislation is drafted.
- In principle, where there are existing reservation policies in other markets, the objective should be to harmonise settings in favour of the stronger requirement for the purposes of adequate and affordable domestic gas supply.
- At a minimum, there should be a 'no worse off' test for the Western Australian market.

## AER Resourcing and ACCC Knowledge Transfer

- Adequate additional resourcing for the AER must be confirmed and funded before scheme commencement on 1 July 2027.
- A formal transition plan for the transfer of ACCC gas market monitoring responsibilities must be developed, including secondment arrangements and comprehensive data transfer.
- ACCC Gas Inquiry reporting that users have found most valuable must be explicitly preserved and transitioned to the AER.

## Consumer Input and Ministerial Discretion

- Consumers must be given a formal role in all AER design and guideline development processes.
- Consumers must have a formal right to provide input on individual DSO variation and release valve applications.
- A Consumer Advisory Panel should be established to provide ongoing advice to the AER.
- AER advice to Ministers on all discretionary decisions must be published, along with reasons for any Ministerial departure from that advice.

## Long-Term Contracting for C&I Consumers

- Specific provisions to incentivise longer-term C&I contracting should be included in the framework.
- Access to the release valve should be conditional on demonstrated efforts to contract reserved volumes with C&I consumers on medium and long-term terms.
- The AER should report on the tenor distribution of domestic gas supply agreements entered into by regulated entities.

## Core Non-Negotiables

Manufacturing Australia's position on the following elements is firm. They go to the integrity of the scheme and cannot be diluted without fundamentally undermining it. We will strongly oppose any modification to these elements in the final design:

### The 20 Per Cent DSO Must Be Maintained

The 20 per cent DSO obligation on all gas exporters is the central quantitative pillar of the scheme. Any reduction — whether achieved directly through the base rate or indirectly through generous variation, release valve, or flexibility provisions — would undermine the structural correction the scheme is intended to deliver. Any genuine excess gas that cannot be contracted domestically must accrue to the LNG bank and must only be withdrawn from the LNG bank through the genuine supply of gas to the domestic market, even under the 'release valve' or any other flexibility mechanisms. A DSO with leaks is a DSO in name only.

The additionality test for third-party compliance arrangements is essential to the integrity of the 20 per cent obligation. Any gas counted toward a regulated entity's DSO through third-party arrangements and/or by a later-variation location swap must be gas that would not otherwise have been available to the domestic market. The AER must develop robust methodologies for assessing additionality and these must be published and subject to user input.

### Obligation to Supply Must Be Preserved

The obligation to physically supply gas — as opposed to merely offer it — is the single most important technical improvement over the previous regulatory instruments. Under the ADGSM and the Heads of Agreement, producers could and did satisfy domestic obligations by making gas notionally available at commercially unacceptable prices. That experience must not be repeated.

The draft framework is clear on this point, and it must remain so in the final and implemented design. Any attempt to dilute the supply obligation back toward an offer obligation — through the flexibility mechanisms, through the definition of compliance, or through administrative practice — must be resisted. This is crucial for the reservation to be effective in addressing supply and price pressures and a line Manufacturing Australia will not move from.

### No Discounting of Accrued LNG Bank Liabilities

The LNG bank — which accumulates liabilities when DSO volumes are reduced through flexibility mechanisms — must function as a genuine accumulation of legally enforceable obligations. There must be no mechanism by which accrued bank liabilities are written down, forgiven, or otherwise extinguished without the regulated entity having physically supplied the corresponding gas to the domestic market.

