

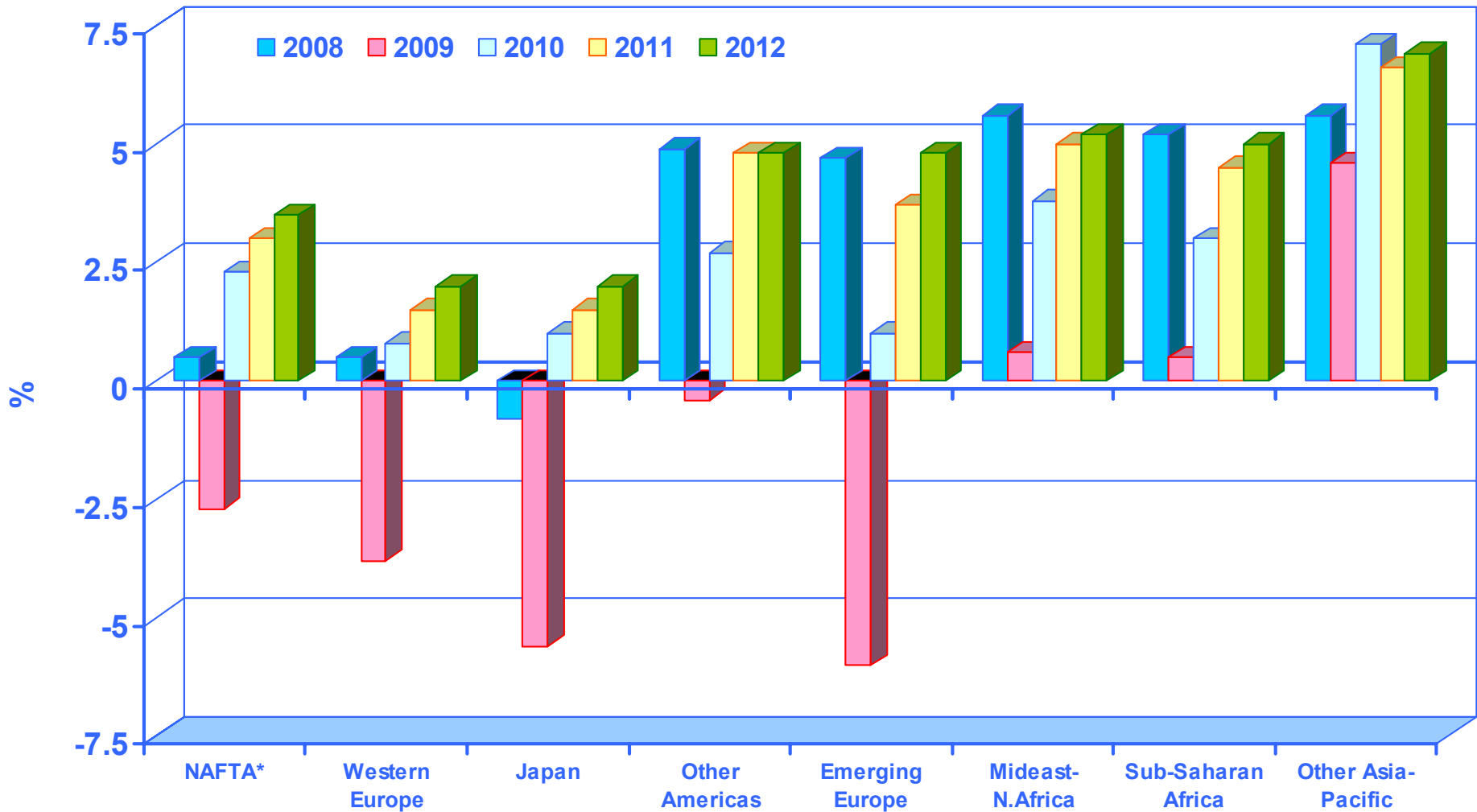


CURRENT SITUATION AND STRATEGIC DEVELOPMENT OF RUSSIAN GAS INDUSTRY

**DEPUTY HEAD OF STRATEGIC
DEVELOPMENT DEPARTMENT**

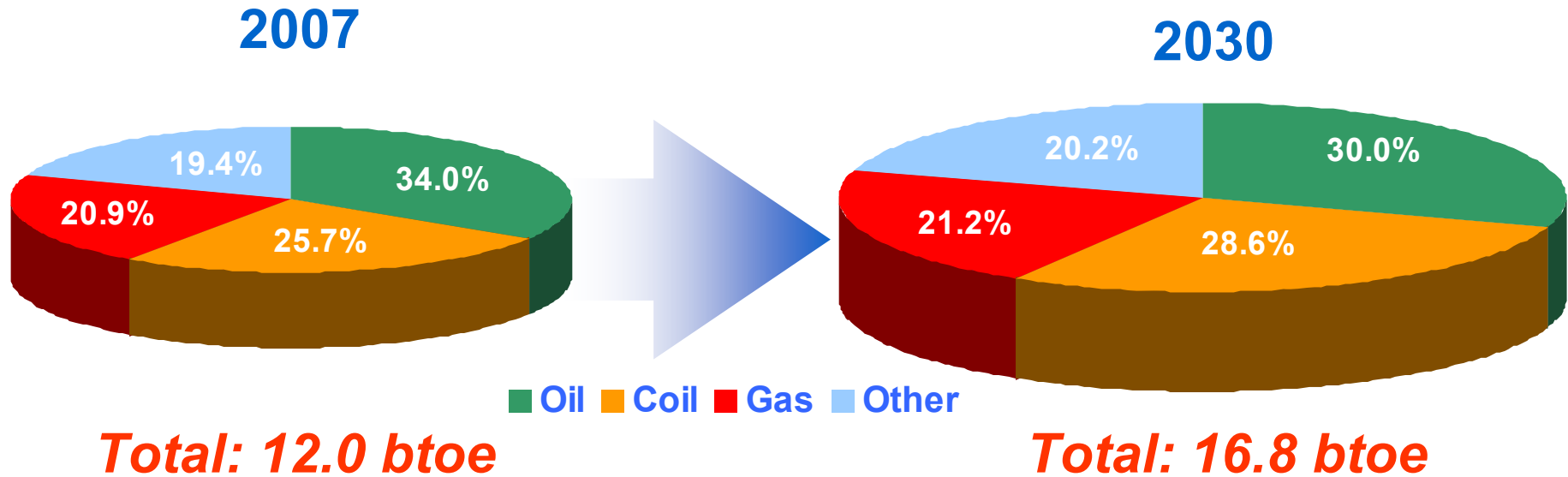
S. PANKRATOV

