



Turkey and the World of Energy: Realities of Today and Future Developments

Batu Aksoy

Board Member, PETFORM

Board Member, TURCAS PETROL





About PETFORM

- **Petroleum Platform Association (PETFORM) was established in September 2000;**
- **PETFORM played a crucial role in the transfer of private sector concerns to public authorities in Turkey especially in terms of enacting or revising various Turkish energy legislations (such as the Natural Gas Market Law, Petroleum Market Law, Turkish Petroleum Law, etc.);**
- **There are 2 working groups under the Board:**
 - **Exploration & Production (E&P) Group, and**
 - **Gas Group.**

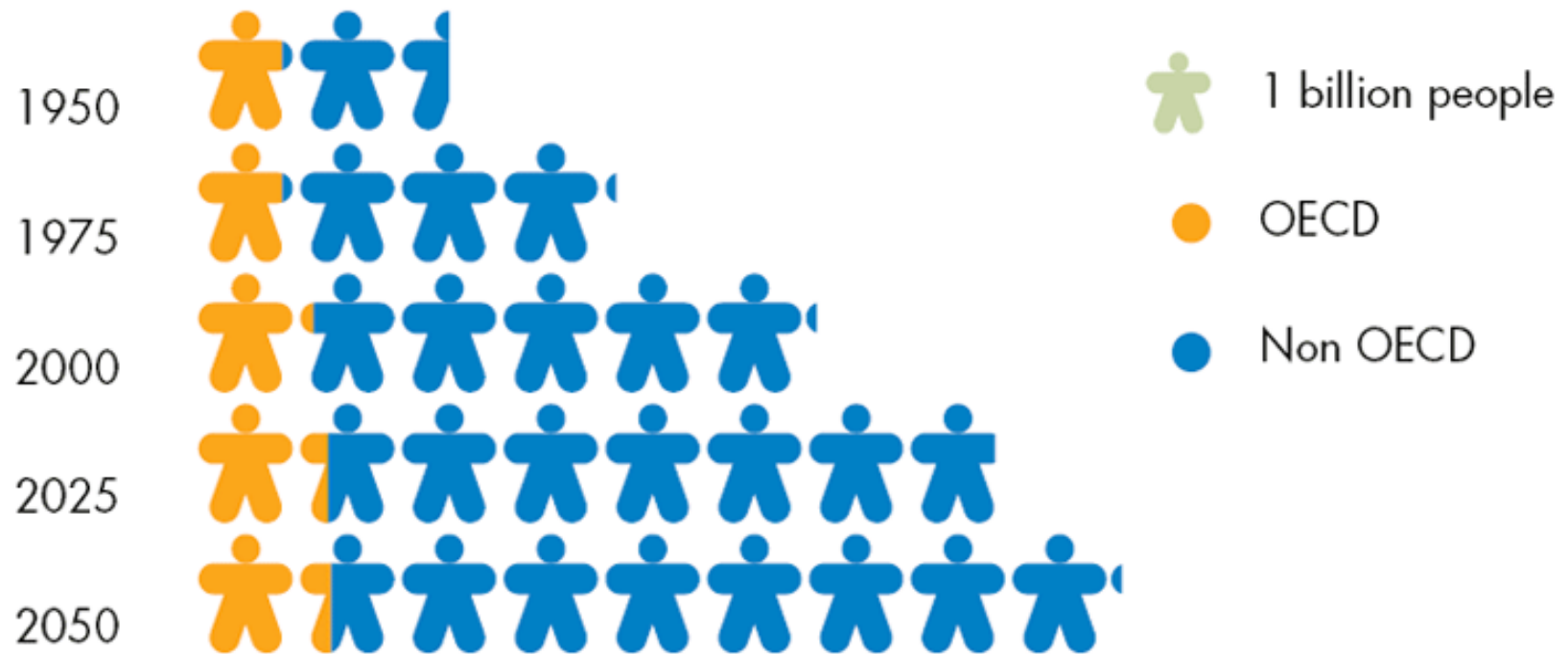


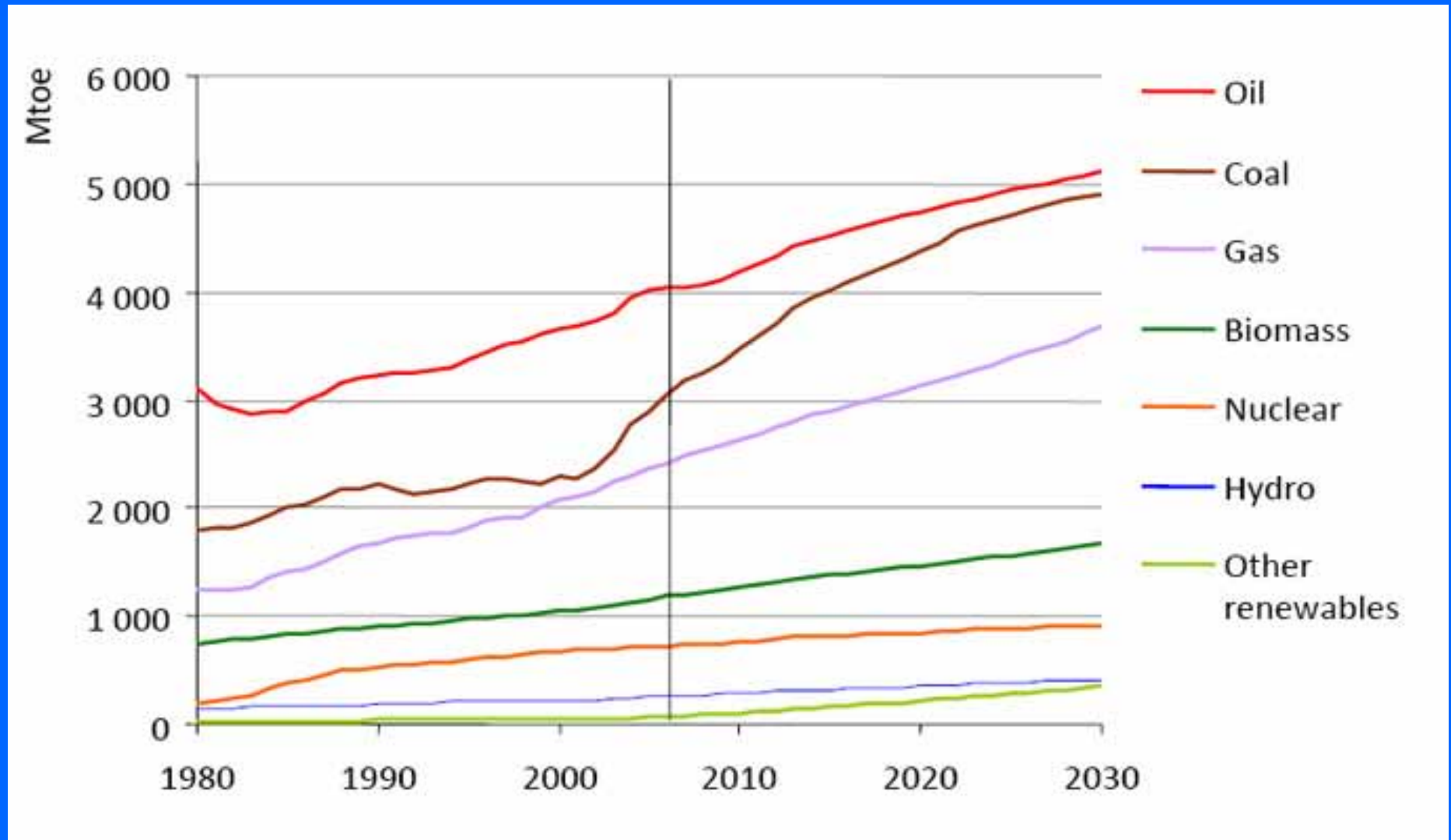
35 Member Companies

- AKENERJİ
- AKSA
- ALADDIN MIDDLE EAST
- ARGM
- ATILA DOĞAN İNŞAAT
- AVRASYA GAZ
- BOSPHORUS GAZ
- BP
- ÇALIK ENERJİ
- EDISON
- EGEGAZ
- ENERCO ENERJİ
- ENERGY OPERATIONS TURKEY
- ENERJİSA
- ENI
- E.ON RUHRGAS
- GENEL ENERJİ
- GÜNEY YILDIZI
- IBS RESEARCH
- MERTY ENERGY
- N.V.TURKSE PERENCO
- OMV
- OPALİT
- PALMET
- PEMI
- PETOIL
- PETROL OFİSİ
- SHELL ENERJİ
- STATOILHYDRO
- TEKFEN
- THRACE BASIN
- TOTAL
- TURCAS
- TURUSGAZ
- ZORLU PETROGAS

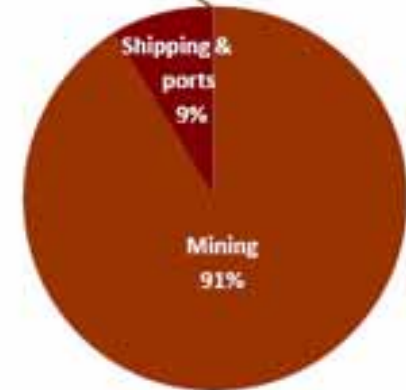
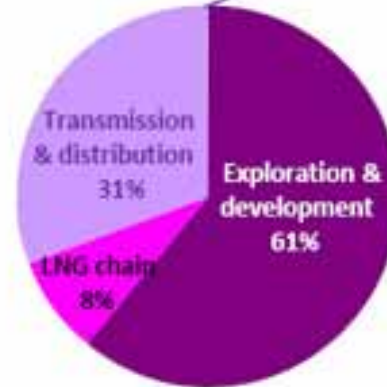
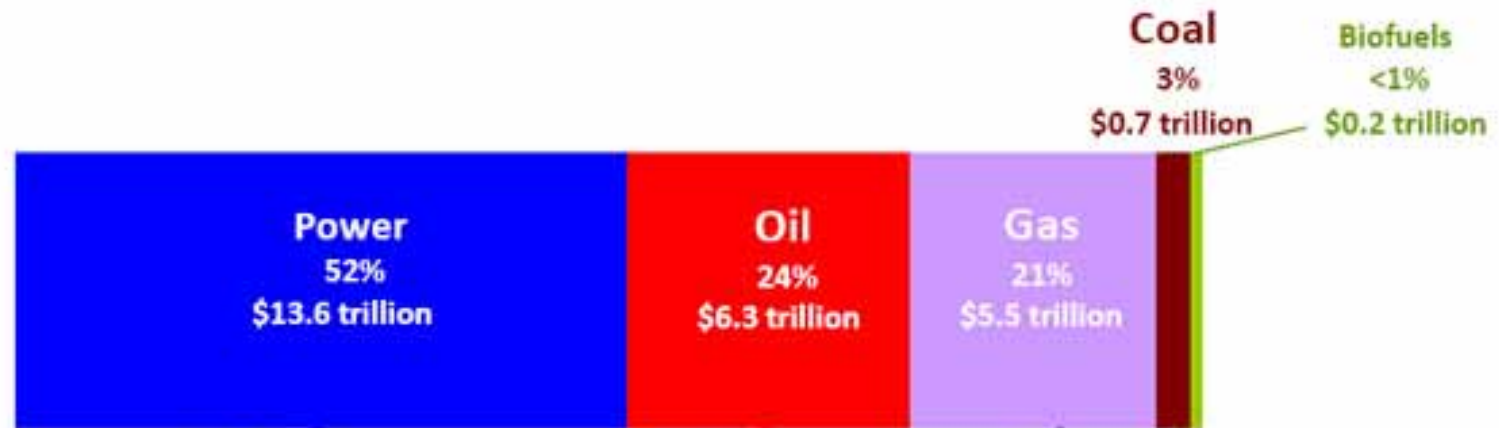


