



MINISTRY OF ENERGY AND NATURAL RESOURCES

“Energy and Energy Security: Turkey’s Role”

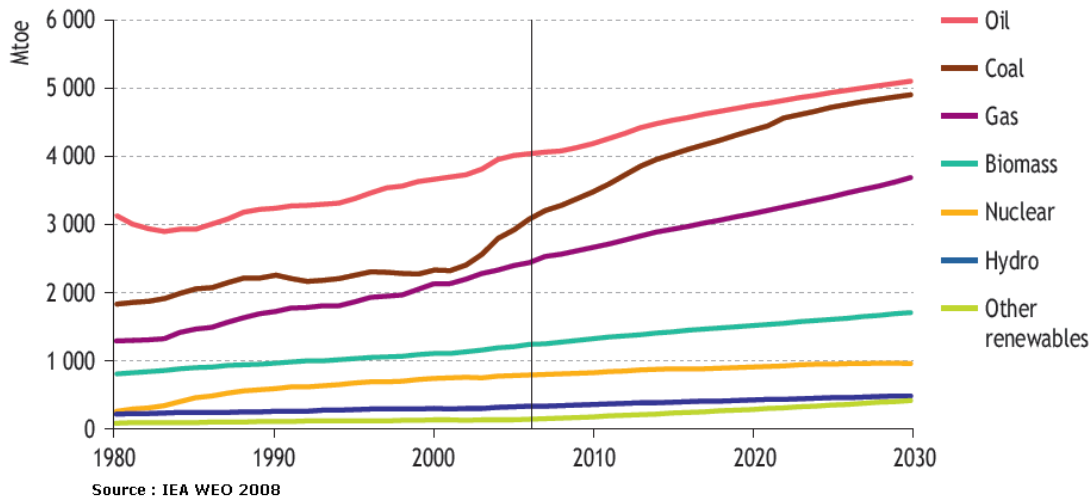
Selahattin ÇİMEN
Undersecretary

The 28th Annual Conference on U.S.-Turkish Relations

June 1, 2009
Washington , DC

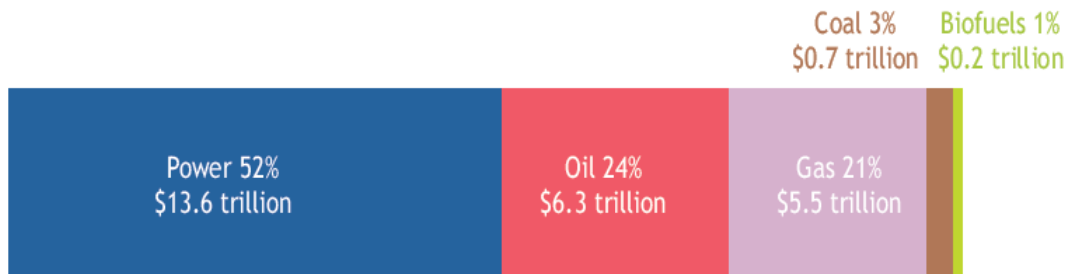
WORLD ENERGY OUTLOOK BY 2030

World primary energy demand



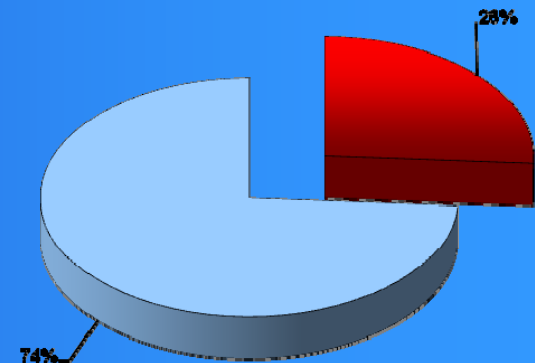
