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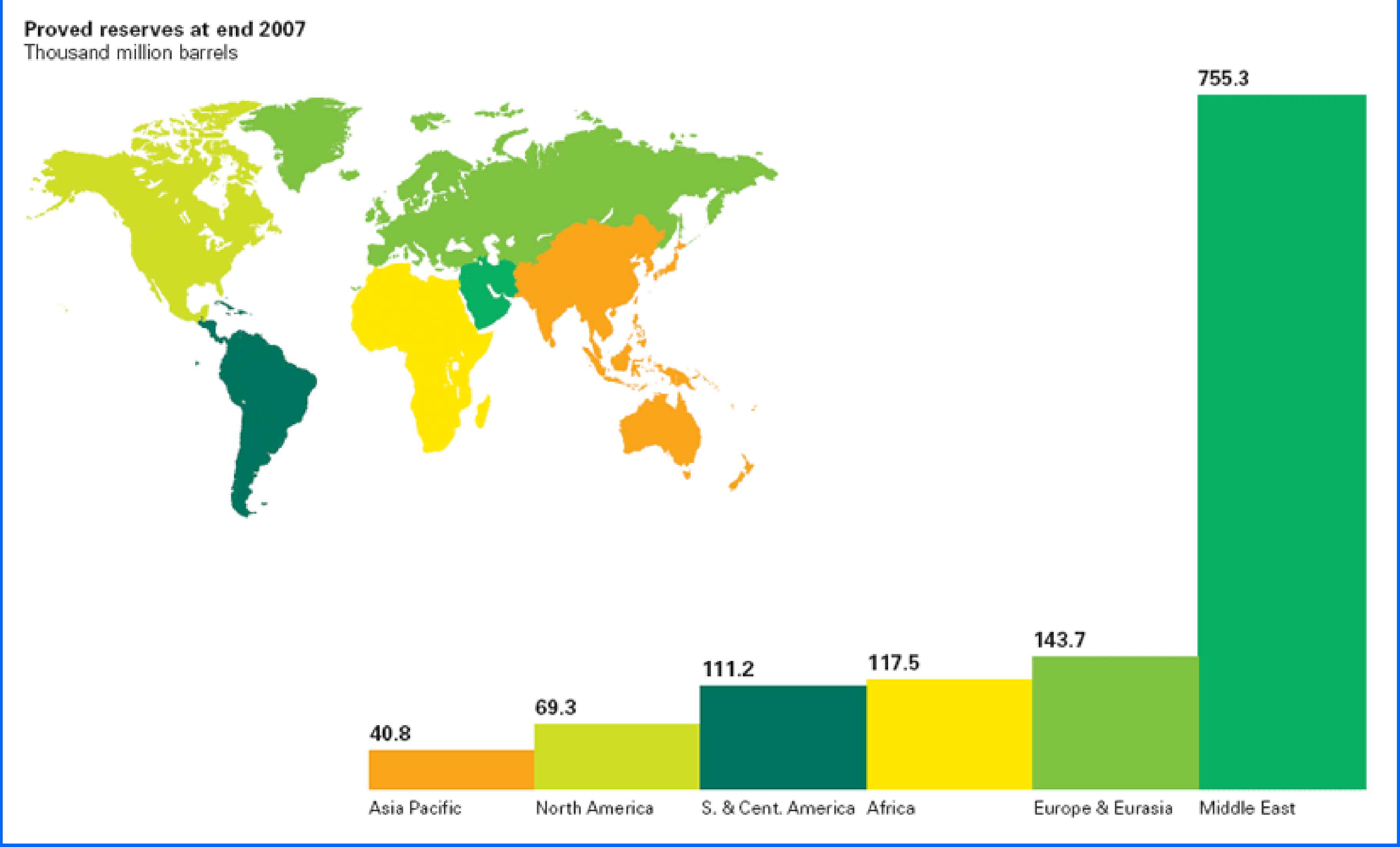
Growing World Population

