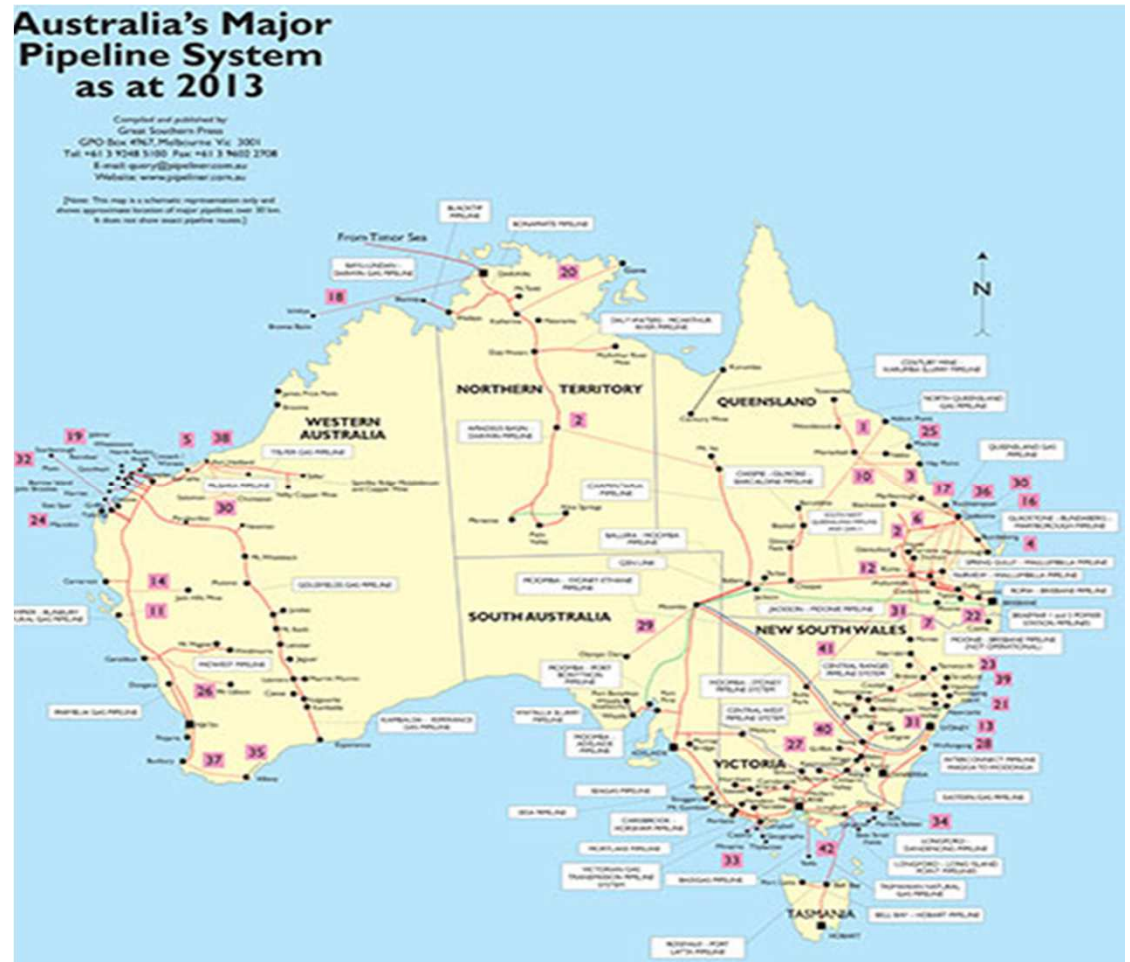


# Overview – Australia

Australia has in excess of 25,000km of gas transmission pipelines - **Growing by approx. 200km per year** (data last 3 years)

- The major gas producing fields are located in
  - central Australia,
  - north east Australia and
  - western Australia.
- Privatised Industry
  - All tiers of the industry such as Exploration, Production, Transmission, Distribution and Retail is controlled by Private entities. (Local and International Both)
- Strong Regulation to monitor public interest, economic benefits, security of supply, environment and other macro benefits.