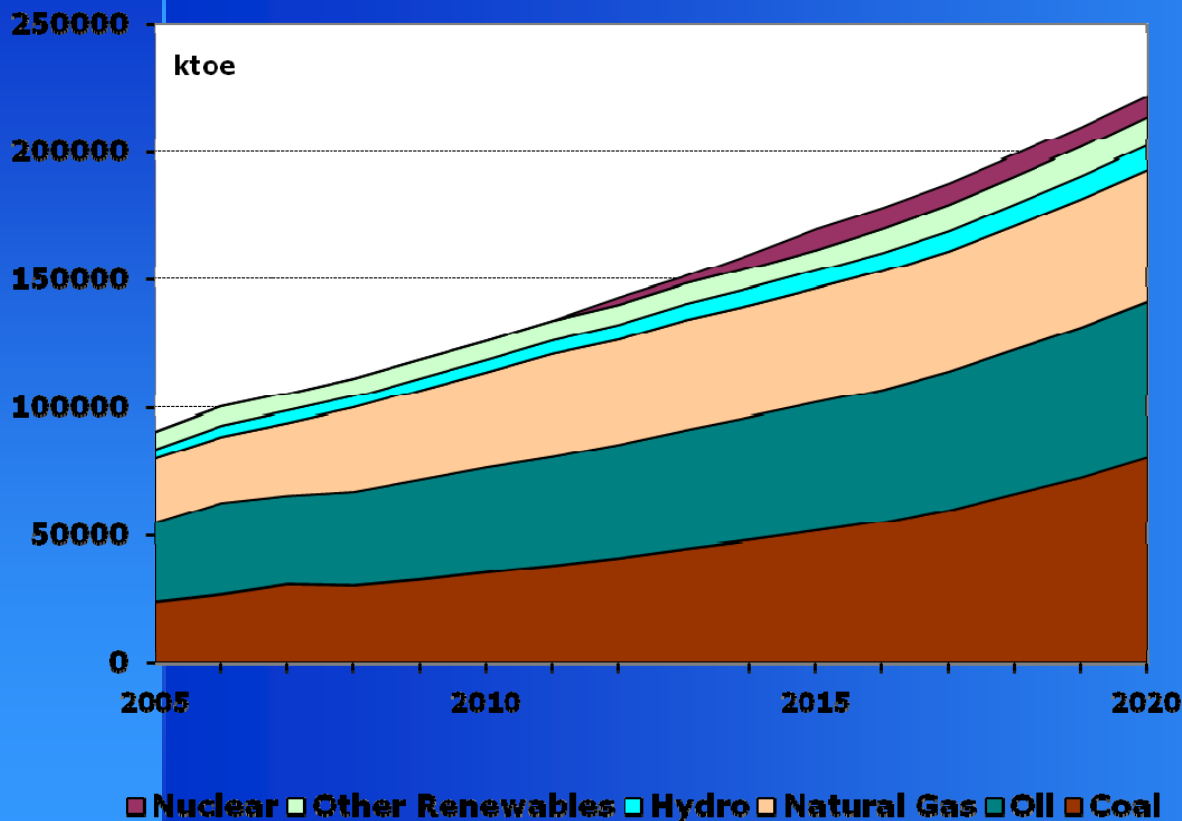
- 45% INCREASE IN GLOBAL ENERGY DEMAND BY 2030
- ABOUT 26 TRILLION US \$ OF INVESTMENT
- SIGNIFICANCE OF DIVERSIFICATION OF THE ENERGY SUPPLIES AND THE TRANSPORT ROUTES

Total investment = \$26.3 trillion (in year-2007 dollars)



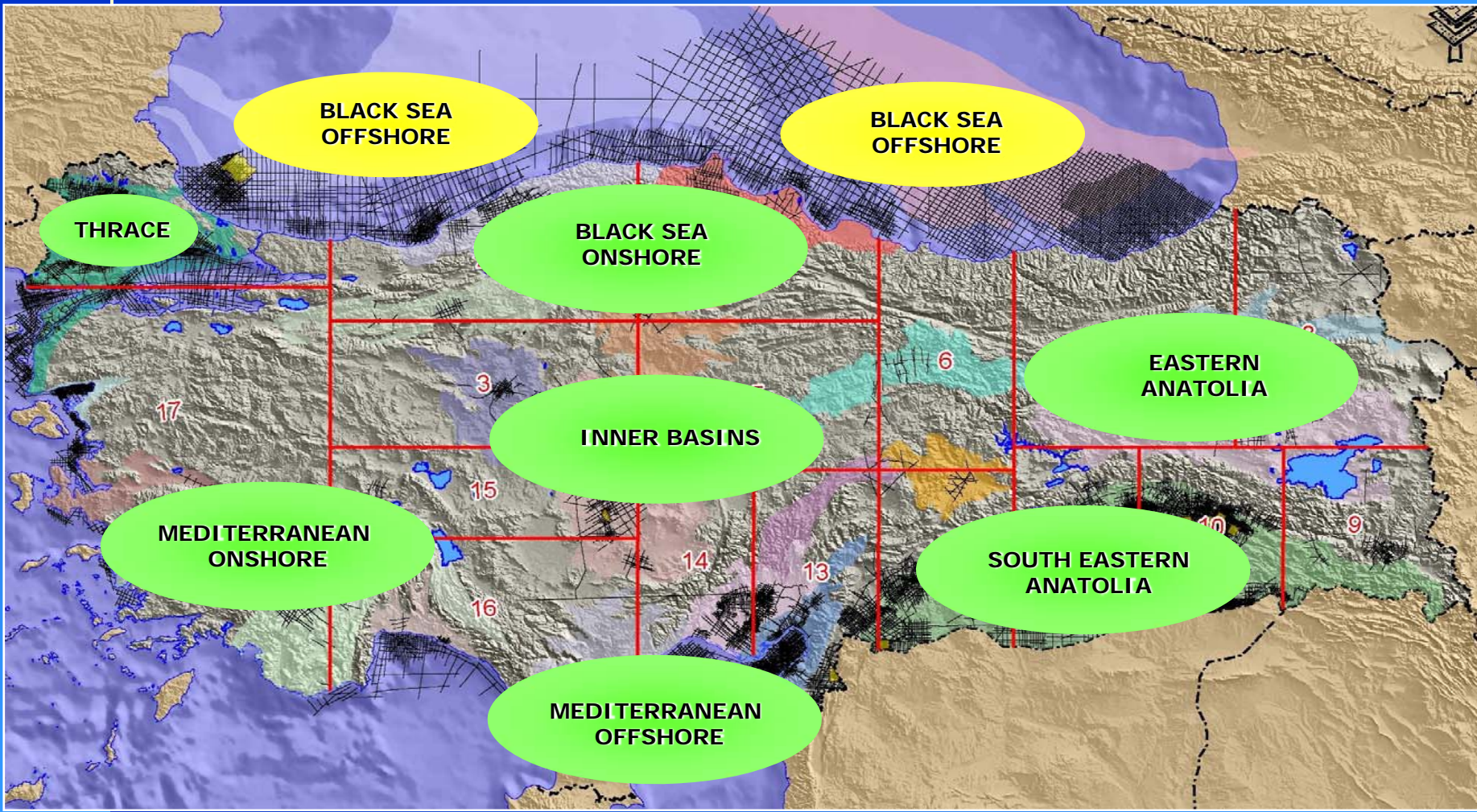
DEMAND FOR PRIMARY ENERGY & IMPORT DEPENDENCY

