

“Rethinking Energy Security”

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Chairman of the Board



About PETFORM



Established in 2000, PETFORM has played a crucial role in the transfer of private sector views to the public authorities regarding to Turkish energy legislation including Natural Gas Market Law, Petroleum Market Law and Turkish Petroleum Law.

Member companies mainly have activities in 2 sectors:

- Exploration & Production**
- Natural Gas**

36 Member Companies



- AKENERJİ
- AKSA
- ALADDIN MIDDLE EAST
- ARGM
- ATTILA DOĞAN İNŞAAT
- AVRASYA GAZ
- BOSPHORUSGAZ
- BP
- ÇALIK ENERJİ
- EDISON
- EGEGAZ
- ENERCO ENERJİ
- ENERGY OPERATIONS TURKEY
- ENERJİSA
- ENI
- E.ON RUHRGAS
- EWE ENERJİ
- GENEL ENERJİ
- GÜNEY YILDIZI PETROL
- 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 ENERJİ

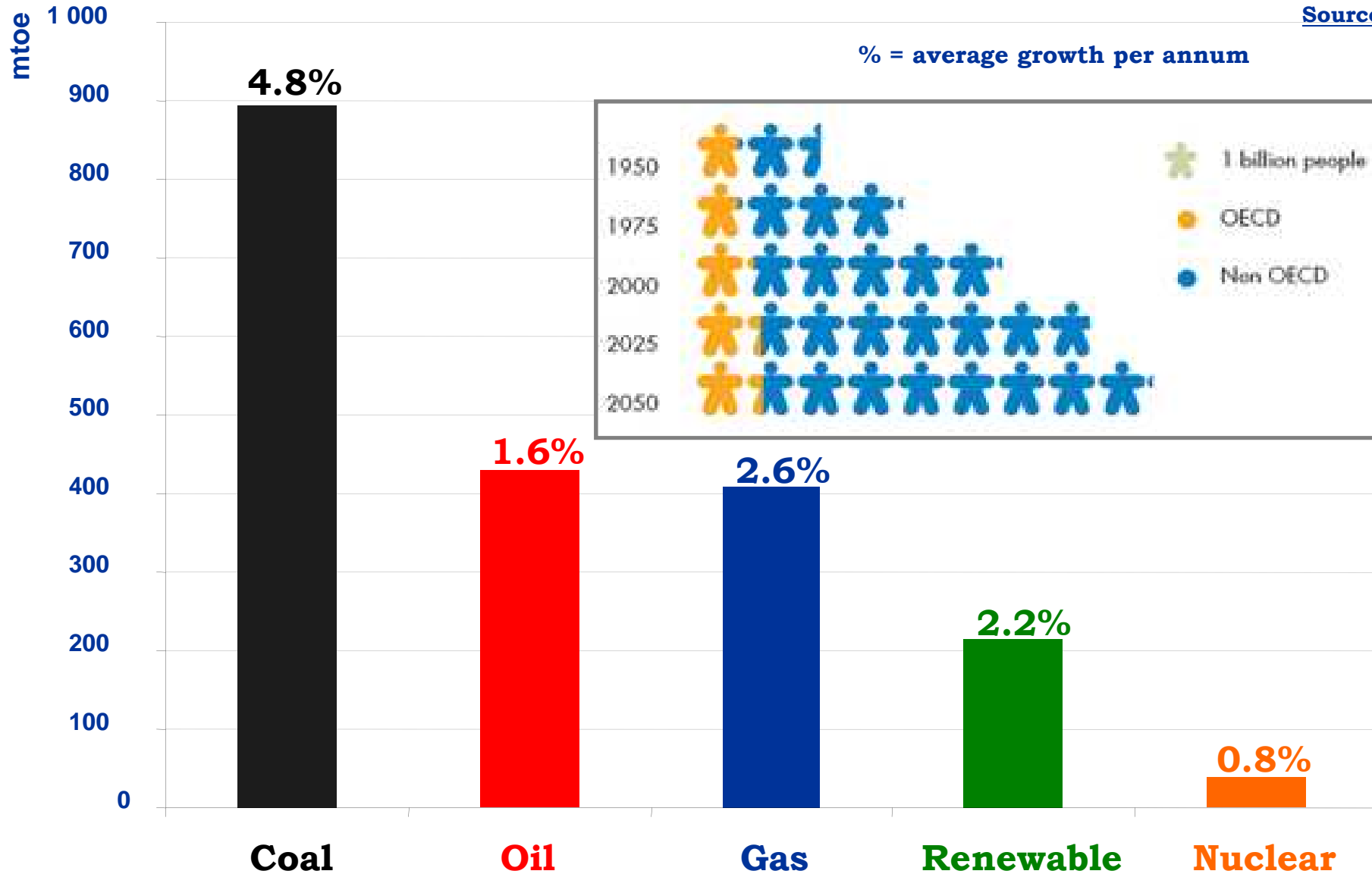
Rethinking World's Energy Security



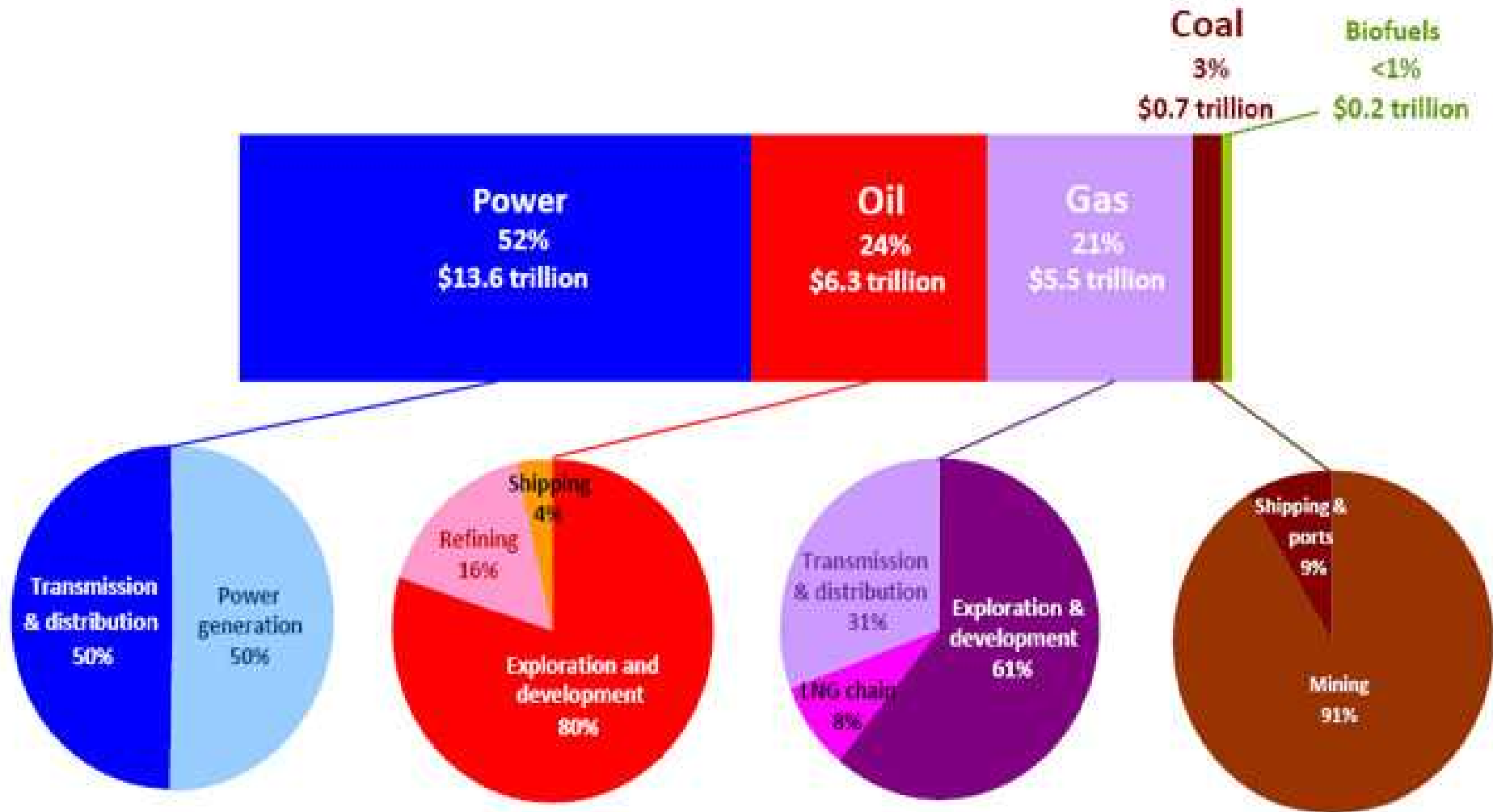
World Primary Energy Demand



Source: IEA



Energy Investments (2007 – 2030)

