



Second Six-Month Activity Report for 2020

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ABOUT **PETFORM**

PETFORM (Petroleum and Natural Gas Platform Association), celebrating its 20th anniversary, which plays a key role in transferring private sector sensitivities to the competent public institutions in all legal arrangements that Turkey needs in the field of energy, has taken an active role on behalf of the private sector in the formulation of legal legislation required by the energy sector, especially the Natural Gas Market Law and the Turkish Petroleum Law.

Message From The Chairman



Murat Kalay

Distinguished PETFORM Members;

As you know, the Covid-19 has affected the daily lives of billions of people around the world and brought it to a near standstill. Although humanity is going through a difficult period, we strive to continue our life and business life in the light of scientific advice and official regulations.

As the PETFORM family, we strived to continue our activities for the development of the exploration-production sector and the natural gas market in this extraordinary period. The spirit of unity and solidarity our Association has had since the first day it was founded has been with us in these difficult days and with the valuable studies done in our sub-working groups, we have carried out important studies both for the development of our sectors and for our country to reach a brighter future and we had the opportunity to share our studies with the public. With the power we receive from you members, we continue our studies continuously during this difficult period. We continued our activities by keeping our energy high in order to maximize the effectiveness of PETFORM at the public level, to increase our visibility in the public and to develop the markets where our members operate and to carry out high value added activities in the related process and we will continue our activities with the same motivation in the future.

On the other hand, the structuring process has also been completed within our PETFORM Secretariat. From the beginning of April, Mr. Gökhan Soruş, who served as Deputy Secretary General in our Secretariat, was appointed as Secretary General and Mrs. Çiğdem Çetiner joined our Secretariat team as Senior Specialist. I hope that our Association will continue to perform productive works during this change of duties.

Based on the fact that our association has a transparent and participatory management approach, we present our activity report summarizing our activities in the second six months of 2020.

I wish you healthy and peaceful days full of success.

PETFORM Board of Directors



Murat Kalay
Chairman



Ayhan Kırbaş
Vice Chairman



Didem Kalkan Erdem
Gas Group Leader



Altan Kolbay
Principle Member



Cenk Pala
Principle Member



Cem Aşık
Principle Member



Seçkin Kara
Principle Member



Gökhan Soruş
Secretary General



Çiğdem Çetiner
Senior Specialist

Board of Directors Meetings (July-August Period)

No	Date	Agenda
2020/7	24.07.2020	Collecting Data Regarding the Fields of Activity from the Companies for the Statistical Studies to be Made within the Association, Studies Conducted with EMRA Regarding Procedures and Principles for Futures Natural Gas Market, Studies on Pricing of End Users and Implementation of Eligible Consumers Rights within the scope of Strategy Plan, Studies on the 20th Anniversary Video of PETFORM, Creation of Videos to be Published in Digital Media Regarding the Activities of PETFORM Members, Preparation of Training Contents Explaining the Operational Activities of Exploration-Production and Gas Group Companies via Youtube
2020/8	07.08.2020	Studies Conducted with EMRA and EXIST on Futures Market, Studies on the 20th Anniversary of PETFORM, Employment of Çiğdem Çetiner as a Senior Specialist
2020/9	21.09.2020	Organization of the Exploration-Production Sector Consultation Meeting, Amendment on Turkish Petroleum Law Implementing Regulation, Studies Conducted with EMRA and EXIST Regarding Procedures and Principles for Futures Natural Gas Market, Studies on Pricing of End Users and Implementation of Eligible Consumers Rights within the scope of Strategy Plan, Studies on the 20th Anniversary Video of PETFORM, Webinar Organization with EY Turkey, Quarterly newsletter format, EU Project Proposal

Board of Directors Meetings (October-December Period)