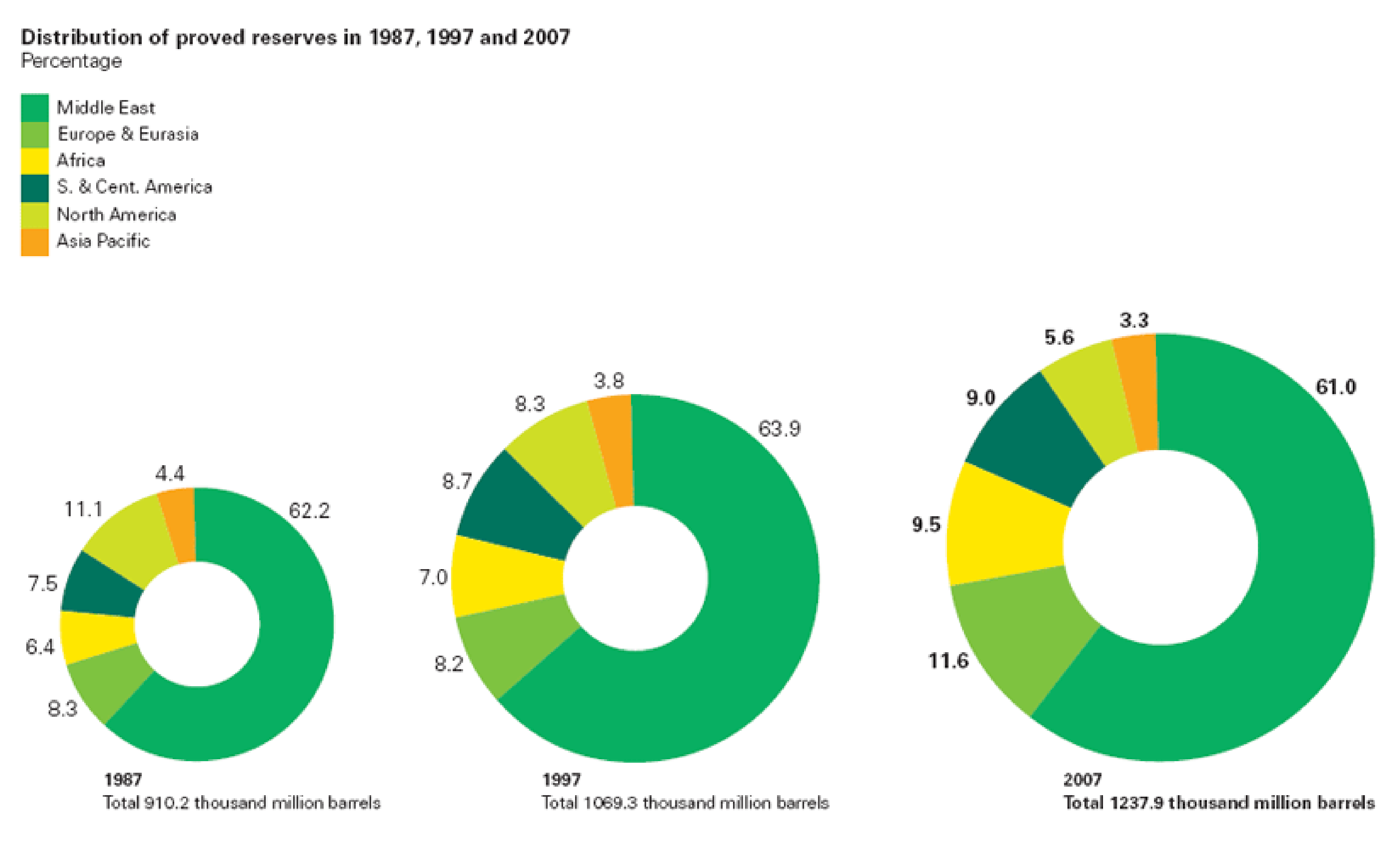
Source: Shell Energy Scenarios to 2050

Distribution of Oil Reserves - I



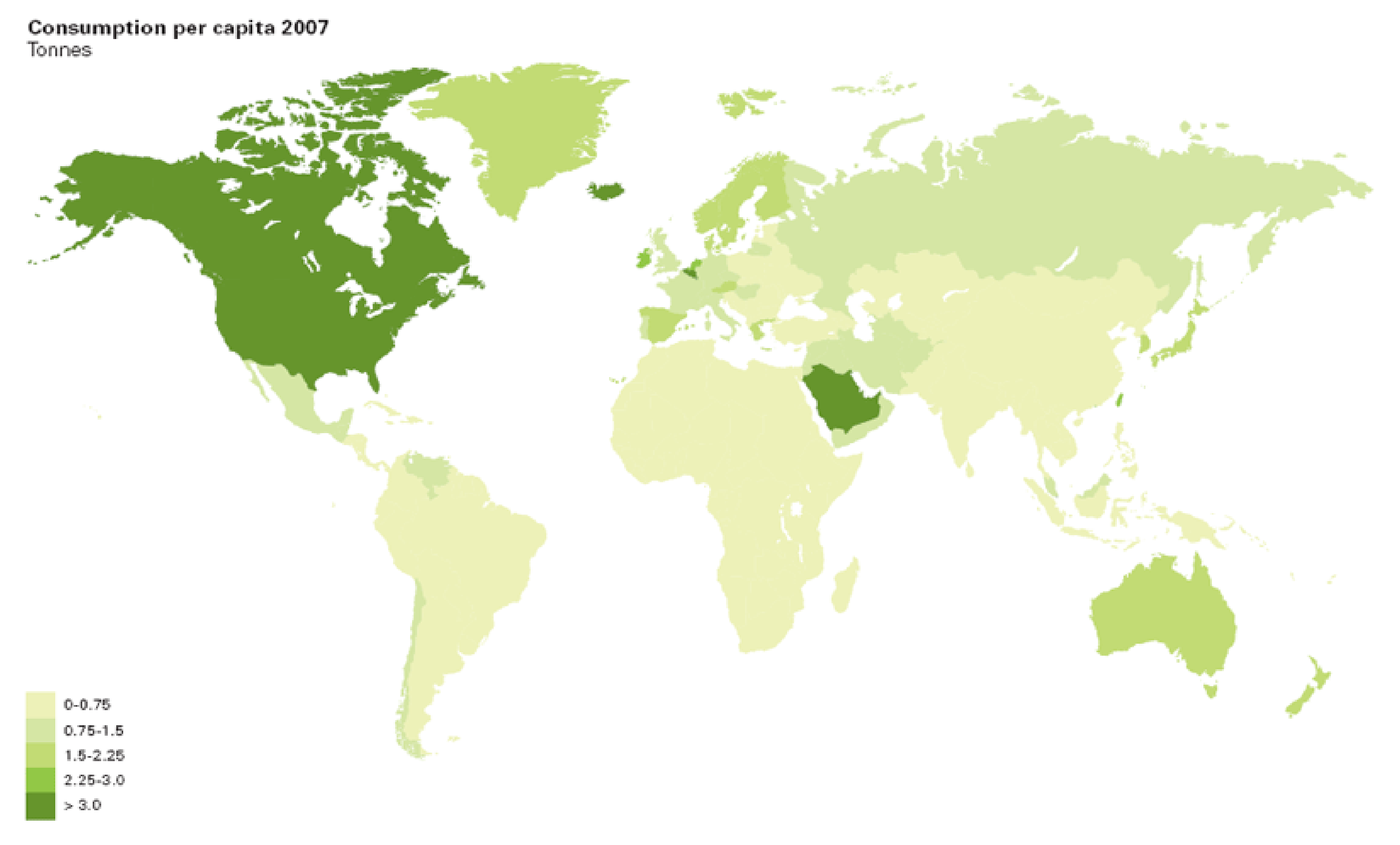
Source: BP Statistical Review (June 2008)

Distribution of Oil Reserves - II



Source: BP Statistical Review (June 2008)

Distribution of Oil Consumption



Source: BP Statistical Review (June 2008)

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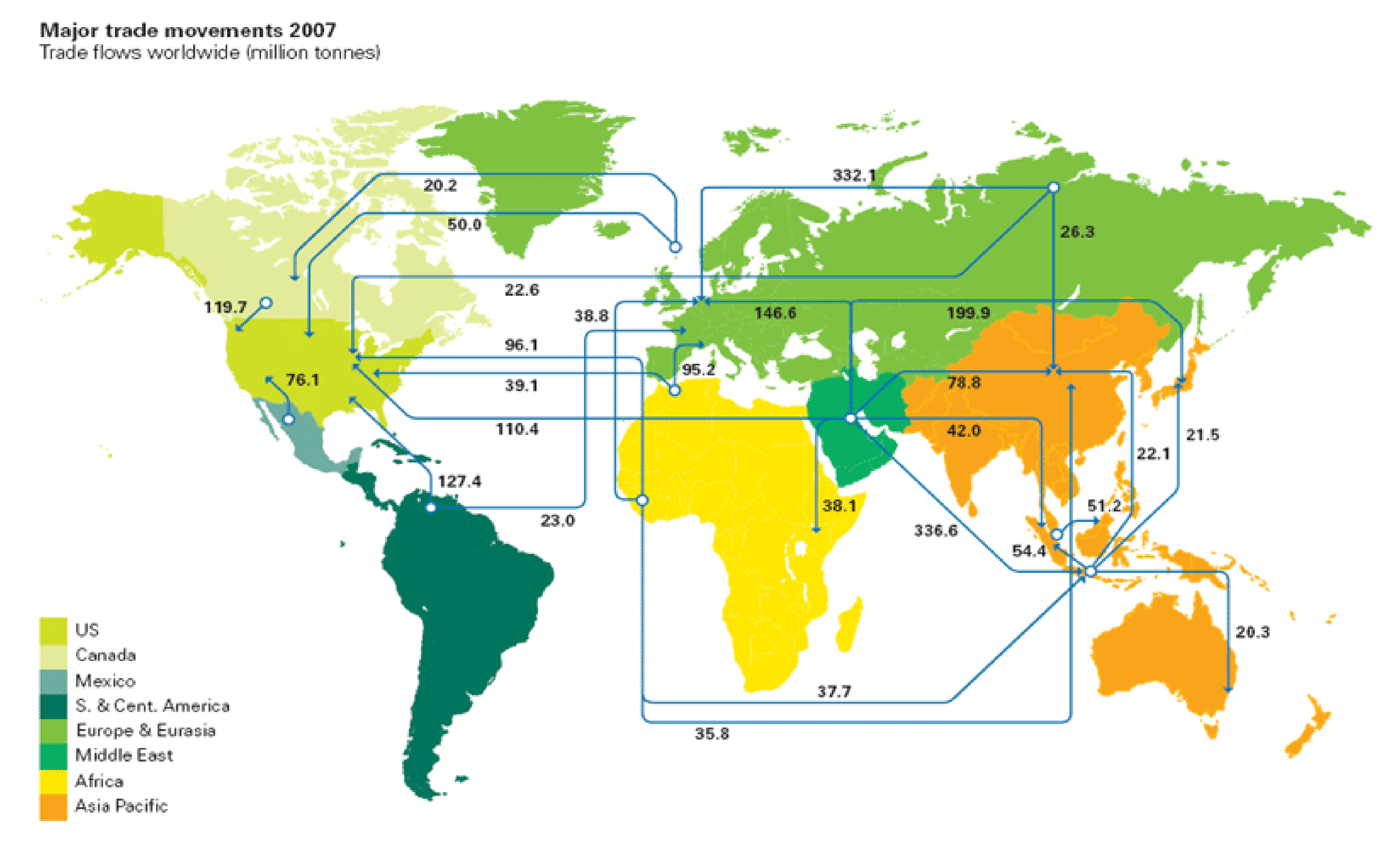
Oil Trade Movements



