

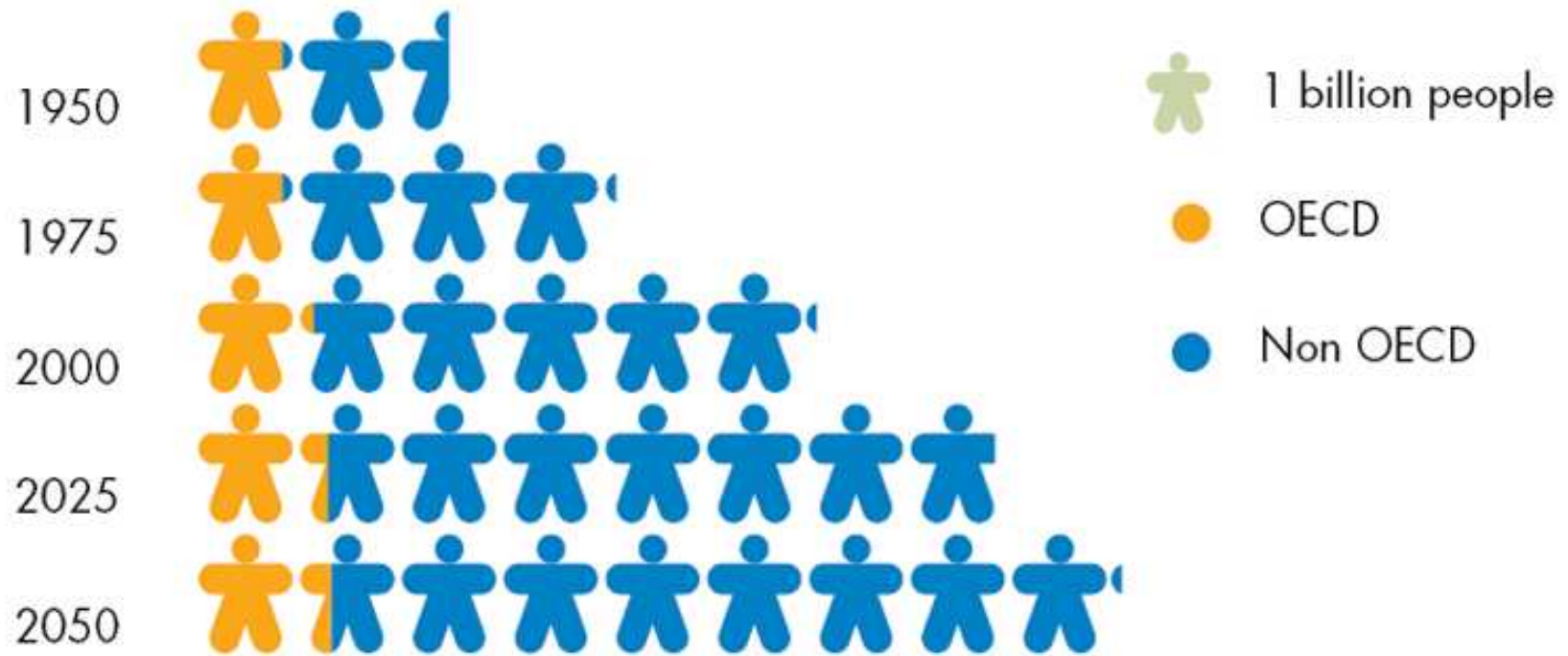
# PETFORM





# Growing World Population

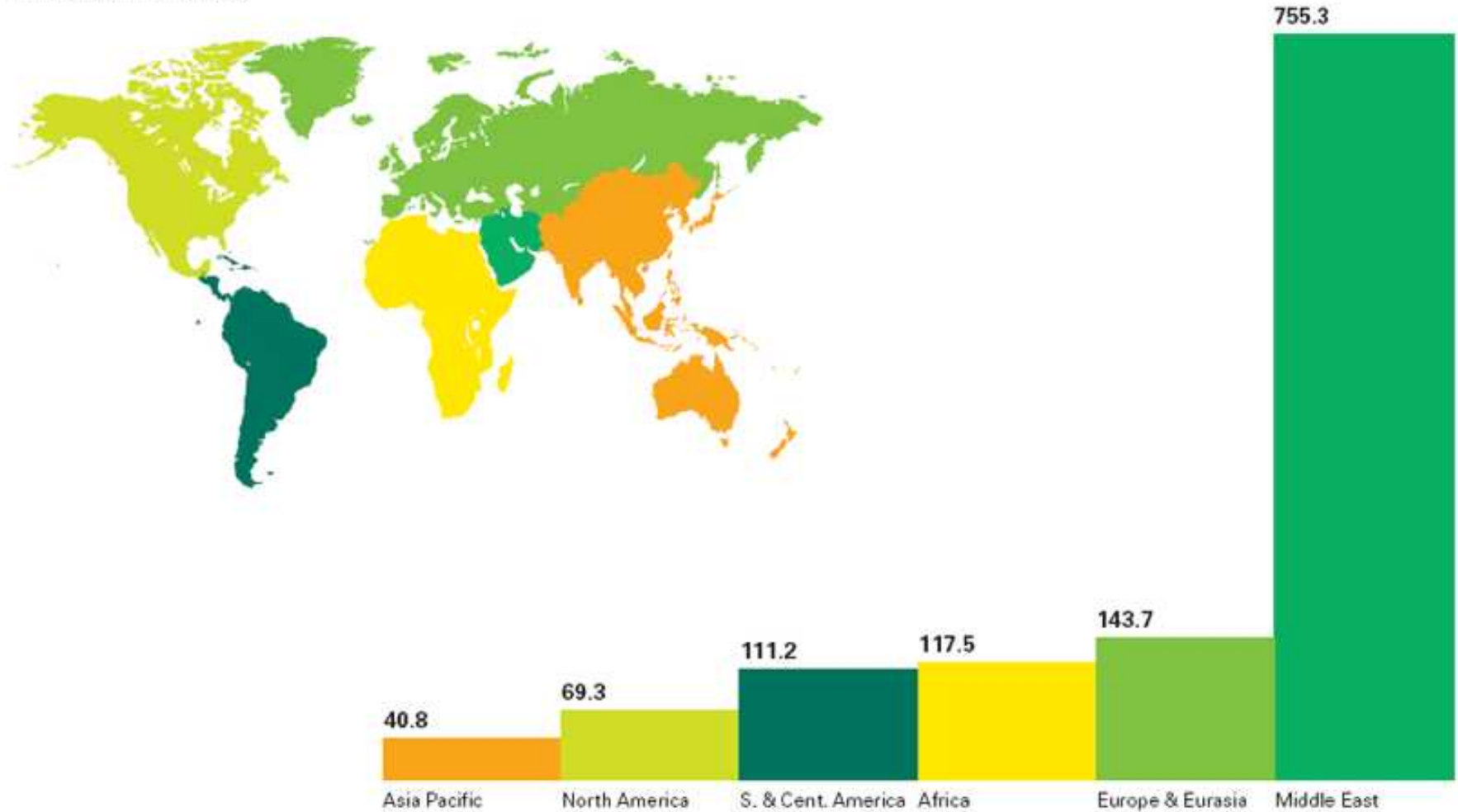
## World population



# Distribution of Oil Reserves - I

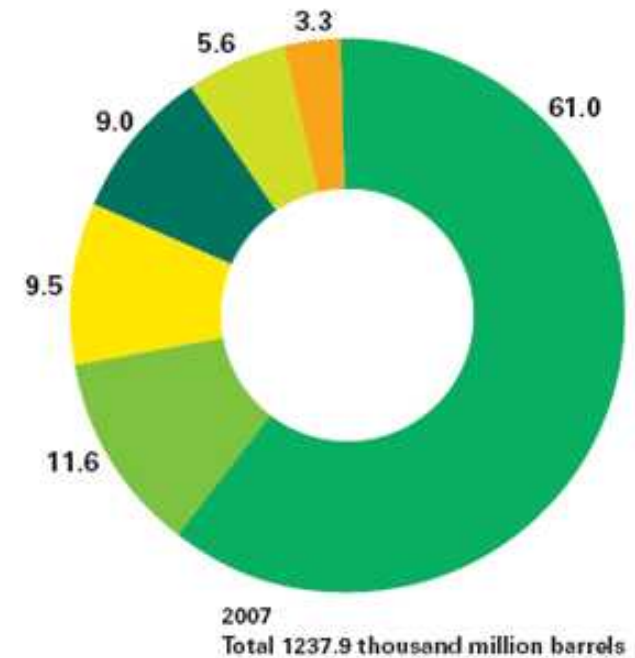