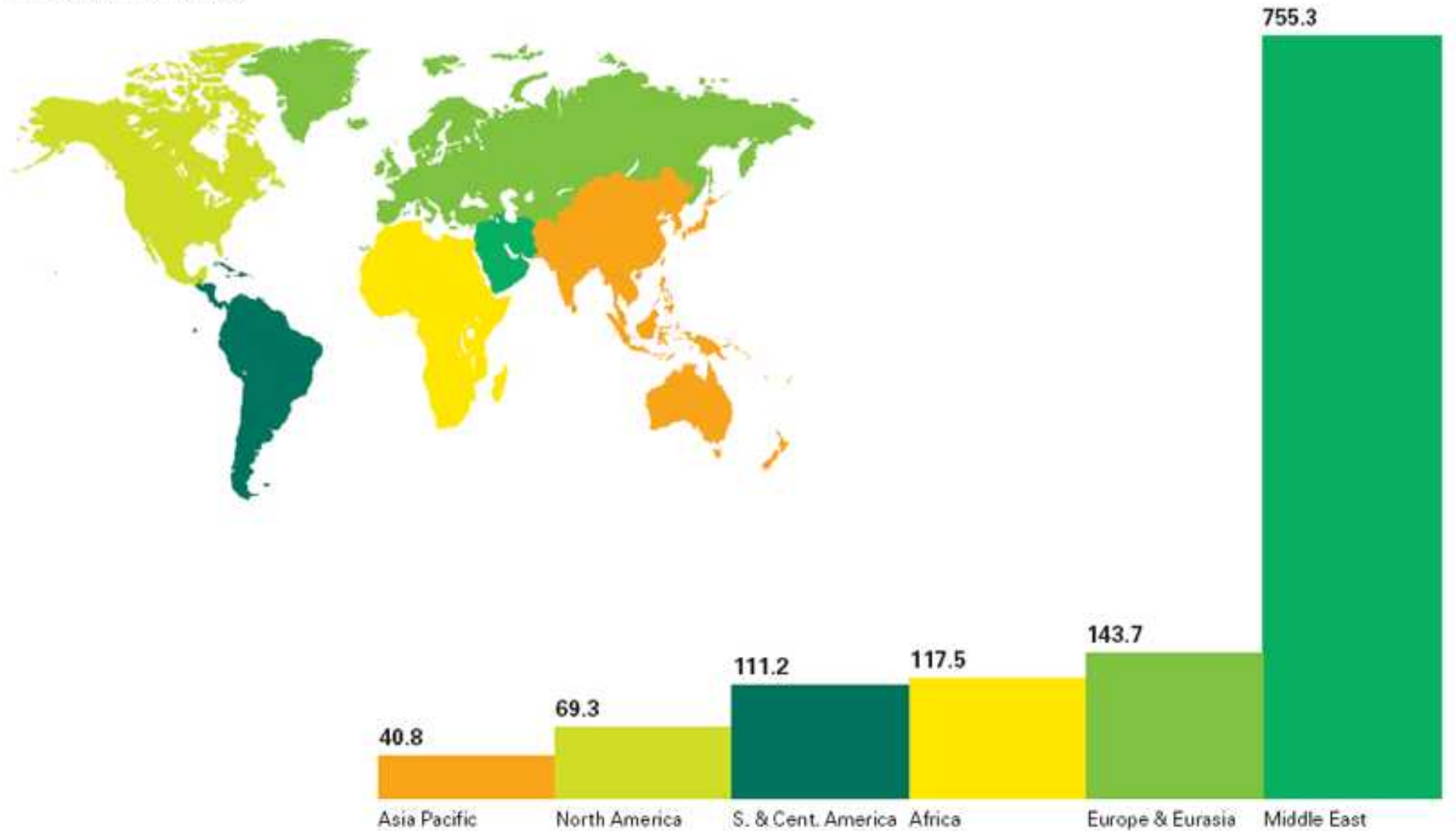


Distribution of World Oil Reserves



Source: BP

Proved reserves at end 2007
Thousand million barrels



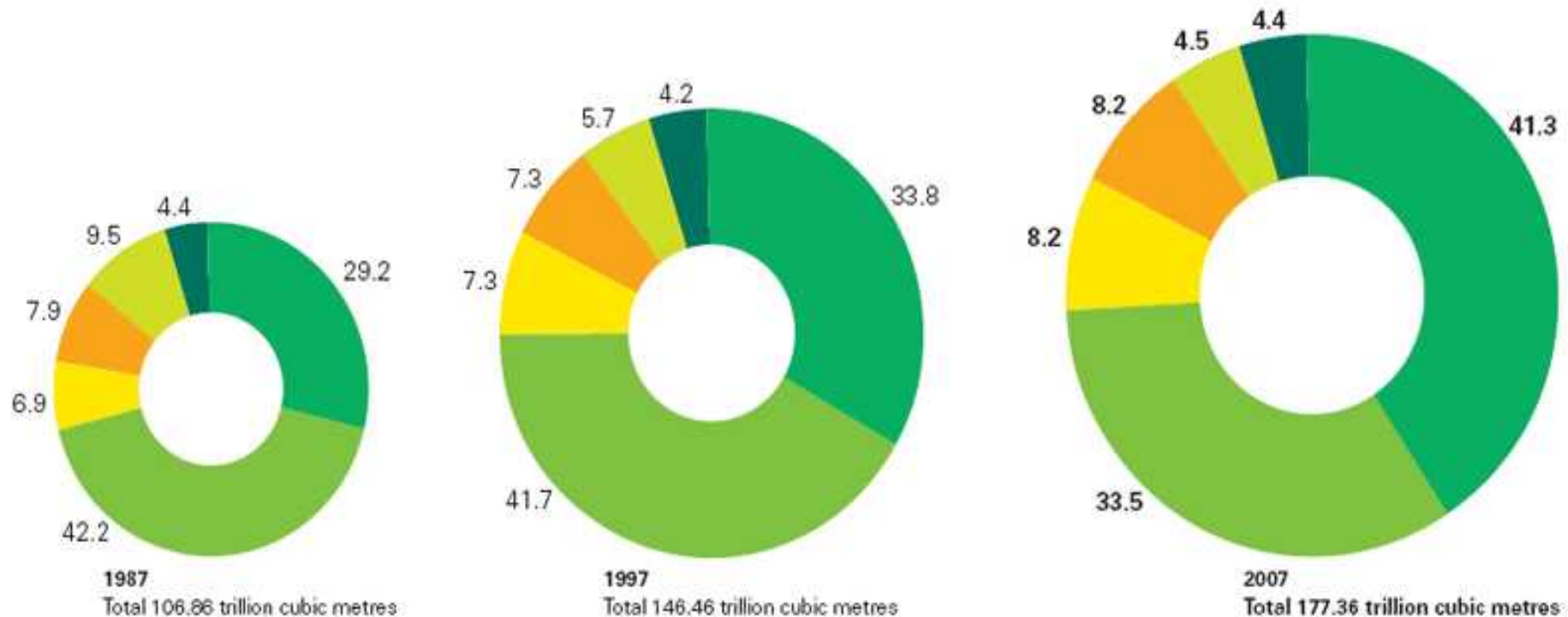
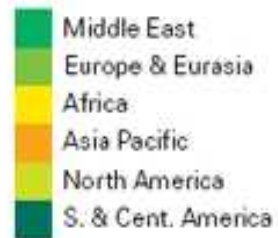
Distribution of World Gas Reserves