“Reference Scenario : 110 % increase until 2020”





TURKEY'S OIL AND GAS POTENTIAL

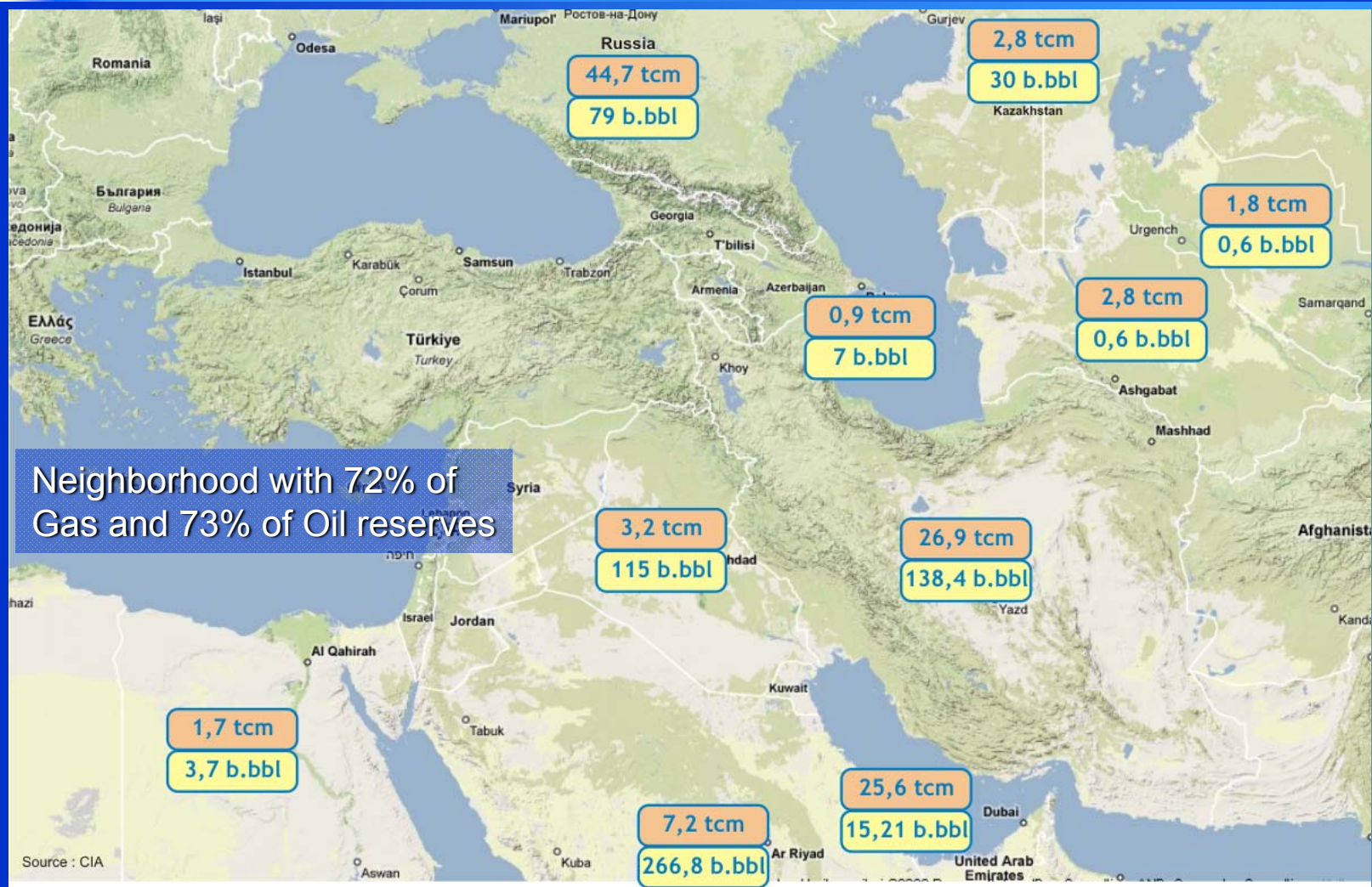




MINISTRY OF ENERGY AND NATURAL RESOURCES

- SUBSTANTIAL PROGRESS IN RESTRUCTURING AND LIBERALIZING THE ENERGY MARKET
- COMPETITIVENESS OF THE ENERGY MARKET, SUPPORTED BY A STABLE LEGAL AND REGULATORY FRAMEWORK, IS PERCEIVED AS ONE OF THE KEY INSTRUMENTS TO ADDRESS THE CHALLENGES.
- ELECTRICITY, NATURAL GAS, PETROLEUM AND LPG MARKET LAWS.
- RENEWABLE ENERGY AND ENERGY EFFICIENCY LAWS
- KYOTO PROTOCOL WAS RATIFIED BY THE TURKISH PARLIAMENT FEBRUARY 5th, 2009

PROVEN OIL & GAS RESERVES AROUND TURKEY





BAKU – TBILISI – CEYHAN CRUDE OIL PIPELINE



**BAKU - TBILISI - CEYHAN
CRUDE OIL PIPELINE**

TECHNICAL FEATURES

Total Length	1760 Km
Pipeline Diameter	46-42-34 Inch
Cur. Capacity	50 mtoa(1mdbl/day)

- IN OPERATION SINCE MAY 2006
- 1st TANKER LOADED ON JUNE 4TH, 2006
- PROVIDES APP. 1,5% OF WORLD OIL SUPPLY
- THE CAPACITY EXPANSION TO 1,2 mdbl/day, SOON TO 1,6 mdbl/day
- KAZAKH OIL FLOWS THROUGH THE BTC PIPELINE SINCE LATE 2008