World Gross Domestic Product



* - North American Free Trade Agreement

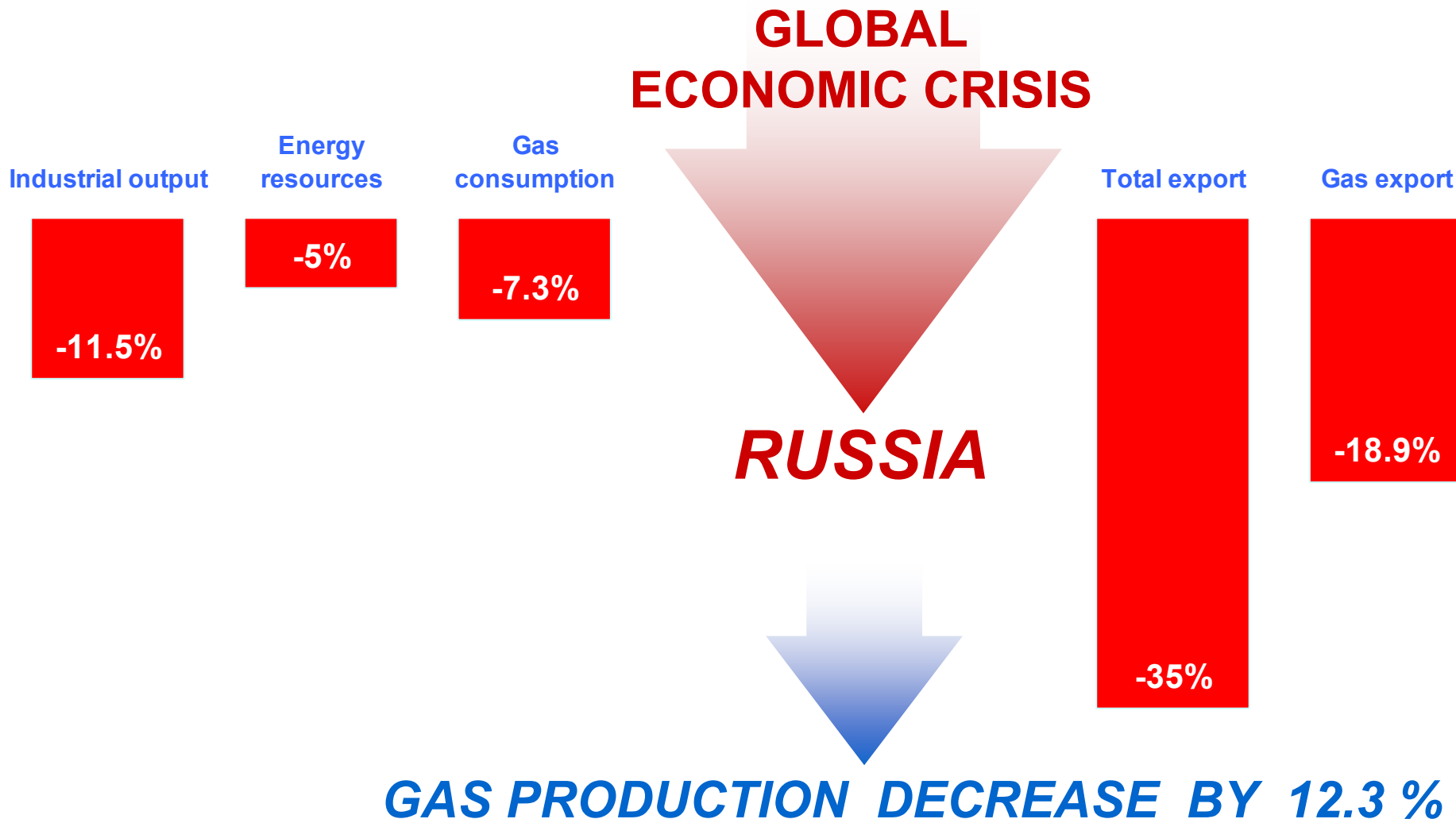
Energy demand (IEA scenario)



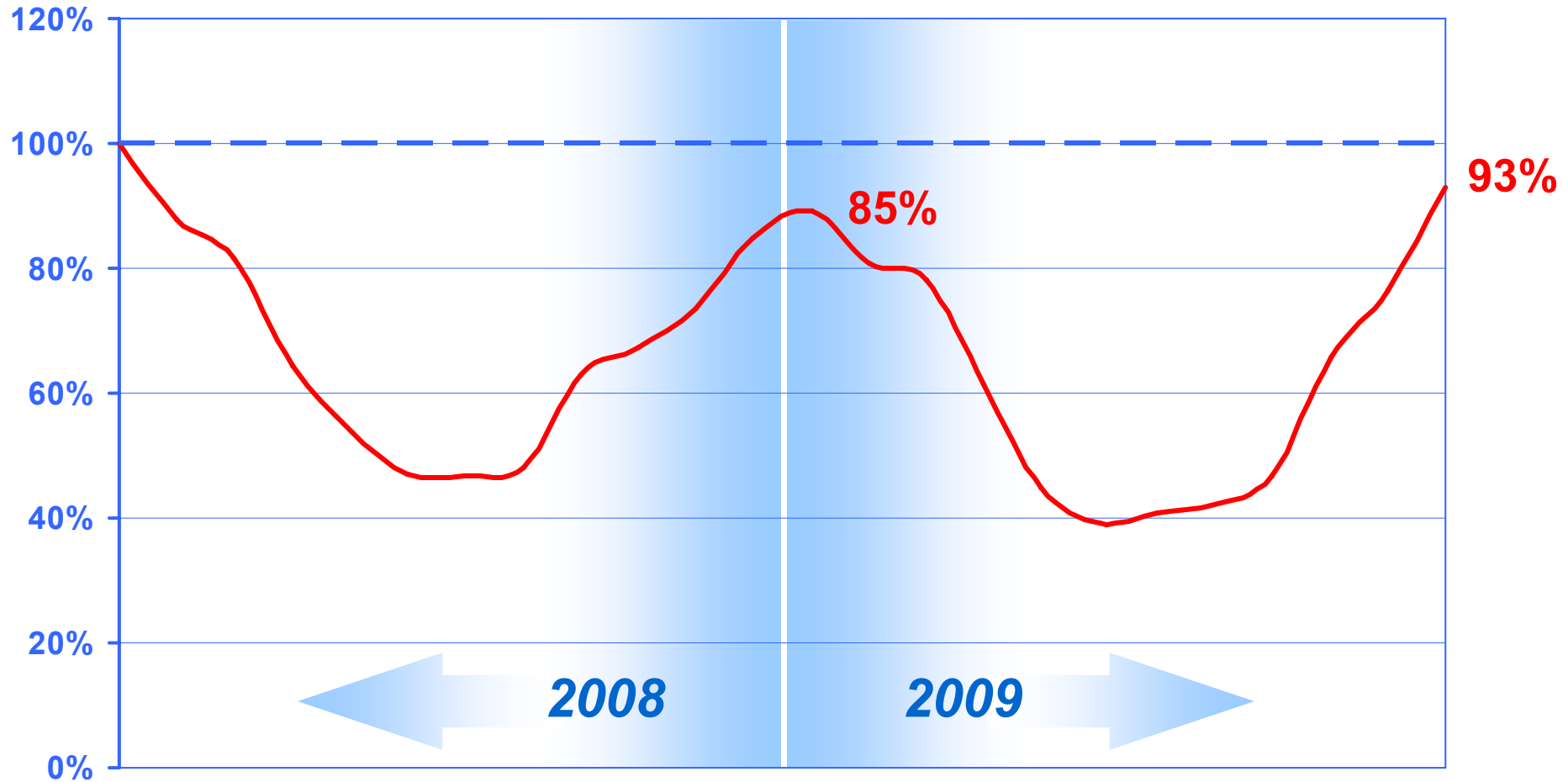
World oil and gas demand (basic scenario)