Source: BP Statistical Review (June 2008)

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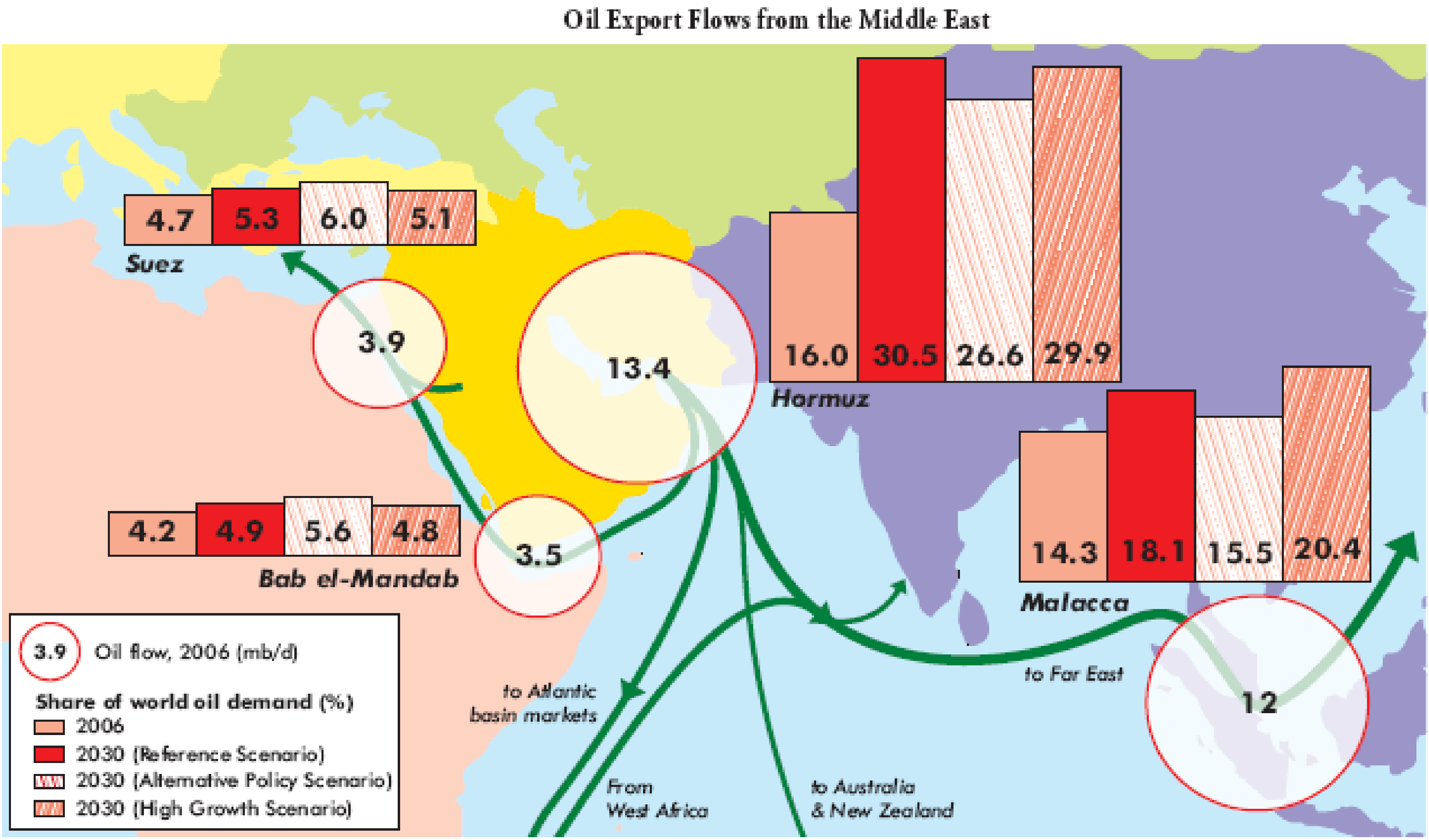
Oil Flows from the Middle East



Source: World Energy Outlook (2007)

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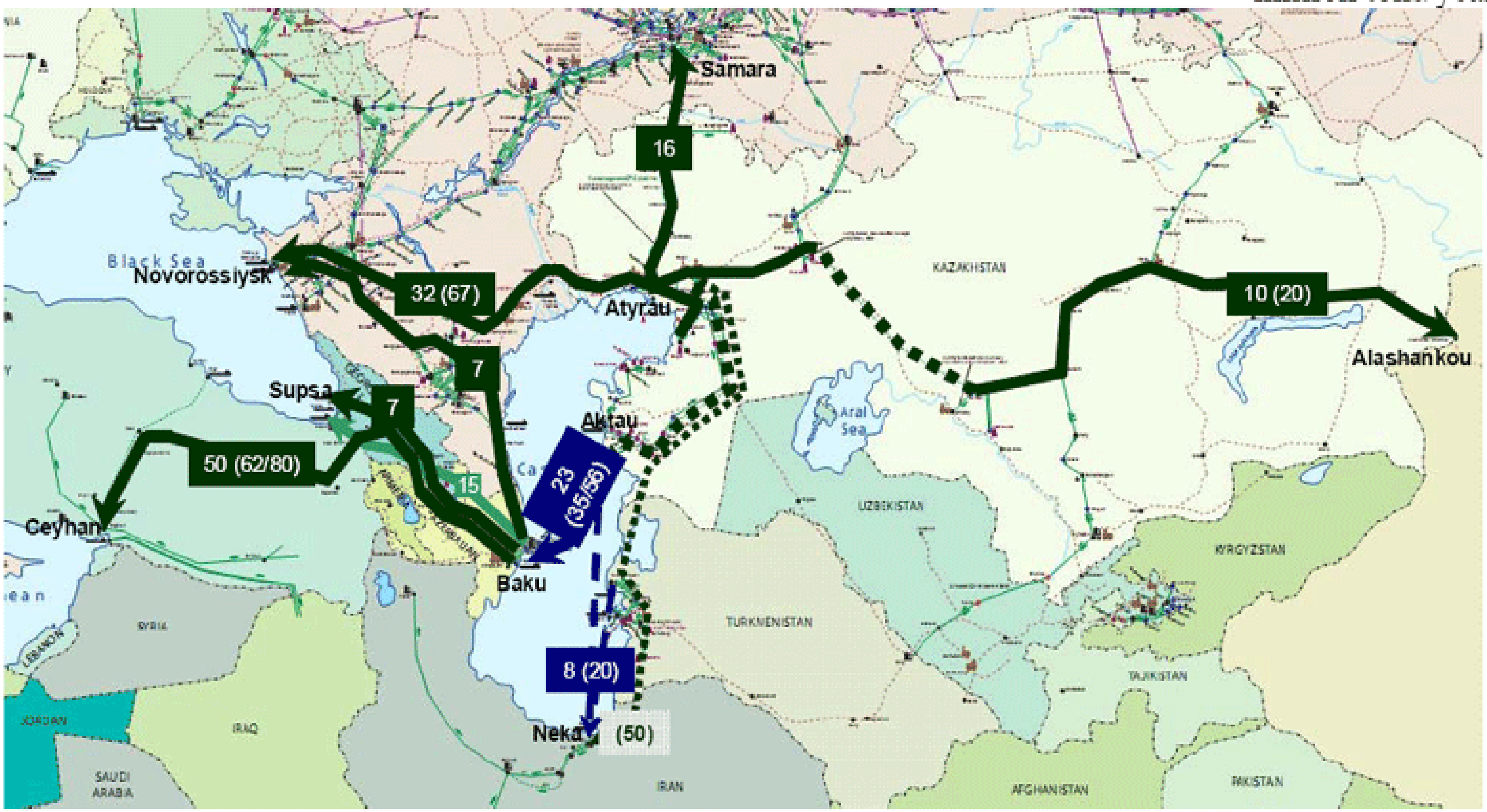
Oil Flows from the Caspian Basin