No	Date	Agenda
2020/10	22.10.2020	Organization of the 12th Exploration-Production Sector Consultation Meeting, Additional Discovery of 85 bcm in Tuna-1 Field, Omnibus Bill Regulations, Studies Conducted with EMRA and EXIST Regarding Procedures and Principles for Futures Natural Gas Market, Studies on Pricing of End Users and Implementation of Eligible Consumers Rights within the scope of Strategy Plan, Turkey Energy Summit Panelists Participation, PETFORM 20th Anniversary Introductory Video, EU Project Proposal, Studies on Media Visibility of PETFORM
2020/11	19.11.2020	Evaluation of 12th Exploration-Production Sector Consultation Meeting, Determining Future Actions, Organization of the 14th Natural Gas Trade Forum, EXIST Transparency Workshop, Studies Conducted with EMRA and EXIST Regarding Procedures and Principles for Futures Natural Gas, Application Carried Out By BOTAŞ in the Storage, Information About Association Regulations within the Scope of Covid-19
2020/12	29.12.2020	Evaluation of 2020 Activities, Determining the Actions for the First Quarter of 2021, Information About Association Regulations within the Scope of Covid-19, 2020 Budget Realizations, Determining the 2021 Budget

Organized and Participated Activities:

12nd Exploration-Production Sector Consultation Meeting



- It was held online on November 18, 2020 with the participation of sector stakeholders, especially Minister of Energy and Natural Resources Mr. Fatih Dönmez.
- Views are exchanged on the activities carried out in the Turkish Exploration-Production sector.
- Mr. Fatih Dönmez touched on the discovery of 405 billion cubic meters of natural gas and the oil and natural gas production figures of the last 18 years in his speech.
- Murat Kalay emphasized the positive effects of the discovery of the Black Sea on the sector and the 20th anniversary of PETFORM in his speech.

Organized and Participated Activities:

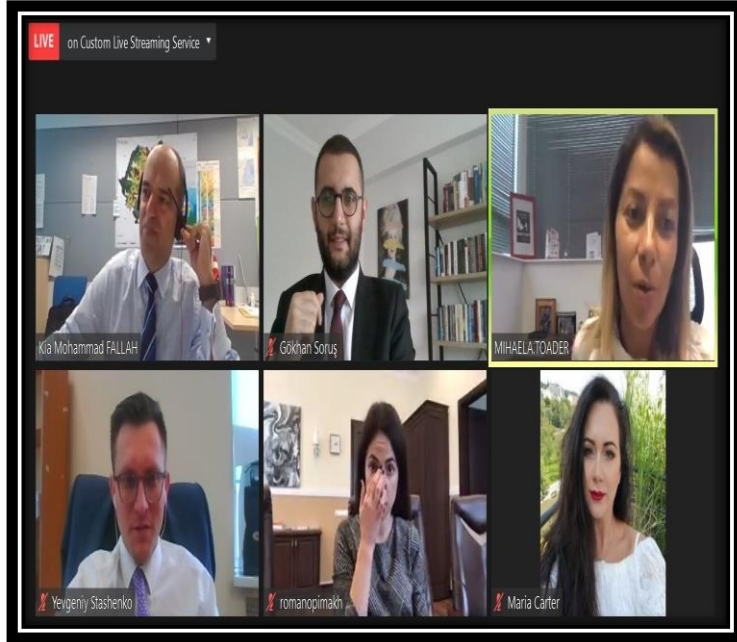
EY Turkey-PETFORM Recovery in Energy Markets, 2020 Outlook and Beyond Webinar



- A webinar was organized in cooperation with EY Turkey in order to examine the world economy under the impact of COVID-19 from a macroeconomic point of view and to evaluate current economic indicators in oil and gas markets and energy services.
- PETFORM Chairman Mr. Murat Kalay, EY Russia Deputy Manager Mrs. Olga V Beloglazova and EY Turkey Energy Services Consultant Mr. Batuhan Danışman participated as speakers in the webinar moderated by Mr. Erkan Baykuş EY Turkey Energy Services Leader.

Organized and Participated Activities:

8th Black Sea Oil and Gas Conference



- Secretary General Mr. Gökhan Soruş made a presentation on «Turkish Exploration and Production Sector and Turkey's Black Sea Natural Gas Discovery» at 8th Black Sea Oil and Gas Conference was held on 08 November 2020.
- Mr. Soruş gave details about Turkey's overall energy balance, the share of domestic gas production in total consumption, exploration-production sector investments, drilling in Turkey and Black Sea discovery in his presentation.