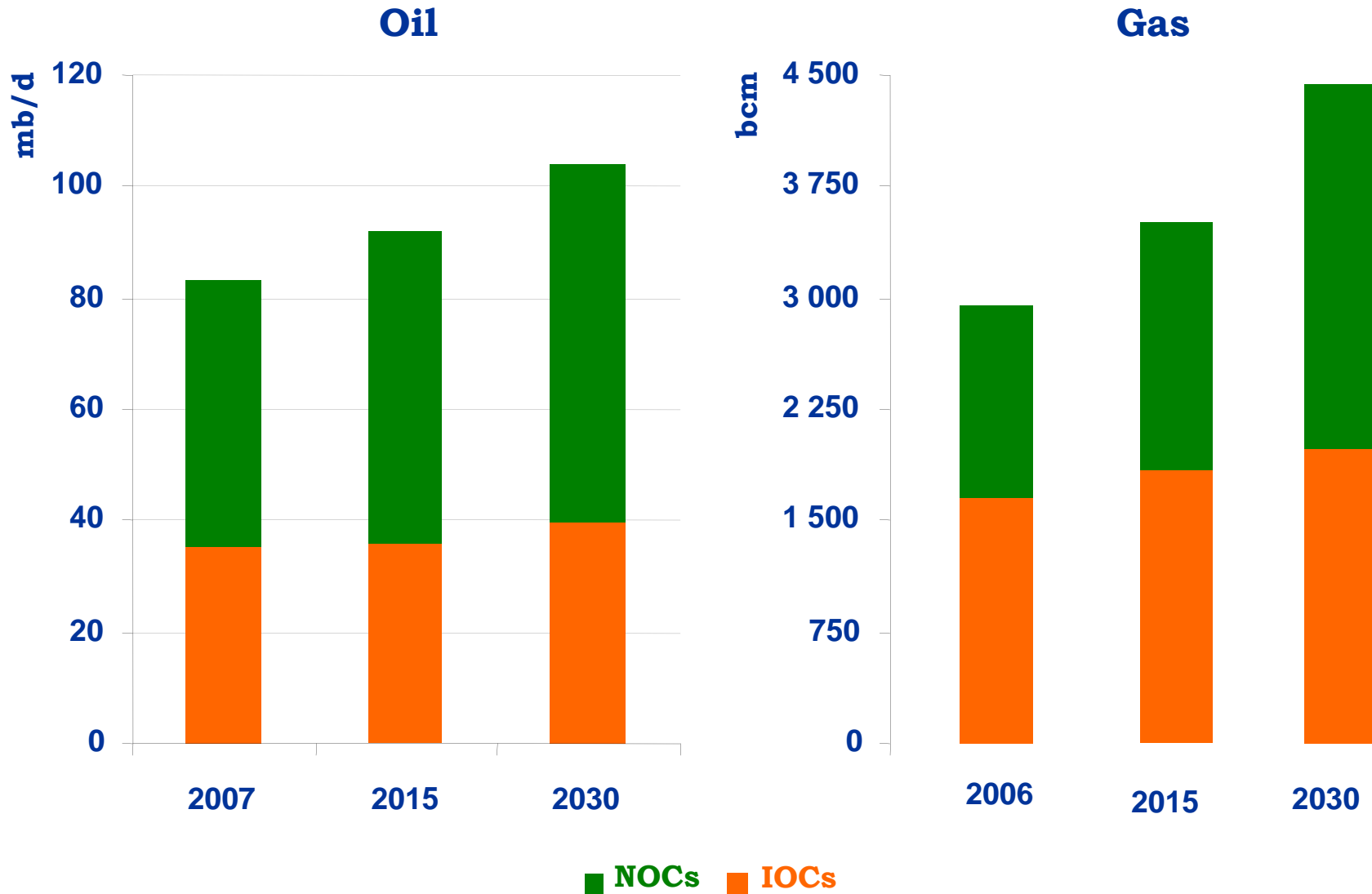
Source: BP

Distribution of proved reserves in 1987, 1997 and 2007

Percentage



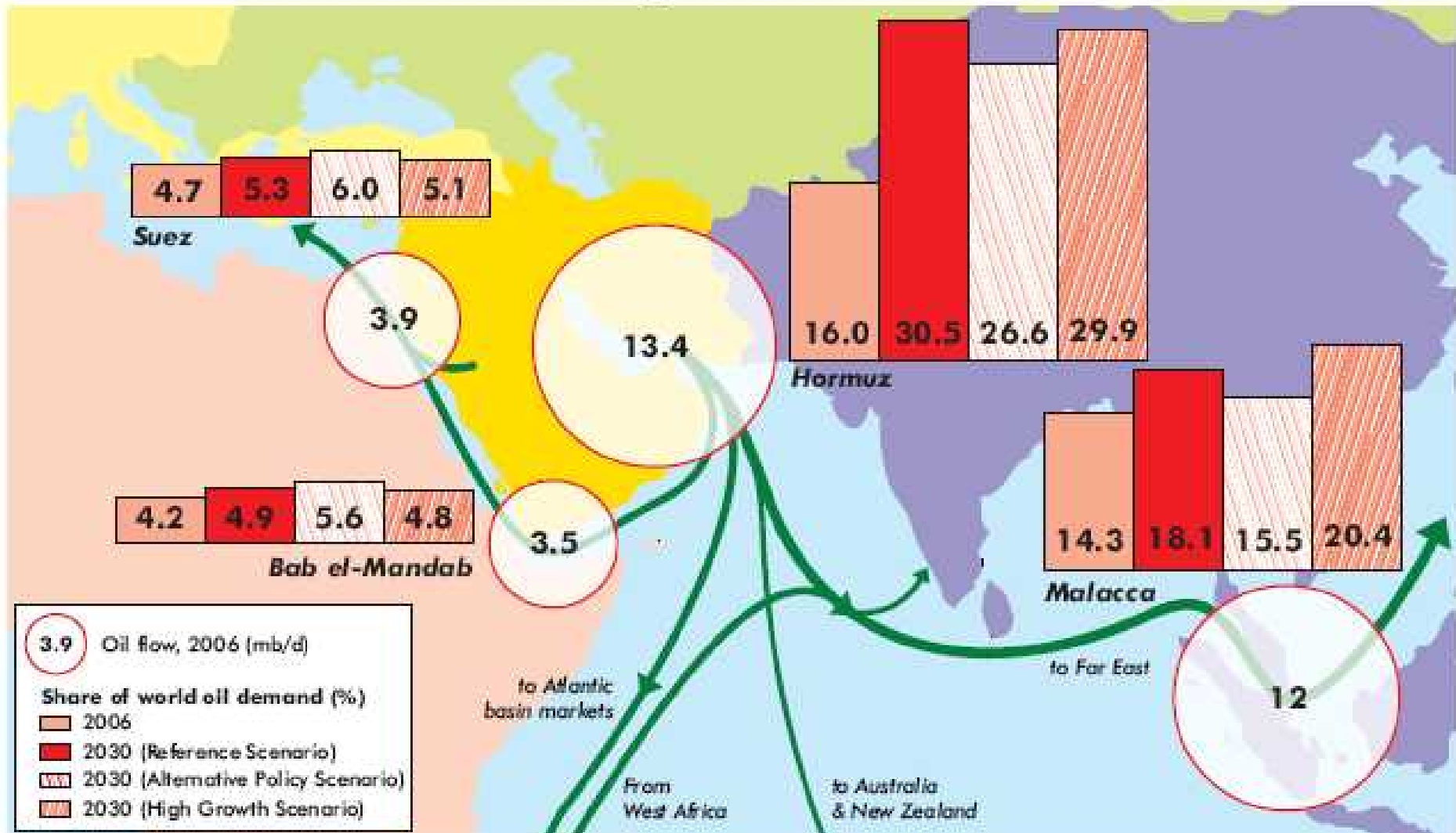
Production Trends of NOCs & IOCs



Oil Flows from the Middle East

