



GAS NO ES SOLUCIÓN

WHERE DOES SPANISH FOSSIL
GAS COME FROM? PART 3

RUSSIA



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EXECUTIVE SUMMARY

Where does Spanish fossil gas come from? **Part 3: Russia**

- In 2024 the **Russian Federation was the Spanish State's second-largest fossil gas supplier (21.3%), but its share dropped to 11.5% in 2025**, allowing the U.S. to overtake it.
- **The Spanish State was the second largest importer of Russian fossil gas in the EU in 2021, 2022 and 2024.** In **2023**, it ranked **first**, and in **2025**, it fell to **third place**. But this is something **relatively new**, as Spain has only been buying fossil gas from Russia since 2018.
- **Russia maintains extremely weak climate ambition**, removing references to fossil fuels in its Climate Doctrine, relying on inflated land-use carbon sinks, and suppressing environmental organisations amid the ongoing war in Ukraine, which is partly a war for its resources.
- **Fossil fuels remain central to Russia's economy, and despite EU sanctions, Europe still buys nearly half of Russia's LNG and a third of its pipeline gas**, as the transshipment ban has had only marginal impact without broader import restrictions.
- The Arctic is at the core of Russia's fossil gas strategy, even as climate change accelerates ecological collapse. **Russia is responsible for over 90% of Arctic oil and fossil gas output in 2023, threatening fragile ecosystems and Indigenous livelihoods.** Also the **Arctic region contributes approximately 80% of Russia's fossil gas production in 2023.**
- **Yamal LNG, a major LNG project operated by Novatek, exemplifies the political-economic nexus of Arctic extraction, with Russian oligarchs and international partners** (Novatek, TotalEnergies, CNPC or Silk Road Fund). For example, TotalEnergies have been charged with complicity in war crimes.
- **Yamal LNG exports mostly to Europe (75-80%) and provides significant tax revenues to the Russian state**, for example, **Naturgy's long-term contract to 2038 sustains Spain's dependence on Russian LNG.**



- **Other projects** related to **fossil gas extractivism** include: **Arctic LNG 2, Murmansk LNG** and **Belokamenka Assembly Yard** (Center for the Construction of Large-Capacity Offshore Structures, CCOSS).
- Major projects such as the **expansion of Arctic LNG 1 or Tambayskoye facilities**, or the plan of **Power of Siberia-2 pipeline**, **signal Russia's continued fossil fuel growth**. The development of Power of Siberia-2 shows its strategic pivot toward Asian markets after losing EU pipeline customers.
- **Indigenous resistance persists despite repression**; groups such as ***Voice of the Tundra (Golos tundry)*** defend land, culture, and reindeer herding against rapidly expanding industrial activity that is degrading the Yamal Peninsula and undermining Indigenous rights.
- The **environmental movement in Russia is suffering severe repression**. Many are forced to operate from exile. These organisations are being replaced by 'state-affiliated civil society structures,' which are nothing more than greenwashing by the Russian government.





INTRODUCTION



This is the third of a series in which we will analyze the largest exporters of gas to the Spanish State. **The Russian Federation was the second largest fossil gas exporter**, accounting for 21.3% of total Spanish fossil gas imports in 2024. In **2025**, it **decreased to 11.5%**, being overtaken by the **United States** (figure 1). **The Spanish State was the second largest importer of Russian fossil gas in the EU in 2021, 2022 and 2024**. In **2023**, it ranked **first**, and in **2025**, it fell to **third place**.

It must be noted that the Russian Federation is a quite new supplier, in comparison, for example, with Algeria. **Historically, Spain has not been dependent on Russia, unlike other countries in Northern Europe**. In figure 1, it can be observed that the imports increased from 2022. In this year, the contract to import fossil gas from Algeria by the Medgaz pipeline (Algeria - Morocco - Spain), was ended due to diplomatic tensions, such as the diplomatic stance of the Spanish State on Western Sahara. Additionally, it should be noted that Spain's regasification plants are operating well below capacity, with the system being completely oversized.

WHAT ABOUT RUSSIA?