LNG bank liabilities must be recorded as legally enforceable obligations on the regulated entity's export approval, reported publicly on a regular basis, and enforced rigorously by the AER. The framework's current formulation on bank liability management and drawdown processes requires further development to ensure there is no ambiguity on this point, noting a degree of ambiguity in the draft framework paper itself. For example, on page 19 the framework paper confirms DSO bank volumes must be made up through the supply of equivalent volumes to the domestic market in future years, both in the context of pre-compliance period DSO variations and within-period use of the 'release valve': *"Any approved variation to DSO volumes for a regulated entity will be carried forward into future compliance periods, i.e., unmet volumes resulting from a reduction to a DSO will accrue and must be met in future periods."* And *"Any DSO volumes that are exported through the release valve mechanism must be made up in subsequent years"* However the framework paper also indicates this principle may be modified in final design, noting (page 20): *"Ongoing accrual of DSO volumes could lead to excessive liabilities that may be impractical or impossible for regulated entities to deliver. LNG exporters have expressed concerns that accrual volumes would be considered balance sheet liabilities which could affect investment confidence. As such, the extent to which DSO volumes accrue should be limited."*

## Flexibility Mechanisms

The draft framework acknowledges that flexibility mechanisms are necessary to manage genuine oversupply. Manufacturing Australia accepts this in principle. However, flexibility mechanisms carry a significant design risk: they can become the primary loophole through which DSO obligations are avoided. Every mechanism must therefore be codified as tightly as possible in primary or subordinate legislation, and must be designed to manage genuine oversupply rather than to provide producers with ongoing relief from supply obligations.

The governing principle must be: any gas that cannot be contracted in the domestic market accumulates in the bank; the bank does not leak. If flexibility mechanisms are designed such that gas regularly cycles through the release valve and back to export without ever reaching domestic customers, the scheme will have failed regardless of nominal compliance.

It is worth noting the draft framework proposes annual DSO setting on a rolling basis. In order to better support contracting with customers as well as investment in new gas supply, DSO approvals over a longer period than one year as well as draft DSOs should be considered. Longer term DSO approvals must however be considered in the context of ensuring the supply goals of the reservation, and the timeframes over which final and draft DSOs are approved must primarily be informed by the degree of certainty over future market supply and demand balance across the forward planning horizon.

### Annual DSO Variation

The framework proposes a mechanism by which regulated entities may seek a variation in their annual DSO in response to demand conditions. Manufacturing Australia's positions on this mechanism are:

- The 'high assessment threshold' for granting a variation must be maintained and codified in legislation. It must not be left to administrative discretion in a way that creates uncertainty or opens the door to producer lobbying for annual relief.
- The 'demand buffer' must be codified and must ensure a genuine modest oversupply in all compliance periods. A scheme that targets exact balance provides no structural downward pressure on prices; modest oversupply is the mechanism through which the scheme delivers its pricing and international LNG market separation objectives.
- Any accepted variation in the annual DSO must result in the foregone volume being banked. There must be no cap on accumulation of bank liabilities across years — the 30 per cent of DSO annual banking limit should apply only to the release valve, not to accrual of liabilities arising from DSO variations.
- AER advice to Ministers on all variation requests must be published in full prior to the Ministerial decision. Where Ministers depart from AER advice in their decisions, the reasons for that departure must also be published.

### Release Valve

The release valve is described as a mechanism of last resort, and it must function as such. Manufacturing Australia's positions are:

- Activation conditions must be codified in legislation, not left to Ministerial or AER discretion without clear legislative parameters.
- A high evidential threshold must apply. Regulated entities seeking to activate the release valve must demonstrate, with real-time and verifiable evidence, that domestic demand has been met across all relevant market segments at commercially reasonable prices. Claims of domestic oversupply based on elevated pricing offers — where producers have priced gas at levels no domestic buyer will accept — must not qualify.
- All volumes released through the valve must be banked, consistent with the framework's stated intent. As flagged above, Manufacturing Australia notes that one passage in the framework appears to suggest DSO banked volumes may not be required to be supplied to the market in future years (a limit on the extent DSO volumes accrue to the bank) and seeks clarification that this is not the intended position.
- The release valve must not be available to regulated entities that are not in full compliance with their supply obligation and the conduct provisions of the framework.