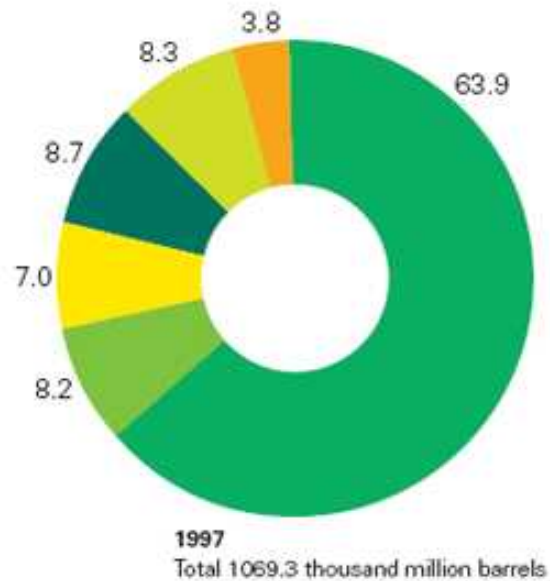
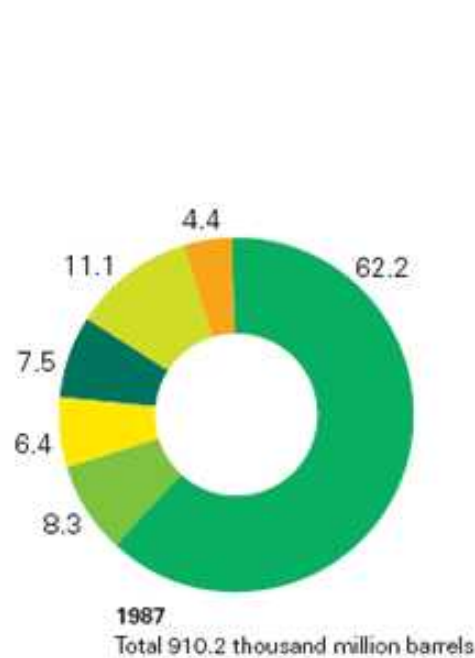


Proved reserves at end 2007  
 Thousand million barrels





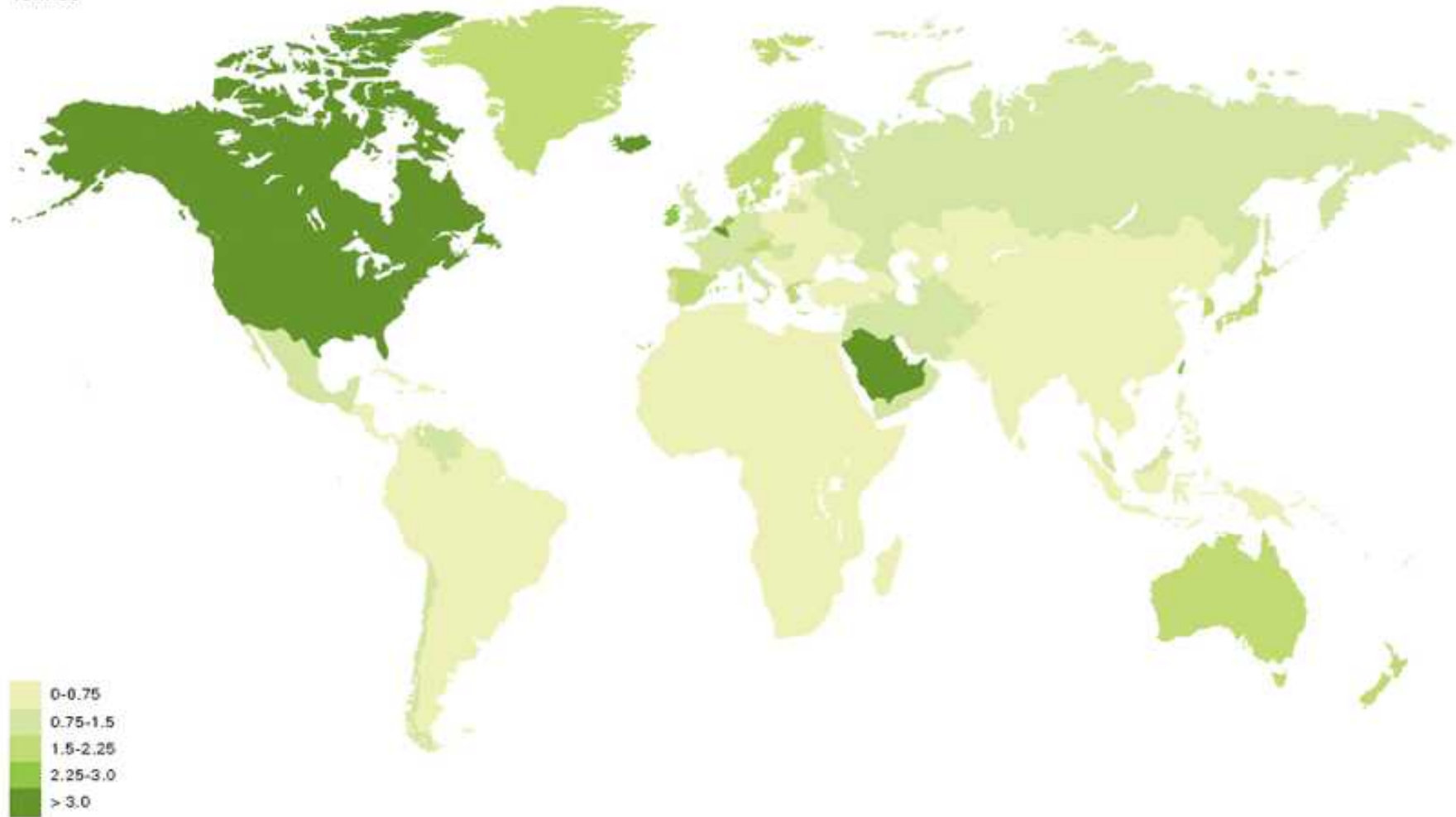
**Distribution of proved reserves in 1987, 1997 and 2007**  
Percentage



