



Moldova: Gas Infrastructure

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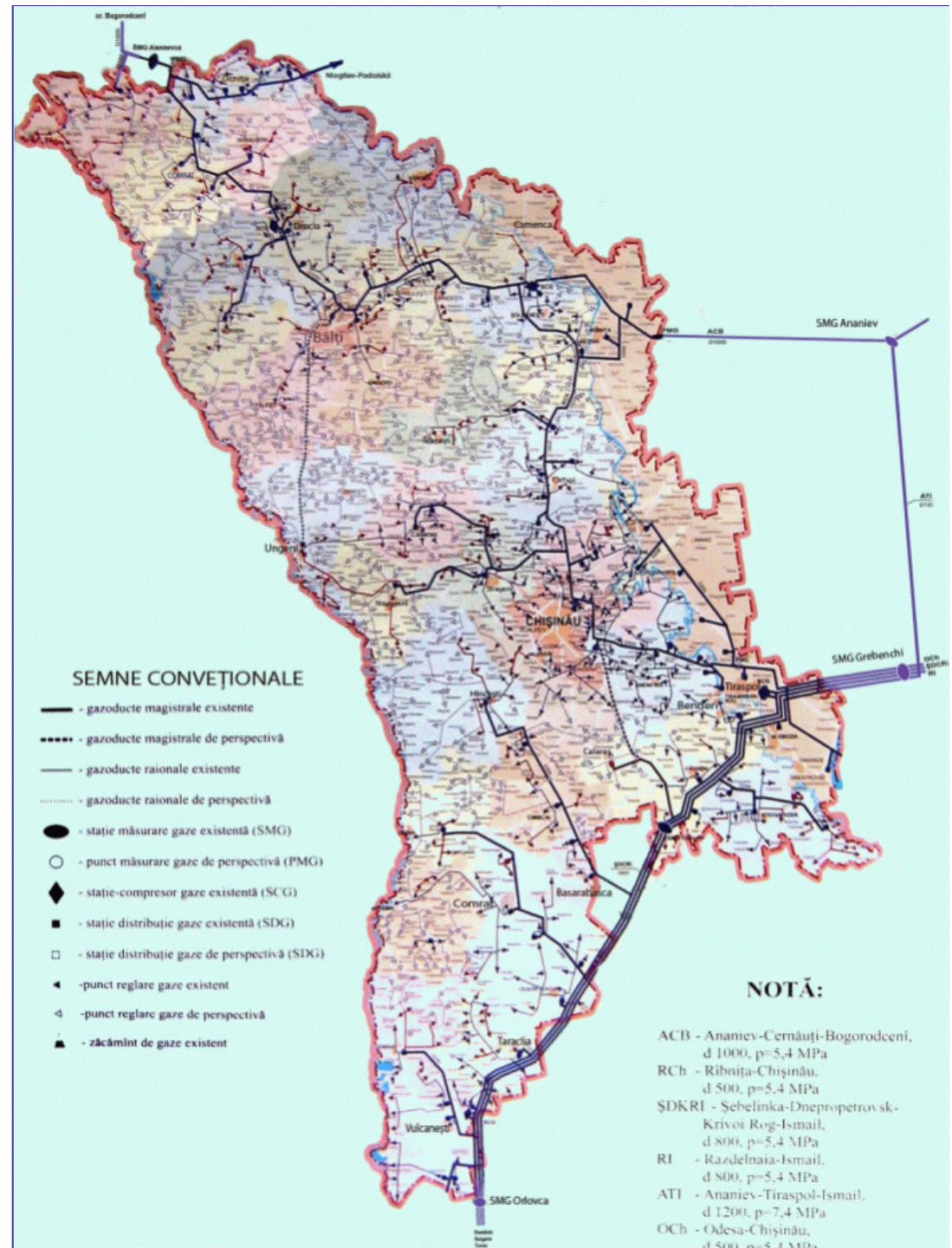


REPUBLIC OF MOLDOVA

- ❑ Parliamentary Republic
- ❑ Population: 3.56 million
- ❑ GDP (2010): \$5.8 billion
- ❑ GDP per Capita: ~\$1,631
- ❑ Currency: Moldovan Leu
\$ 1 = 12.00 Lei
- ❑ Area: 33.7 thous. sq. km
- ❑ Language: Romanian
- ❑ Plains and hills
- ❑ Highest level: 428 m
- ❑ Access to Danube
- ❑ Frozen conflict with a separatist region (Transnistria)