	2007	2030	Growth in 2007-2030 period, %
Oil, MB/day	85	105	24
Gas, BCM	3.0	4.3	41

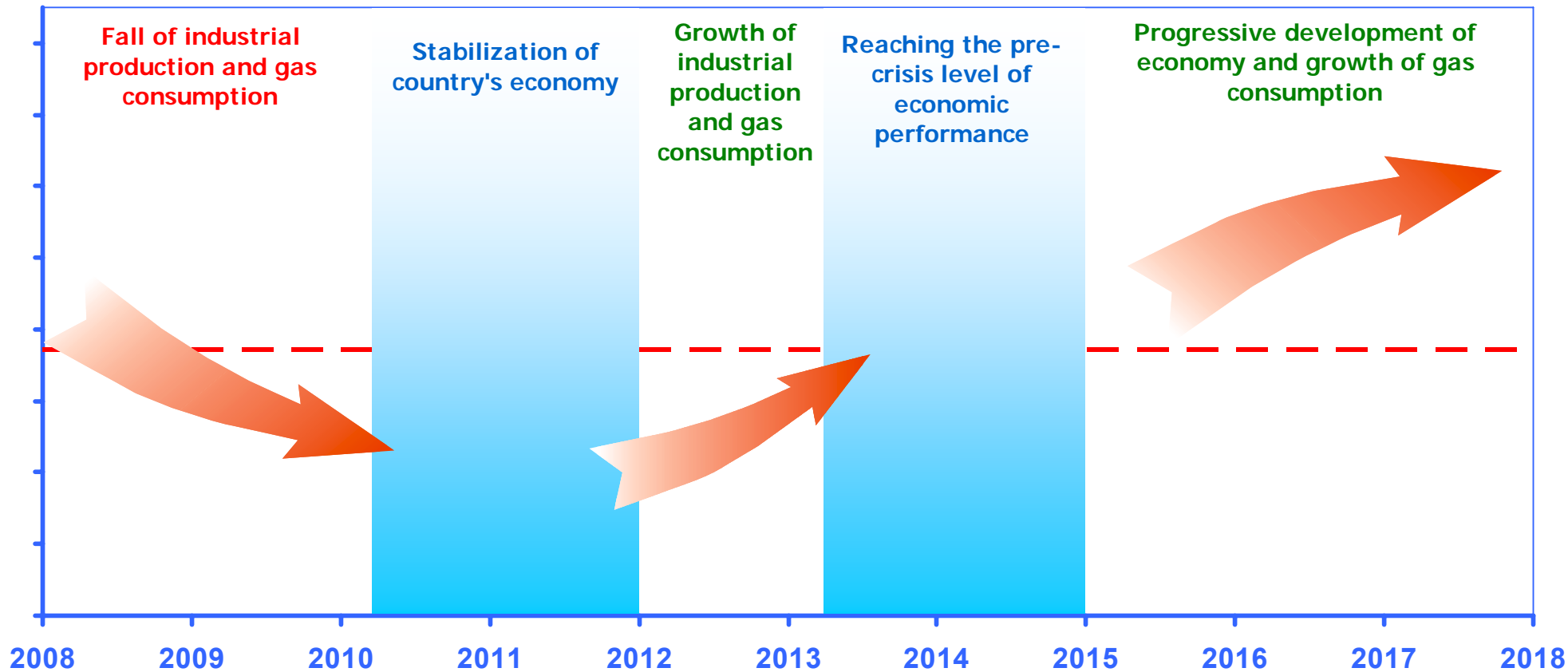
Global economic crisis and Russian economy