million tons/year



existing
planned

* 50 (62/80) means existing capacity 50, expansion planned for 62 or 80

Source: Energy Charter

Oil Flows in Black Sea Region

Source: Energy Charter

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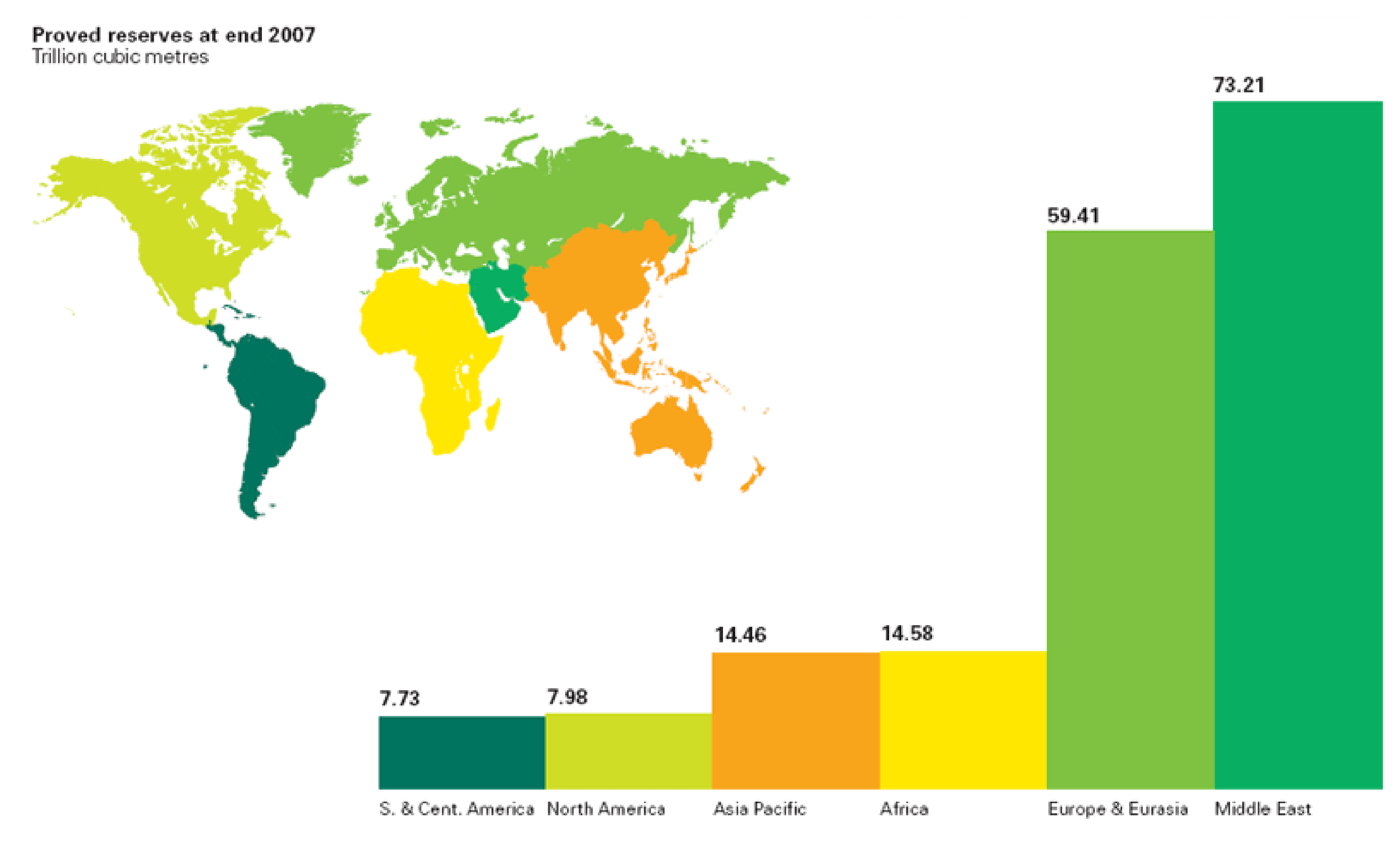
Distribution of Gas Reserves - I



Source: BP Statistical Review (June 2008)