# Distribution of Oil Consumption



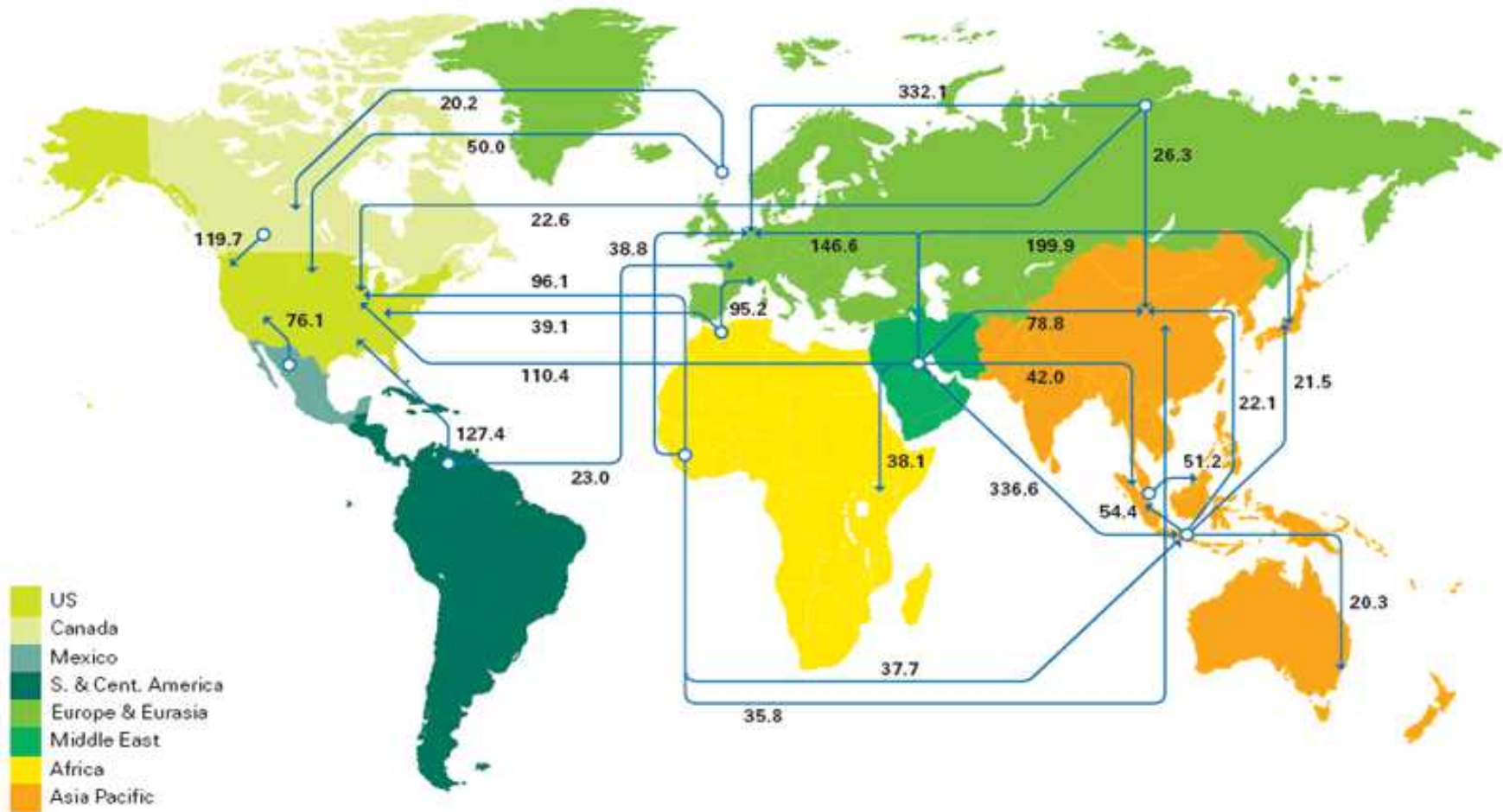
Consumption per capita 2007  
Tonnes



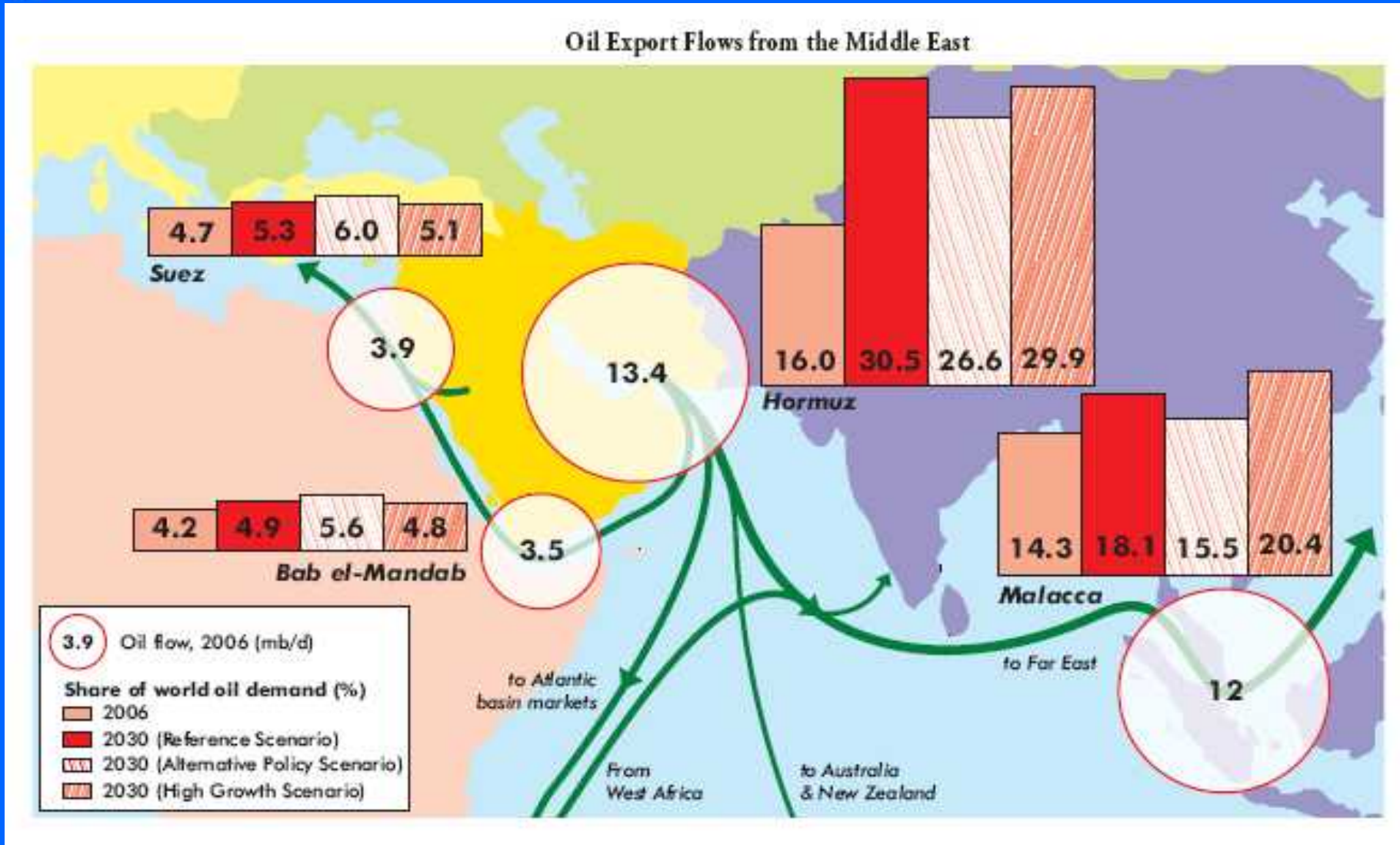