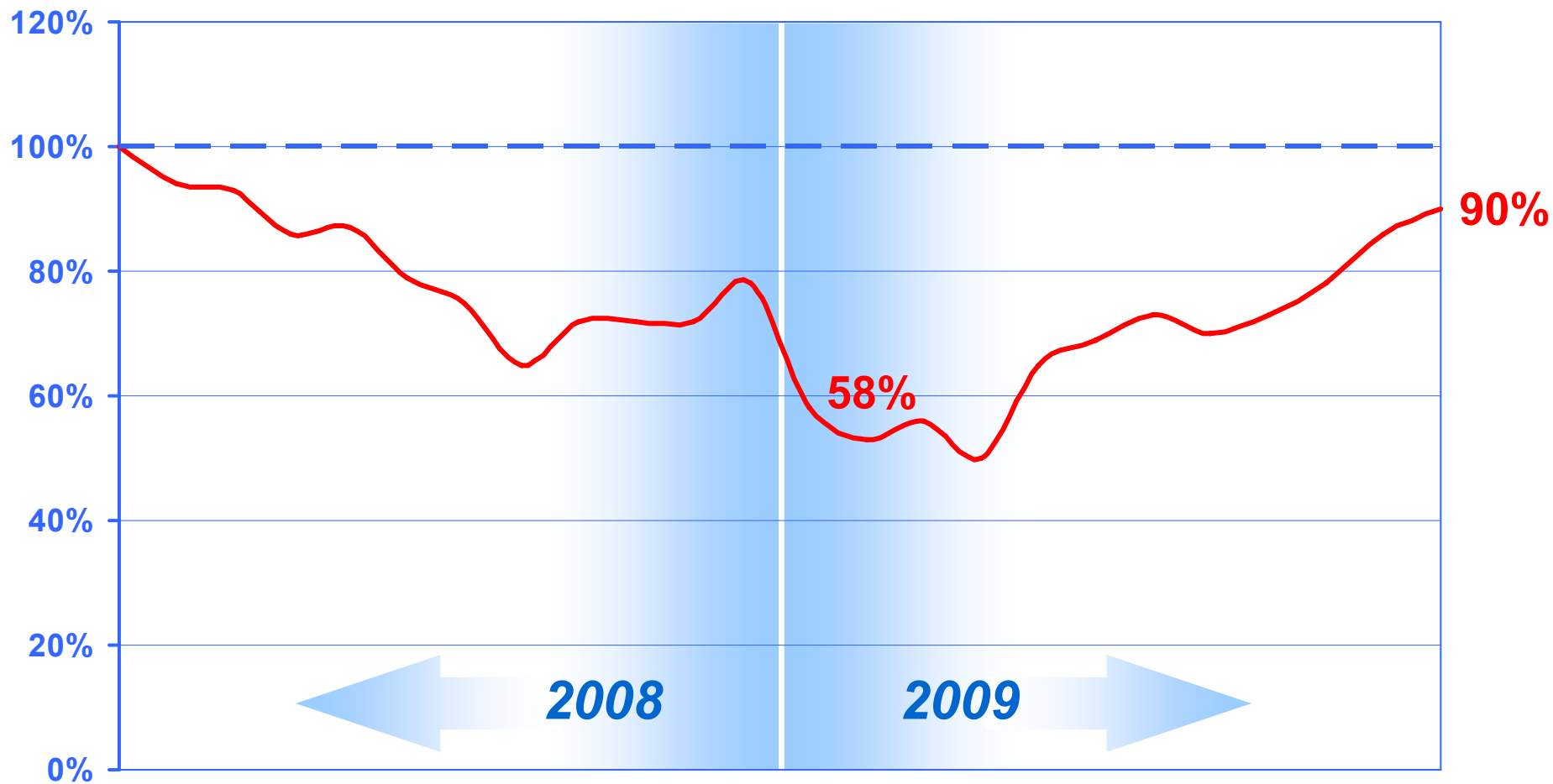
Gas Consumption in Russia



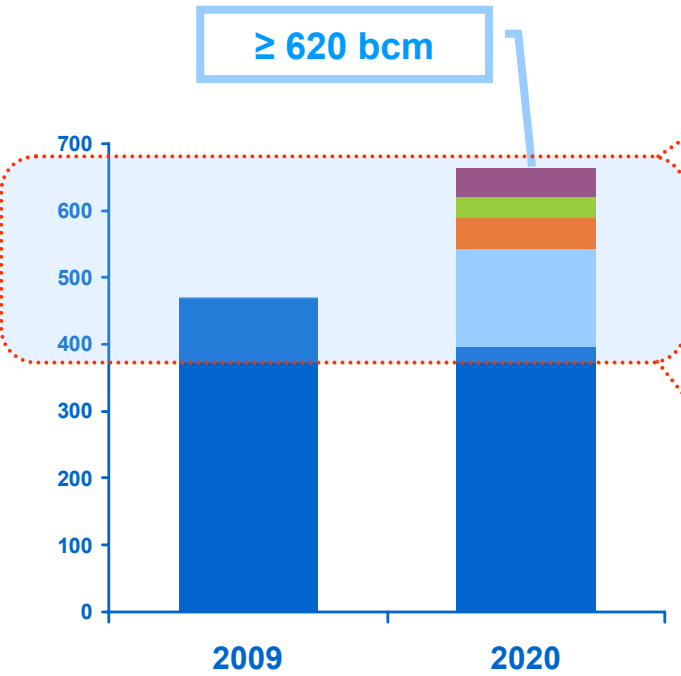
Gas Demand Forecast For Domestic Market



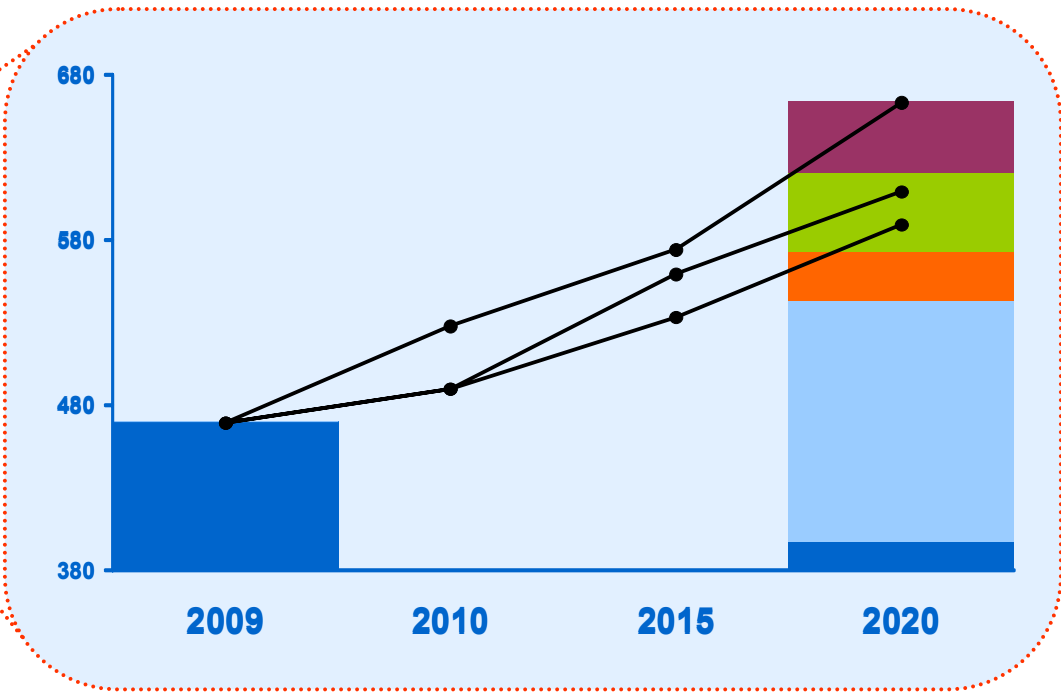
Gazprom group's natural gas export supplies 2008-2009