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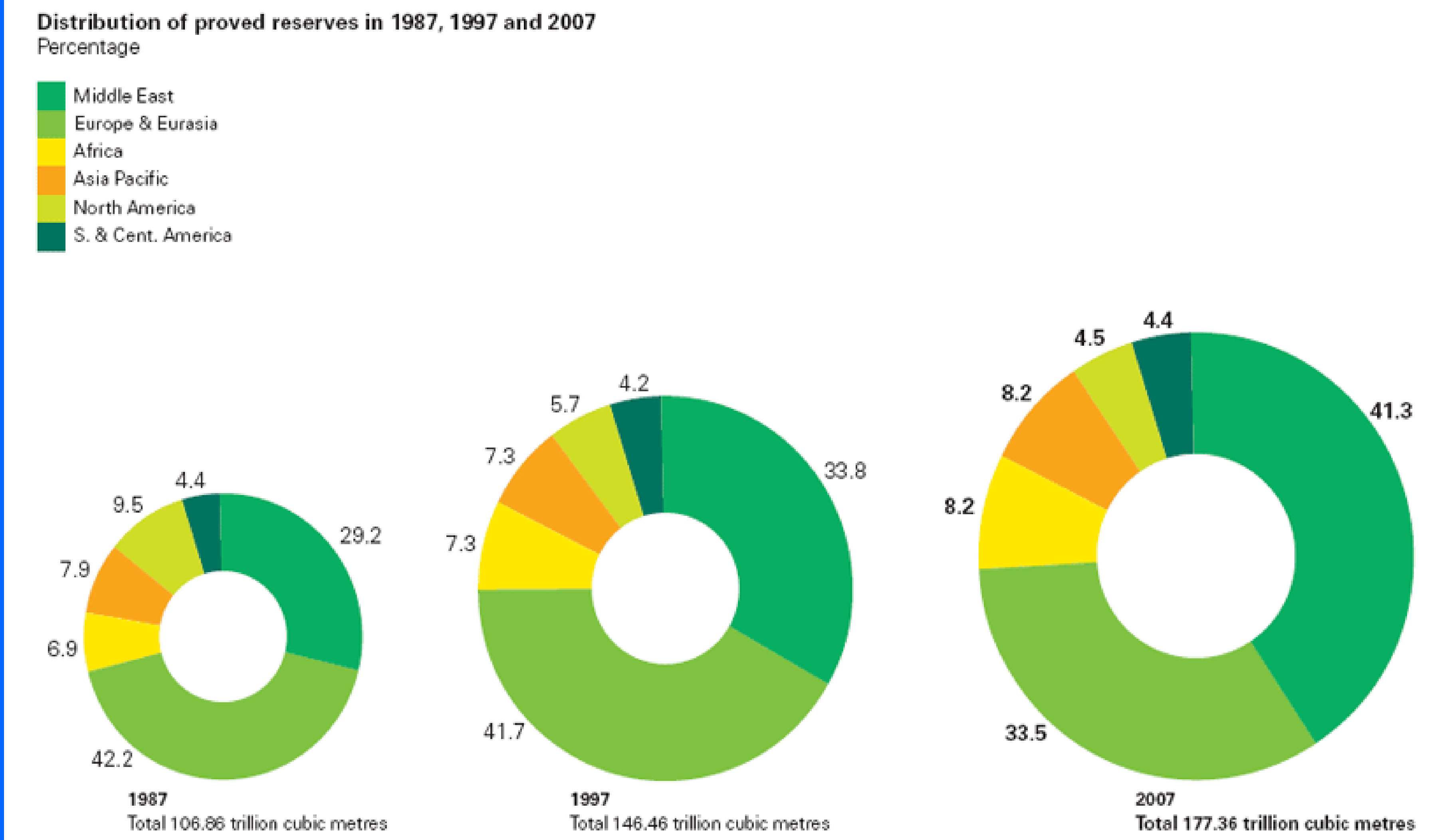
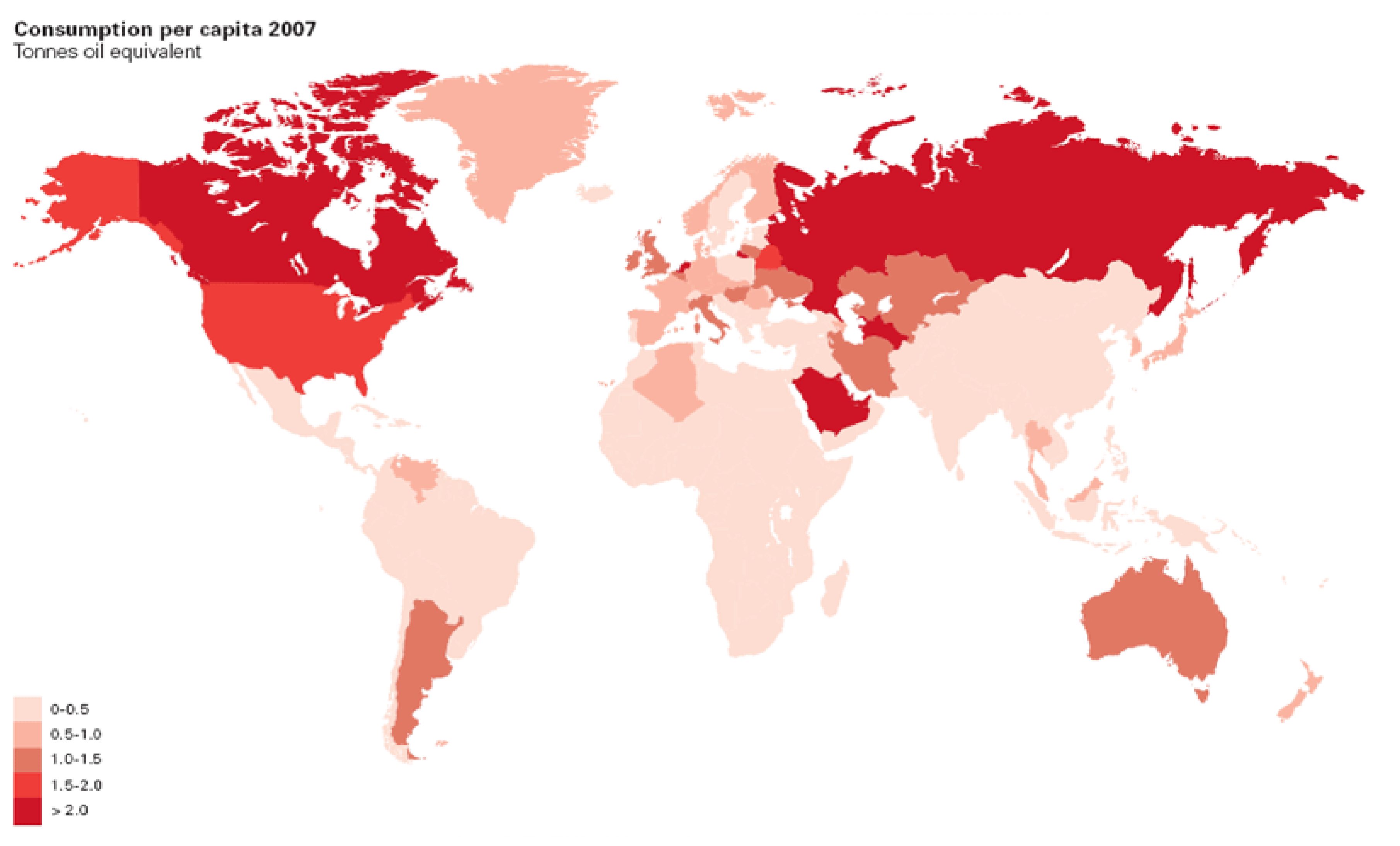
Distribution of Gas Reserves - II



Source: BP Statistical Review (June 2008)

Distribution of Gas Consumption



Source: BP Statistical Review (June 2008)

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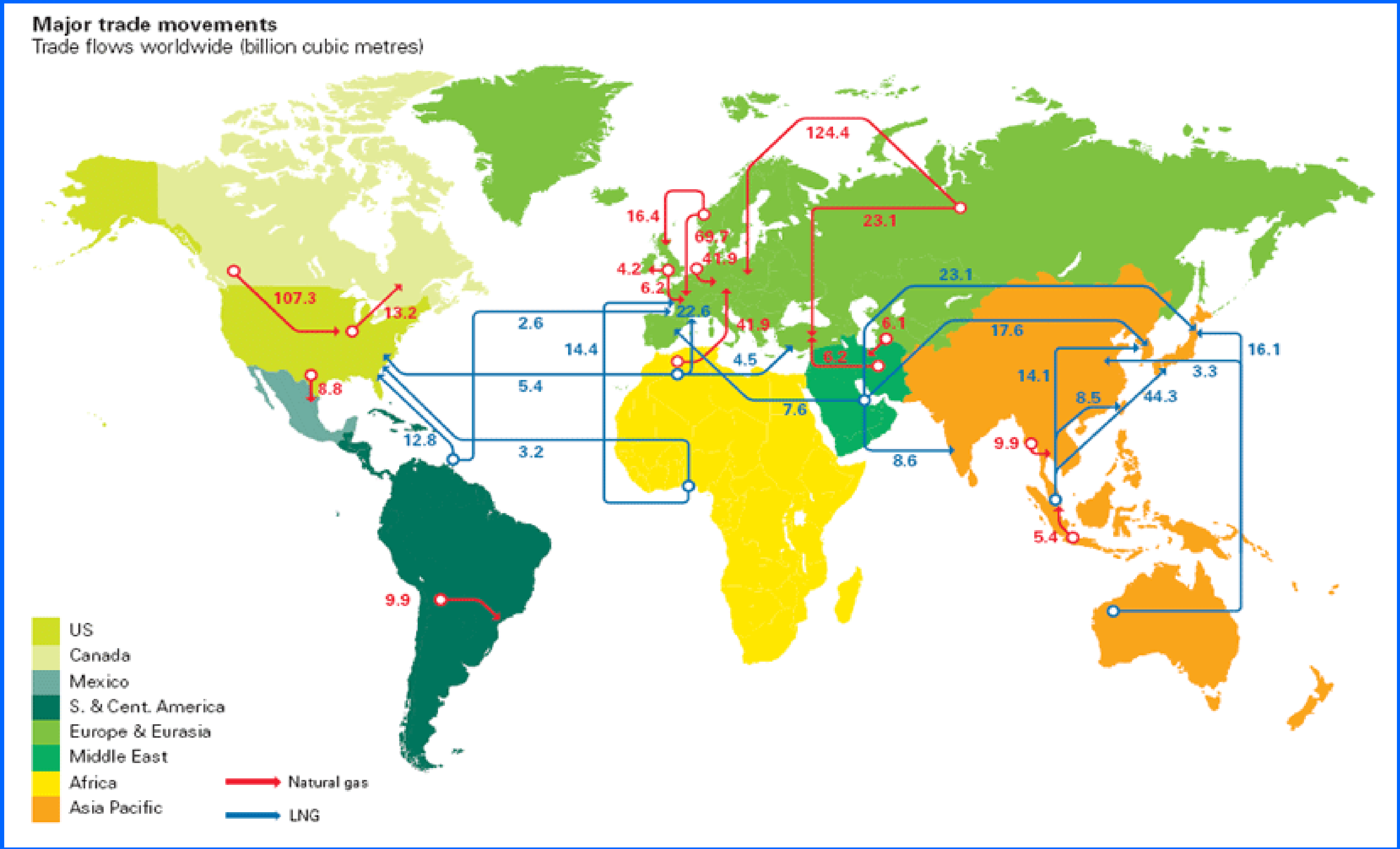
Gas Trade Movements