World population





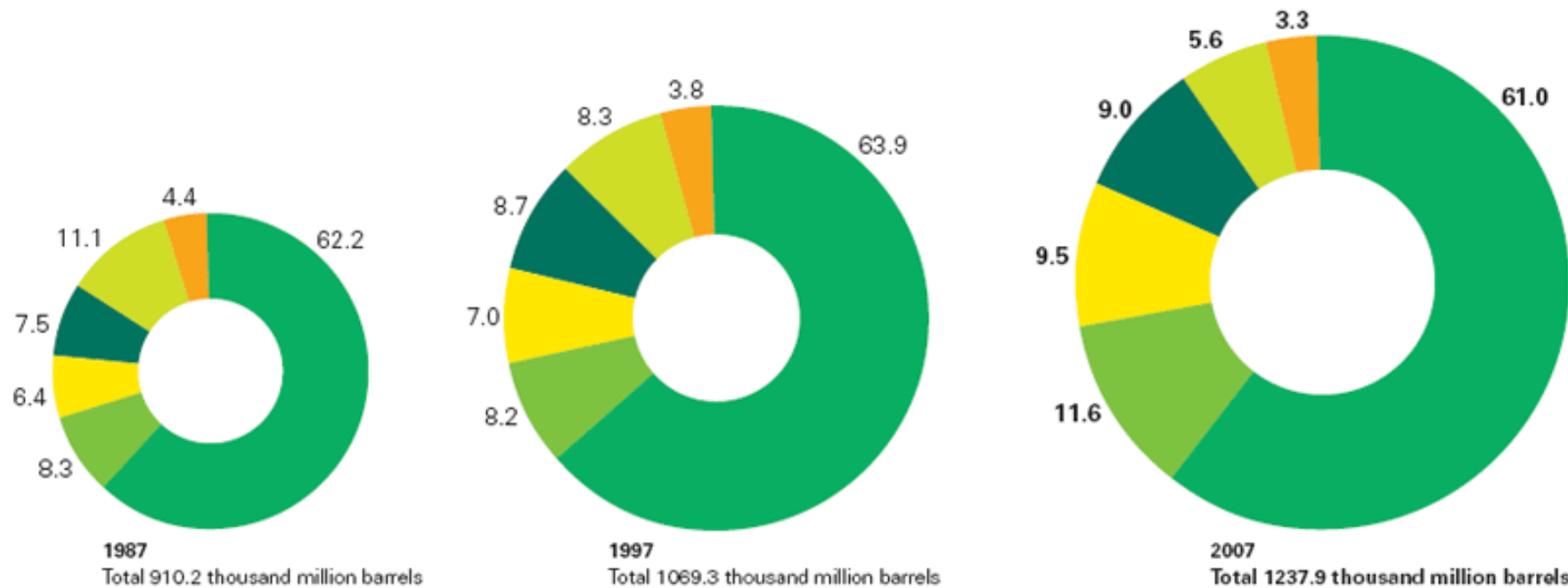
Energy Investments (2007 - 2030)