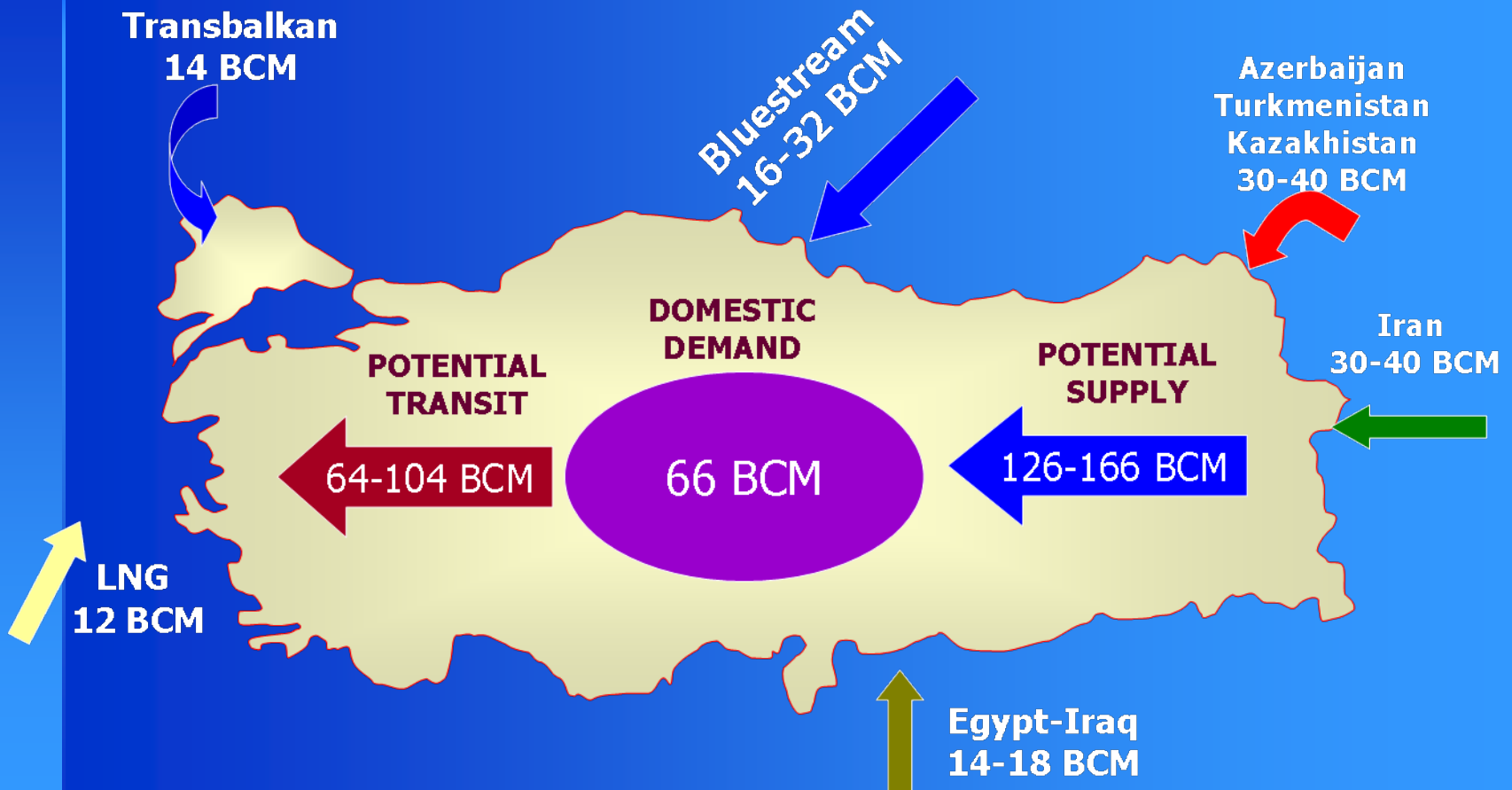
BAKU – TBILISI – ERZURUM GAS PIPELINE



- SALE AND PURCHASE AGREEMENT FOR 6,6 bcm OF GAS WAS SIGNED ON 12 MARCH 2001
- IN OPERATION SINCE JULY 2007
- IN 2008, 4.5 bcm IMPORTED
- IDLE CAPACITY IS CONSIDERED TO BE USED FOR SHAH DENIZ PHASE-2 PRODUCTION

TECHNICAL FEATURES	
Total Length	915 Km
Pipeline Diameter	42 Inch
Max. Capacity	20 bcma

GAS SUPPLY & TRANSIT POTENTIAL (2020)



TURKEY – GREECE – ITALY GAS PIPELINE PROJECT



- ON NOVEMBER 18, 2007 GAS SUPPLY STARTED ON ITG