Organized and Participated Activities:

Natural Gas Discovery in the Black Sea Webinar



- A webinar was held in order to examine the strategic, legal, financial and technical dimensions of TPAO's exploration of natural gas in the Black Sea.
- PETFORM Chairman Mr. Murat Kalay, Retired Ambassador Mr. Mithat Rende and Former BOTAS General Manager Mr. Gökhan Yardım participated as speakers in the webinar moderated by Mr. Murat Yazıcı Yazıcı Attorney Partnership's Founding Partner.
- Mr. Kalay, gave information about the previous studies on the fields in the Black Sea, and also touched on the issues of the phases necessary for the discovery to be commercial and for the start of production and how this production can be financed.

E&P Group Activities



- 12nd Exploration-Production Sector Consultation Meeting was held online with the participation of Minister of Energy and Natural Resources Mr. Fatih Dönmez.
- E&P Group meeting was held on September 02, 2020 under the chairmanship of Murat Kalay.
- A formal letter regarding the follow-up of the matters in hand in the 12nd Exploration-Production Sector Consultation Meeting was prepared and shared MENR and GDMPA .
- The proposals amendment for the «Omnibus Bill for Amendment on Electricity Market Law and Other Laws» sent to the Turkish Grand National Assembly Industry, Energy, Natural Resources, Information and Technology Commission were followed up by our Secretariat and the relevant changes were evaluated under our E&P Group.

Gas Group Activities



- Two group meetings were held on 11 August and 16 October under chairmanship of Didem Kalkan Erdem.
- Five consultation meetings were held with EMRA and EXIST in the preparation process of Futures Market, and proposals were prepared with the Joint Meetings of the Legislation and Liberalization Sub-Working Groups regarding the draft procedures and principles.
- Proposal letter regarding the drafts published by EMRA for the Natural Gas Market Licensing Regulation, Natural Gas Market Distribution and Customer Services Regulation and Organized Wholesale Natural Gas Sales Market Regulation has been prepared and shared with EMRA.
- Formal letter requesting extension regarding the 2021 capacity reservation has been prepared and shared with EMRA.
- The articles of «Omnibus Bill for Amendment on Electricity Market Law and Other Laws» concerning our gas market have been examined in detail under the Gas Group.
- Within the scope of our study calendar, our study on «Pricing of End Users and Implementation of Eligible Consumer Rights», which is our second study topic, was finalized by reporting and shared with the authorities of MENR, EMRA and BOTAS.

Media Visibility

Visibility was provided in 16 visual and printed media.



TRT Haber



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Media Visibility



Hürriyet, Milliyet, Habertürk, TRT, NTV, CNN Türk, Gas&Power



MAPEG Dergi

Media Visibility



Petro Türk



CNN Türk

Media Visibility



TRT Haber



Anadolu Ajansı

Media Visibility



MURAT KALAY, TÜRKİYE'NİN DOĞAL GAZ KEŞFİNİ DEĞERLENDİRDİ

50 görüntüleme • 21 Ağ 2020

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PETFORM spot boru gazı ithalat ve ihracat hacimlerinin artırılmasına ilişkin çalışmasını tamamladı

Doğalgaz (Enerji IQ - 29.7.2020) Bu yıl 20. yılını kutlayan ve kurduğu tarihten bu yana arama-üretim sektörünün ve doğalgaz piyasasının gelişmesi için çalışmalarını sürdüren Petrol ve Doğal Gaz Platformu Derneği (PETFORM), 2020 yıl çalışma döneminde de faaliyetlerine devam ediyor. PETFORM doğalgaz gaz piyasası ile ilgili, piyasanın daha da gelişerek bölgesel referans fiyat olgusunu ve Türkiye'deki şirketlerin bölgesel oyuncu olgusuna ulaşması motivasyonu ile çalışmalarına yoğunluk vererek, bu kapsamda kısa, orta ve uzun vadeli çalışma takvimi oluşturdu. PETFORM çalışma takvimi kapsamında oluşturduğu ilk çalışması olan "Spot boru gazı ithalat ve ihracatının başlaması ve mevcut ithalat/ihracat noktalarında hacimlerin artırılması" başlıklı bilgi notunu Enerji Bakaneği ve ilgili kamu otoriteleriyle paylaştı.