### Infrastructure Constraint Variations

Manufacturing Australia accepts that legitimate infrastructure constraints may, in some circumstances, prevent a regulated entity from physically supplying its DSO to the domestic market. However, this must not become a standing excuse for non-supply. Persistent infrastructure constraints unable to be addressed

through existing mechanisms and private investment warrant the intervention of governments in partnership with infrastructure investors and owners to support the delivery of investment to address these constraints, noting this was a role envisioned for AEMO under a proposed expansion of AEMO powers that was not progressed by Energy and Climate Minister's Council. Our positions are:

- Infrastructure constraint variations must be limited to one compliance year at a time, with a published and binding remediation plan required from the producer as a condition of any variation.
- Regulated entities seeking an infrastructure constraint variation must demonstrate they are pursuing commercial arrangements to overcome any infrastructure constraints that may otherwise prevent them supplying their DSO gas into the domestic market over the medium-longer term.
- All variation requests, along with the producer's remediation plan and the AER's assessment, must be published in full.
- The framework must address the position of floating LNG projects and other projects where market connection depends on third-party infrastructure, where the current text is silent on what happens if a commercial solution proves unviable.

### The LNG Bank

The LNG bank is the mechanism by which the scheme maintains cumulative integrity over time. A bank that leaks — whether through forgiveness of liabilities, generous drawdown terms, or design gaps — is functionally equivalent to a lower DSO. Manufacturing Australia's positions are:

- Bank liabilities must be recorded as legally enforceable obligations on the regulated entity's export approval, not merely as administrative records.
- Current bank positions must be published by the AER on a regular basis, with sufficient granularity to enable market participants and the public to assess whether the scheme is meeting its objectives.
- The framework must develop a clear and transparent mechanism for managing the drawdown of accumulated bank liabilities, including a cap on cumulative accrued liabilities across years. The current draft is silent on drawdown mechanics and this gap must be addressed before the scheme commences.
- The framework must confirm that there is no circumstance in which accumulated bank liabilities may be written off without equivalent physical supply to the domestic market.

### DSO bank accrued volumes

Manufacturing Australia recognises that accrued DSO banks may be considered a contingent liability on LNG operators' balance sheets and as the framework paper notes, could negatively impact investment or become impossible to deliver (and unnecessary to ensure supply and price objectives of the reservation). Manufacturing Australia notes this 'excessive DSO bank liabilities' remains a hypothetical problem and no evidence has been presented to date that confirms such an issue will eventuate in reality. However, should the Government seek to address this potential issue through an additional design feature (DSO bank flexibility mechanism) not included in the draft framework (as flagged in the framework), Manufacturing Australia's position on any such mechanism will be based on adherence with the following basic principles:

- Any DSO bank flexibility mechanism cannot violate the basic principle and goal, as well as the practical outcome that the reservation deliver sufficient domestic supply plus a buffer to the market, including in all compliance periods into the future;
- Both the introduction and the implementation of such a mechanism must be justified through the presentation of concrete evidence, including to gas consumers;
- Any mechanism should be recognised as a 'leak' from the firm 20% DSO obligation commitment. In order to protect the basic integrity of the reservation, any such mechanism cannot simply provide LNG operators with access to a free 'leak' out of their DSO obligations (including banked obligations and including any mechanism that aims to mitigate the growth of DSO banks through the effective lowering of DSO obligations that accrue to DSO banks) and instead must require actions that deliver additional and/or alternative material benefits to consumers and the market as a whole.

## Pricing

Manufacturing Australia's fundamental test for the scheme remains unchanged: it must materially reduce delivered gas prices for industrial customers, targeting below \$10 per gigajoule. Supply is a means to an end. The end is price.

If the Government holds the line on the 20 per cent DSO, closes the flexibility and bank loopholes, and enforces the additionality test rigorously, the scheme should structurally deliver a domestic market in which prices are based on variable domestic supply cost rather than LNG netback pricing. If such prices make high-cost domestic gas projects uneconomic, those projects should seek export partners or not proceed — the scheme's design must not be distorted to protect the economics of marginal gas projects at the expense of Australian manufacturers.