- TRILATERAL IGA ON ITGI ON JULY 26th, 2007
- IGI IS TO OPERATE BY 2013

TECHNICAL FEATURES	
ITG Length	296 Km
Total Length	808 Km
Pipeline Dia.	36 Inch
Contracted Cap.	12 bcma

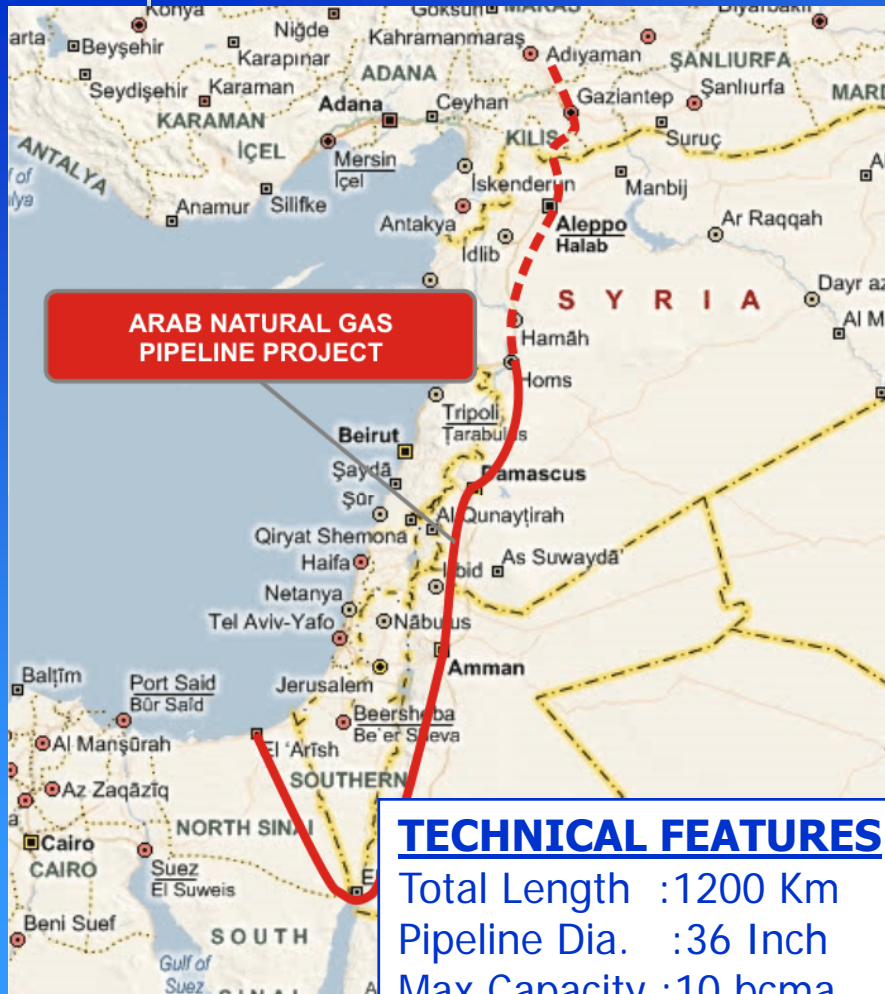
NABUCCO GAS PIPELINE PROJECT



- GERMAN RWE HAS BEEN THE 6TH PROJECT PARTNER IN 2008
- FIRST ROUND OF OFFICIAL NEGOTIATIONS ON IGA WAS HELD IN BRUSSELS, JANUARY THIS YEAR AND CONTINUED IN VIENNA
- PSA'S TO FOLLOW
- START OF OPERATIONS BY 2014

<u>TECHNICAL FEATURES</u>	
Total Length	3300 Km
Pipeline Dia.	42-56 Inch
Max.Capacity	31 bcma