# Oil Trade Movements



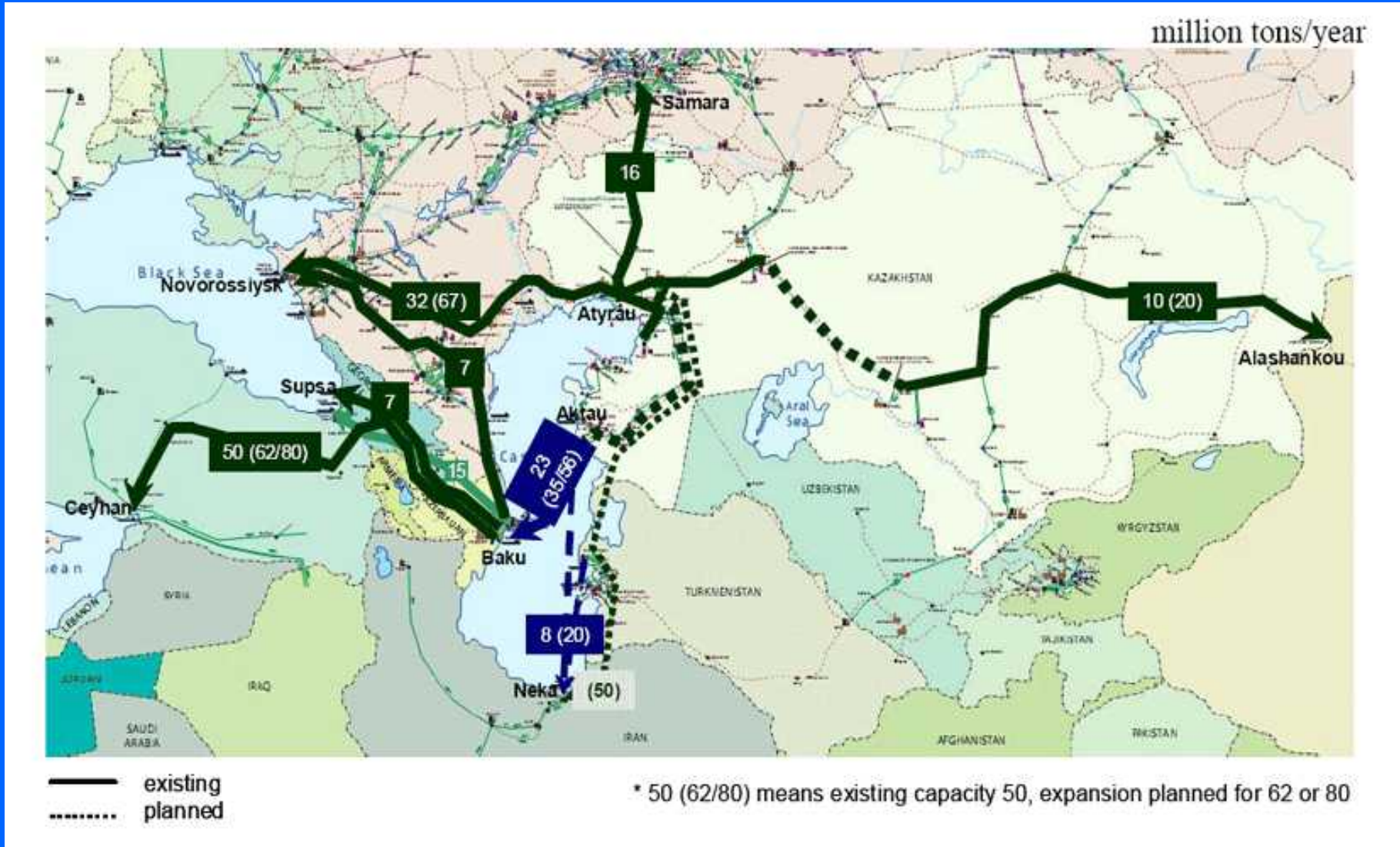
**Major trade movements 2007**  
Trade flows worldwide (million tonnes)