The Russian Federation is located in Eastern Europe and North Asia and it is the largest country in the world. It is **ruled by Vladimir Putin** (1999–2008 and 2012–). **The freedom of expression, peaceful assembly and association remaind severely restricted, torture is being used to maintain the restrictions.** In February 2022, they invaded Ukraine, after having occupied Crimea, Ukrainian territory, in 2014. It should be noted that invasion is affecting the regions bordering Russia, where the most pro-Russian Ukrainian population is located and which has been affected by war since 2014. It also coincides with the territories richest in energy and mineral resources.

Russia's climate policy remains largely unambitious. Recent updates include a revised high-level Climate Doctrine, which **removed any reference to the role of fossil fuels in driving the climate crisis**. The announcement of Russia's headline 2035 target could be met without any additional effort. In 2024, **Russia recalculated the carbon absorption capacity of its land use, land-use change and forestry sector, nearly doubling the estimated sink** in Russia's favour. In addition, **the government is cracking down on environmental organisations that are critical of state policies and stepping up fossil fuel production**.



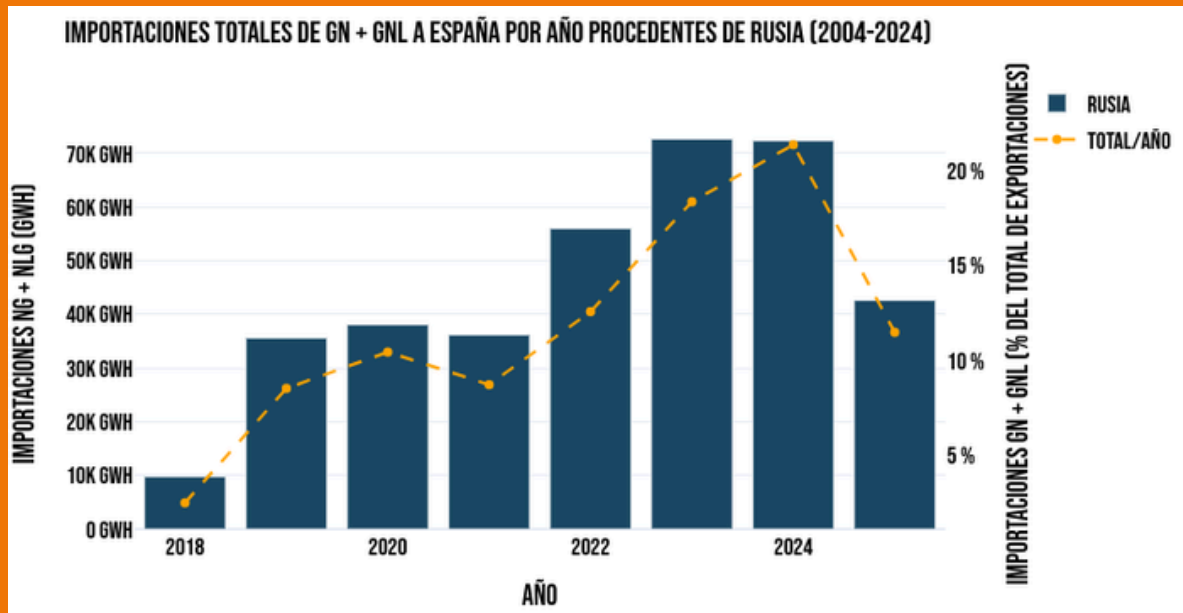
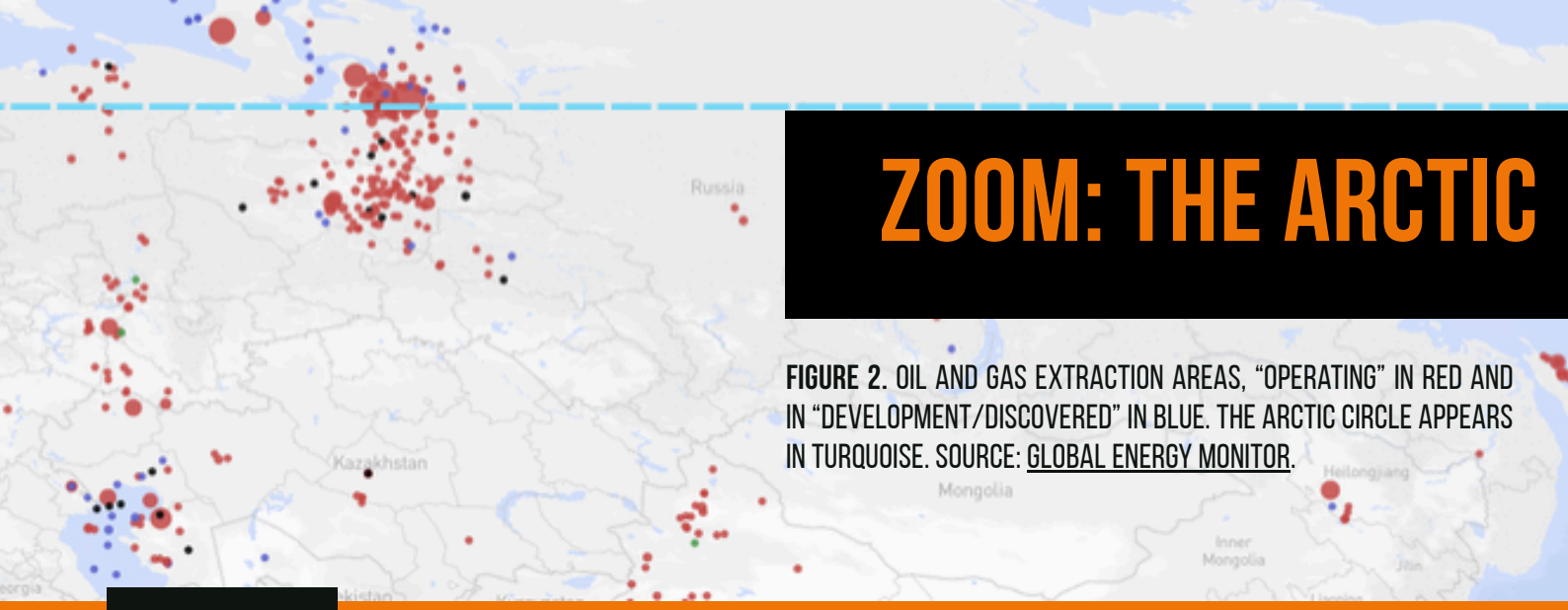