Transmission and distribution of natural gas

- ❑ TSO: JSC “Moldovagaz” (50% owned by Gazprom)
- ❑ 4 gas transmission pipelines;
- ❑ 4 compressor stations: Drochia, Tiraspol (2), Vulcanesti;
- ❑ ~18000 km gas pipelines, including cca 570 km transit pipelines
- ❑ Over 90% of localities have access to gas
- ❑ Over 40% of consumers are connected



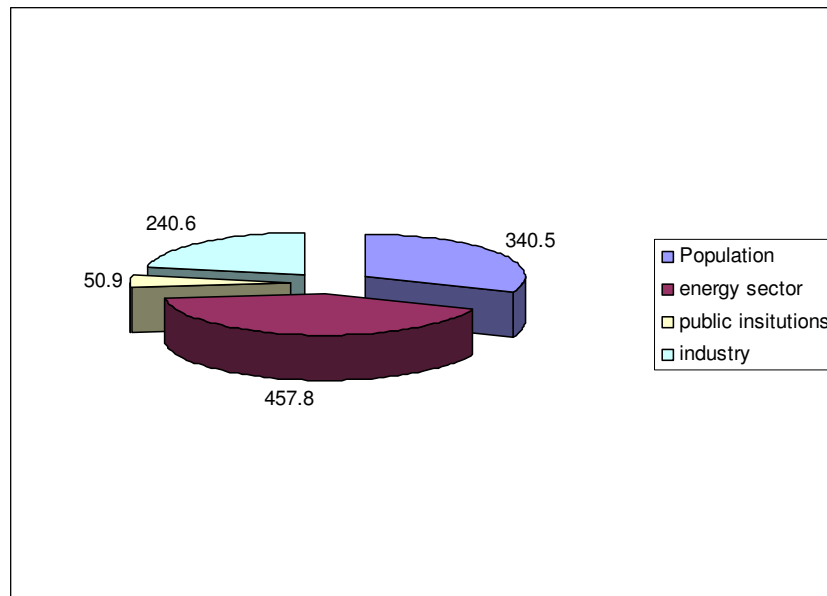
General statistics on gas consumption and transit (2010)