# Oil Flows from the Middle East



# Oil Flows from the Caspian Basin





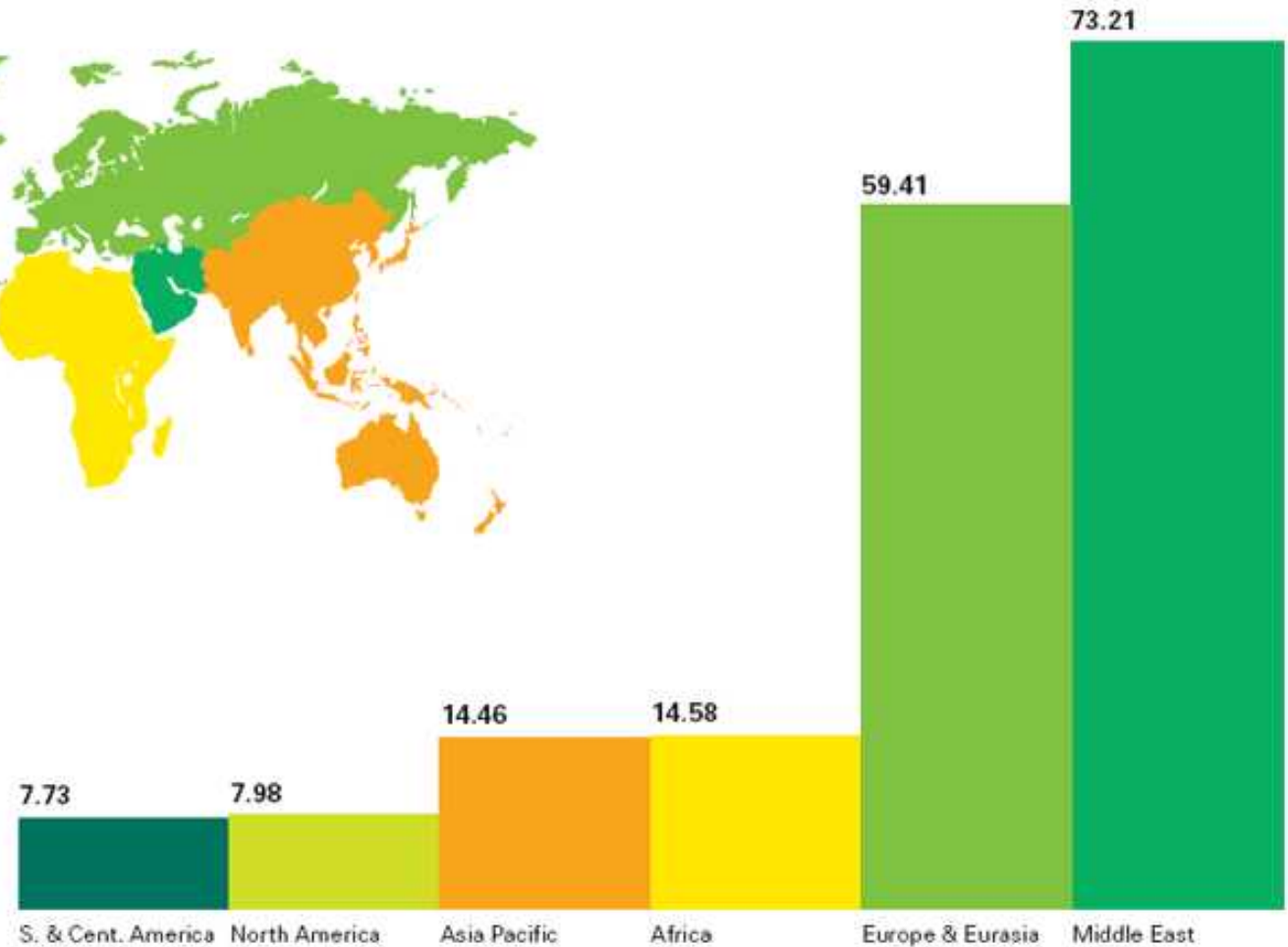
# Oil Flows in Black Sea Region



# Distribution of Gas Reserves - I



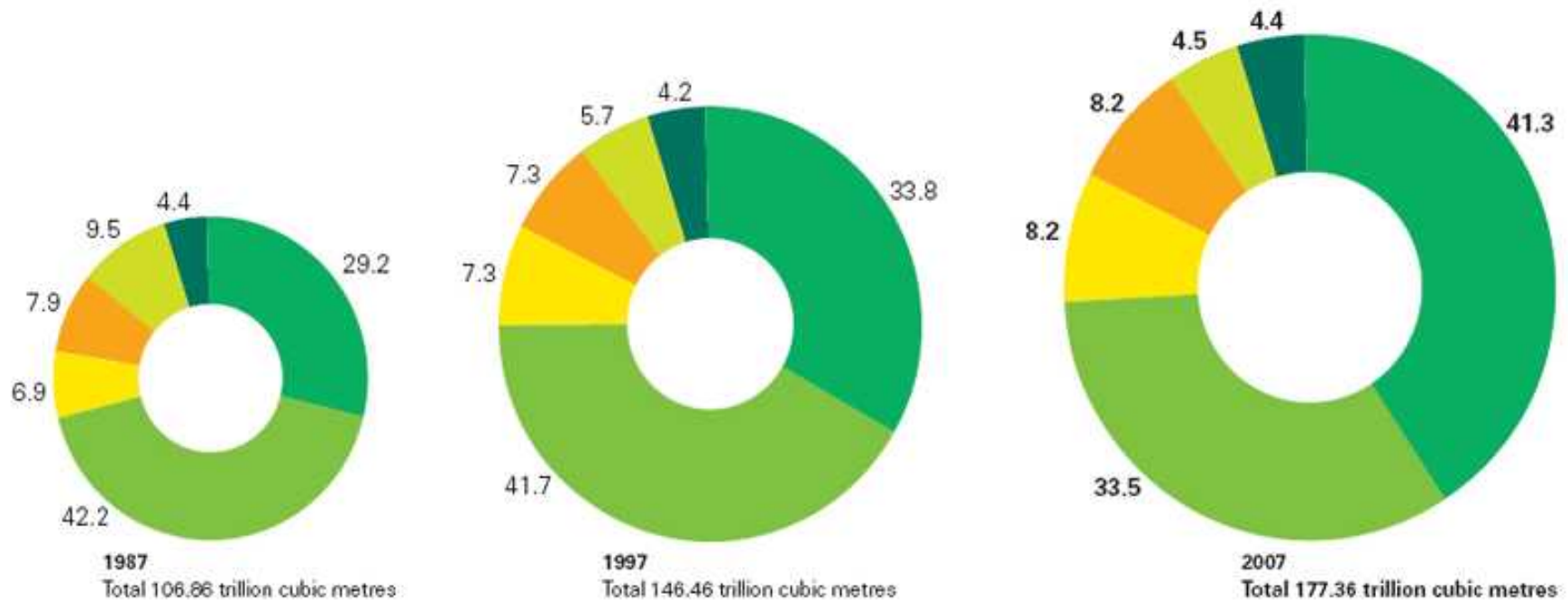
Proved reserves at end 2007  
Trillion cubic metres





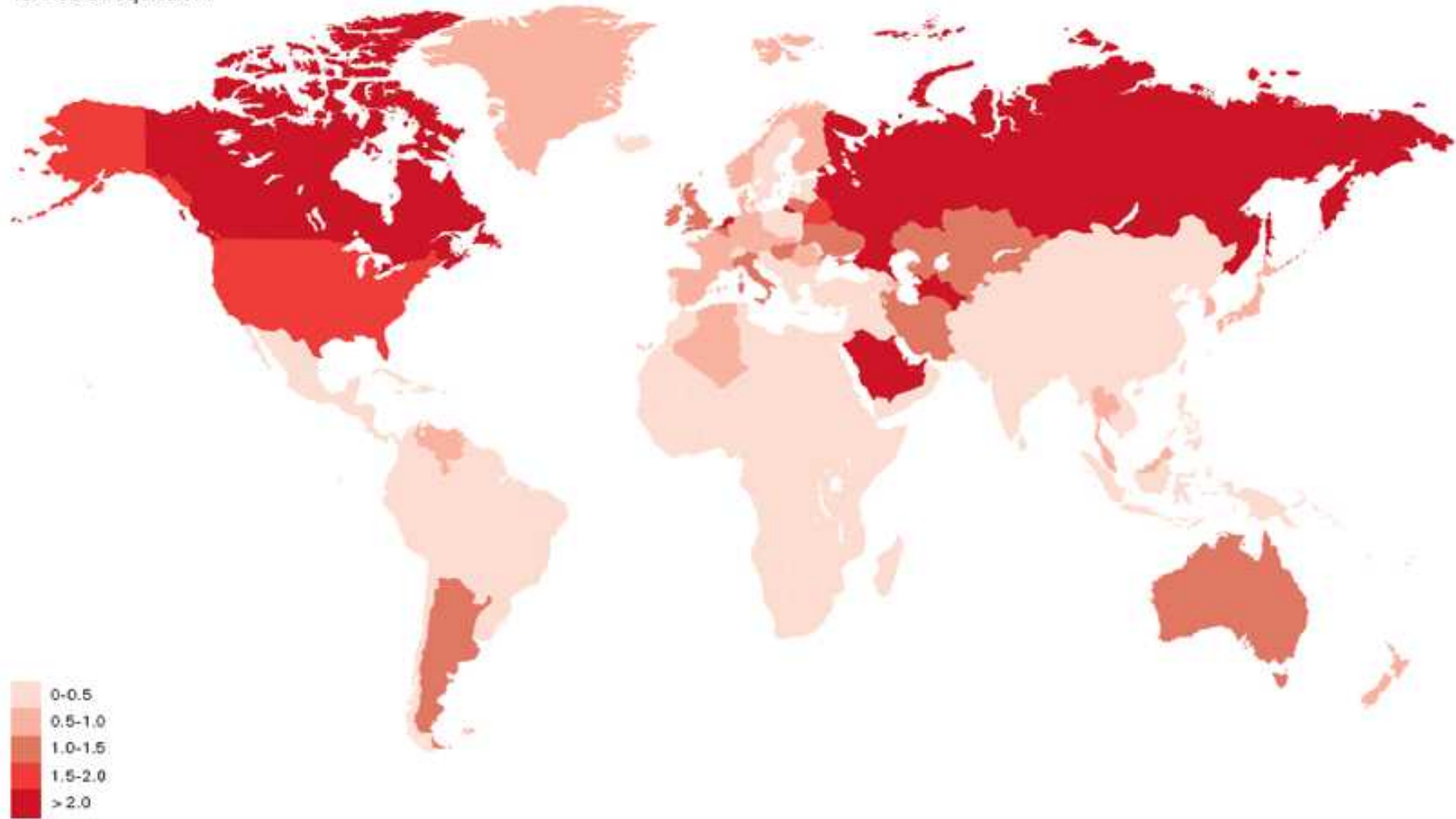
**Distribution of proved reserves in 1987, 1997 and 2007**  
Percentage