Manufacturing Australia's specific positions on pricing-related design elements are:

- Manufacturing Australia supports the development and publication of an independently derived domestic gas price series based on production cost estimates, alongside market price data. This should function as a price reference — not a price cap — to provide transparency about the relationship between domestic supply costs and prevailing contract prices.
- The AER should be required to regularly report on the relationship between DSO compliance and domestic price outcomes, including whether the scheme is delivering the structural price correction that is its objective. If the evidence shows the scheme is not delivering the intended price outcomes, the AER should be required to make recommendations to Ministers on adjustments to the scheme.
- The framework's requirement that reserved gas be supplied on 'domestically competitive terms' must be operationalised with sufficient precision to prevent producers from technically complying with the supply obligation while pricing at levels that no domestic buyer will accept. The AER must develop clear guidance on what constitutes 'domestically competitive' pricing.

## Western Australia and National Scope

Manufacturing Australia strongly supports the national scope of the reservation scheme. A scheme that applied only to the east coast would leave WA producers outside the framework, creating regulatory arbitrage risks and failing to comprehensively address the structural failures of the Australian gas market. The WA reservation is generally considered to be a success story, including by producers, though lessons can and should be learned from the WA experience, including the fact that many of the arguments against the introduction of a WA reservation at the time are now being repeated as arguments against the national reservation currently being designed. None of those arguments were validated through experience and WA producers are now supportive of the WA reservation.

The framework's approach to the interaction between the national DSO and Western Australia's existing state-based reservation scheme requires careful design. Manufacturing Australia's positions are:

- There is a structural difference between the WA domestic reservation scheme and the proposed national framework that is directly relevant to its effectiveness: the WA scheme operates on a lifetime production basis, whereas the federal framework imposes annual obligations. Annual obligations create stronger and more immediate supply discipline and significantly mitigate the risk of short-term domestic shortages driven by producers front-loading export production.
- If the WA scheme is to be recognised as equivalent for the purposes of the national DSO, WA operators should be required to demonstrate annual compliance consistent with the east coast framework — that is, annual obligations rather than lifetime production obligations. Allowing WA producers to meet their national obligations through a lifetime production commitment would create a two-tier system with materially weaker protections for domestic customers in WA.
- The framework notes that regulated entities may seek DSO variations to reflect 'existing regulatory arrangements' such as state-based schemes, but provides little detail on how this will operate. This must be developed in detail before the scheme commences, and users must be consulted on the design of any equivalency assessment.

## AER Resourcing and Capturing ACCC Lessons

The reservation scheme represents the most substantial expansion of the AER's regulatory responsibilities in its history. The quality of the scheme's administration will determine whether its objectives are achieved in practice. A well-designed scheme administered by an under-resourced regulator will produce the same outcome as a poorly designed scheme: nominal compliance without practical effect. This is not a theoretical risk — it is one of the flaws that undermined the effectiveness of the ADGSM and the Heads of Agreement (along with design flaws such as 'obligation to offer').

### AER Resourcing

Manufacturing Australia has three specific concerns about AER resourcing:

- Adequate additional resourcing must be confirmed and funded before scheme commencement on 1 July 2027. Under-resourcing not only creates significant compliance risk and threatens the integrity of the whole scheme once operational, but also threatens the implementation of the AER role (including administering flexibility mechanisms) before scheme commencement. The LNG industry has demonstrated over many years a sophisticated capacity to identify and exploit gaps in regulatory administration. The AER must be funded and staffed on the assumption that it will face this challenge from day one.
- The AER must be given explicit, well-resourced mandates to monitor and enforce not only aggregate DSO compliance but individual producer-level compliance and broader producer trading behaviour, including the additionality of third-party arrangements and the appropriateness of pricing offers.
- Manufacturing Australia notes, as directly as is appropriate in a public submission, that the history of the east coast gas market is not one of producers acting in good faith toward domestic customers. The AER's compliance approach must be calibrated accordingly. A compliance culture premised on producers' good faith will not be sufficient.

### Capturing ACCC Lessons

The transition of gas market monitoring responsibilities from the ACCC to the AER represents a significant knowledge transfer risk. The ACCC Gas Inquiry has over many years produced rigorous, independent scrutiny of gas market conduct. Its reports have been indispensable in documenting producer behaviour, building the evidentiary case for reform, and — critically — establishing the methodologies and data relationships needed to assess whether producers are complying with their domestic market obligations.