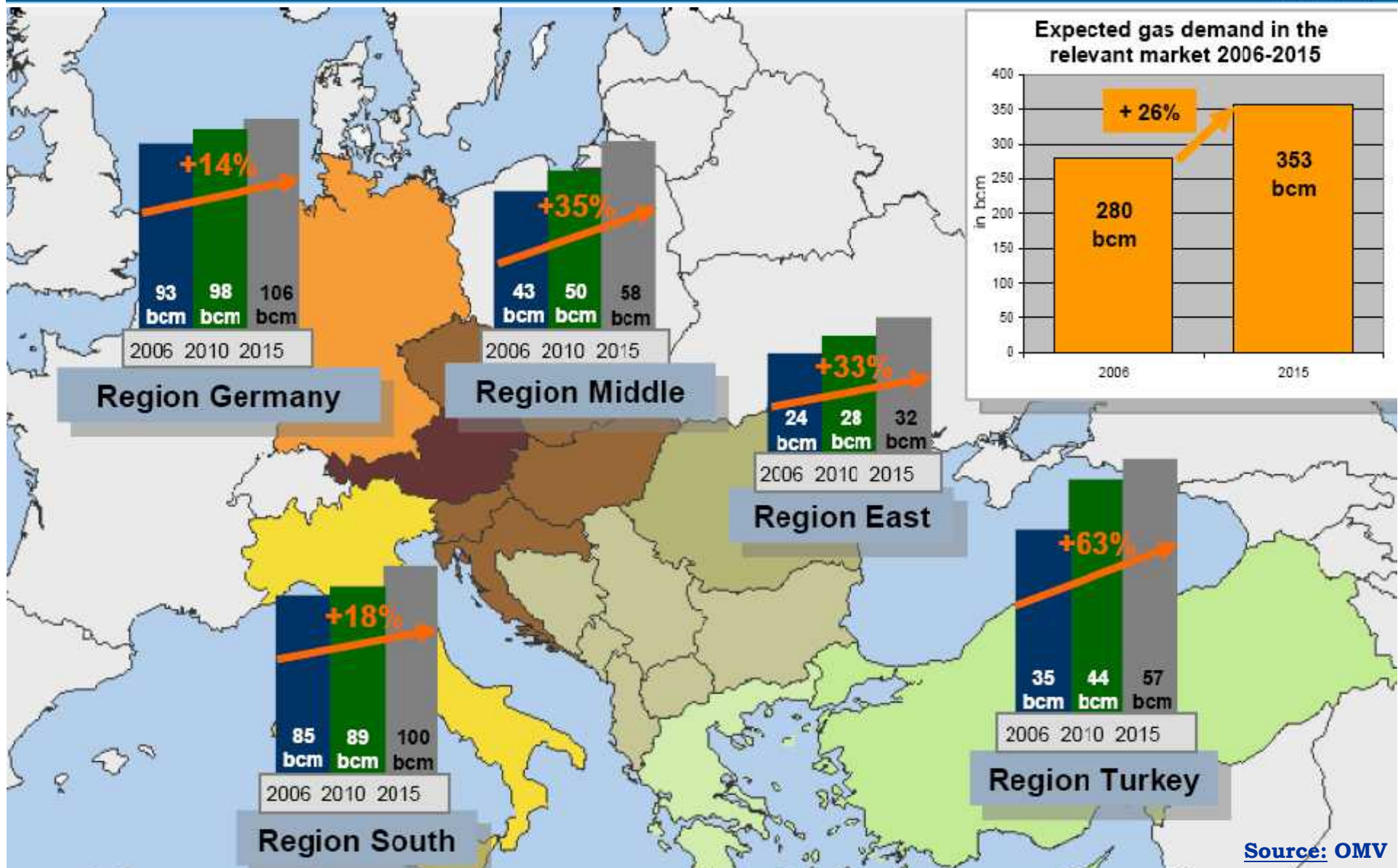


Oil Export Flows from the Middle East



Source: IEA

Europe's Gas Demand Forecast

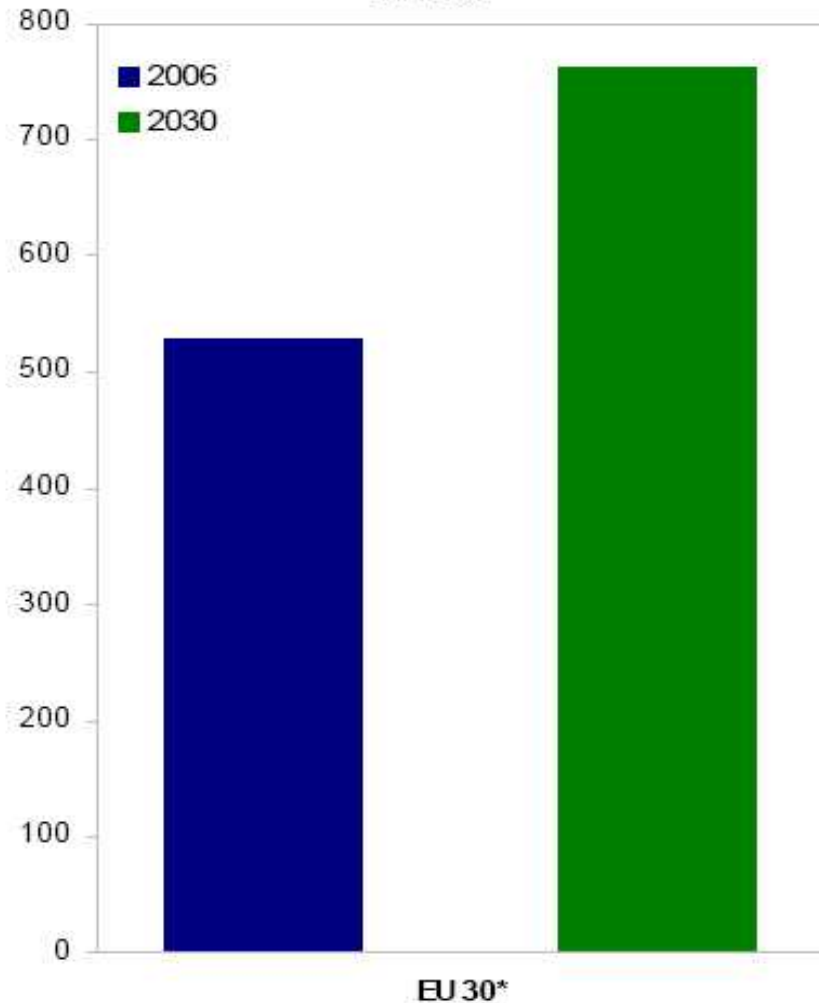


Source: OMV

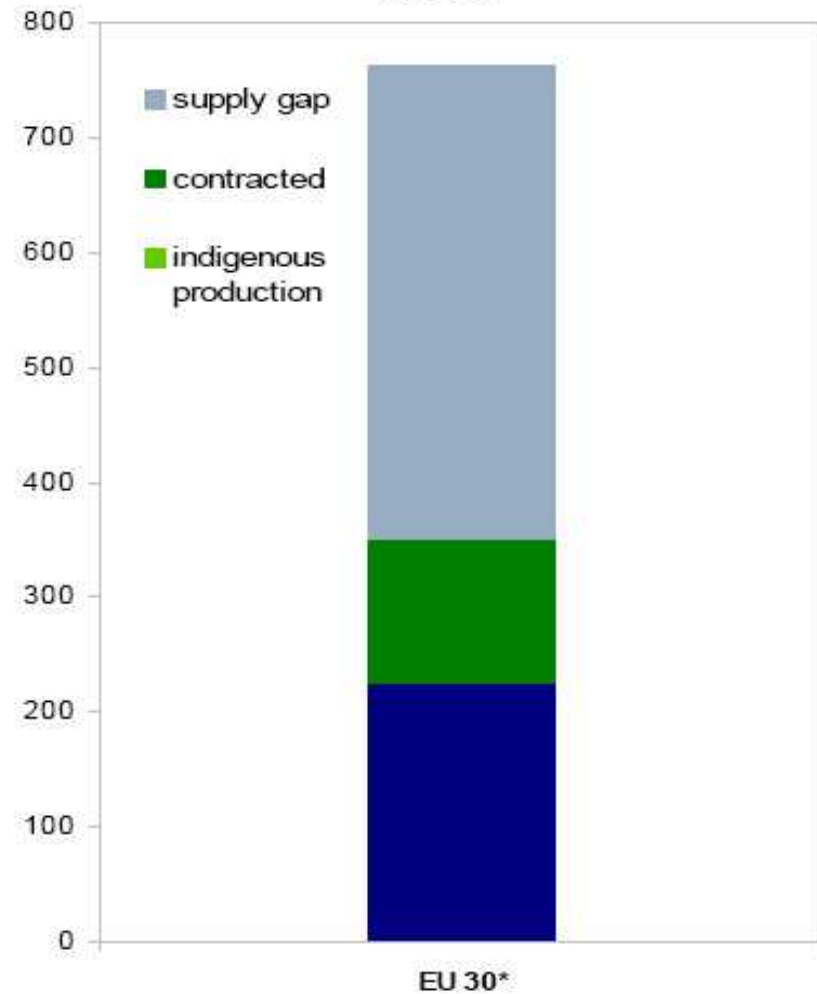