FIGURE 1. TOTAL RUSSIAN FEDERATION GAS, NG ("NATURAL" GAS) + LNG (LIQUEFIED "NATURAL" GAS), IMPORTS TO THE SPANISH STATE BY YEAR FROM RUSSIAN FEDERATION (2004-2025). TOTAL IMPORTS IN BARS AND PERCENTAGE OF THE IMPORTS (GAS IMPORTED FROM RUSSIAN FEDERATION BY SPANISH STATE * 100 / TOTAL GAS IMPORTED BY SPANISH STATE) IN LINES. DATA: CORES. SOURCE: RED GAS NO ES SOLUCIÓN.

If we look at the country's trade balance, in 2024, we find that the **Russian Federation's top exports** were crude and refined petroleum, petroleum gas, coal briquettes, and gold. During the same year, Russian Federation's **top imports included** cars and other vehicles, medicaments and electronics. **This highlights the importance of fossil fuel extraction and mining in this country's economy.**

Focusing on fossil gas, where is it going? Most of Russia's exports continue to flow to the **EU, China, Turkey, and Japan**. The EU remains the largest buyer of both LNG, accounting for almost half (49%) of Russia's total LNG exports in December 2025, and pipeline gas, which accounted for 34% of Russian exports in the same month, although it should be noted that in 2025, EU imports of Russian gas fell by 31% year-on-year.

Unlike other fossil fuels, fossil gas has been largely exempt from EU sanctions. However, in its fourteenth package of sanctions, the EU introduced a ban on the transshipment of Russian LNG in EU ports, covering ship-to-ship transfers as well as the unloading and storage of LNG intended for re-export. But the transshipment ban has had only a marginal impact and, without a reduction in demand for fossil gas in Europe or a total ban on Russian imports, it does not contribute significantly to restricting Russia's ability to sell its LNG on global markets. Nevertheless, in early December 2025, the European Parliament and the Council reached a provisional agreement on the Regulation to effectively and permanently stop imports of Russian fossil gas and move towards phasing out Russian oil, setting December 31, 2026, as the deadline for Russian LNG imports.



