CONTENTS

List of Maps                                            vii
List of Figures                                        vii
List of Tables                                         x
Preface                                                xiii
Acknowledgements                                      xv
Units and conversions                                 xvi
Glossary                                               xvii
Notes on contributors                                 xx

Introduction 1
James Henderson and Simon Pirani

Part 1: Political Economy of Russian Gas
1 The Political and Economic Importance of Gas in Russia 6
   Tatiana Mitrova
2 The Matrix: an Introduction and Analytical Framework 39
   for the Russian Gas Sector
   Jonathan Stern

Part 2: The Impact of Competitive Markets on Russian Gas
3 Russian Responses to Commercial Change in European 50
   Gas Markets
   Jonathan Stern
4 The Impact of European Regulation and Policy on 82
   Russian Gas Exports and Pipelines
   Jonathan Stern
5 Russia’s Domestic Gas Market Development, Prices, 108
   and Transportation
   James Henderson, Simon Pirani, and Katja Yafimava
6 Sources of Demand in the Russian Domestic Gas Market 155
   Simon Pirani
7 CIS Gas Markets and Transit 181
   Simon Pirani and Katja Yafimava
8 Asia: a Potential New Outlet for Russian Pipeline Gas 216
   and LNG
   James Henderson
Summary: the Influence of Markets on Russia’s Gas Supply Strategy
Simon Pirani

Part 3: Russia’s Gas Supply Strategy
10 Sources of Russian Gas Supply
James Henderson

11 Gazprom’s West-Facing Supply Strategy to 2020
Jonathan Stern and James Henderson

12 The Dynamics of Gazprom’s Future Strategy
James Henderson and Jonathan Stern

13 Non-Gazprom Russian Producers: Finally Becoming Truly Independent?
James Henderson

14 Central Asian and Caspian gas for Russia’s Balance
Simon Pirani

15 Summary: the Likely Balance of Russian Gas Supply
James Henderson

Part 4: Conclusions
16 The Changing Balance of the Russian Gas Matrix and the Role of the Russian State
James Henderson and Simon Pirani

Appendices
Appendix 1. Statistical issues
Appendix 2. Russian domestic gas consumption by region
Appendix 3. Data on gas transmission and storage in Russia
Appendix 4. Proposed legal framework for third-party access to the Russian gas transport system
Appendix 5. Gas transportation tariff methodology
Appendix 6. Statistical information on the power sector
Appendix 7. Reserves, production, and costs at Gazprom’s major production associations

Bibliography

Index