Building the Bridge

Biomethane market development through a bridge-building lens

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Bridge build: iconic spans

Sydney Harbour Bridge

London Tower Bridge

Golden Gate Bridge

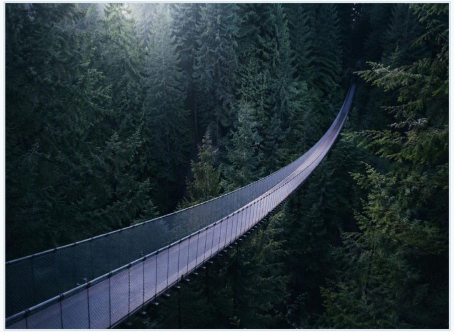
Python Bridge

Pont du Gard

Helix Bridge

Ruyi Bridge

Living Root Bridge



Capilano Suspension Bridge

Chapel Bridge

But the most beautiful bridge is…the Medium Girder Bridge or MGB.

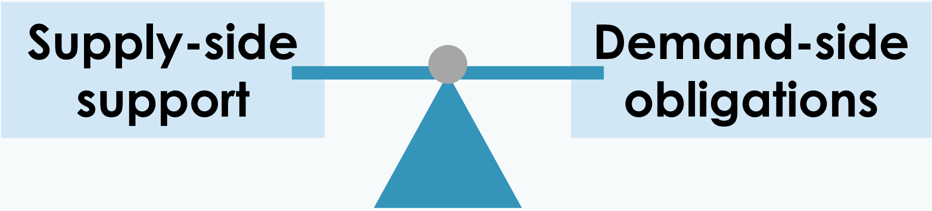
Developing a renewable gas market is like building a bridge: strong foundations, connected infrastructure, operational systems and clear value are all required

1 Abutments & Footings	2 Construction	3 Launch	4 Final Fit-out
Policy & Regulatory Foundations	**Market Considerations**	**Operations**	**Value & Growth (BAU)**
Rules, policy certainty, and social licence	Demand, supply, access and scale	Quality, metering, settlement and standardisation	Export value, domestic balance, bankability and investment settings
The Base to enable the market to exist	**The Pathway for renewable gas to flow through the market.**	**The Systems that make the RG operational and safe**	**The Value delivered to support long-term growth**

Policy foundations: abutments

Policy and regulatory settings carry the load before the market can scale.

- Policy and regulatory frameworks are foundational to biomethane market development.
- The current government policy landscape creates uncertainty for investment decisions.
- Clear regulatory treatment is needed for gas quality, standards implementation and compliance oversight.
- Social licence and stakeholder engagement should be built before issues become barriers.



Market considerations: construction of bridge components

The bridge is built by connecting demand, supply, access and scale.

- Industrial customers are a key demand source because they need practical decarbonisation pathways.
- Infrastructure is the bridge between renewable gas producers and end users.
- The market must allow small projects to enter while still providing a pathway to market-scale volumes.
- Participation settings should not unintentionally constrain smaller producers.

> Renewable gases could be viewed not only as a transition fuel, but as a permanent energy source, alongside wind and solar, in Australia’s decarbonised economy.
> *National Renewable Gas Policy consultation, Aug 2026*

Technical considerations: launching the bridge

Technical integration moves the concept from buildable to operable.

Phase 4: Launching

- Infrastructure must accommodate growth from small initial injection volumes to market scale.
- Small projects can be difficult to integrate into larger transmission and distribution systems.
- Heating value, billing and settlement processes need further development as supply points diversify.
- Standardisation of technical equipment and processes can reduce costs across jurisdictions.
- Gas quality implementation needs consistent regulatory interpretation and application.

> Historically, gas has flowed one way in the network from natural gas fields into high pressure transmission pipelines, and then to medium/low pressure distribution networks.
> *National Renewable Gas Policy consultation, Aug 2026*

Commercial considerations: final fit-out

Commercial settings make the bridge bankable, usable and safe to rely on.

- Commercial viability remains uncertain without clear policy, demand and support mechanisms.
- Cost reduction through standardisation is an important commercial enabler.
- Infrastructure owners need scale and utilisation to support investment decisions.
- Export opportunities may help establish scale, however, the domestic market should not be left behind if export pathways grow quickly.

> Supporting an export oriented renewable gas industry could attract foreign capital and accelerate scale and innovation, but may also result in a greater share of production being exported rather than meeting domestic gas user needs or domestic emissions reduction goals.
> *National Renewable Gas Policy consultation, Aug 2026*

So what?...

1	**Infrastructure is the critical bridge** between biomethane supply and customer demand
2	Technical, regulatory and commercial **certainty leads to investor confidence**
3	Industrial decarbonisation demand is likely to be a major driver, but market signals remain mixed
4	Small projects need **entry pathways** and larger volumes need **growth pathways**
5	Stakeholder engagement and social licence should be treated as active **project enablers**.

THE FLOOR IS YOURS

Questions?

Curiosity welcome. Curveballs encouraged (if directed to Phil).

Ask what matters — and help us bridge anything we’ve missed.

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ASK

The practical question

CHALLENGE

An assumption

CONNECT

A missing span

P
Policy

M
Market

C
Commercial

I
Infrastructure

C
Customers

P
Producers

PHIL + RACHEL