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ABSTRACT

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PROPOSED TRANS ASEAN GAS PIPELINE: UNFULFILLED EXPECTATIONS?

CERA's view of how gas pipeline infrastructure will evolve in Southeast Asia differs from that in the Trans ASEAN Gas Pipeline (TAGP) proposal, a project agreed by the energy ministers of ASEAN at a meeting last summer. The TAGP proposal envisions an extensive pipeline network criss-crossing ASEAN, linking existing large sources of gas with distant load centers. CERA's view of gas pipeline development in Southeast Asia is as follows:

- * It will consist of more of the same, with mostly bilateral, but increasingly cross-border, contracts linking gas reserves with nearby load centers, namely the three basins of Thailand-Southern Vietnam; the Malaya Peninsula; and Java in Indonesia.
- * In contrast to assumptions implicit in the TAGP proposal, CERA believes that modest new gas reserves will be discovered near load centers.
- * Those looking to transport gas very long distances will be disappointed, as will those hoping to position themselves as large gas trading hubs.