■ Number of customers: 597 900

- Household: 588 100
- Non-household customers: 9 800

■ Consumed volume: 1 090 mln m³

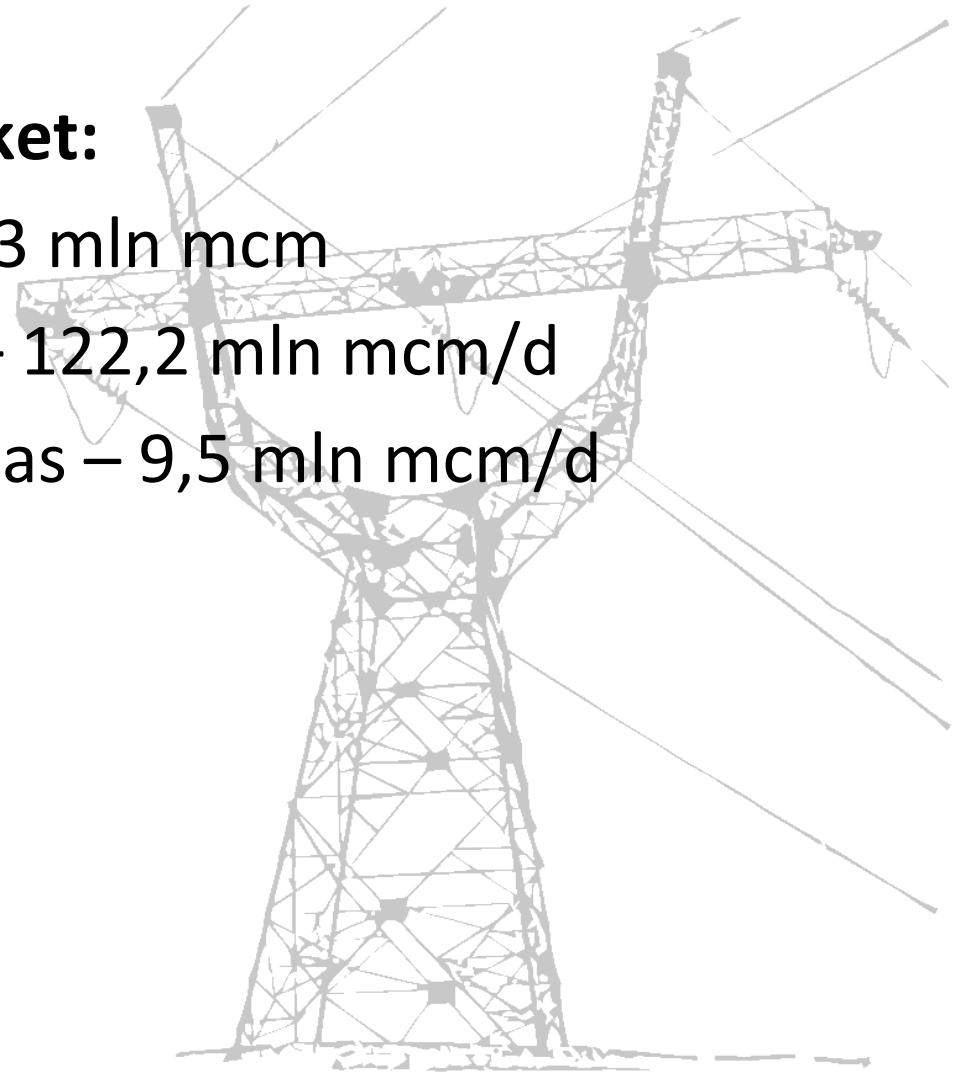


General statistics on gas consumption and transit (2010)

- **Gas transit to other countries (annually):**
 - **Capacity: ~42 bln m³**
 - **Historical maximum: cca 25 bln m³**
 - **Current average: cca 18 bln m³**

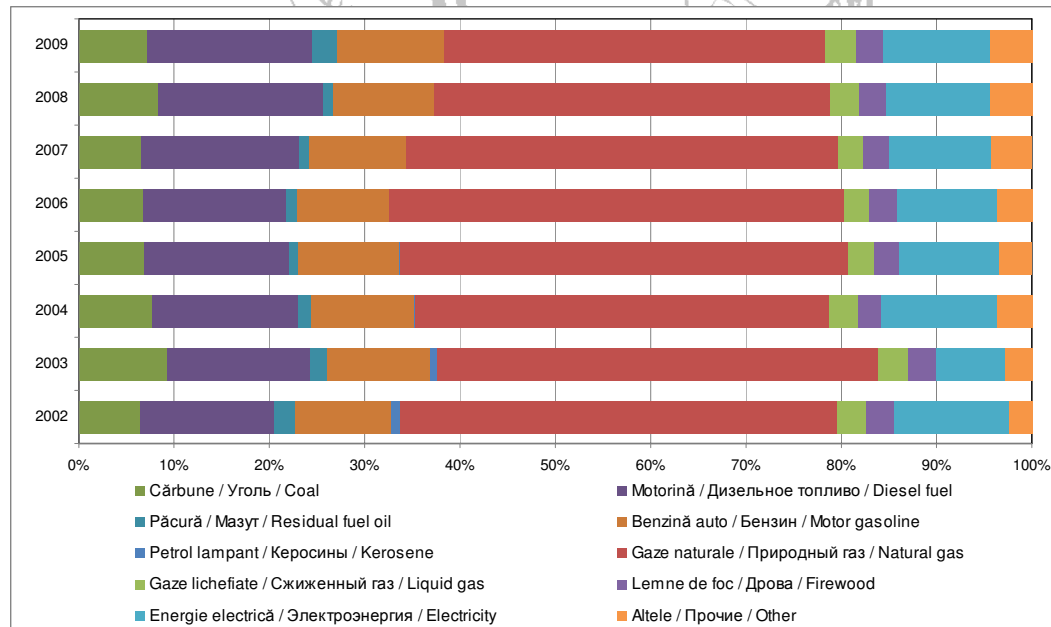
Characteristics of gas market:

- Total daily gas demand – 3 mln mcm
 - Total piped gas capacity – 122,2 mln mcm/d
 - Peak demand of natural gas – 9,5 mln mcm/d
- (26.01.2010)



Share of natural gas in the energy mix

- Natural gas share in the energy balance is apr. 42%
- Natural gas source – Gazprom (Russia) - 99,9% out of total gas consumption



Main challenges to gas sector

Challenges to gas supply:

- Risk of disconnection mainly political and economical (year 2006, 2009)
- High rate of wear of transportation gas pipes
- New gas sources for import
- Interconnection with Romanian gas grid

Market challenges:

- Increased price for natural gas vs alternative energy sources (fossil fuels and renewable energy sources)

Major bottlenecks of gas infrastructure

- Investigations on natural gas sources in Moldova are not performed fully
- Dependence on one source stresses the need for a alternative gas pipe source through Romania, that would allow us to:
 - use the gas storage facilities from Romania
 - Import natural gas from Romania
 - Participate in European gas projects (for ex. Nabucco)
- Increase of gas transportation safeness from Russia to EU;
- Improve of gas consumption metering and usage (energy efficient equipment).



Thank you!

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