Gas Production Scenarios



- - Eastern Siberia and Far East
- - Arctic Shelf
- - New fields in Nadym-Pur-Taz

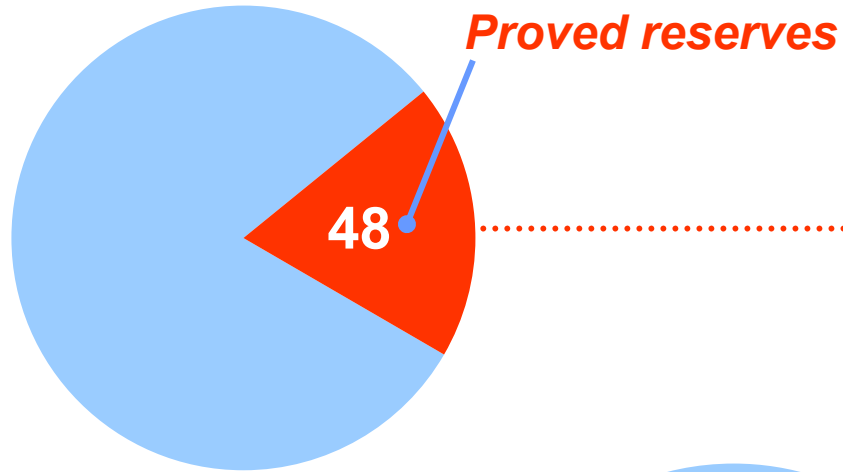


- - Fields of Yamal peninsula
- - Currently existing projects
- - Gas Production Alternatives

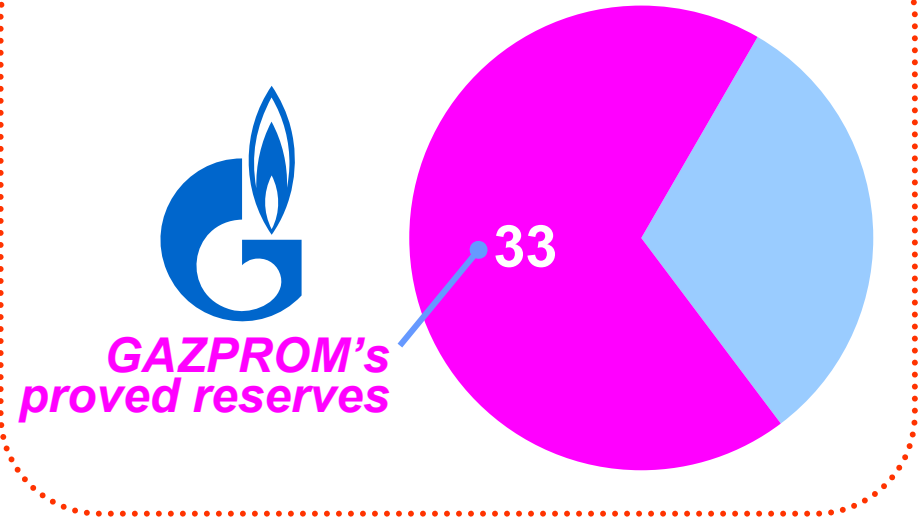
Adaptive scenarios allow Gazprom to mobilise reserves in a timely manner according to market demand as well as to develop its production and transportation system as needed, do not create excess capacity