ARAB GAS PIPELINE PROJECT



- THE EGYPTIAN GAS IS CURRENTLY BEING SUPPLIED TO SYRIA
- THE NETWORK OF TURKEY AND SYRIA WILL BE LINKED WITH THE CONSTRUCTION OF REMAINING 230 KM.
- FURTHER GAS SUPPLIES MUST BE SECURED BEFORE PROCEEDING WITH SYRIA – TURKEY INTERCONNECTOR

TECHNICAL FEATURES

Total Length :1200 Km

Pipeline Dia. :36 Inch

Max.Capacity :10 bcma



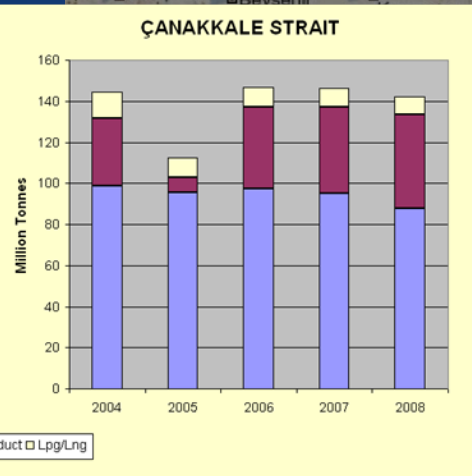
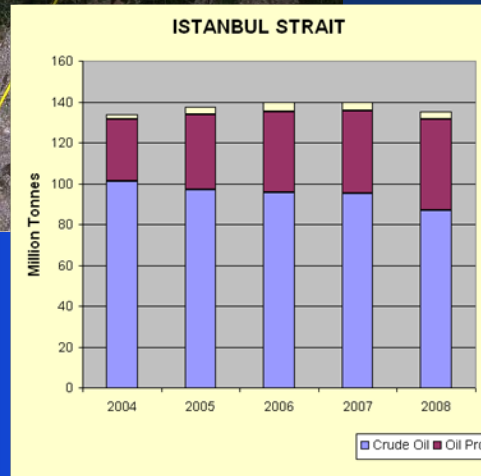
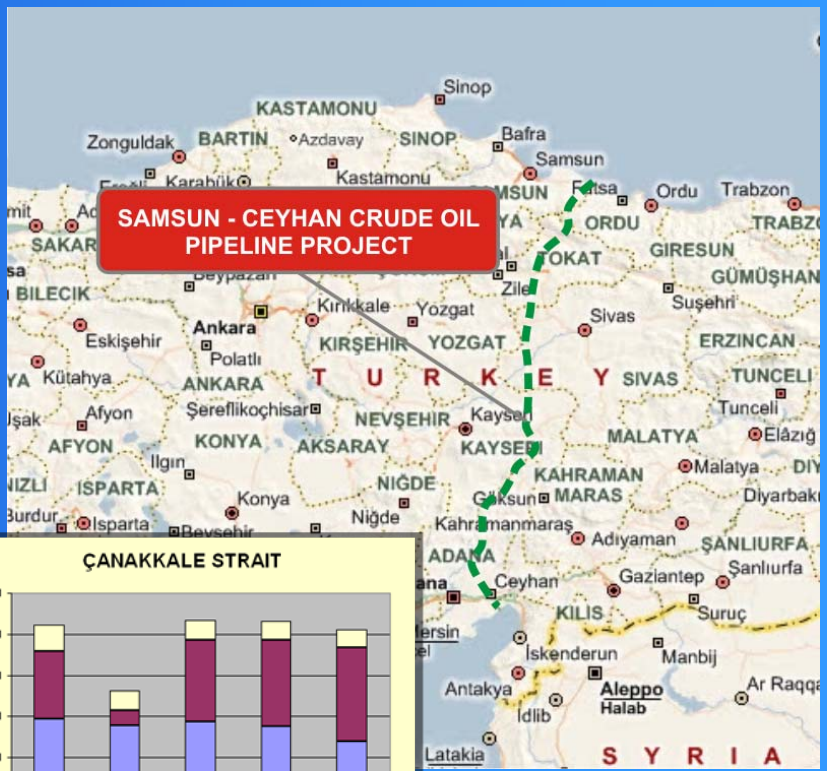
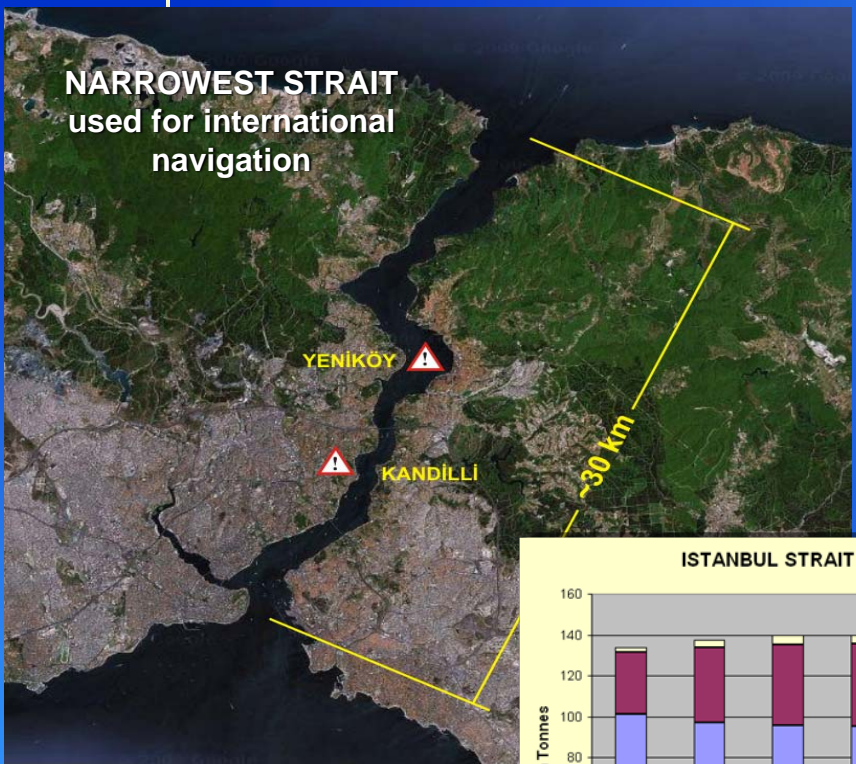
IRAQ – TURKEY GAS PIPELINE PROJECT