Gas Demand & Supply Gap in Europe



Demand in Europe in bcm

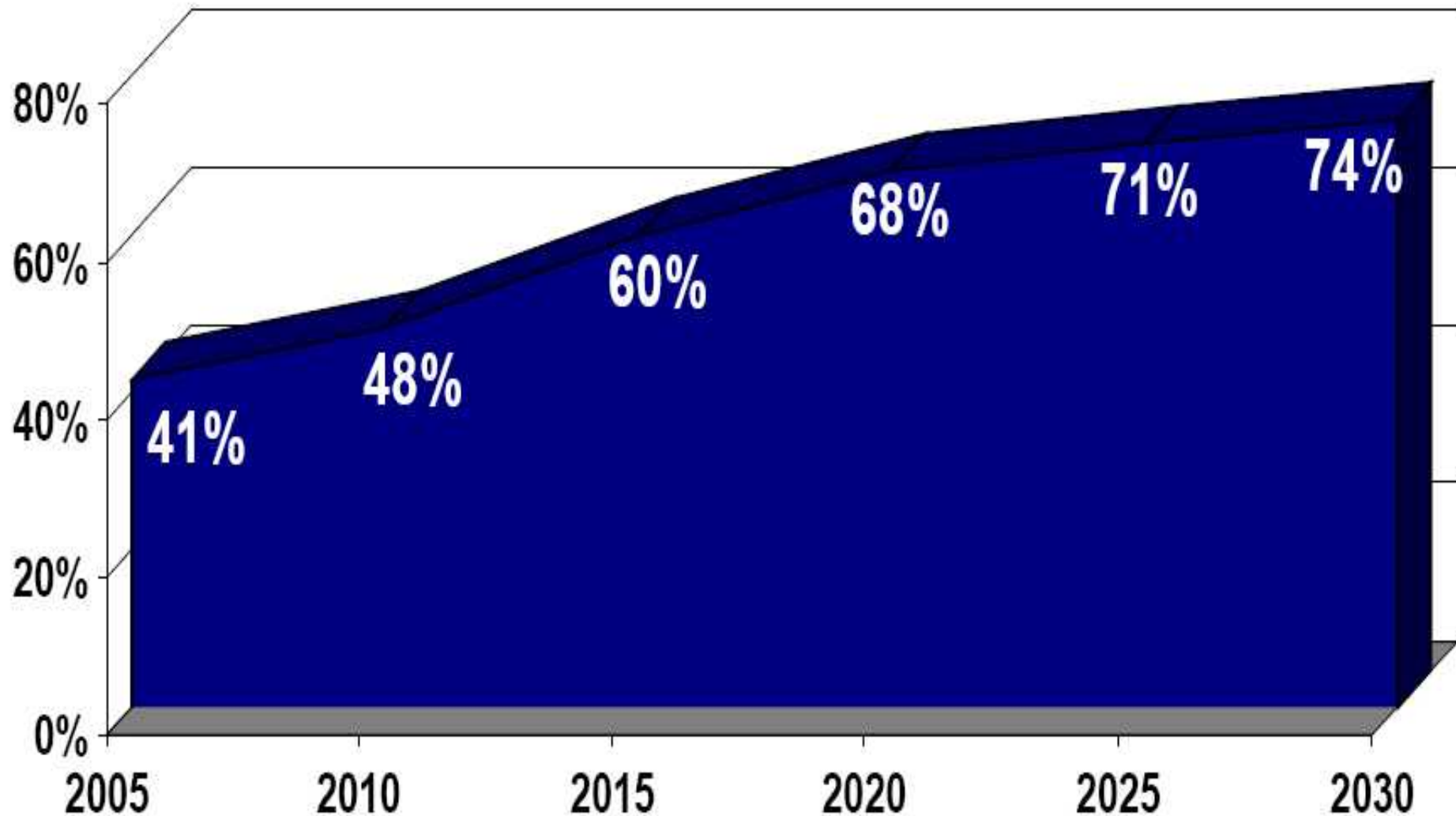


Supply gap in Europe 2030 In bcm



* Europe 30 (EU 25 + Rumania, Bulgaria, Croatia, Turkey, Norway)