This institutional knowledge and data infrastructure must not be lost in the transition. Manufacturing Australia recommends:

- A formal transition plan that includes secondment arrangements between the ACCC and AER, comprehensive documentation and transfer of all relevant data (including historical inquiry data), and a defined handover period during which both agencies operate in parallel.
- The Government should commit explicitly to adequate resourcing of the AER's expanded gas market functions as part of the legislative and budget package for the scheme — not as a subsequent administrative decision.
- The reporting obligations that users have found most valuable from the ACCC Gas Inquiry must be explicitly preserved and transitioned to the AER, with user consultation to identify which elements of current ACCC reporting should be maintained.

## Consumer Input and Ministerial Discretion

Manufacturing Australia has a fundamental concern with the draft design framework that goes beyond any individual design element: consumers are not given a formal role in the processes that will determine the success or failure of the scheme. The setting of DSO variation thresholds, the assessment of release valve applications, the evaluation of infrastructure constraint claims, and the development of AER guidelines — all of these are processes in which domestic gas consumers have a direct and material interest, and all of them, as currently drafted, are conducted without any formal mechanism for consumer input.

This must be corrected. A scheme designed primarily through consultation with producers, and administered through processes in which producers participate but consumers do not, will systematically drift in producers' favour over time. This is the historical pattern, and it must not be repeated.

Manufacturing Australia's positions are:

- Consumers must be given a formal role in all AER design processes, including the development of guidelines on additionality, 'domestically competitive' pricing, DSO variation thresholds, and release valve activation conditions.
- Consumers must have a formal right to provide input on individual DSO variation and release valve applications, with sufficient information provided to enable meaningful participation.
- The Government should consider establishing a Consumer Advisory Panel to provide ongoing advice to the AER on its role as regulator, including on compliance assessment, reporting adequacy, and scheme effectiveness.
- The framework includes significant Ministerial decision-making on DSO variations, release valve activation, and export approvals. To protect the integrity of the scheme from political pressure, AER advice to Ministers on all discretionary decisions must be published. Where Ministers depart from AER advice in their decisions, the reasons for that departure must be published contemporaneously.
- The lack of a time-bound review mechanism for the 20 per cent DSO is noted. While Manufacturing Australia does not oppose this in principle — indeed, a higher DSO may be warranted — the absence of a review mechanism means the scheme's settings could be changed at Ministerial discretion without transparent criteria or user consultation. Any mechanism through which Ministers may review the reservation percentage must include mandatory consultation with domestic gas consumers.

## Long-Term Contracting for C&I Consumers

Earlier consultation papers in the gas reservation design process explicitly acknowledged the importance of the reservation scheme in incentivising longer-term gas contracting for commercial and industrial (C&I) consumers. This focus appears to have receded in the current draft framework. Manufacturing Australia strongly urges the Government to restore it.

The capacity of manufacturers to make long-term investment decisions — in new plant, decarbonisation pathways, and workforce — depends on the availability of long-term gas supply contracts at commercially viable prices. A reservation scheme that increases the volume of gas nominally available to the domestic market on short-term terms, without improving the availability of medium and long-term C&I contracts, will fail to deliver one of the most important commercial benefits of the policy.

Manufacturing Australia's positions are:

- The framework should include specific provisions to incentivise longer-term contracting with C&I consumers, including through requirements that apply to regulated entities seeking access to flexibility mechanisms such as the release valve.
- Regulated entities seeking to activate the release valve should be required to demonstrate that they have made genuine efforts to contract reserved gas volumes with C&I consumers on medium and long-term terms before excess volumes are deemed to exist.
- The AER should be required to report on the tenor distribution of domestic gas supply agreements entered into by regulated entities, to enable assessment of whether the scheme is delivering improved access to long-term contracts for C&I consumers.
- The Government should engage directly with C&I consumers through the detailed design process to ensure the scheme's conduct provisions — including the new selling practice requirements that will replace the Gas Market Code — are designed to address the specific bargaining power imbalances that C&I consumers currently face.



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