Natural gas reserves of Russian Federation

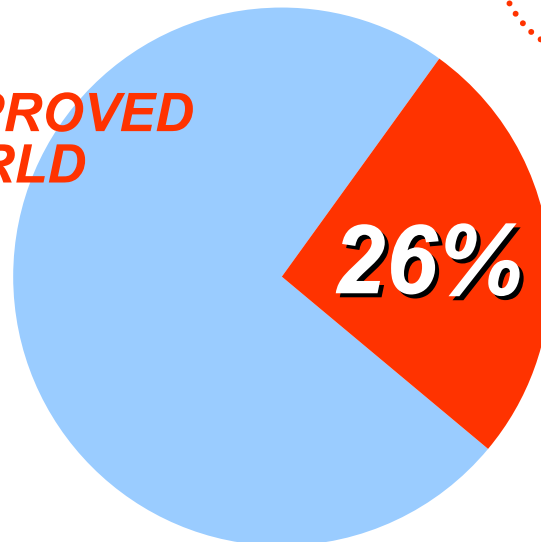
Total resources – 250 tcm



Proved reserves – 48 tcm



SHARE RUSSIAN PROVED RESERVES IN WORLD

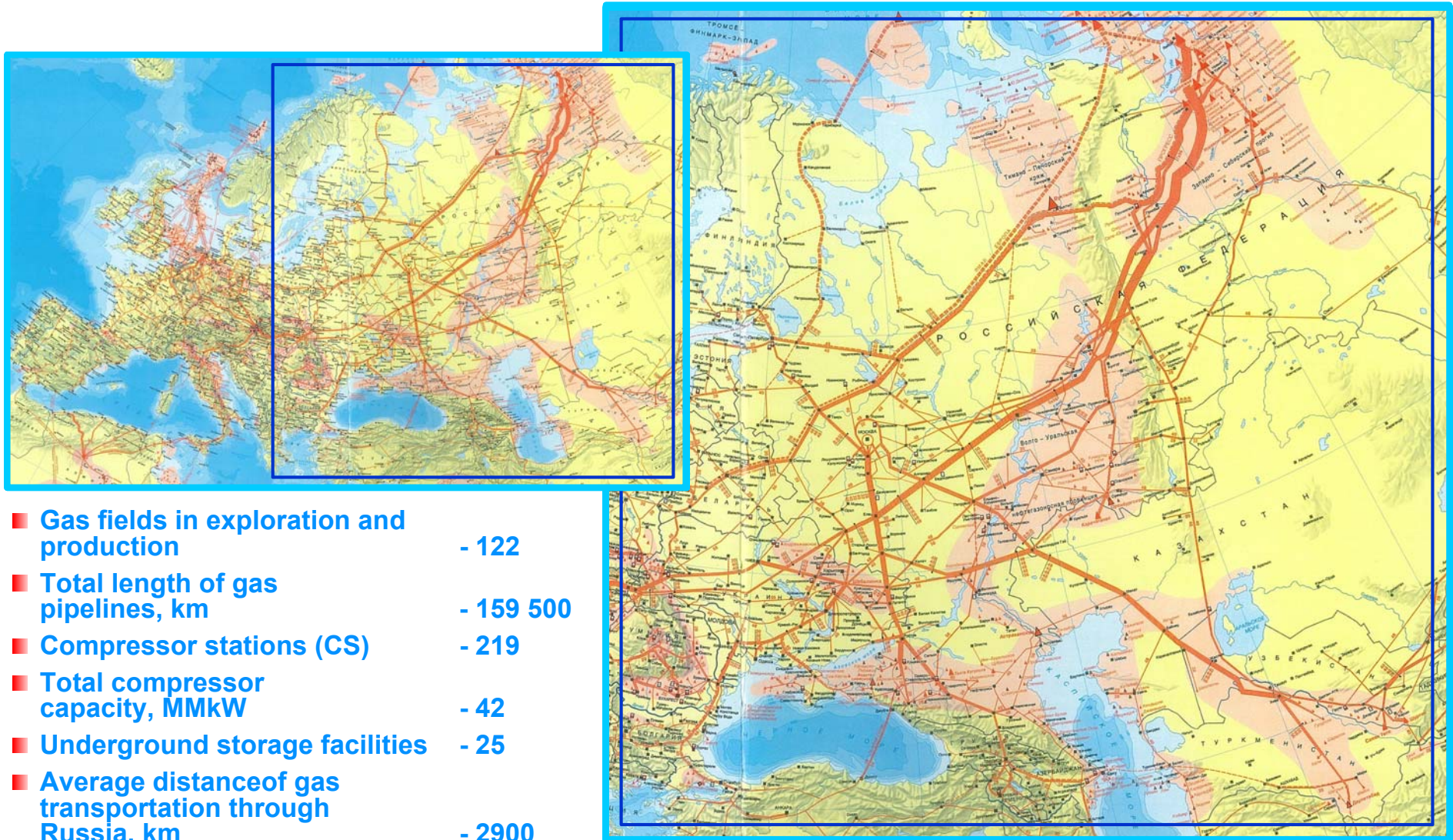


RESERVES REPLACEMENT RATIO

> 1

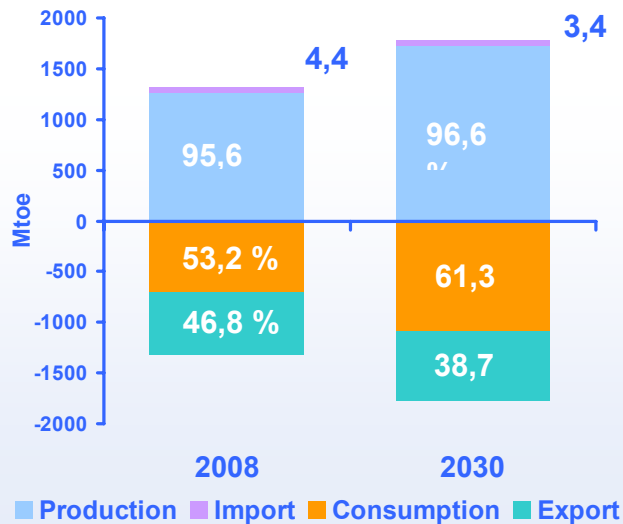
NEXT 10 YEARS

Russian Unified Gas Supply System (UGSS)