Distribution of proved reserves in 1987, 1997 and 2007
Percentage

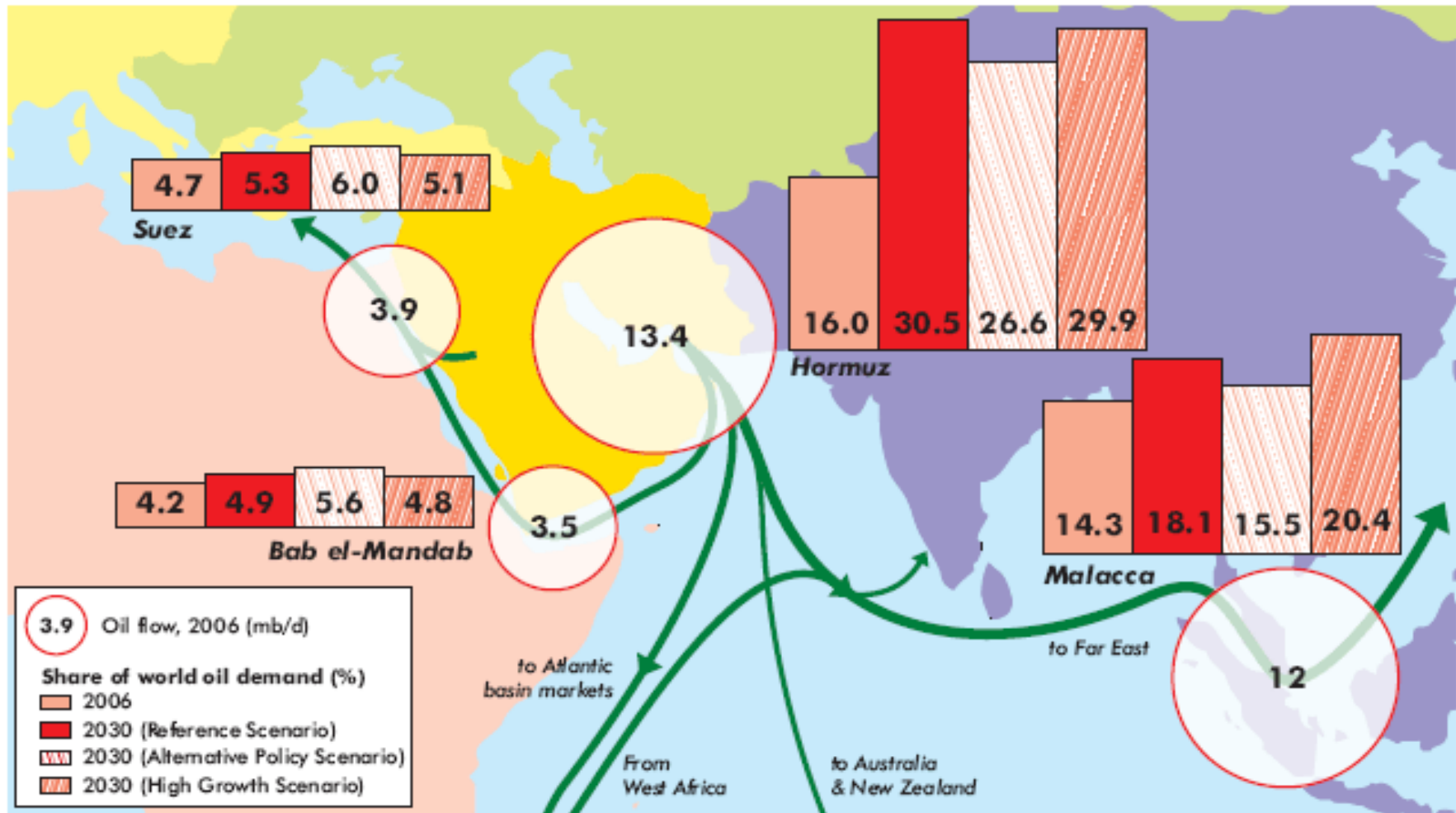
- Middle East
- Europe & Eurasia
- Africa
- S. & Cent. America
- North America
- Asia Pacific



Oil Flows from the Middle East



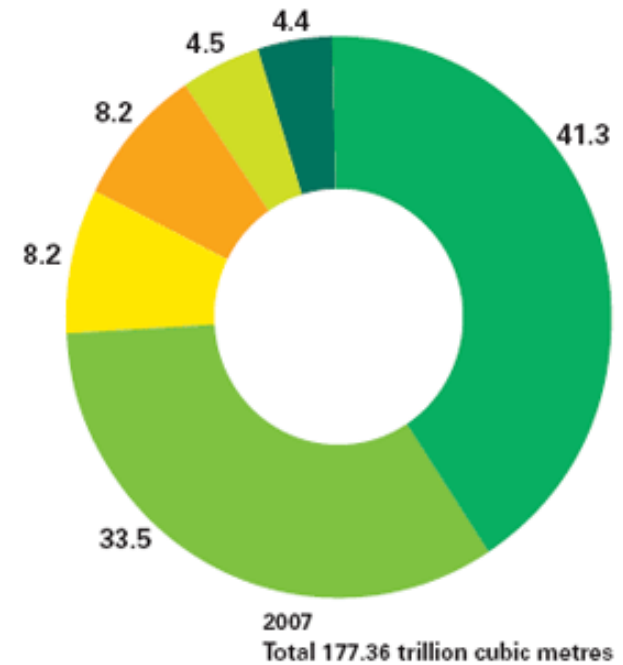
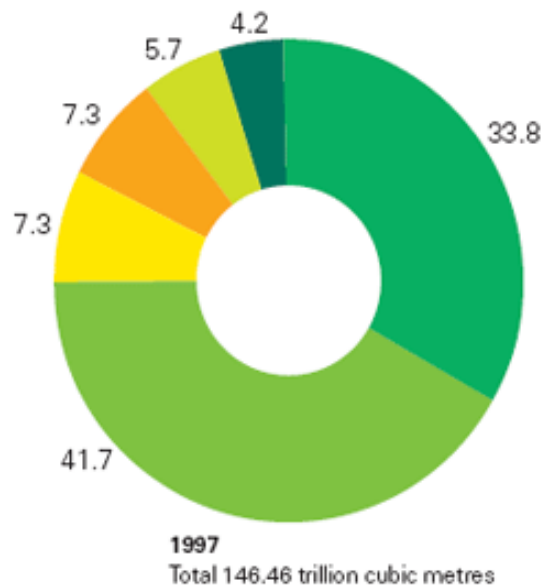
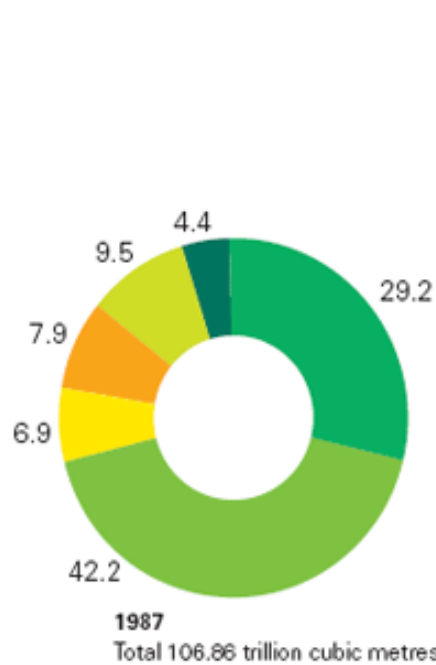
Oil Export Flows from the Middle East





