

## ECGS projected assessment of system adequacy

### **The Commission has made a draft rule to improve information in the ECGS with two new PASA forecasts**

#### **The draft rule would improve information in the ECGS on supply, demand and infrastructure capacity to support reliability and supply adequacy**

The Commission has made a draft rule that would amend the National Gas Rules (NGR) to introduce two new projected assessment of system adequacy (PASA) forecasts. These would cover the east coast gas system (ECGS) over 7-day and 12-month outlooks.

We consider that our draft rule would increase transparency in, and improve the operation of the ECGS by providing better information on gas supply, demand and infrastructure availability.

One key benefit is that it would allow the ECGS to operate more efficiently. Both existing participants and potential new entrants would be provided with an improved view of relevant factors, allowing them to make better decisions around:

- gas demand
- facility maintenance
- gas supply
- bilateral trading.

Not only would the draft rule empower participants to make better decisions around their supply and demand for gas, and facility maintenance. It would also empower governments and policymakers to better target any policy interventions and highlight where the market is operating efficiently and no policy change is required.

#### **The short term and the medium term PASA would improve information over a 7-day and 12-month horizon, respectively**

The draft rule would introduce a PASA that consists of two forecasts that bridge the gap between the present and the GSOO, which AEMO would publish on its website:

- short-term (ST) PASA with a daily publication frequency and 7-day horizon
- medium-term (MT) PASA with a weekly publication frequency and 12-month horizon.

Each PASA would include a forecast of demand, supply, and infrastructure availability. The ST PASA would also include any identified threats to reliability and supply adequacy (RSA) over the next week. The projected assessment would be based on information collected from participants and/or modelled by AEMO on market, non-market, storage, LNG export and gas powered generator demand, and supply and infrastructure availability. Most of this information is already collected under the current rules. The outputs and methodology to produce both PASAs would be set out in AEMO's ECGS Procedures, which are developed in consultation with stakeholders. This would provide flexibility for the PASA to iterate over time.

#### **The new forecasts would be built on existing information with a modest uplift in information disclosure**

The PASA would be generally based on information that is already collected, both through the bulletin board (BB), and through the information uplift provided by the stage one RSA reforms. In addition, we have identified a number of changes to the ECGS information disclosure regime that are necessary to ensure the PASA is produced from a complete, high-quality dataset.

The new or modified information disclosure requirements would be prescriptively set out in

the rules to ensure that participants have clarity and predictability over the obligations that apply to them. Maintaining a clear set of requirements for the information disclosure regime in the NGR would also provide regulatory certainty and consistency to the parties providing the information.

The new information disclosure obligations would include:

- For the ST PASA:
  - Extending the STTM and DWGM bid and demand forecast horizons to 7 days, respectively
  - Requiring BB shippers and gas buyers to provide facility operators with good faith estimates of their use/gas demand over 7 days
- For the MT PASA:
  - Requiring BB facilities (excluding BB large user facilities) to submit daily capacity for every day, instead of only the periods when reductions are forecast to occur
  - Extending the LNG export facility demand forecast horizon to 12 months
  - Requiring BB pipeline operators to provide their medium term capacity outlooks by pipeline segment
- The definition of daily capacity would also be improved to ensure it clearly accounts for resource and plant availability

### **The PASA would commence in time for Winter 2027**

The draft rule would be implemented in several stages, with the key dates being:

- **9 October 2025** - Final determination published
- **5 March 2026** - AEMO ECGS and BB Procedure updates due
- **1 March 2027** - New information disclosure obligations commence, AEMO internal PASA trial commences
- **3 May 2027** - PASA commences.

### **AEMO's implementation costs would be recovered from participant fees**

The draft rule would be taken to be a 'major gas project'. This would entitle AEMO to recover the costs incurred in the implementation of the PASA through participant fees. We acknowledge this and the new information disclosure requirements would result in some cost being borne by ECGS participants. However, we consider this would be outweighed by the key benefits of improved visibility of gas reliability and supply adequacy to participants, governments and policymakers. We are particularly interested in stakeholder views on the benefits identified, and how these weigh up against the costs.

### **We are seeking feedback on the draft rule**

The AEMC requests **submissions** to the draft determination **by 28 August 2025**. We expect to publish a final determination for the rule change in October 2025.

### **For information contact:**

Media enquiries: [media@aemc.gov.au](mailto:media@aemc.gov.au)

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