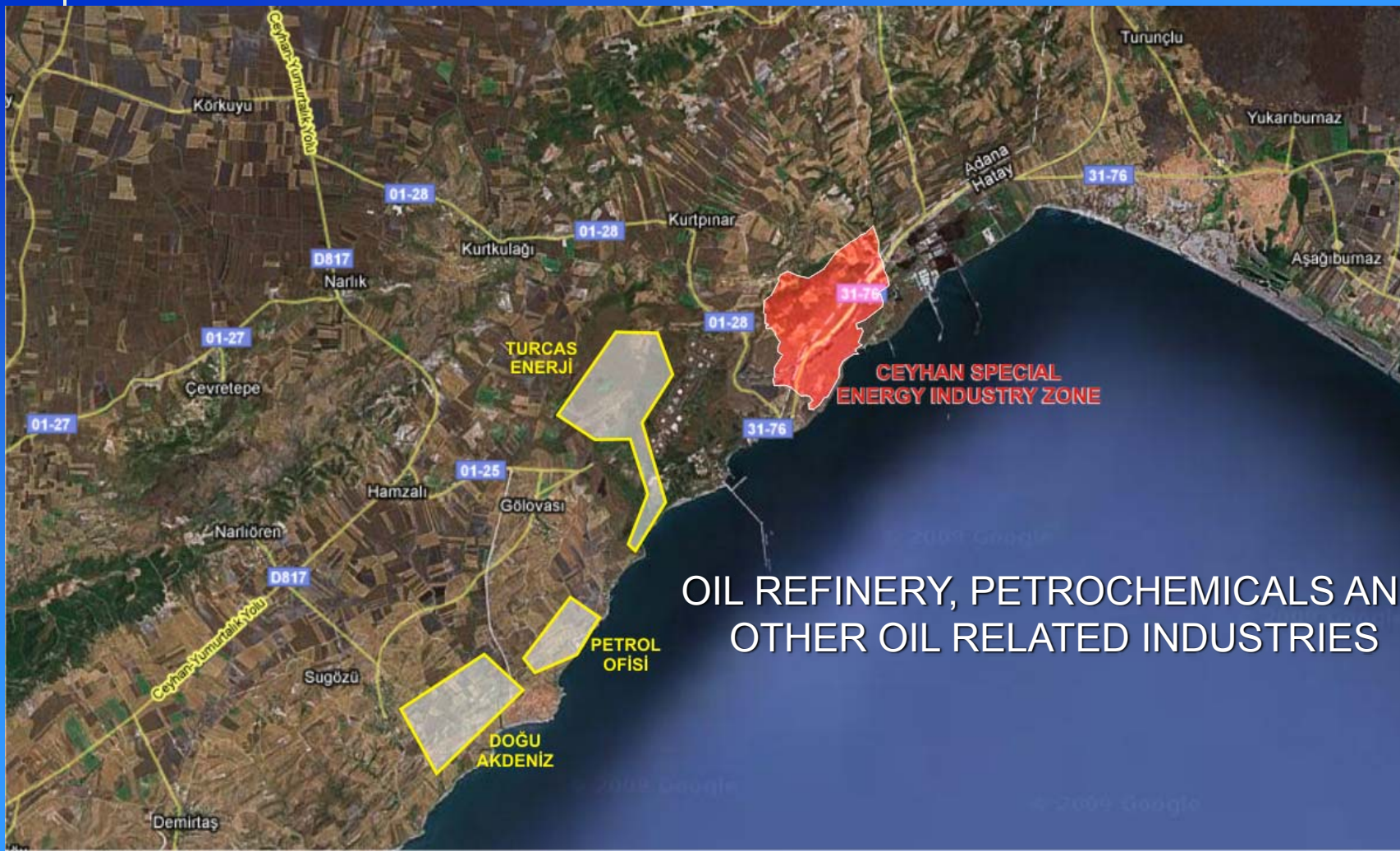
- HAVE GREAT POTENTIAL IN ENHANCING BOTH TURKEY'S AND EU'S ENERGY SECURITY
- MoU SIGNED AMONG TPAO, BOTAS AND SHELL ENERGY EUROPE BVA ON 20 NOVEMBER 2008
- MoU REFERS TO COOPERATION IN EXPLORATION, PRODUCTION, TRANSPORTATION AND MARKETING FIELDS