Source: BP Statistical Review (June 2008)

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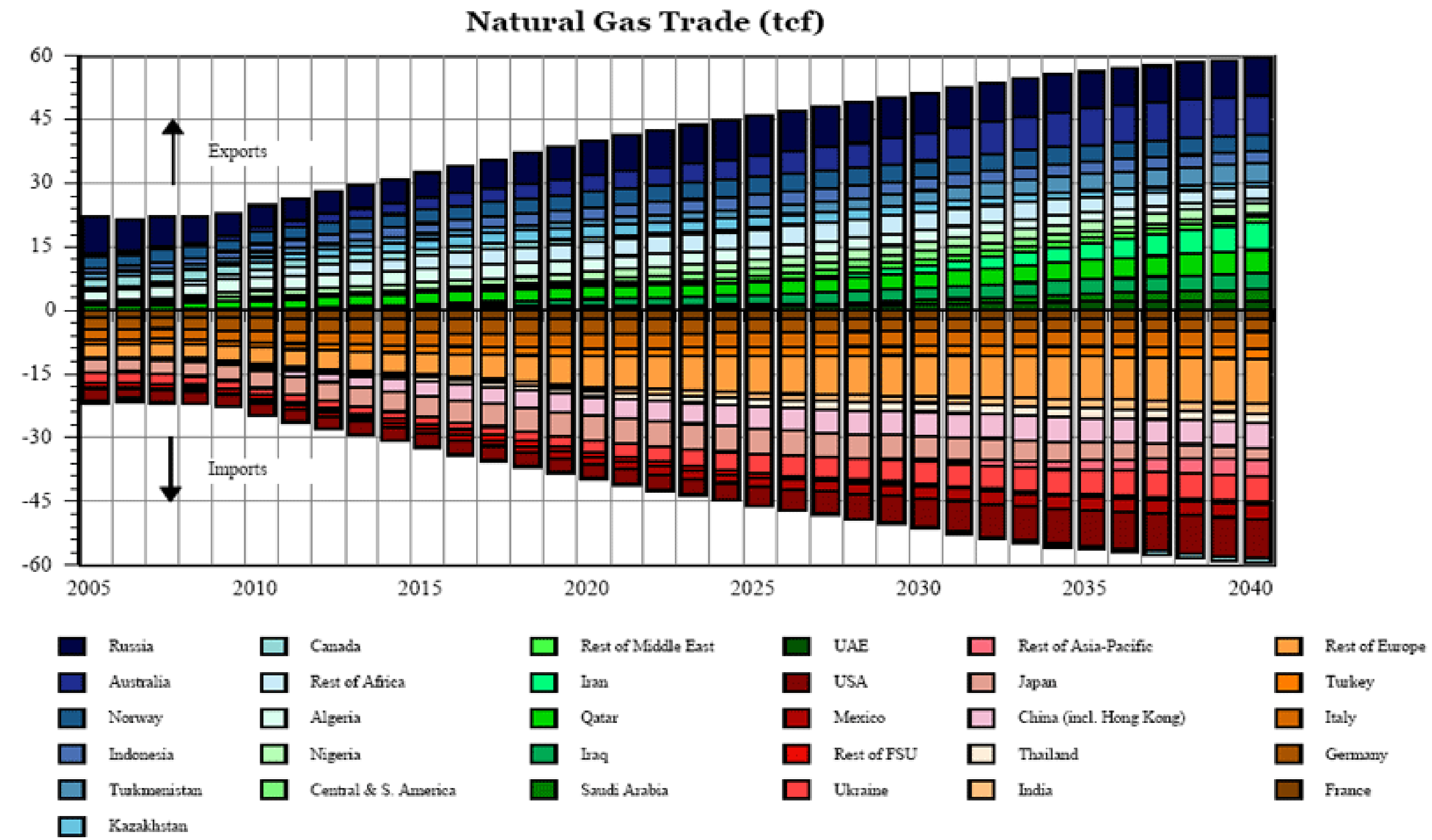
Gas Exports & Imports