ZOOM: THE ARCTIC

FIGURE 2. OIL AND GAS EXTRACTION AREAS, “OPERATING” IN RED AND IN “DEVELOPMENT/DISCOVERED” IN BLUE. THE ARCTIC CIRCLE APPEARS IN TURQUOISE. SOURCE: [GLOBAL ENERGY MONITOR](#).

The Arctic’s ecosystems are undergoing rapid transformation driven by the climate crisis and expanding industrial activity. Summer sea ice is vanishing at an unprecedented rate, **destroying critical** habitats and causing steep declines in species that depend on snow and ice. This loss is putting narwhals, polar bears, and walrus, between others, under severe pressure. Fish populations are shifting their ranges, while southern whale species, including orcas, are increasingly moving northward.

Offshore oil exploration, drilling, and further production threaten the fish and marine mammals that Indigenous Peoples depend on, while associated infrastructure, such as pipelines, can degrade habitats and disrupt sensitive species. For **Arctic residents**, many of whom are Indigenous, these changes are immediate and deeply **affecting their environment, economies, and ways of life.**

Arctic marine **ecosystems** are also highly vulnerable to oil **spills from blowouts, pipeline failures, or shipping accidents.** The region’s remoteness and limited infrastructure mean that **spill responses can take days or weeks, and clean-up efforts are often ineffective.** As a result, local environments can be damaged for decades, leading to the collapse of wildlife populations and undermining the livelihoods and food sovereignty of local communities.

The Arctic already supplies roughly **25% of the world’s fossil gas, primarily from onshore production.** It is also **believed to contain about 22% of the Earth’s undiscovered oil and fossil gas resources.**

Russia aims to further exploit hydrocarbon reserves within the Arctic Circle, a priority that has grown as melting ice opens new opportunities for resource extraction. It is the region’s dominant producer, responsible for more than **91% of all Arctic oil and fossil gas output in 2023.** The **Arctic accounts for around 80% of Russia’s fossil gas production,** and these economic interests are closely tied to the country’s expanding military presence across the region.