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





**Consumption per capita 2007**  
Tonnes oil equivalent

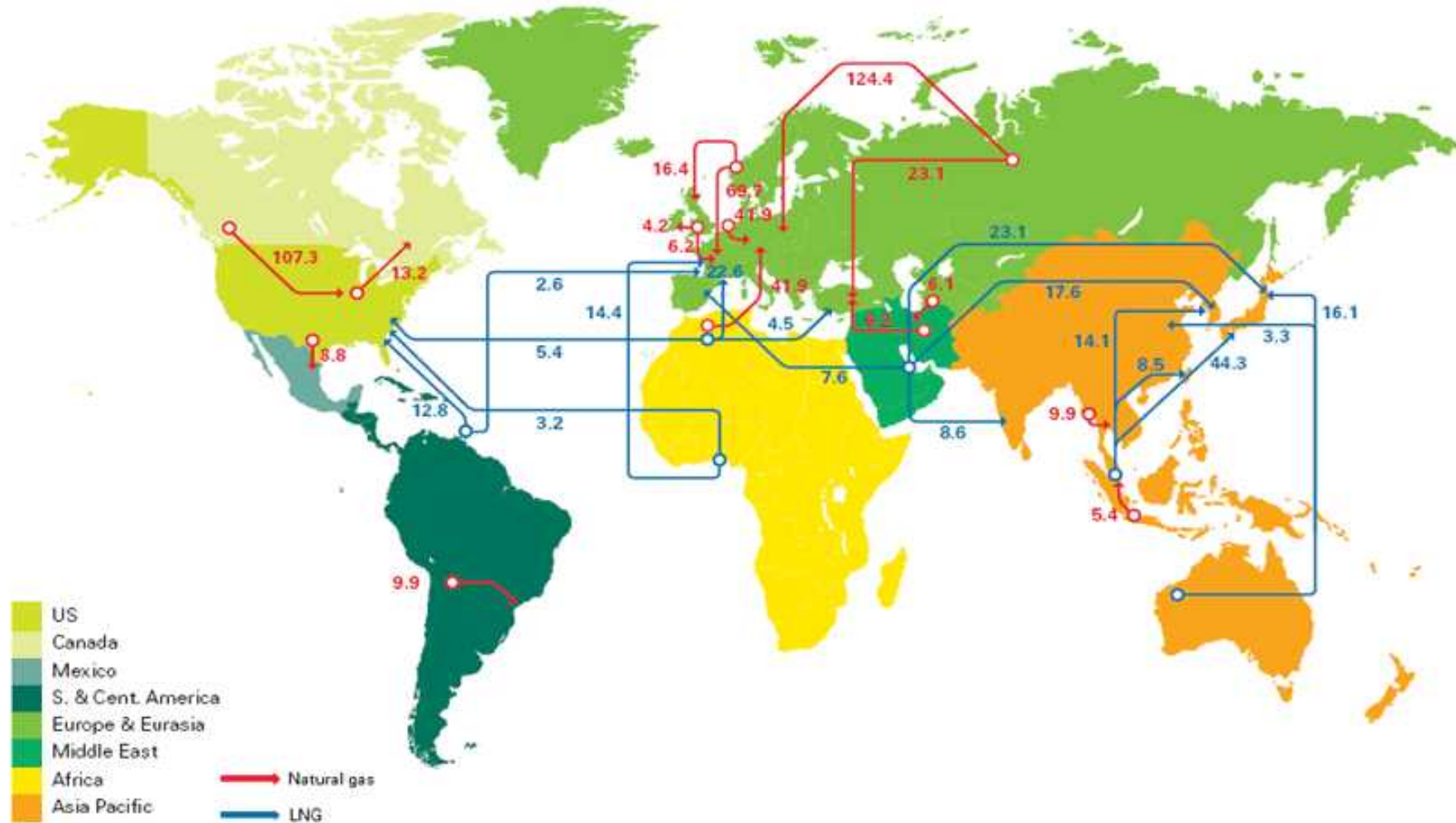


# Gas Trade Movements



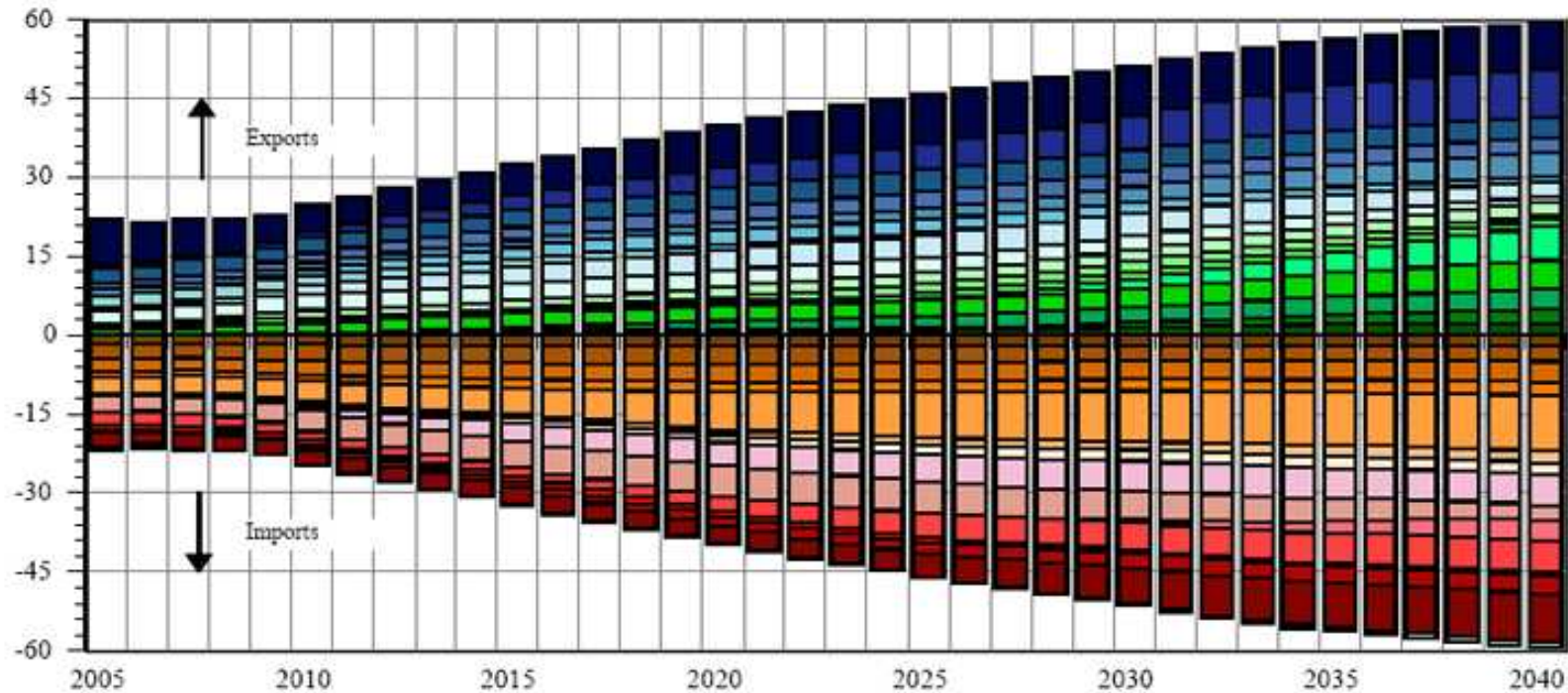
## Major trade movements

Trade flows worldwide (billion cubic metres)