Distribution of proved reserves in 1987, 1997 and 2007
Percentage

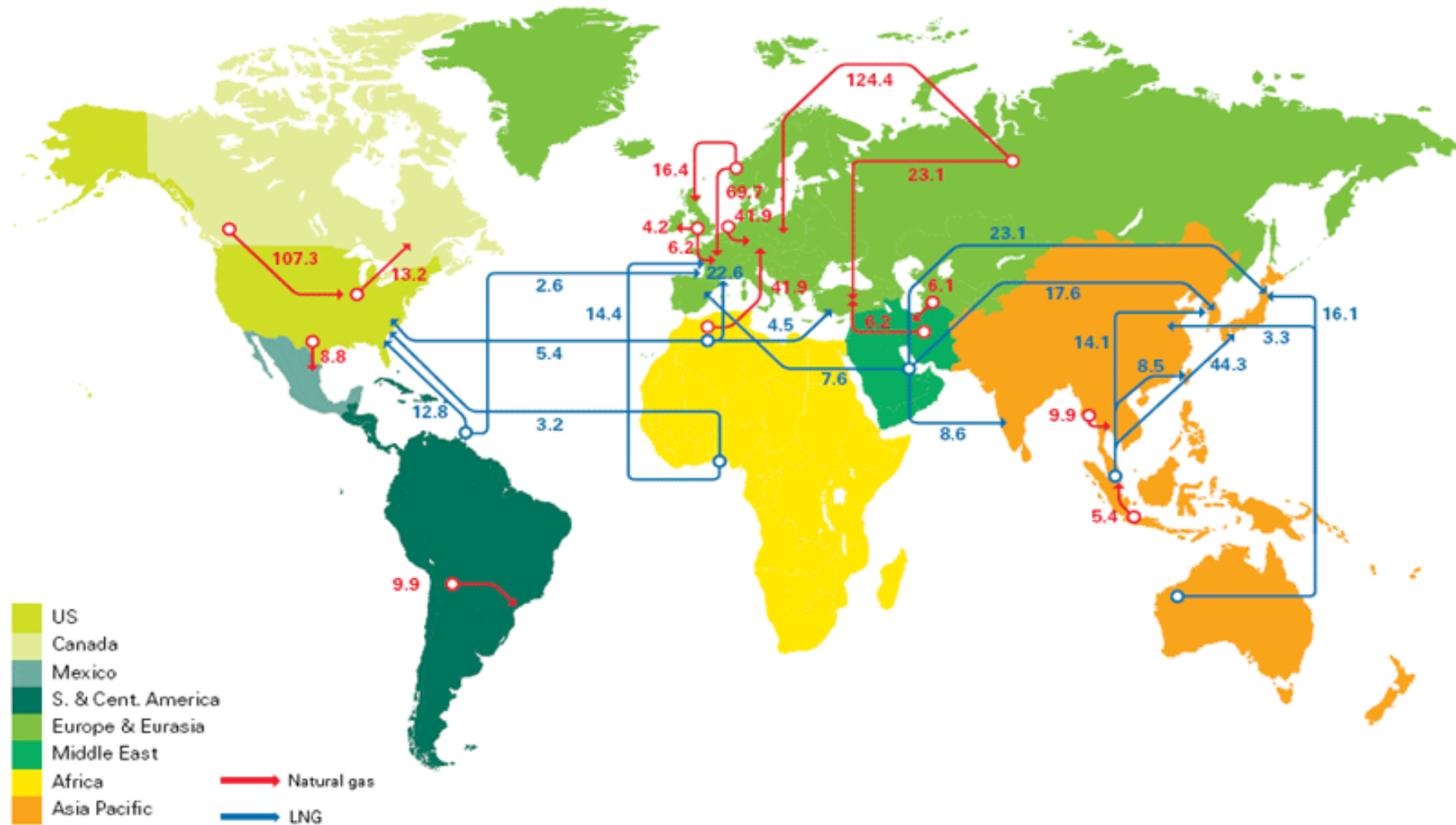
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- Europe & Eurasia
- Africa
- Asia Pacific
- North America
- S. & Cent. America