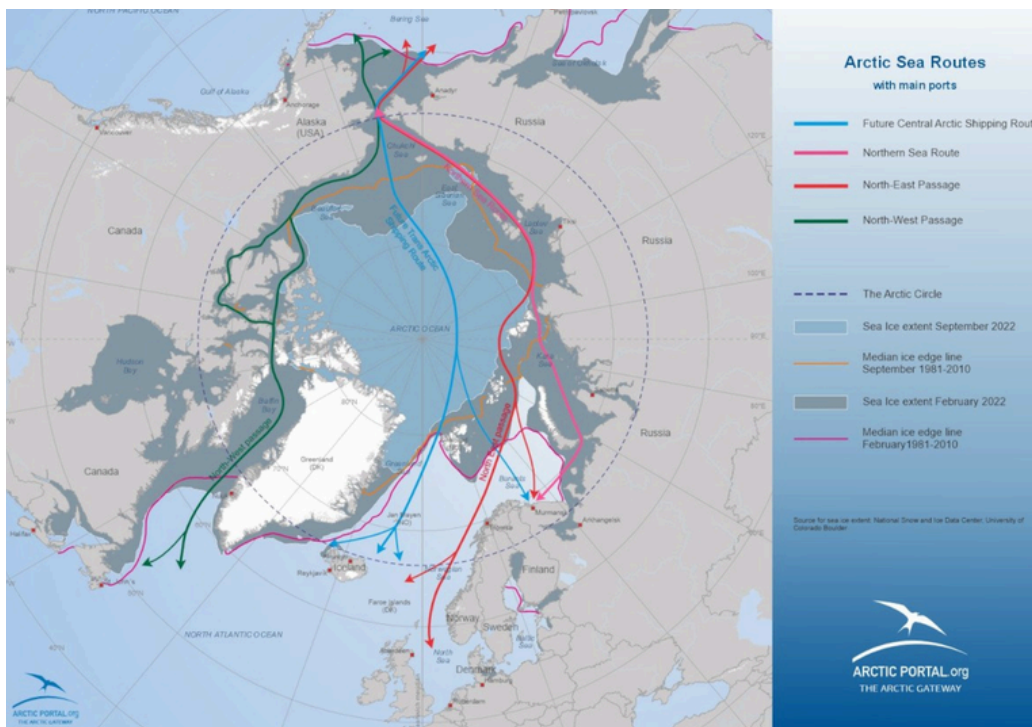


FIGURE 3. ARCTIC SHIPPING ROUTES AND MAIN PORTS. SOURCE: ARCTIC PORTAL, NATIONAL SNOW AND ICE DATA CENTER, UNIVERSITY OF COLORADO BOULDER / ARCTICPORTAL.ORG

The melting of the Arctic ice cap is sparking interest in new navigation routes such as the **Northern Sea Route**, which is geopolitically and commercially significant. Just between 2013-2023, the number of vessels sailing the Arctic increased by 37%. After the IMO HFO ban in 2024, the incorporation of LNG as a fuel for ships is also a concern. Growing use of LNG as a marine fuel in the Arctic region will likely lead to more LNG infrastructure in the region, and increased methane emissions from LNG-fuelled ship engines. The Arctic is already warming at a rate up to four times faster than the planet as a whole, leading to concerns that Arctic shipping could replace problems with HFO with the introduction of a methane slip problem.

WHAT PROJECTS CAN WE HIGHLIGHT IN THE RUSSIAN ARCTIC?

Yamal LNG

The Yamal LNG project is a major liquefied fossil gas project located on Russia's Yamal Peninsula (Arctic). It began exporting LNG in December 2017 and represents Russia's first large-scale effort to exploit the region's vast fossil gas reserves using the Northern Sea Route for maritime exports. The facility is situated near the South Tambey fossil gas field. It is operated by a consortium led by **Novatek** (50.1%), Russia's largest privately owned fossil gas producer. The remaining shares are held by **TotalEnergies** (20%), the **China National Petroleum Corporation** (CNPC, 20%), and **China's Silk Road Fund** (9.9%), as shown in Figure 3.

Novatek's ownership structure highlights its close ties to the Kremlin. Major shareholders include CEO and oligarch Leonid Michelson (28%), Gennady Timchenko's Volga Group (23%), Total Energies (19.4%), and Gazprom (9.4%). Who are they?

- **Mikhelson** led Novatek through the post-Soviet pipeline privatization and later aligned closely with Putin's inner circle. He brought in Timchenko in 2008 to help protect the company. Mikhelson has benefited from state favoritism, receiving special exemptions from competition laws.
- **Timchenko**, a former Soviet official and oil trader, rose rapidly after Russian state companies routed major oil exports through his firm, Gunvor. Within a few years, Gunvor controlled about 30% of Russia's seaborne oil exports, making him one of the country's richest men. He was not merely an independent businessman but a key financial conduit for Putin's personal wealth. Volga Group is his investment fund.

- **TotalEnergies**, the major French energy company whose profits depend heavily on the fossil-fuel industry, has been linked to serious disasters, such as complicity in war crimes in Cabo Delgado LNG (Mozambique). They have been charged because local security forces tortured and executed dozens of civilians in a group of shipping containers on their facilities. It is not surprising that they are interested in Yamal LNG, as they have a twofold interest: they are the second largest shareholder in the Yamal LNG project and also the third largest shareholder in Novatek (the largest shareholder in Yamal LNG).
- **Gazprom**, Russia's energy giant, is a global company involved in fossil gas exploration, extraction, transportation, storage, processing, and sales. It also produces and markets heat and electric power, known for exploiting the Arctic.

Yamal LNG exports Russian fossil gas in liquefied form to buyers in Europe and Asia via tanker and maintains several long-term supply agreements with companies based in both regions. Approximately **75-80% of its output is directed to the European Union, with France, Spain, and Belgium serving as the largest importers.**

A key element of Yamal LNG's financial significance lies in its **tax contributions to the Russian state**. Between 2022 and 2024, the company paid an estimated USD 9.5 billion in profit taxes. These figures cover only profit taxes and exclude personnel taxes and other revenue streams. Beyond formal taxation, the Kremlin also benefits from opaque financial mechanisms and long-standing patronage networks, as major strategic projects such as Yamal LNG are controlled by oligarchs closely aligned with President Putin.