Europe's Gas Import Dependency

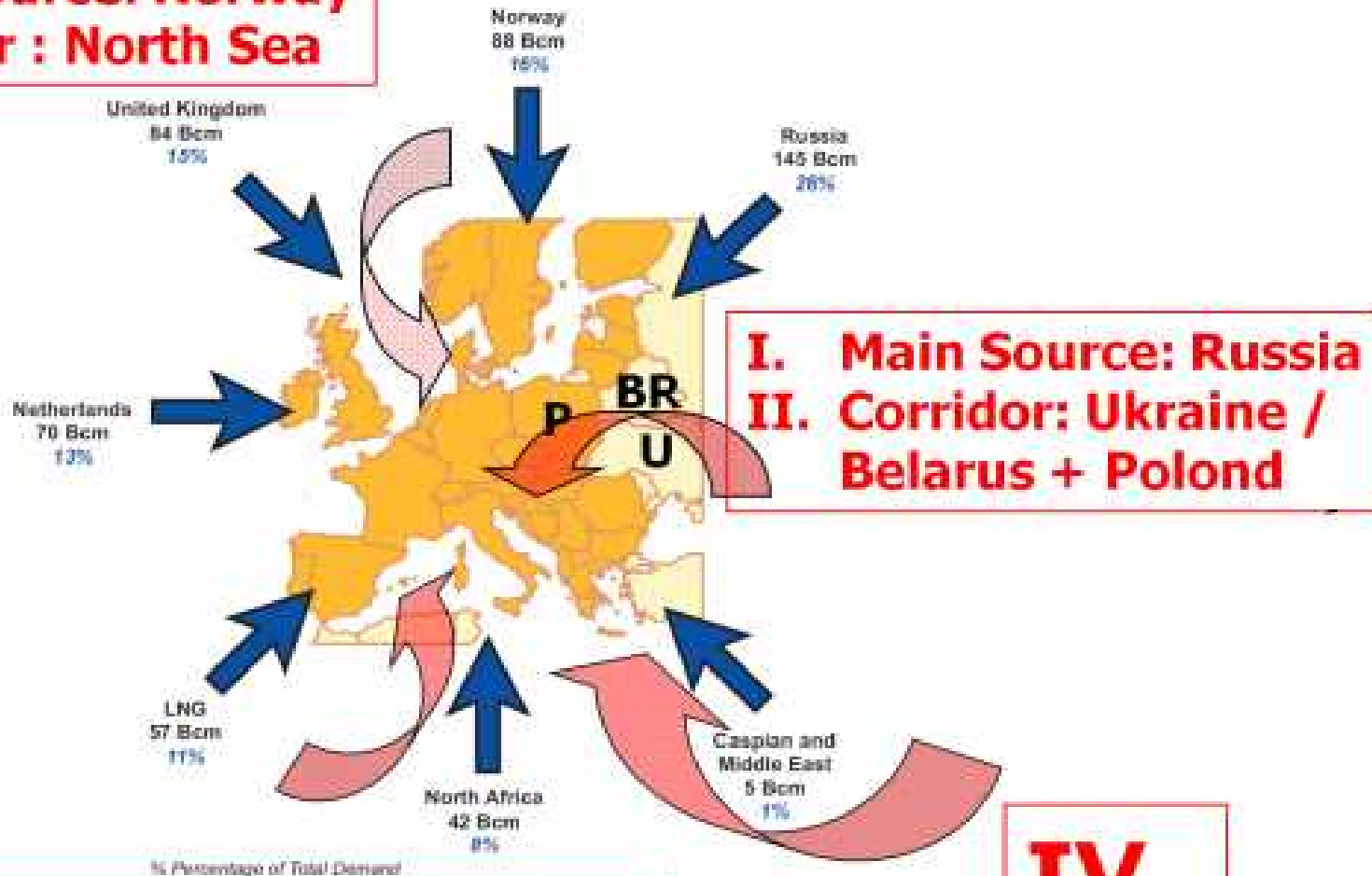


Source: OMV

Europe's Gas Corridors



II. Main Source: Norway
II. Corridor : North Sea

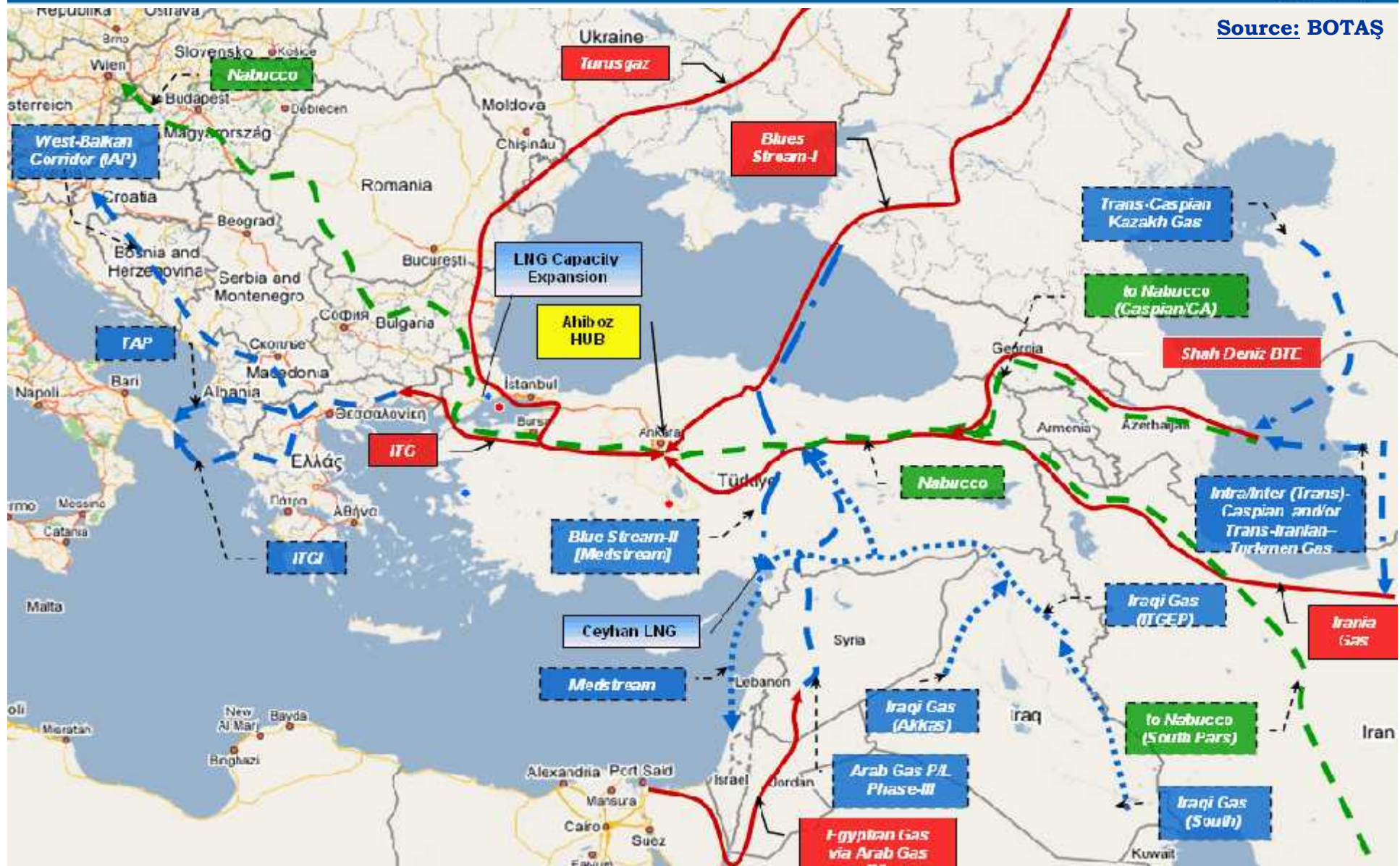


III. Main Source: Algeria
III. Main Corridor: North Africa

Gas Pipelines via Turkey



Source: BOTAS



Turkey's Gas Imports (2007)