## Australia's Major Pipeline System as at 2013

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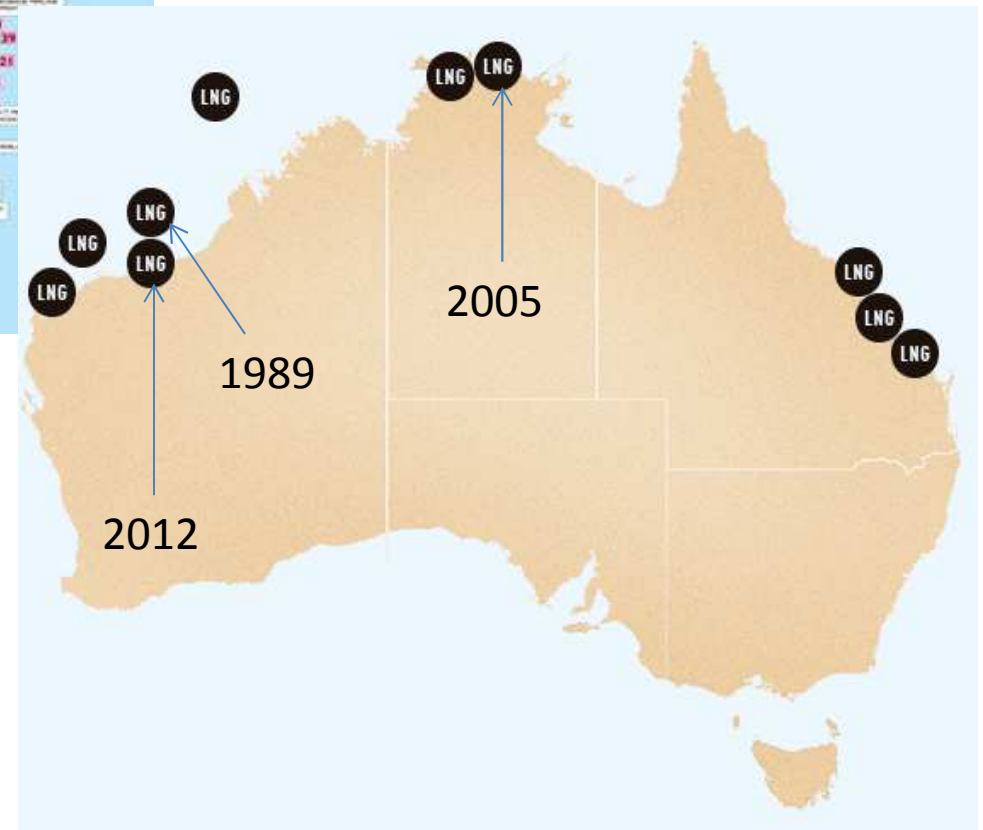
[Note: This map is a schematic representation only and does not guarantee location of major pipelines over 2013 or a full or clear 4447 pipeline route.]



- 3 operating LNG plants
- 7 more by the end of 2018.
- LNG plants are planned for export market.

This growth in LNG production has created a huge demand for natural gas and has **resulted into the growth of exploration & transmission industry.**

- Most of the gas produced from conventional reservoirs.
- Small percentage from Coal Seam Methane beds.
- Community Rejection for Shale Gas
- Unconventional Gas is inevitable



# Recent Updates

- The industry is working on developing a comprehensive set of skill/competency requirements specific for pipeline industry. The draft is out- finalisation is due by end of 2014.
- Major Transmission Pipeline companies are trying to establish a pipe grid connecting north, south and east of Australia. This will become a basis for tapping remote gasses and also provide security of supply and also a way to take gas to the LNG plants which are located on on north west and north east coast.
- Shale and Coal Seam Methane Gas is facing resistance from community. Industry has commenced advocacy and community engagement highlighting the benefits in driving job opportunities and lower gas prices.