Is any Spanish company involved?

Naturgy is Spain's largest purchaser of Russian LNG. Holds a long-term contract with Yamal LNG running until 2038. Russian LNG represents about 15% of Naturgy's total LNG portfolio. These commitments mean Naturgy plans to continue importing Russian LNG through 2038, making it a key facilitator of Russia's continued access to European energy markets.

Other projects that we could highlight are:

- **Arctic LNG 2**, a major LNG development on the Gydan Peninsula in the Russian Arctic, positioned across the Gulf of Ob from Yamal LNG and forming part of a strategic Arctic export corridor.
- **Murmansk LNG**, a planned LNG project near the port of Murmansk, benefiting from the ice-free waters of the Barents Sea and Kola Bay, which allow uninterrupted, year-round shipping without the need for ice-class vessels.

Belokamenka Assembly Yard (Center for the Construction of Large-Capacity Offshore Structures, CCOSS), a key industrial site on the shores of Kola Bay near Murmansk, that specializes in constructing and assembling large modules for LNG liquefaction trains, making it essential to Russia's Arctic LNG infrastructure.

COMBINED OWNERSHIP STRUCTURE (INCLUDING NOVATEK BREAKDOWN)

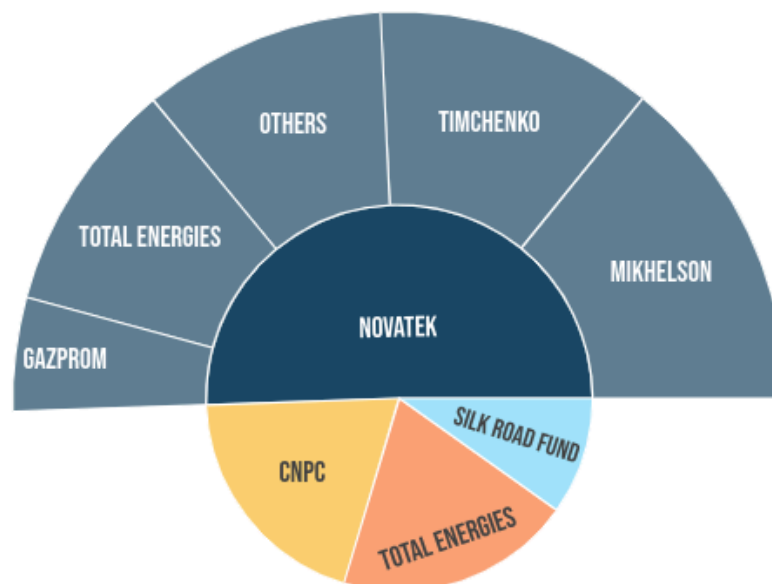


FIGURE 4. COMBINED OWNERSHIP STRUCTURE OF YAMAL LNG, INCLUDING NOVATEK BREAKDOWN.

* WHAT ABOUT THE FUTURE?

Russia's weak **Nationally Determined Contribution (NDC) under the UNFCCC reflects a clear lack of climate ambition**. Current policies already allow the country to meet its 2030 and 2035 targets without additional effort, leaving emissions far above a 1.5°C-compatible pathway. Excluding LULUCF, **Russia's 2035 target represents only a 27–33% reduction from 1990 levels, while a 79% reduction would be required for alignment with 1.5°C**.

Consistent with this low-ambition trajectory, **new fossil gas projects continue to expand**. For example, in March 2025, Gazprom began building an **offshore loading terminal at the Tambeyskoye complex** to support storage and export of fossil gas condensate and LPG. Meanwhile, the **Arctic LNG 1 Terminal**, fully owned by Novatek, remains in the proposed stage, supported by newly discovered fields and government approvals, with construction expected no earlier than 2026–2027.