Natural Gas Trade (tcf)

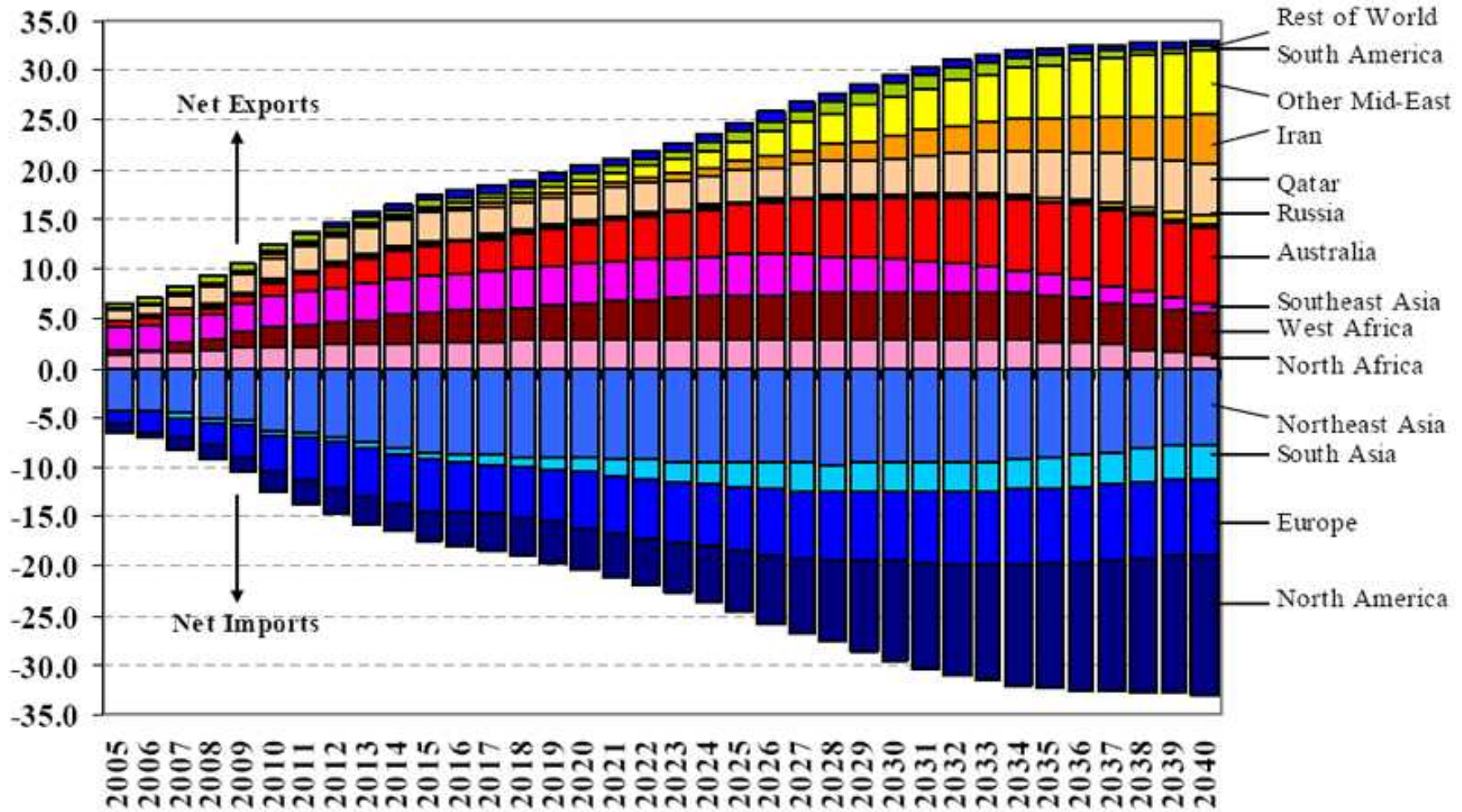


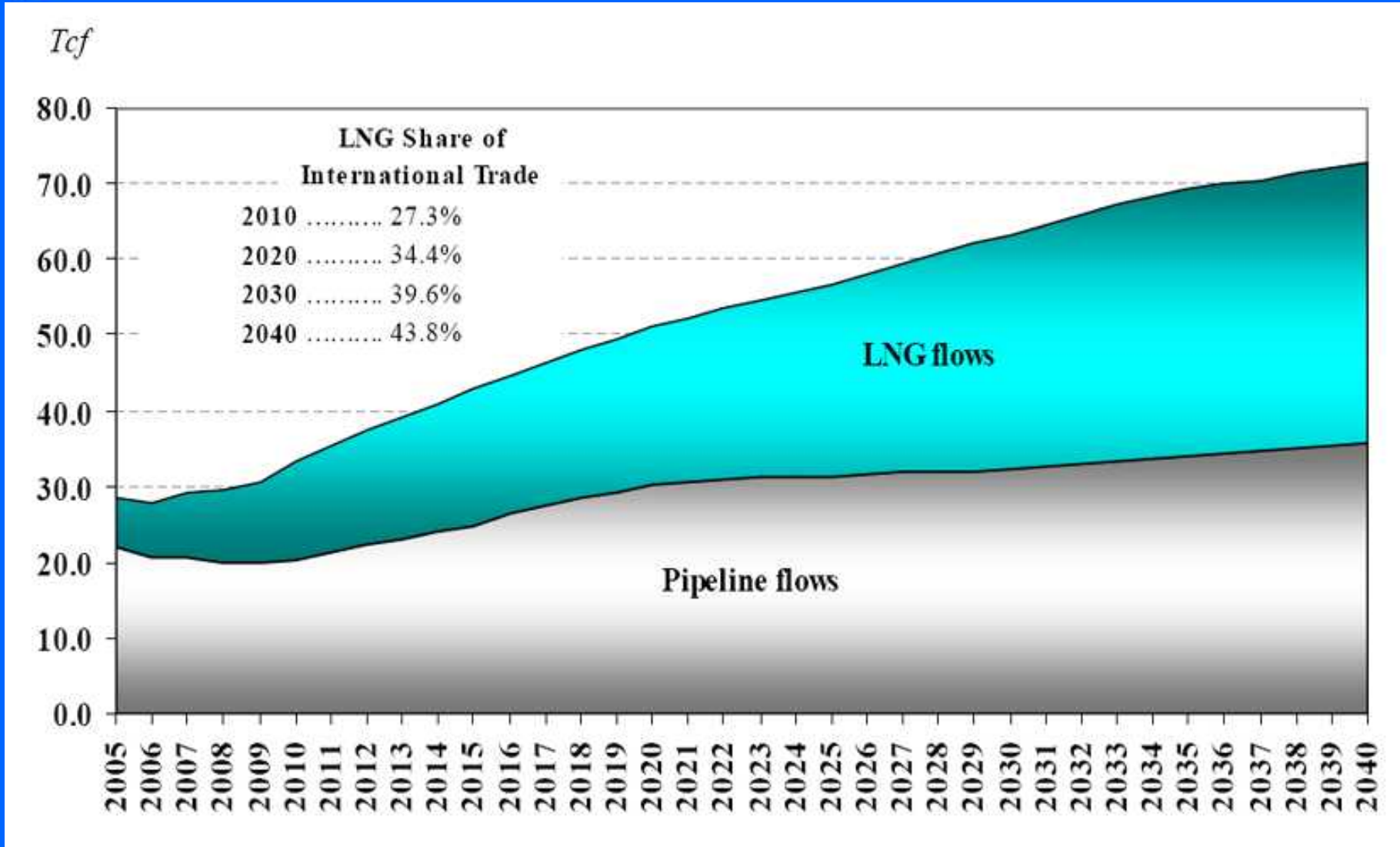
- |                |                        |                       |               |                           |                  |
|----------------|------------------------|-----------------------|---------------|---------------------------|------------------|
| ■ Russia       | ■ Canada               | ■ Rest of Middle East | ■ UAE         | ■ Rest of Asia-Pacific    | ■ Rest of Europe |
| ■ Australia    | ■ Rest of Africa       | ■ Iran                | ■ USA         | ■ Japan                   | ■ Turkey         |
| ■ Norway       | ■ Algeria              | ■ Qatar               | ■ Mexico      | ■ China (incl. Hong Kong) | ■ Italy          |
| ■ Indonesia    | ■ Nigeria              | ■ Iraq                | ■ Rest of FSU | ■ Thailand                | ■ Germany        |
| ■ Turkmenistan | ■ Central & S. America | ■ Saudi Arabia        | ■ Ukraine     | ■ India                   | ■ France         |
| ■ Kazakhstan   |                        |                       |               |                           |                  |