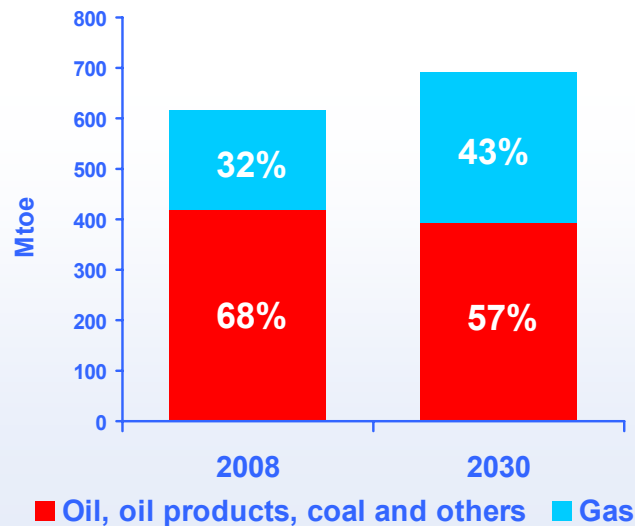


New Russian Energy Strategy 2030

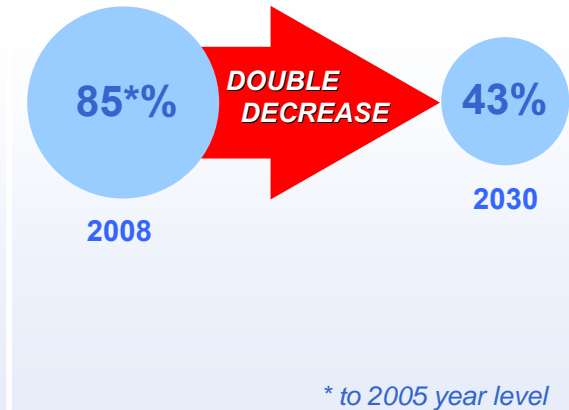
Primary Energy Resources



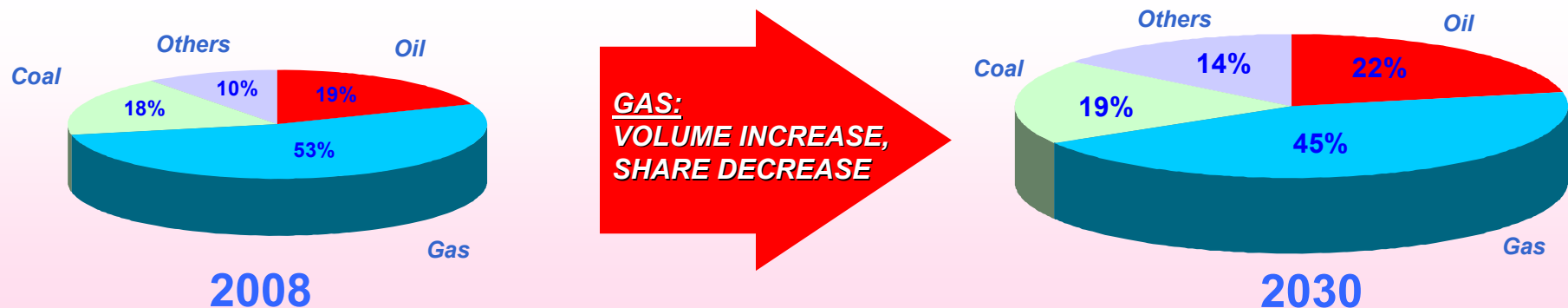
Energy Resources Export



GDP Energy Intensity

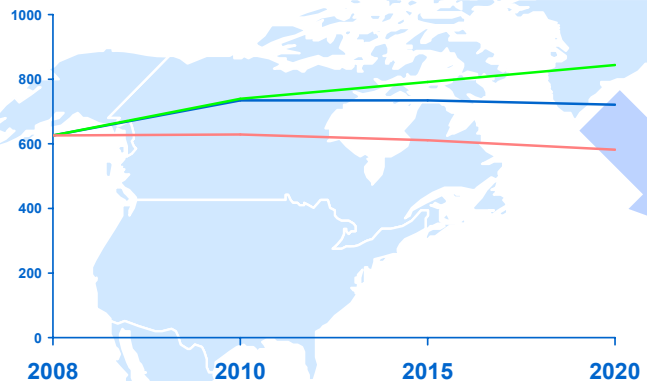


Total Final Consumption



Scenarios for Gas Demand

Europe, FSU and Baltic Countries

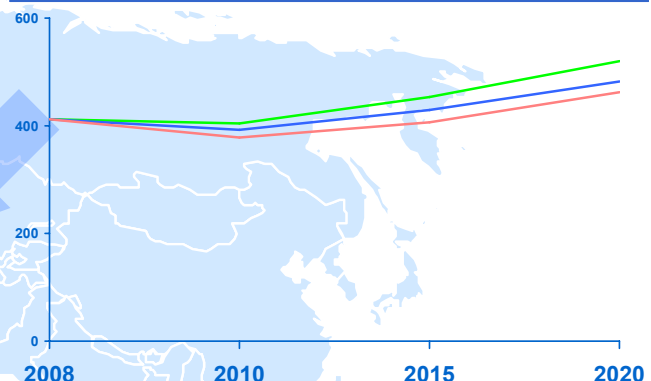


LONGTERM CONTRACTS

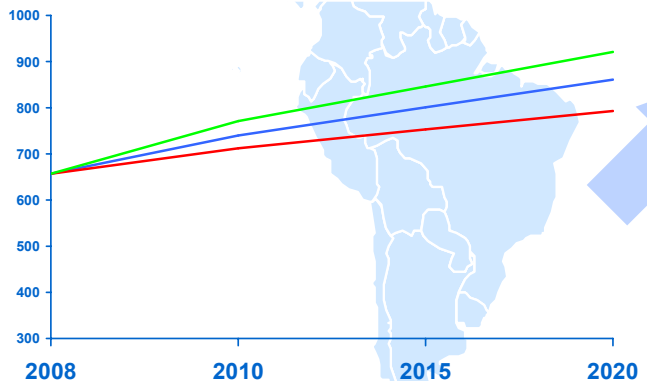
BASIC SCENARIO FOR GAS DEMAND

COMPETITION

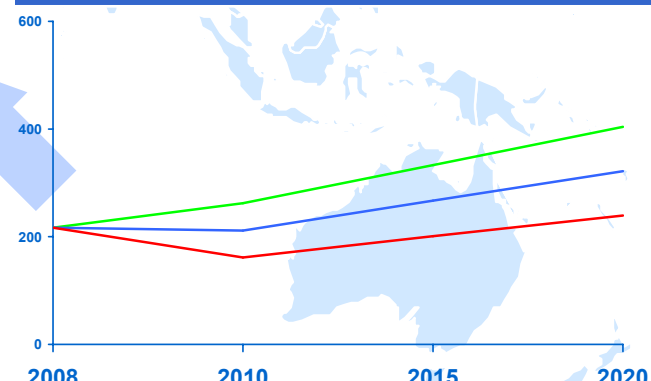
Russia



USA