Source: Rice University

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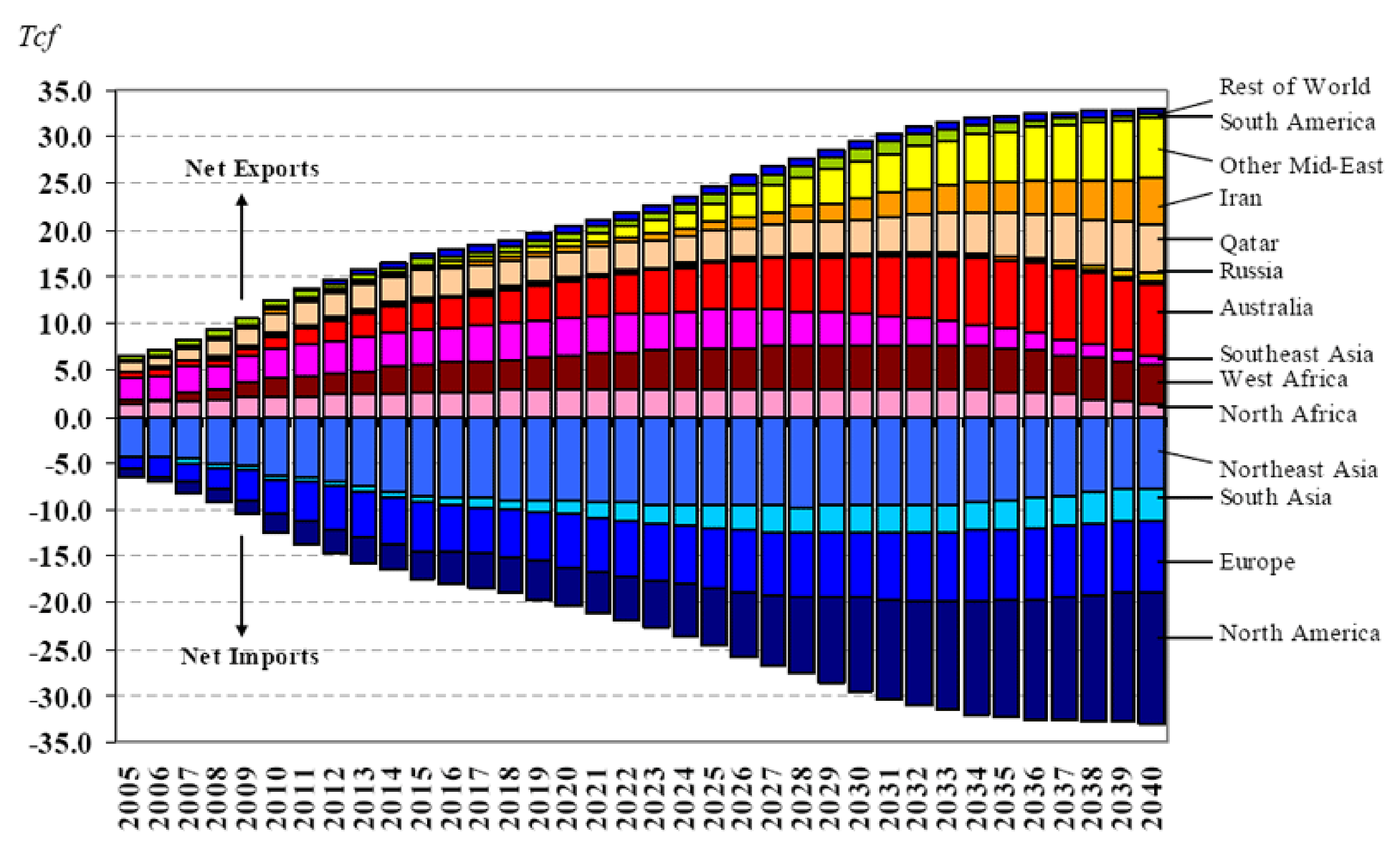
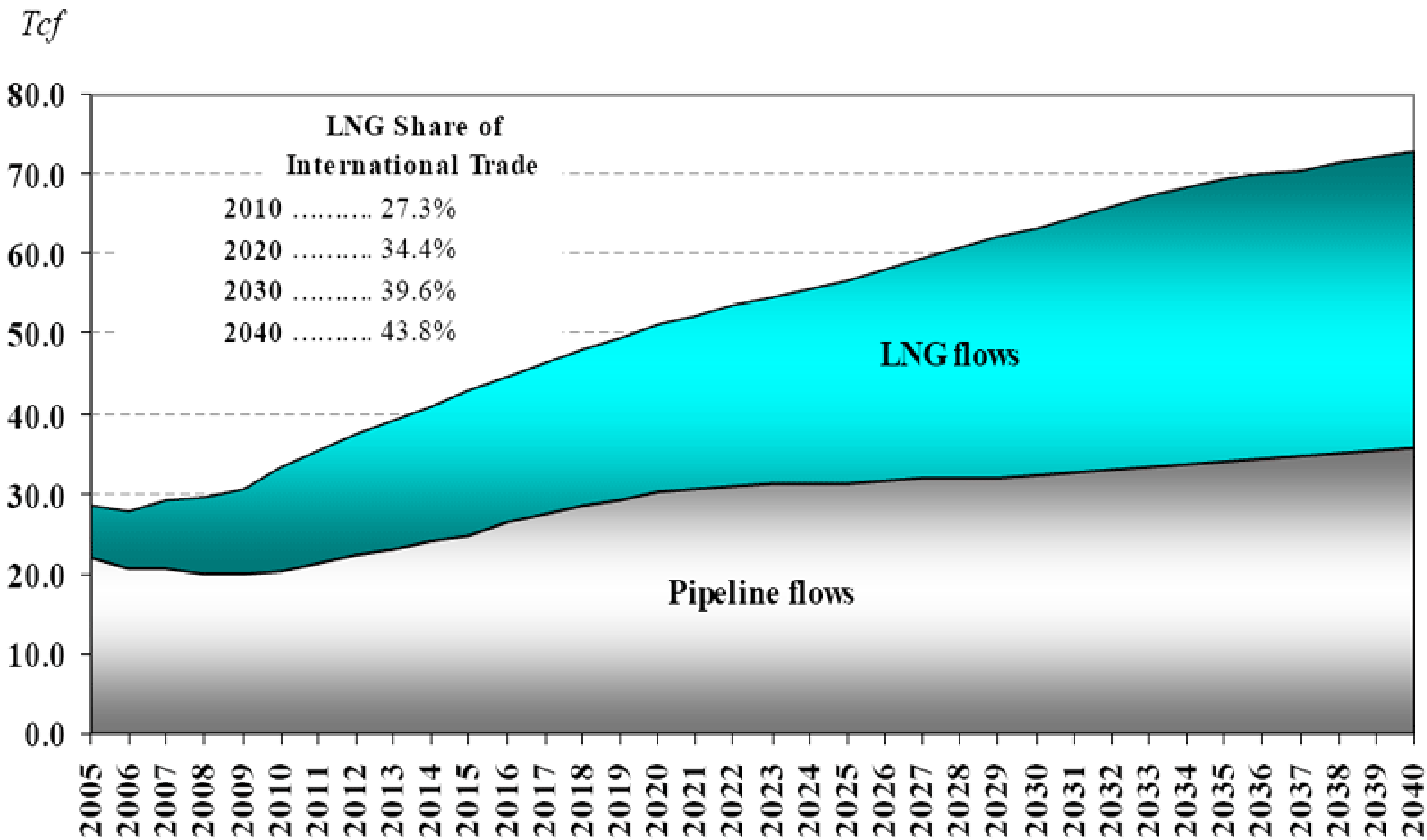
LNG Exports & Imports



Source: Rice University

LNG Share



Source: Rice University

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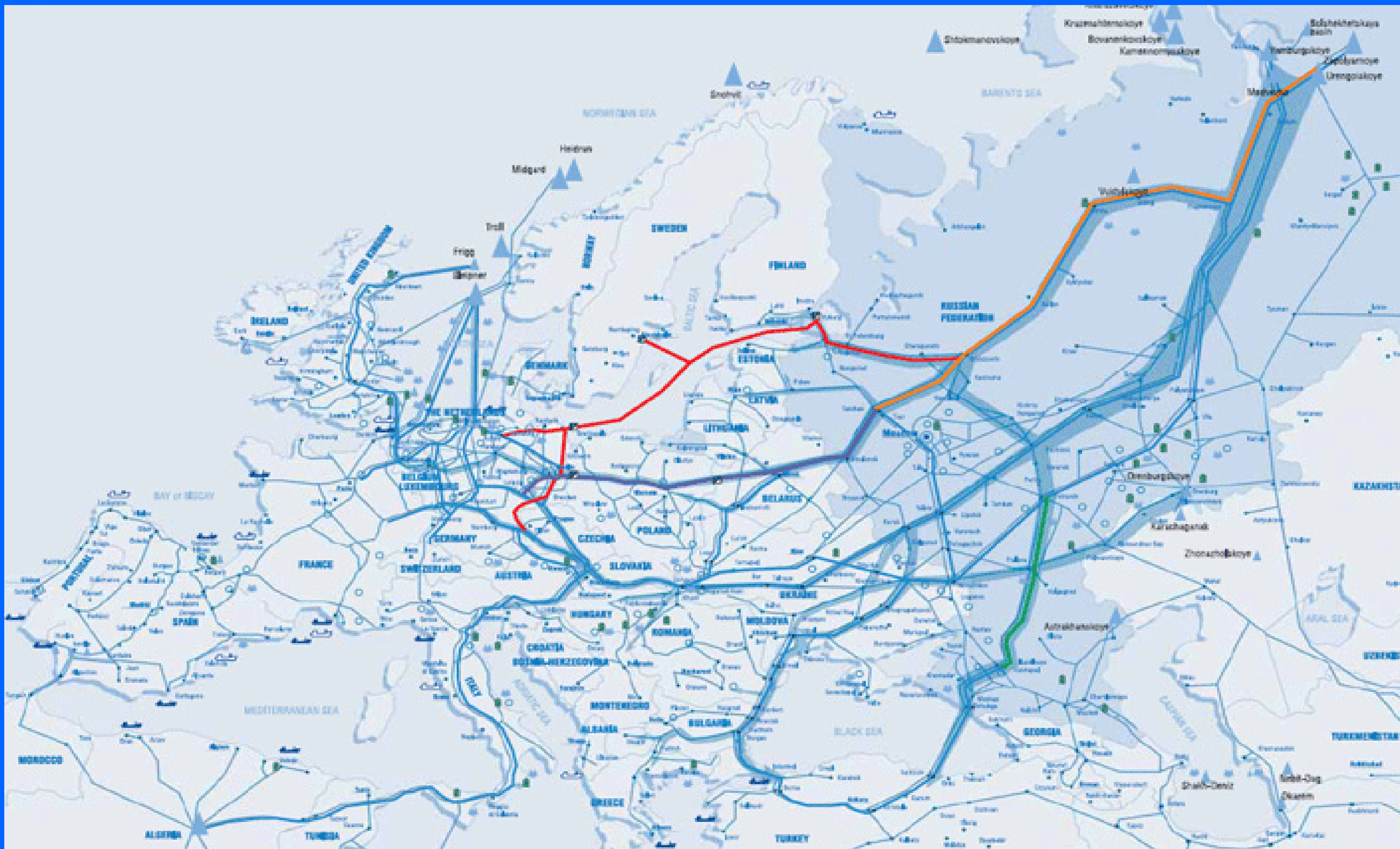
Major Acting Gas Pipelines