Power of Siberia 2, and two other major pipelines, overprescribe China's reliance on Russian gas

Selected operating and in development pipelines, and operating liquefied natural gas (LNG) import terminals, that bring gas to China



Source: Global Gas Infrastructure Tracker, Global Energy Monitor

FIGURE 5. POWER OF SIBERIA 2 GAS PIPELINE.
SOURCE: GLOBAL ENERGY MONITOR.

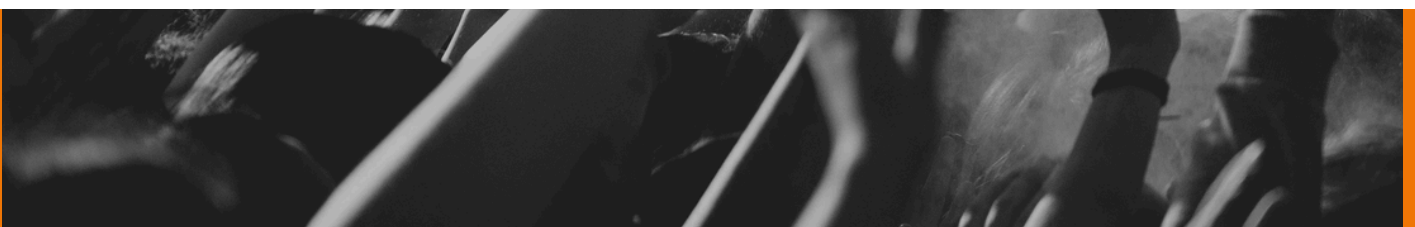
Russia also seeks to redirect its fossil gas exports from Europe to Asia. Due to difficulties in selling fossil fuels to the EU after the invasion of Ukraine, the **Power of Siberia-2 pipeline has become central to its strategy**. By September 2025 Gazprom announced a legally binding deal with China for the pipeline, planned to deliver 50 bcm per year for 30 years. Currently, the capacity of Power of Siberia-1, which already connects to the Chinese border, is 38 bcm/year, so Power of Siberia-2 would significantly increase capacity. Key terms such as investment conditions and the delivery start date remain unclear.

RESISTANCE

The Voice of the Tundra (Golos tundry) is a **grassroots activist community led by Nenets reindeer herder Eiko Sérotétto that advocates for Indigenous rights in Russia's Yamal Peninsula**. It emerged in response to the rapid **industrialization of the Yamal-Nenets Autonomous Okrug**, where massive oil-and-gas projects, championed by the Russian state since 2009, have **displaced reindeer pastures, degraded the tundra, and undermined the traditional livelihoods of Nenets communities**. Industrial expansion, combined with climate-related disasters, has intensified economic insecurity, reduced grazing land and pushed social tensions between Nenets, the state, and energy companies to the breaking point.

Indigenous political representation has been severely weakened as the government has curtailed independent Indigenous organizations, reshaped leadership to align with state interests, and dismissed Indigenous concerns as “subversive.” Many Nenets feel abandoned by official institutions. Activists linked to Golos tundry have been labeled “foreign agents,” and reindeer breeders have been accused of waging an “information war.”

Despite these pressures, Golos tundry continues its advocacy through social media and political alliances, including cooperation with the regional Communist Party of the Russian Federation (CPRF), the opposition to the Kremlin. Sérotétto has established a political alliance with CPRF and become a candidate to the regional parliament in 2018 to defend Indigenous rights, environmental protection, and the survival of reindeer husbandry and fishery resources. Overall, **the situation in Yamal reflects profound conflict between the resource extraction and the survival of Indigenous societies**.





In addition to this local struggle, it should be noted that the **environmental movement in Russia is suffering severe repression, which makes it difficult to voice criticism at the federal level.** Many environmental organisations, as happened to Golos tundry, have been declared “foreign agents” or “undesirables” (figure 5). Dozens of environmental organizations in Russia were classified as “foreign agents,” and many of them were forced to stop their fights. Even so, **they do not stop fighting, although many must continue from exile.** This is what happens to Bellona and Ecodefensa between others. Social organisations are being **replaced by ‘state-affiliated civil society structures,’ which are nothing more than greenwashing by the Russian government.**



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