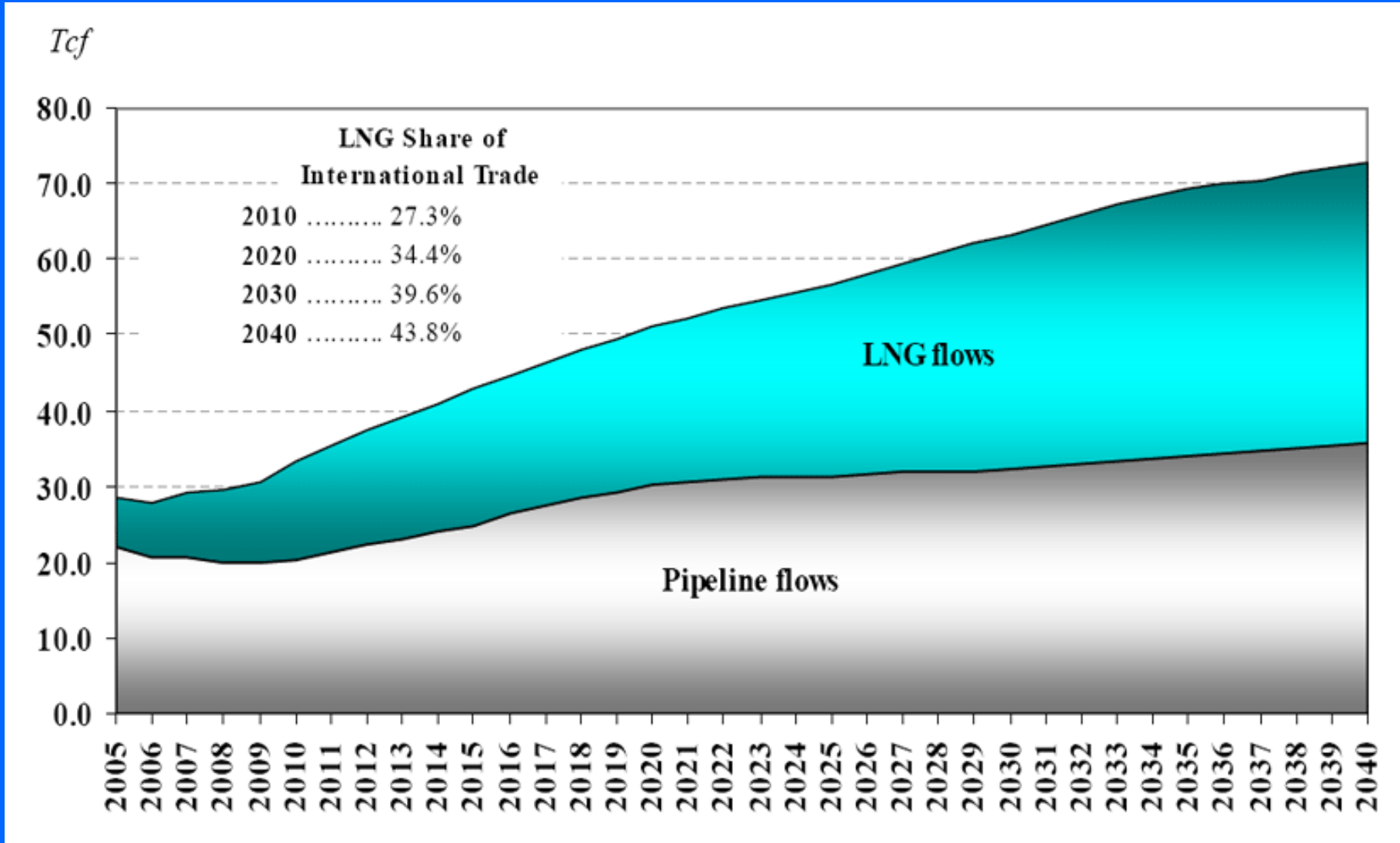




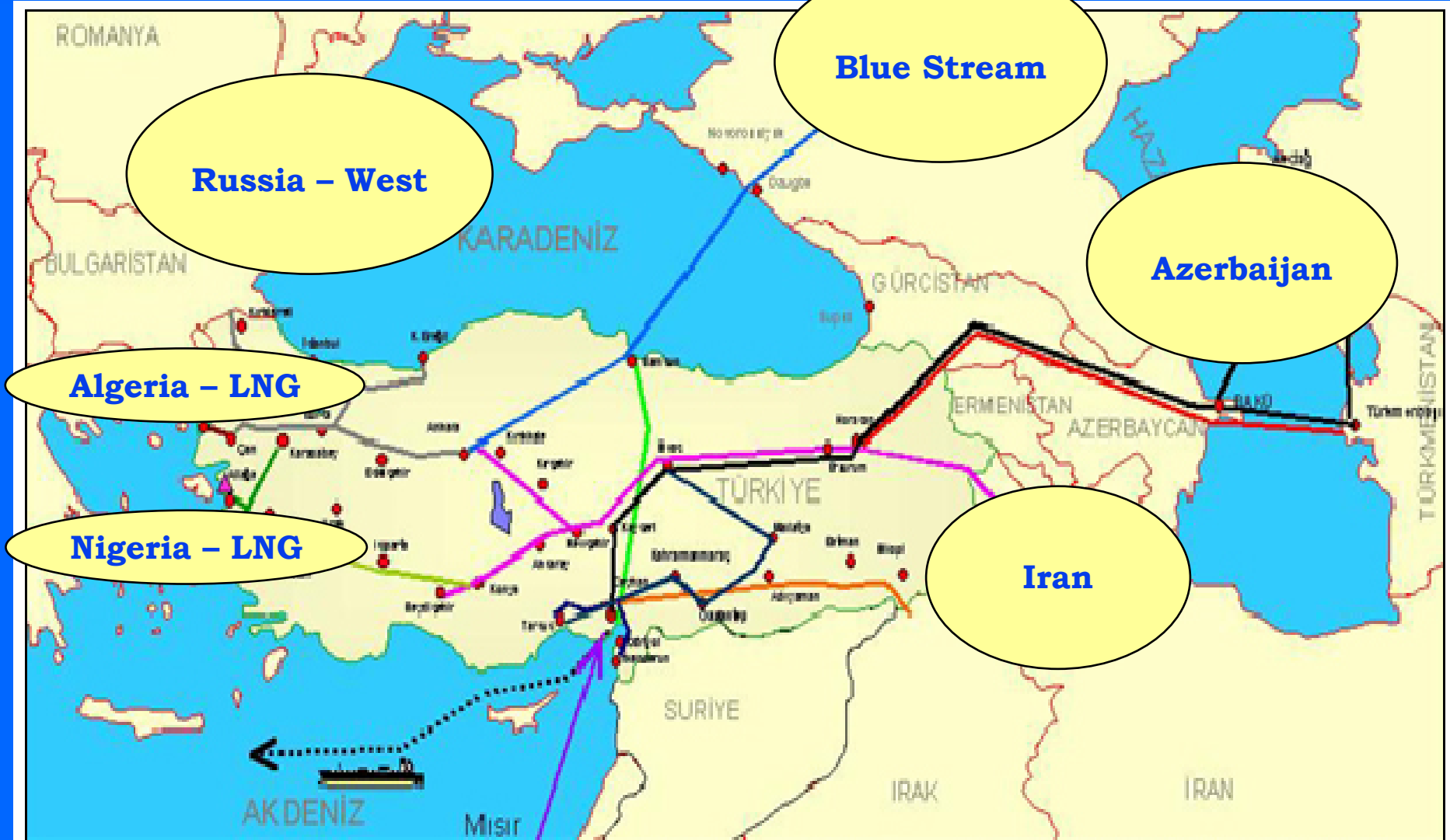
Major trade movements

Trade flows worldwide (billion cubic metres)