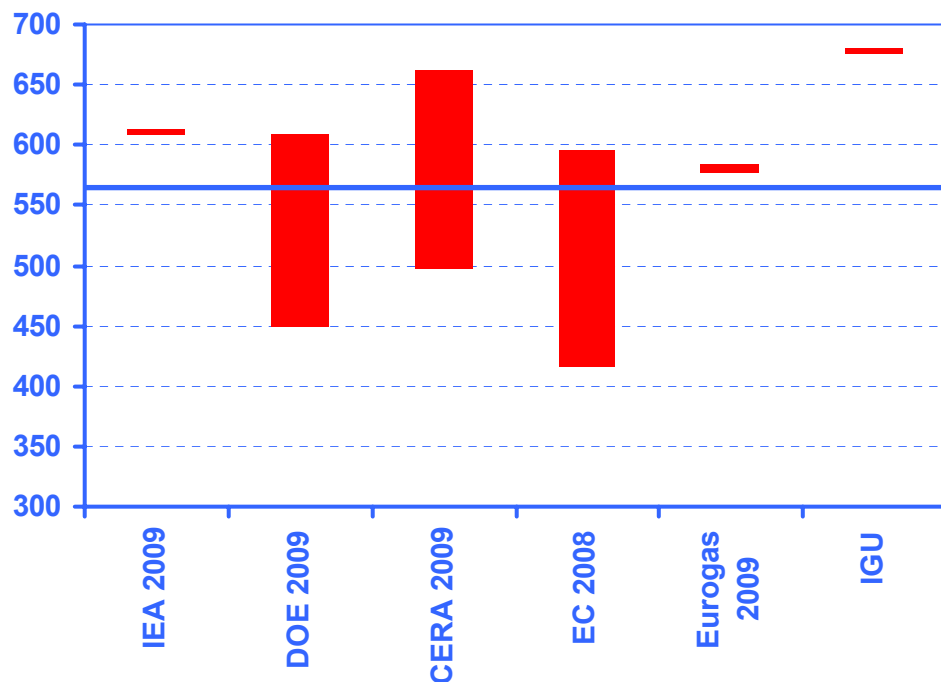
North-East Asia



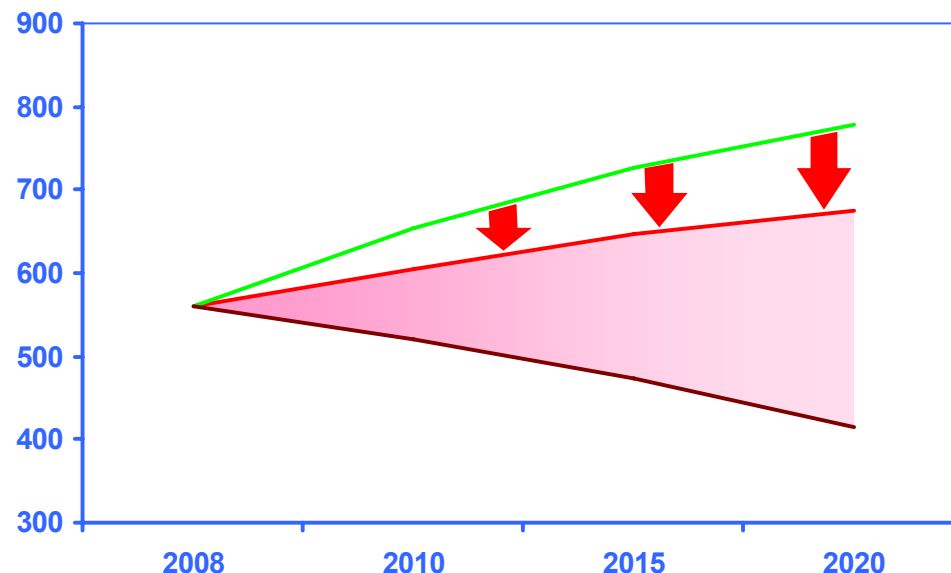
ДЕПАРТАМЕНТ СТРАТЕГИЧЕСКОГО РАЗВИТИЯ - УПР - 01.10 (2)

European market natural gas demand forecast

2020 Forecast, bcm



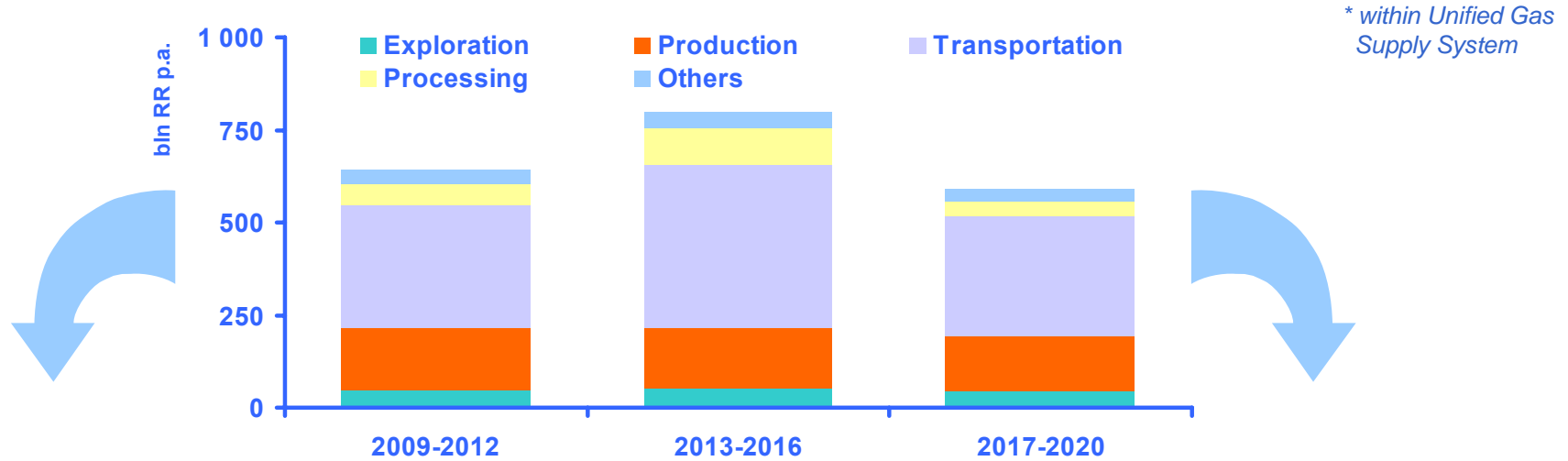
Natural gas demand in Europe (2009 forecasts turndown), bcm



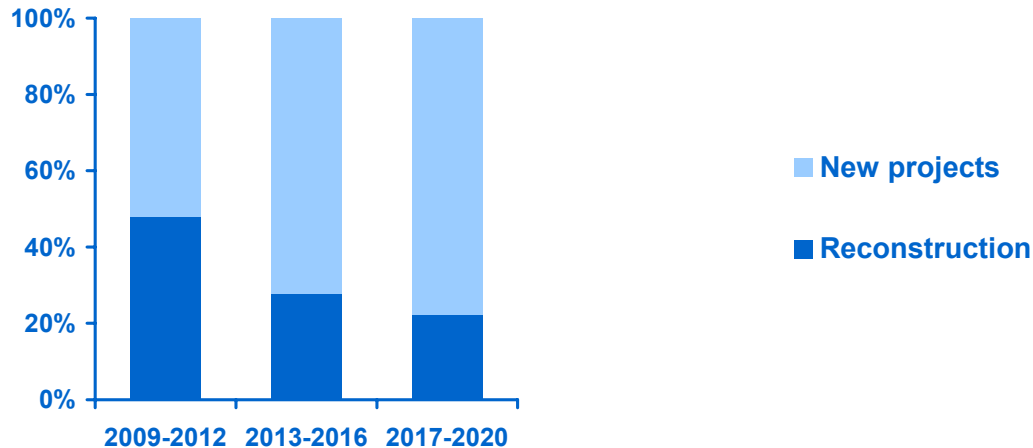
— Natural gas demand in Europe in 2008

Capital Expenditures Programs*

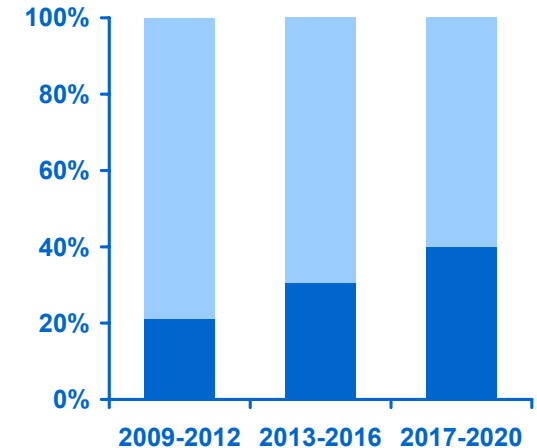
Capital Expenditures (annual average)



Production



Transportation





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