PETFORM Yönetim Kurulu Başkanı Murat Kalay ve Gaz Grubu Başkanı Didem Kalkan Erdem, PETFORM'un yürüttüğü çalışmaların Enerji IQ'ya anlattı.

"Spot piyasasının işlerlik kazanması önemli"

PETFORM Yönetim Kurulu Başkanı Murat Kalay Türkiye doğalgaz piyasasının gelişmesi için yoğun mesai harcadıklarını, PETFORM çatısı altında şirketler yapılan istişaretle ile doğalgaz piyasasının daha likit bir envaryer ulaşabilmesi için Türkiye doğalgaz sektörüne yönelik bir çalışma takvimi hazırladıklarını söyledi. Kalay, 2021 yılı ve sonrasındaki dönemde özel sektör eliyle ve olgusuna yeni piyasa koşullarıyla kontratların yenilenmesi ve spot piyasasının işlerlik kazanmasının oldukça önemli olduğunu, bu çerçevede kamu ve özel sektör paydaşlarını huzur ve koordineli hareket etmesinde büyük fayda bulunduğunu vurguladı. Kalay, bu çerçeveden hareketle, PETFORM olarak oluşturulan çalışma takviminde önemli olarak bilgi notlarının hazırlanması ve özel sektör perçinleştirilmesi Türkiye doğalgaz piyasası için faydalı olabilecek önemli metinlerin yapılmasını planladıklarını belirtti.

"Spot ithalat - ihracat ile birlikte gazın gaz ile rekabet ettiği ve TTF veya NCG gibi bölgesel ticaret merkezleri ile uyumlu bir piyasanın olabileceğini düşünüyoruz"

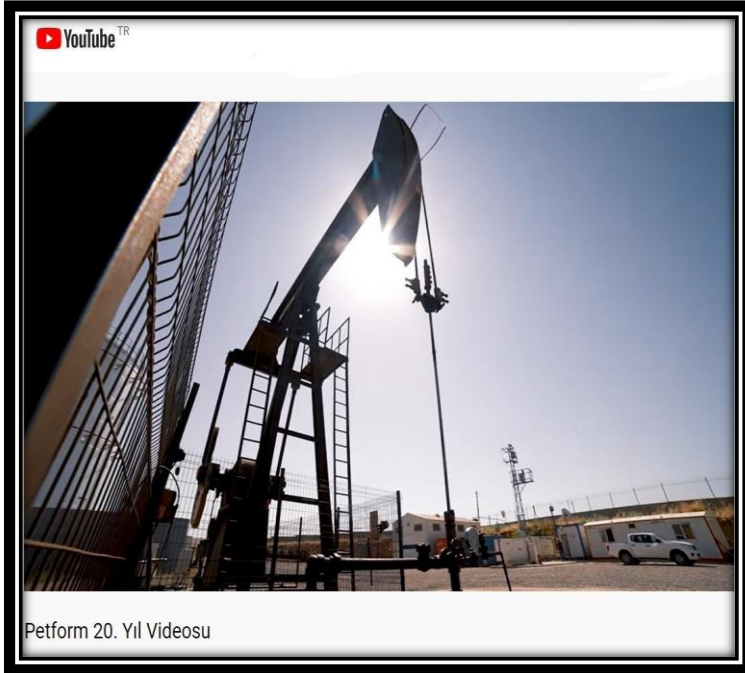
PETFORM Gaz Grubu Başkanı Didem Kalkan Erdem ise Türkiye'nin bulunduğu coğrafya ve yaşanan küresel gelişmeler itibarıyla, doğalgaz gaz ticaret merkezi olma potansiyeline sahip olduğunu ve Türkiye doğalgaz piyasasının son yıllarda gerek altyapı yatırımları gerekse ticaret yönünde atılan adımlarla bu yönde önemli gelişmeler kaydedtiğini ifade etti. Likit doğalgaz piyasasının gelişmesi incelendiğinde, altyapı yatırımları ile başlayan sürecin serbest piyasa dinamikleri ile ele alınan mevzuat düzenlemeleri ve ticaretin gelişmesi için atılan adımlar ile devam ettiğini belirtti. Erdem, bu kapsamda Türkiye'de de altyapı ve mevzuat alanında birleşik adım yapıldığını, artık ticaretin geliştirilmesine yönelik unsurların ele alınması için yeterli kapasiteye ulaşıldığını vurguladı. Erdem, 2021 yılında bu-tacek, uzun dönemli ithalat kontratları sebebiyle yeni bir dönemece girdiğini ve bunun ülkemizin bölgesel bir doğalgaz ticaret merkezi olması için bir fırsat yarattığını düşündüklerini, bu kapsamda 2021 yılından önce atılacak bazı liberalizasyon adımlarının piyasa paydaşlarının yeni döneme hazır olmaları açısından oldukça önemli olduğunu vurguladı. Türkiye'nin bulunduğu coğrafya ve yaşanan küresel gelişmeler itibarıyla, doğalgaz gaz ticaret merkezi olma potansiyeline sahip olduğunu ve Türkiye doğalgaz piyasasının son yıllarda gerek altyapı yatırımları gerekse ticaret yönünde atılan adımlarla bu yönde önemli gelişmeler kaydedtiğini ifade etti. Likit doğalgaz piyasasının gelişmesi incelendiğinde, altyapı yatırımları ile başlayan sürecin serbest piyasa dinamikleri ile ele alınan mevzuat düzenlemeleri ve ticaretin gelişmesi için atılan adımlar ile devam ettiğini belirtti. Erdem, bu kapsamda Türkiye'de de altyapı ve mevzuat alanında birleşik adım yapıldığını, artık ticaretin geliştirilmesine yönelik unsurların ele alınması için yeterli kapasiteye ulaşıldığını vurguladı. Erdem, 2021 yılında bu-tacek, uzun dönemli ithalat kontratları sebebiyle yeni bir dönemece girdiğini ve bunun ülkemizin bölgesel bir doğalgaz ticaret merkezi olması için bir fırsat yarattığını düşündüklerini, bu kapsamda 2021 yılından önce atılacak bazı liberalizasyon adımlarının piyasa paydaşlarının yeni döneme hazır olmaları açısından oldukça önemli olduğunu vurguladı.

