24th World Gas Conference
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The Global Energy Challenge:
Reviewing the Strategies
for Natural Gas

Addressing Uncertainty in the European Gas Market

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GasTerra – the Netherlands
Director Strategy and Planning

PGC B – Supply & Demand   October 6th 2009

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Key Figures 2008 GasTerra

- **GasTerra is the largest natural gas supplier of the EU**
  - 40% EBN (= NOC), 25% ExxonMobil, 25% Shell, 10% Dutch State
  - Market share in EU 15: 16%
- **Bought volumes:**
  - Groningen field: 39,2 billion m3
  - Small Dutch fields: 35,8 billion m3
  - Imports: 9,1 billion m3 (Norway, Russia, Germany, UK)
- **Sold volumes**
  - Netherlands: 33,1 billion m3
  - Rest of Europe: 50,9 billion m3
- **Revenues: € 24 billion**

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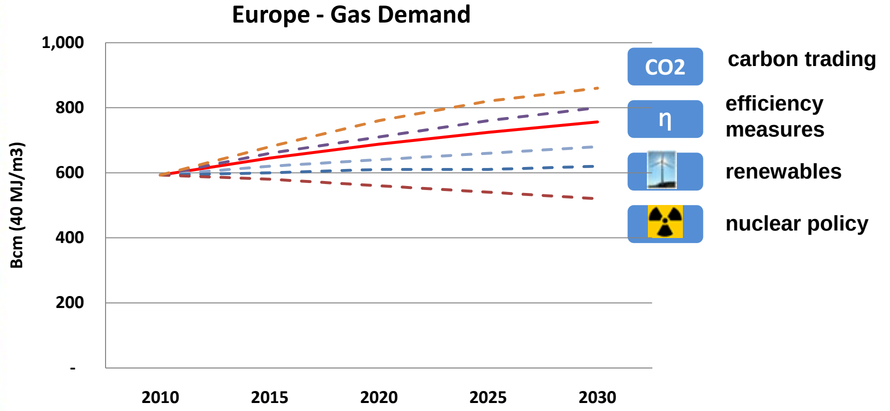
Uncertainty Issues - Gas Demand



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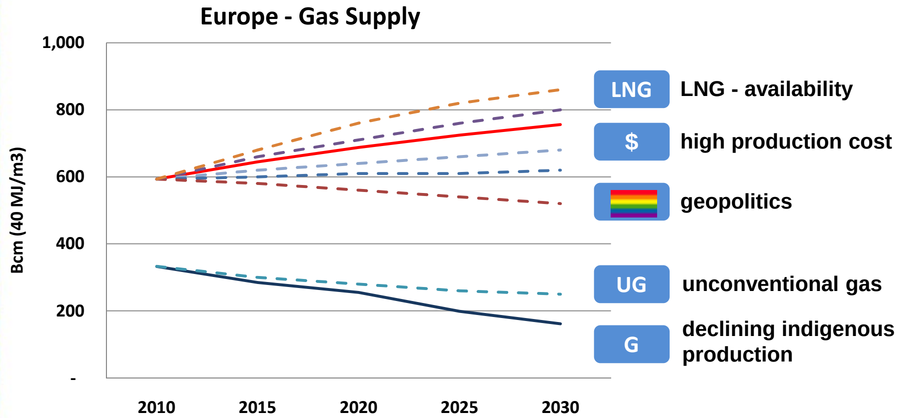
Uncertainty Issues - Gas Supply



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Uncertainty Issues Undermining Gas Market?

Uncertainty

↓

Anxiety

↓

- Loss of Customers
- Political Interference

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Surround Stakeholders with the 3 C's

Confidence

Stakeholders

Cooperation   Coordination

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