

Turkey's Opportunities

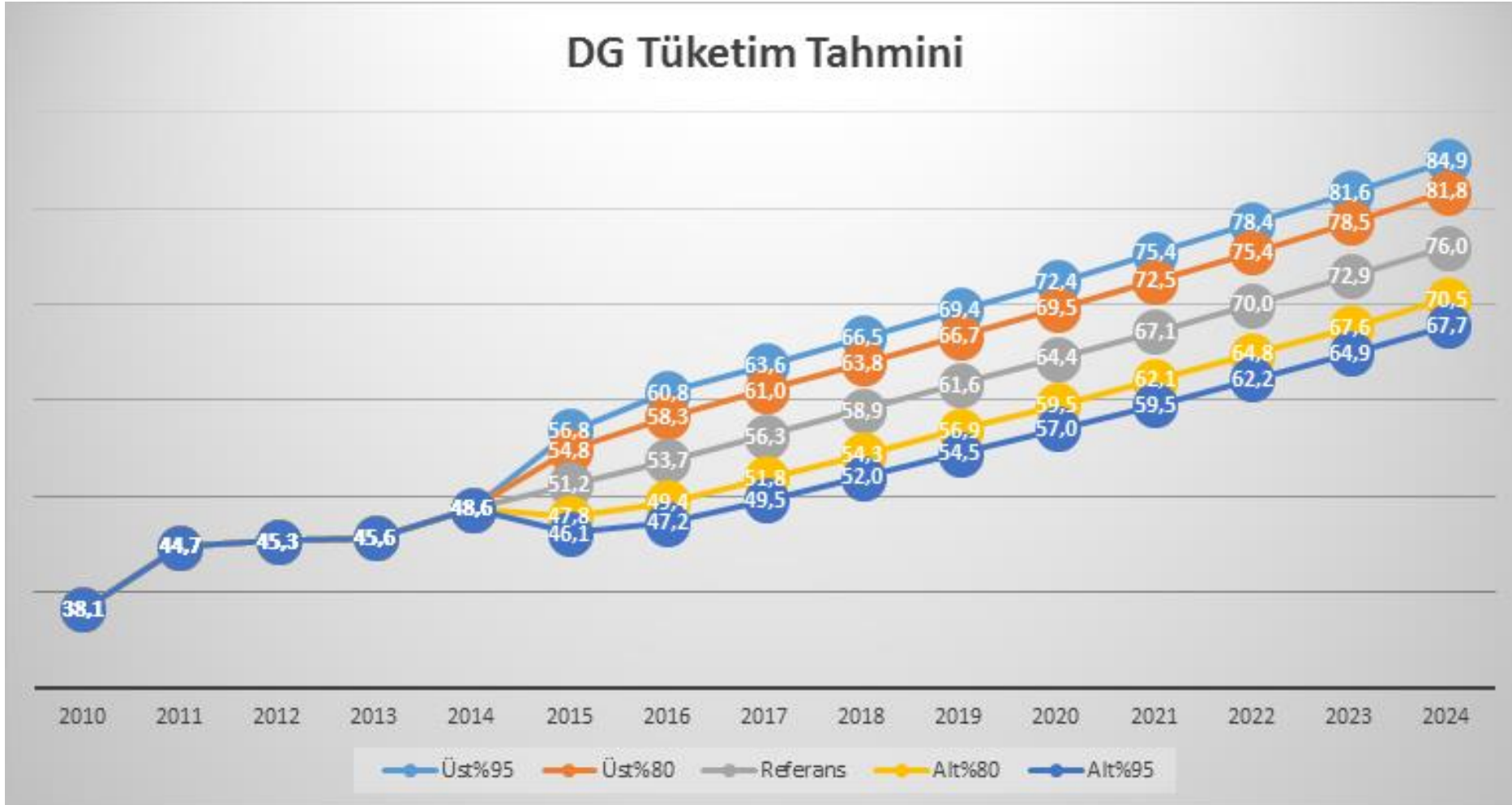
Why TANAP & TurkStream & TAP can coexist? (+Iraq+Med)