# LNG Exports & Imports



Tcf







# Major Acting Gas Pipelines





## Turkey – Gas Imports (2007)

• <b>Russia</b>	<b>: 63,5% - 23,1 bcm</b>
• <b>Iran</b>	<b>: 16,9% - 6,1 bcm</b>
• <b>Algeria</b>	<b>: 11,8% - 4,2 bcm</b>
• <b>Nigeria</b>	<b>: 3,9% - 1,4 bcm</b>
• <b>Azerbaijan</b>	<b>: 3,4% - 1,2 bcm</b>
• <b>Spot LNG</b>	<b>: 0,5% - 0,1 bcm</b>
-----	
• <b>Total</b>	<b>: 36,4 bcm</b>

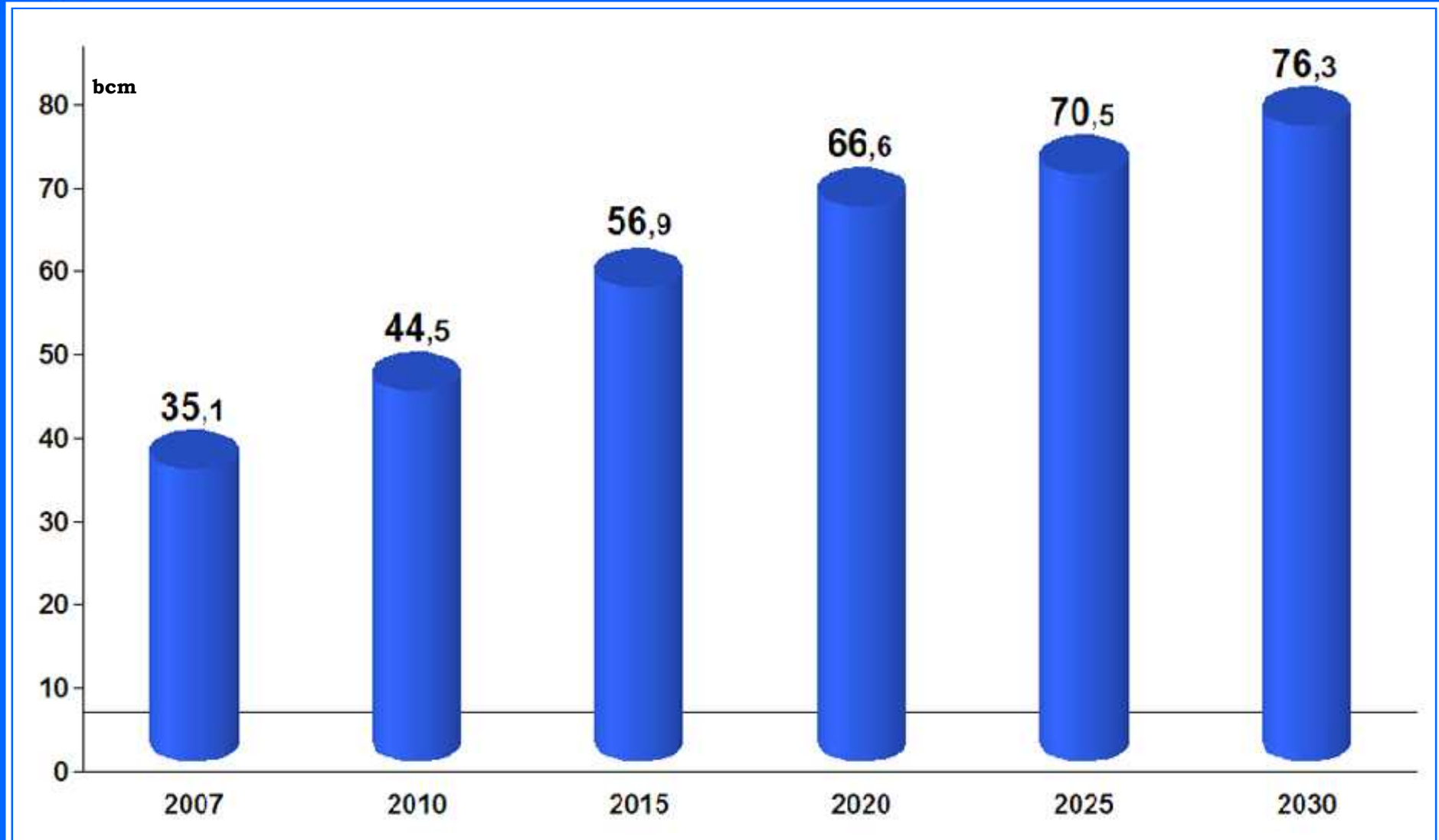
# Turkey – Gas and LNG Contracts



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





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



## *Contract Releases*

- **Shell Enerji** : 0,25 bcm
- **BosphorusGaz** : 0,75 bcm
- **Enerco Enerji** : 2,5 bcm
- **Avrasya Gaz** : 0,5 bcm
- 
- **Total** : 4 bcm



- **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.**



- **Reduce BOTAS' market share rapidly through contract release and/or volume release programs.**
- **New imports to enable security of supply by private sector only.**





- **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**

**PETFORM**



***THANK YOU***