Gas Supplies to Turkey



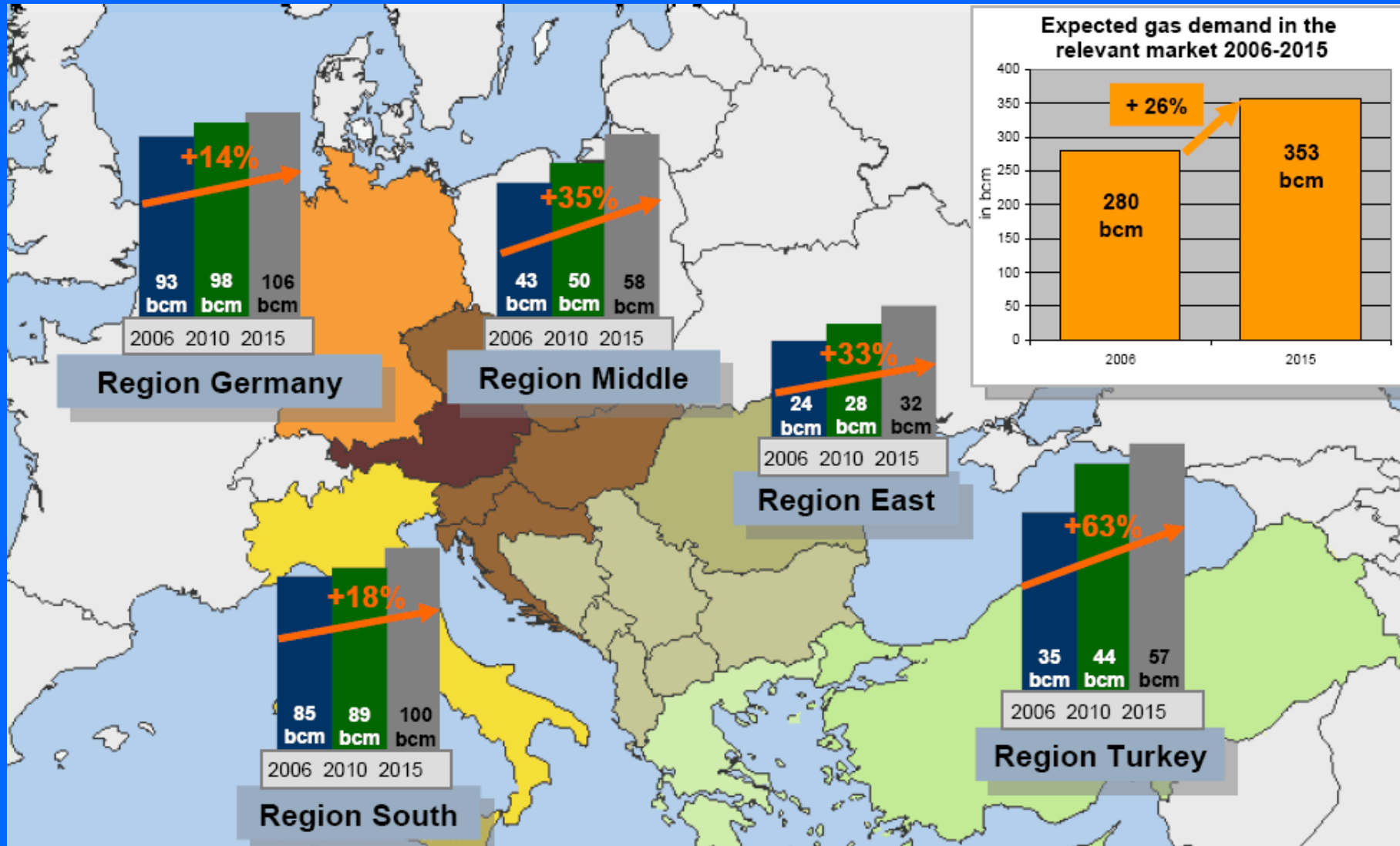


Turkey's Gas Imports (2007)

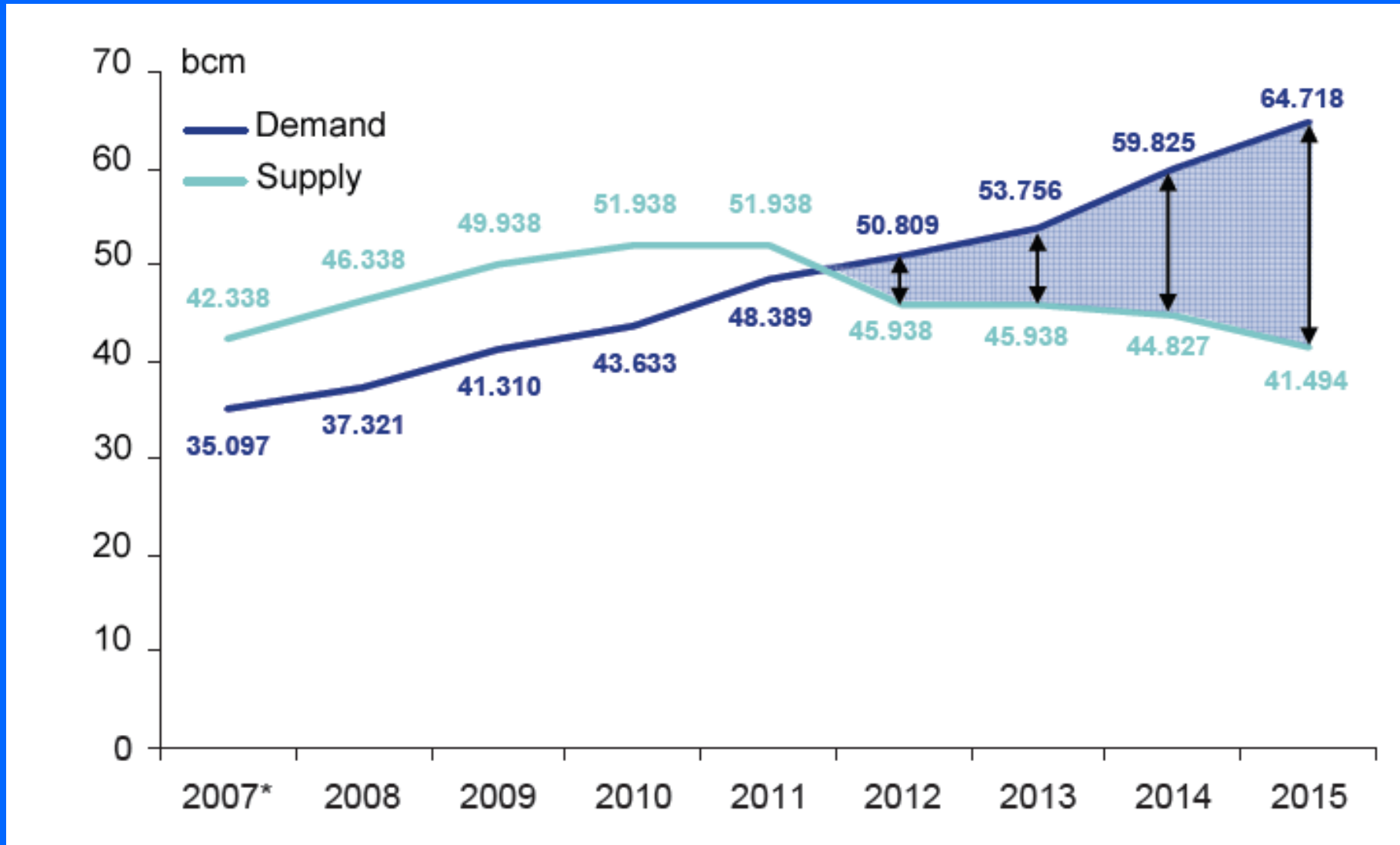
- **Russia** : **63,5%** - **23,1 bcm**
- **Iran** : **16,9%** - **6,1 bcm**
- **Algeria LNG** : **11,8%** - **4,2 bcm**
- **Nigeria LNG** : **3,9%** - **1,4 bcm**
- **Azerbaijan** : **3,4%** - **1,2 bcm**
- **Spot LNG** : **0,5%** - **0,1 bcm**

36,4 bcm

Europe's Gas Demand Forecast



Turkey's Supply - Demand Balance



PETFORM



Thank You