TURKISH STRAITS & SAMSUN – CEYHAN PROJECT

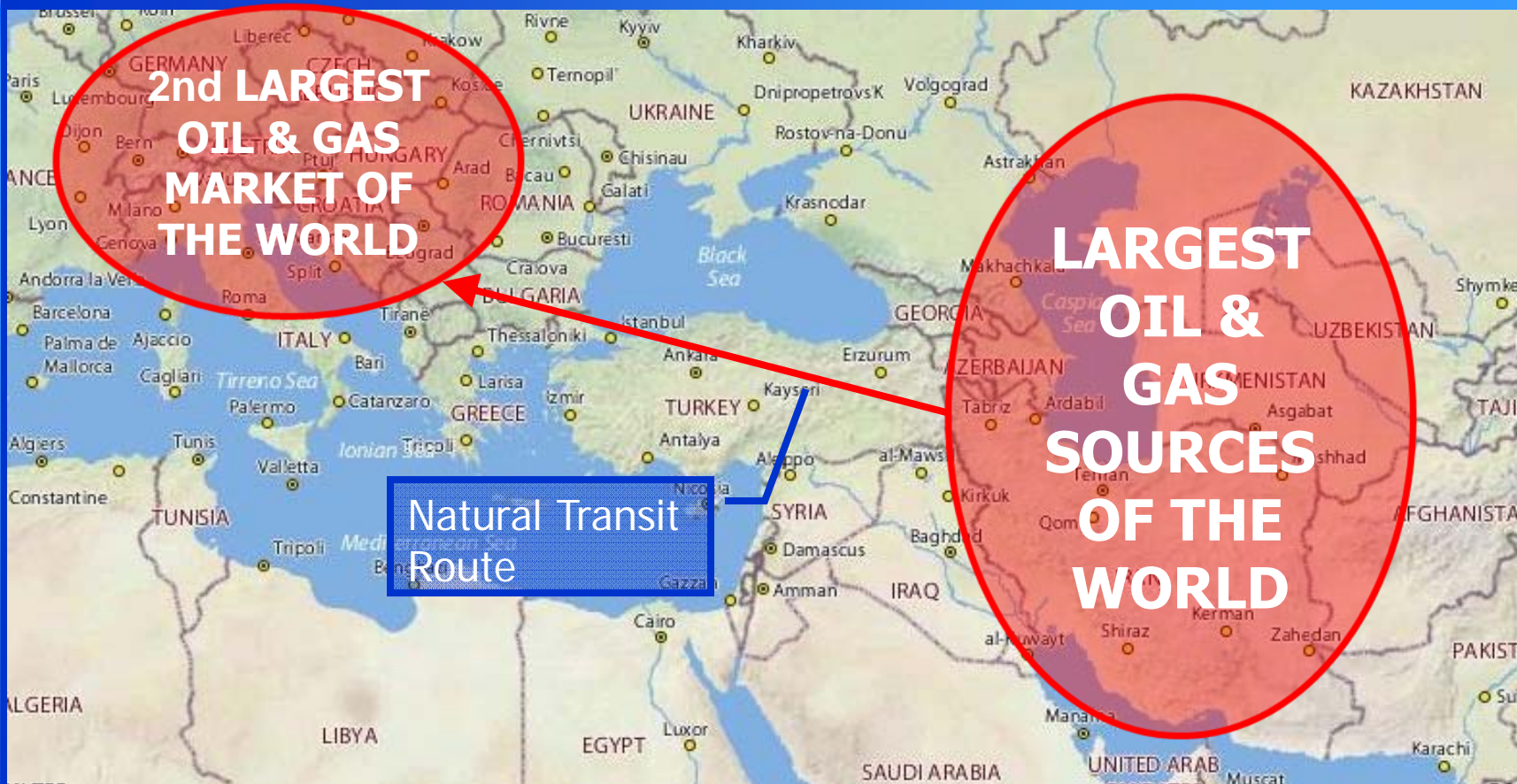


CEYHAN PORT





GAS TO EUROPE AND TURKEY'S TRANSIT ROLE





MINISTRY OF ENERGY AND NATURAL RESOURCES

Thank You...

GAS AND PETROLEUM PIPELINE PROJECTS OF TURKEY

CRUDE OIL PIPELINES



- A & B = KIRKUK-CEYHAN CRUDE OIL PIPELINES (71 MILLION TONS/YEAR)**
- C = BAKU-TBILISI-CEYHAN CRUDE OIL PIPELINE (50 MILLION TONS/YEAR) (planning 80 MTA)**
- D = SAMSUN-CEYHAN CRUDE OIL PIPELINE (70 MILLION TONS/YEAR)**

NATURAL GAS PIPELINE PROJECTS OF TURKEY