Source: BOTAS

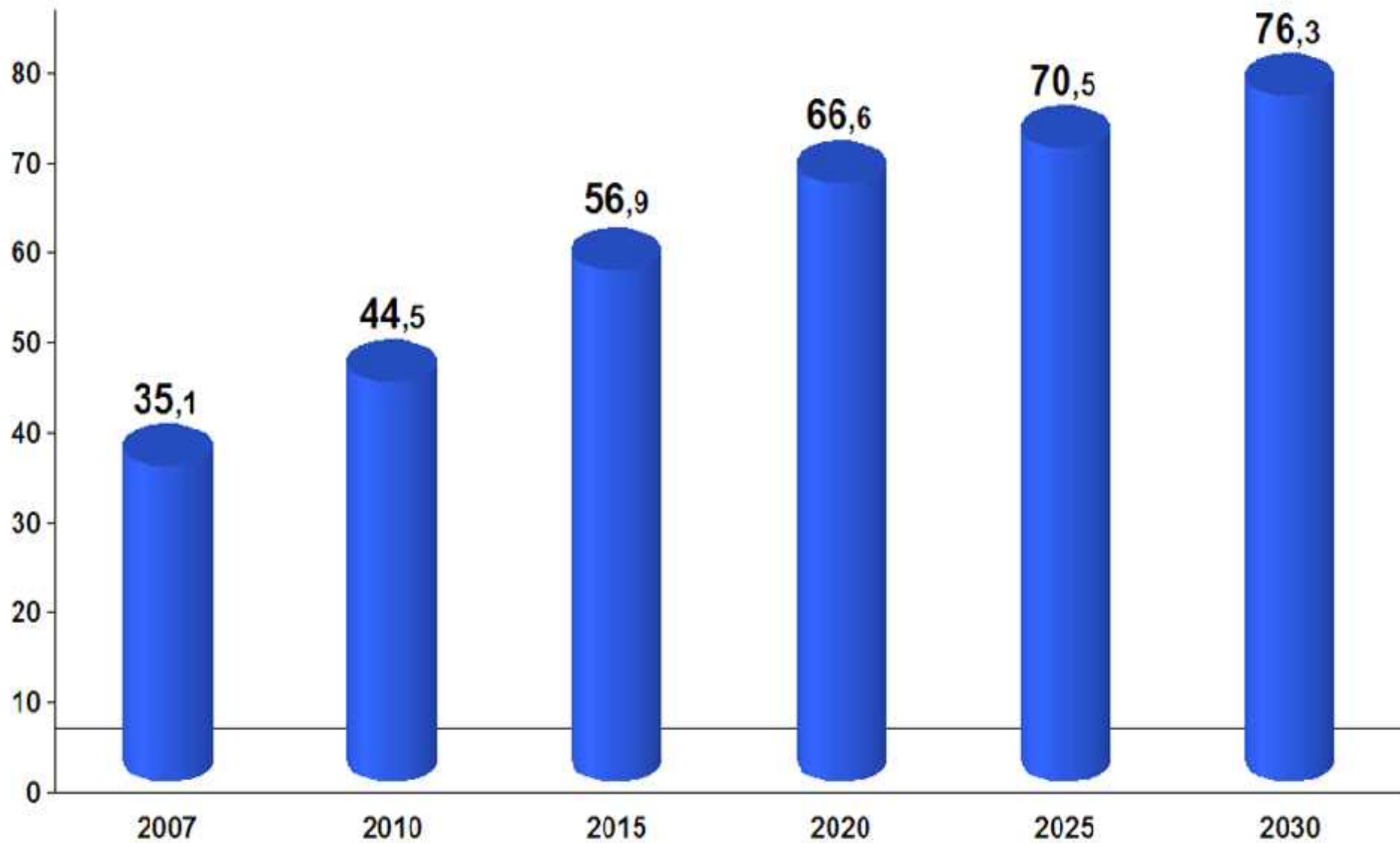
	<u>%</u>	<u>bcm</u>
• Russia	: 63.5	23.1
• Iran	: 16.9	6.1
• Algeria	: 11.8	4.2
• Nigeria	: 3.9	1.4
• Azerbaijan	: 3.4	1.2
• Spot LNG	: 0.5	0.1

		36.4

Turkey's Gas Demand Forecast



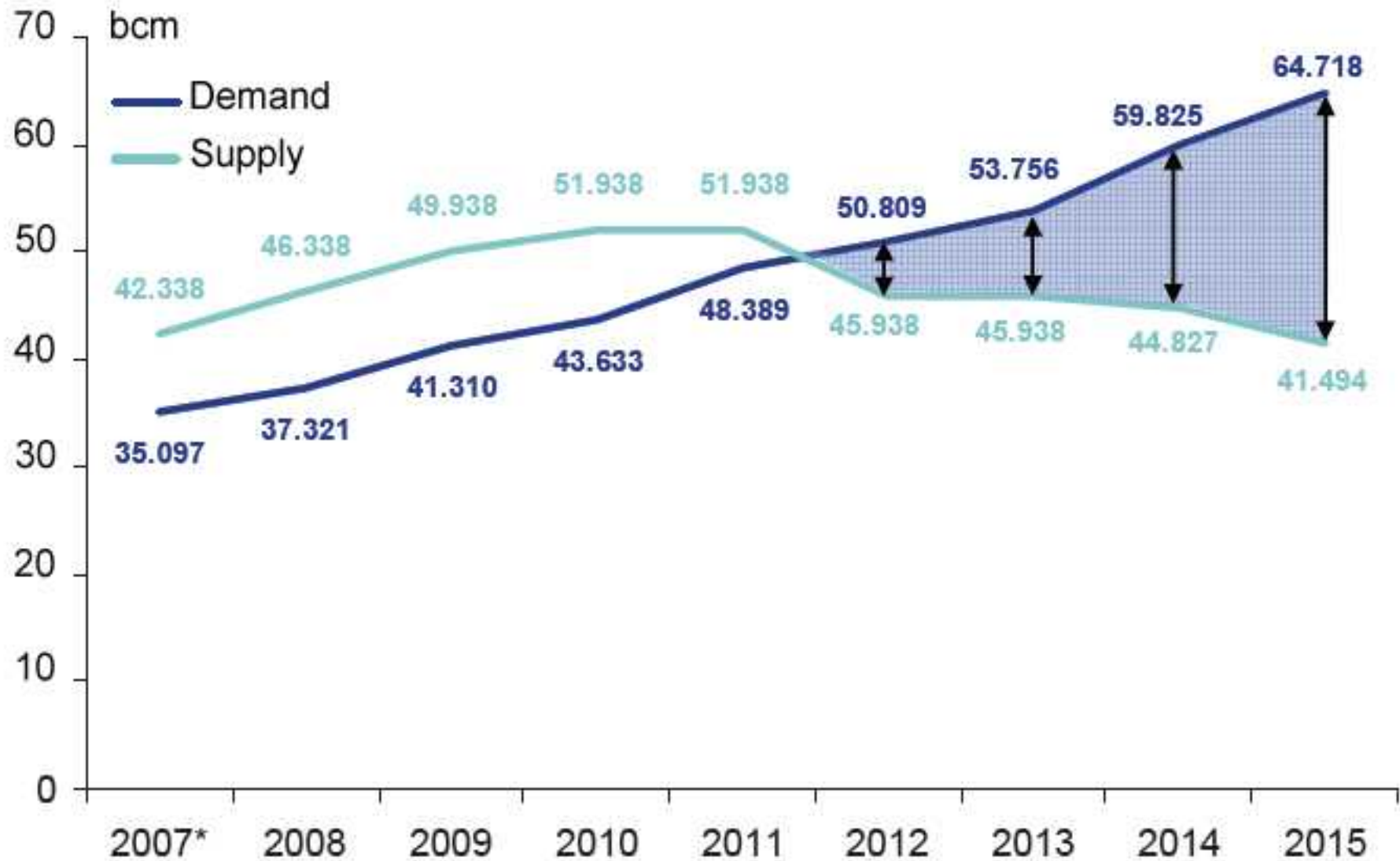
Source: BOTAS



Turkey's Supply – Demand Balance



Source: Deloitte



Thank You

PETFORM