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Enerji IQ

PETFORM 20th Anniversary Video



- The 20th anniversary of our association coincided with an extraordinary period due to the Covid-19 Pandemic period and caused the physical activities of our Association to be maintained online.
- In this context, it has been decided by the Board of Directors to prepare a short video describing our vision and activities for our 20th year.
- The 20th anniversary video has been prepared taking into account the comprehensive images received from our member companies to our Secretariat.
- **Video Youtube Linki**
https://www.youtube.com/watch?v=INxo9eeCES8&ab_channel=Petform

Activity Summary-1



- 12nd Exploration-Production Sector Consultation Meeting was held.
- 2 Gas Group and 1 E&P Group meetings were held.
- 4 groups joint working meetings were held with Sub-Working Groups.
- 5 consultation meetings were held with the participation of EXIST, EMRA and BOTAS.
- Our Association's corporate recognition has increased and visibility in visual and written media has been provided 16 times.
- In addition to routine works and meetings, active communication was provided with members in line with general preferences and expectations.
- Views were exchanged with EMRA and BOTAS regarding the operational problems encountered under the Gas Group and it was aimed to bring constructive solutions.
- Intensive consultations were held with the Ministry of Energy and Natural Resources, Ministry of Treasury and Finance, General Directorate of Mining and Petroleum Affairs, Energy Market Regulatory Authority, BOTAS and TPAO for the development of our sectors.

Activity Summary-2



- 21 reports published by various institutions were shared with members.
- 28 announcements published by various institutions were shared with members.
- 23 announcements published in Official Gazette by GDMPA were shared with members.
- One webinar was organized in cooperation with EY Turkey.
- One webinar was organized in cooperation with Yazıcı Attorney Partnership
- Gökhan Soruş participated as speaker in the Black Sea Oil and Gas Conference.
- The active use of Twitter and LinkedIn social media accounts continued.
- PETFORM's 20th anniversary video has been shared on social media accounts.
- It has been made an application to EU project titled «Improving Vocational Training of Natural Gas Trading Experts in the Covid-19».



Contact Us

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