Source: Gazprom

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Turkey – Gas Imports (2007)

• **Russia**	**: 63,5%**	**- 23,1 bcm**
• **Iran**	**: 16,9%**	**- 6,1 bcm**
• **Algeria**	**: 11,8%**	**- 4,2 bcm**
• **Nigeria**	**: 3,9%**	**- 1,4 bcm**
• **Azerbaijan**	**: 3,4%**	**- 1,2 bcm**
• **Spot LNG**	**: 0,5%**	**- 0,1 bcm**

• **Total**	**: 36,4 bcm**	

Source: **BOTAŞ**

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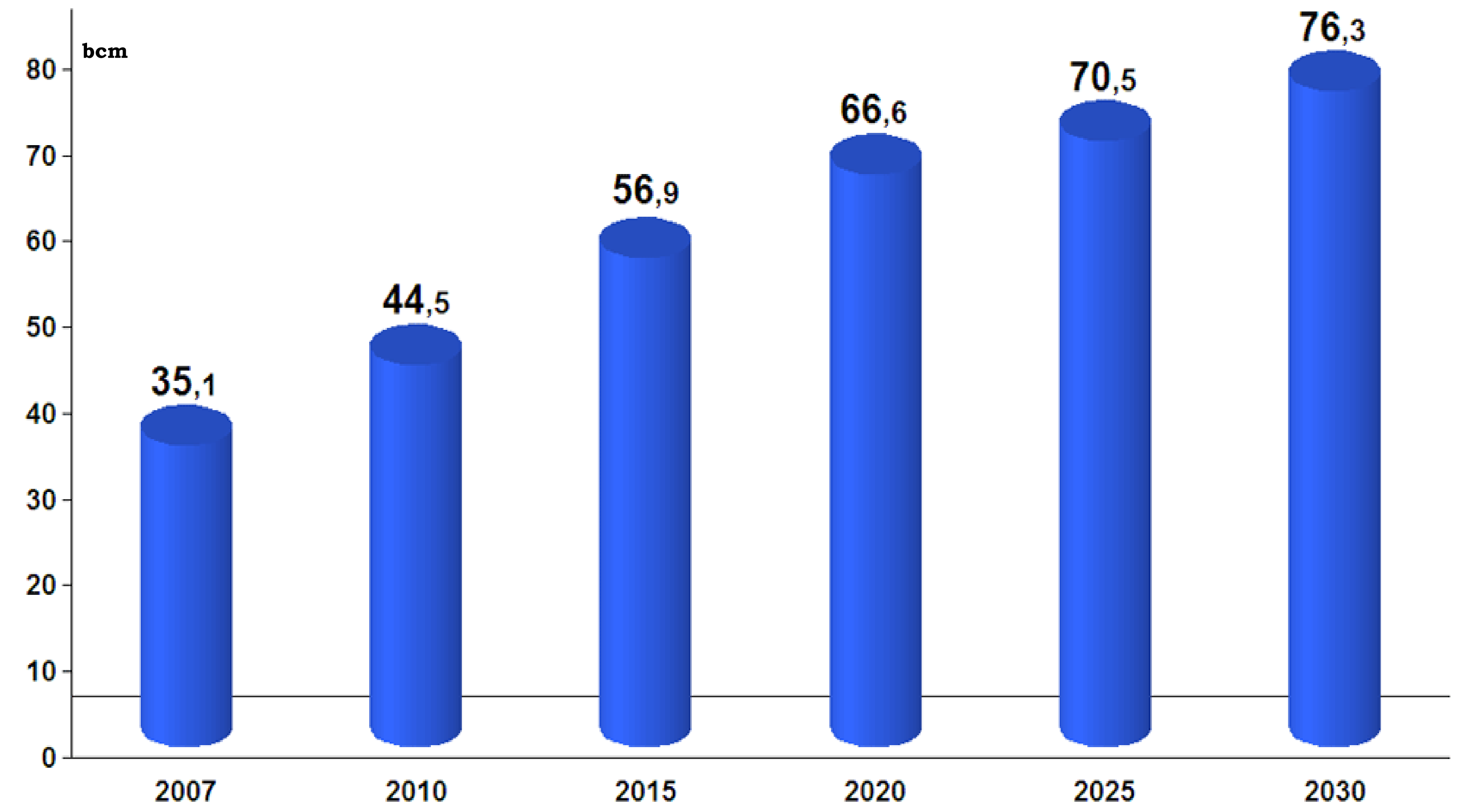
Turkey – Gas and LNG Contracts

Source: BOTAŞ

Contracts	Date of Signature	Date of Operation	Duration (Years)	Volume (Plateau – bcma)	Date of Expiration
Russia (West)	Feb 1986	Jun 1987	25	6	2012
Algeria (LNG)	Apr 1988	Aug 1994	20	4	2014
Nigeria (LNG)	Nov 1995	Nov 1999	22	1,2	2021
Iran	Aug 1996	Dec 2001	25	10	2026
Russia (Blue Stream)	Dec 1997	Feb 2003	25	16	2028
Russia (West)	Feb 1998	Mar 1998	23	8	2021
Turkmenistan	May 1999	- - - - - -	30	16	- - - - - -
Azerbaijan	Mar 2001	- - - - - -	15	6,6	- - - - - -

Turkey – Gas Demand Forecast



Source: BOTAŞ

Natural Gas Market Law No.4646

- Creating a liberal and competitive gas market.
- Reducing BOTAŞ market share to maximum 20% by 2009 through a gas release program.
- Legal unbundling of BOTAŞ import / trading and transmission activities by 2009.
- Providing benefits to customers by ensuring sustainable, cost effective and environment friendly energy supplies.

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Contract Releases

- **Shell Enerji : 0,25 bcm**
- **BosphorusGaz : 0,75 bcm**
- **Enerco Enerji : 2,5 bcm**
- **Avrasya Gaz : 0,5 bcm**

- **Total : 4 bcm**

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PETFORM Members' Suggestions

- **On BOTAŞ side, immediat legal unbundling of BOTAŞ.**

- **Implementation of the cost-based and transparant pricing mechanism to enable competetive, cost effective and liberal gas market.**

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PETFORM Members' Suggestions

- **Reduce BOTAŞ' market share rapidly through contract release and/or volume release programs.**

- **New imports to enable security of supply by private sector only.**

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PETFORM Member Companies

- AKSA DOĞALGAZ
- ALADDIN MIDDLE EAST
- ARGM
- AVRASYA GAZ
- BOSPHORUSGAZ
- BP
- ÇALIK ENERJİ
- EGEGAZ
- ENERCO ENERJİ
- ENERGY OPERATIONS TURKEY
- ENERJİSA
- ENI REPRESENTATIVE
- GENEL ENERJİ
- GÜNEY YILDIZI
- IBS RESEARCH
- MERTY ENERGY
- N.V. TURKSE PERENCO
- OMV GAS & POWER
- OPALİT
- PALMET
- PEMI
- PETOIL
- PETROL OFİSİ
- SHELL ENERJİ
- STATOILHYDRO
- TEKFEN
- THRACE BASIN
- TOTAL
- TURCAS
- TURUSGAZ
- ZORLU PETROGAS

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THANK YOU