Bariş Sanlı, IAEE

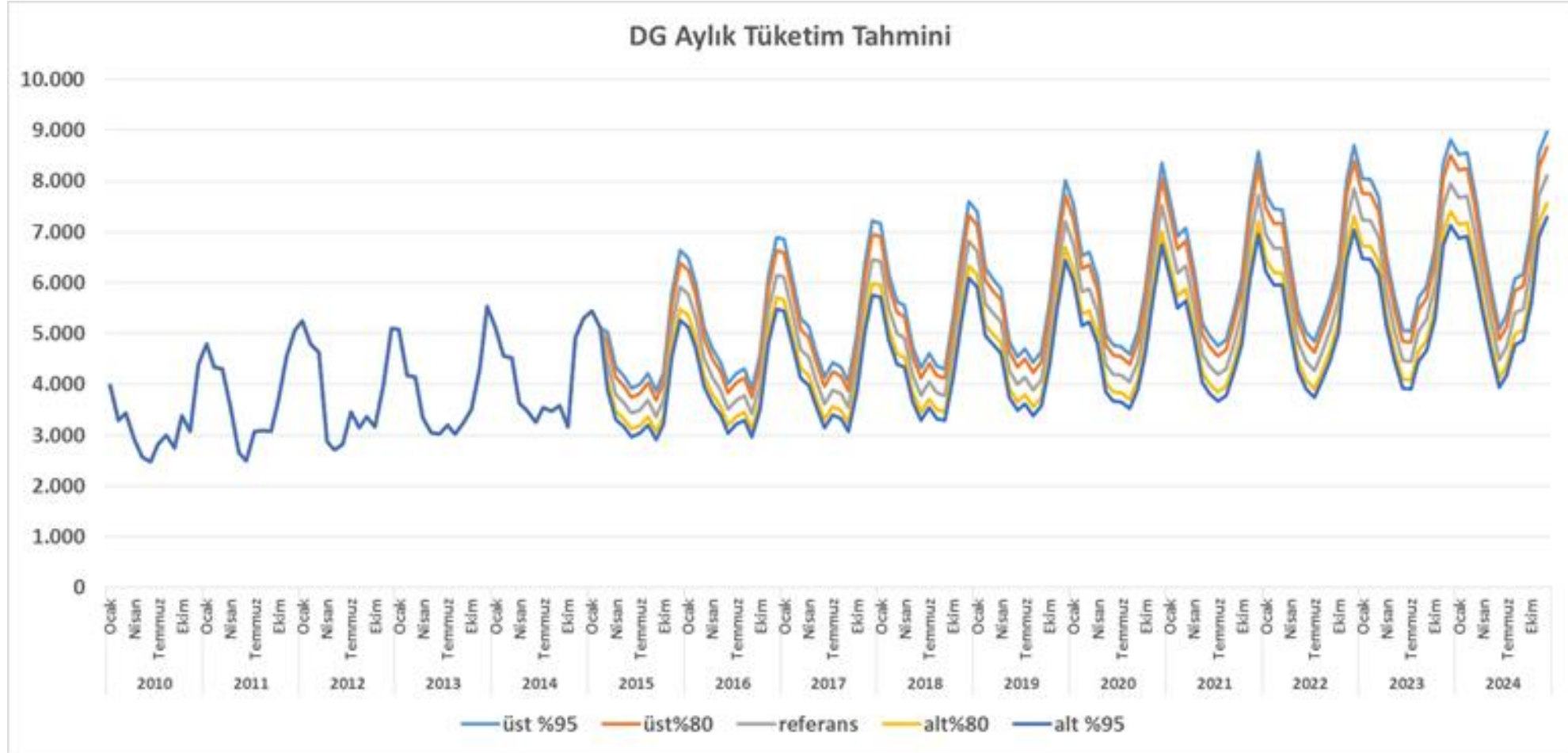
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Turkey Natural Gas Forecasts



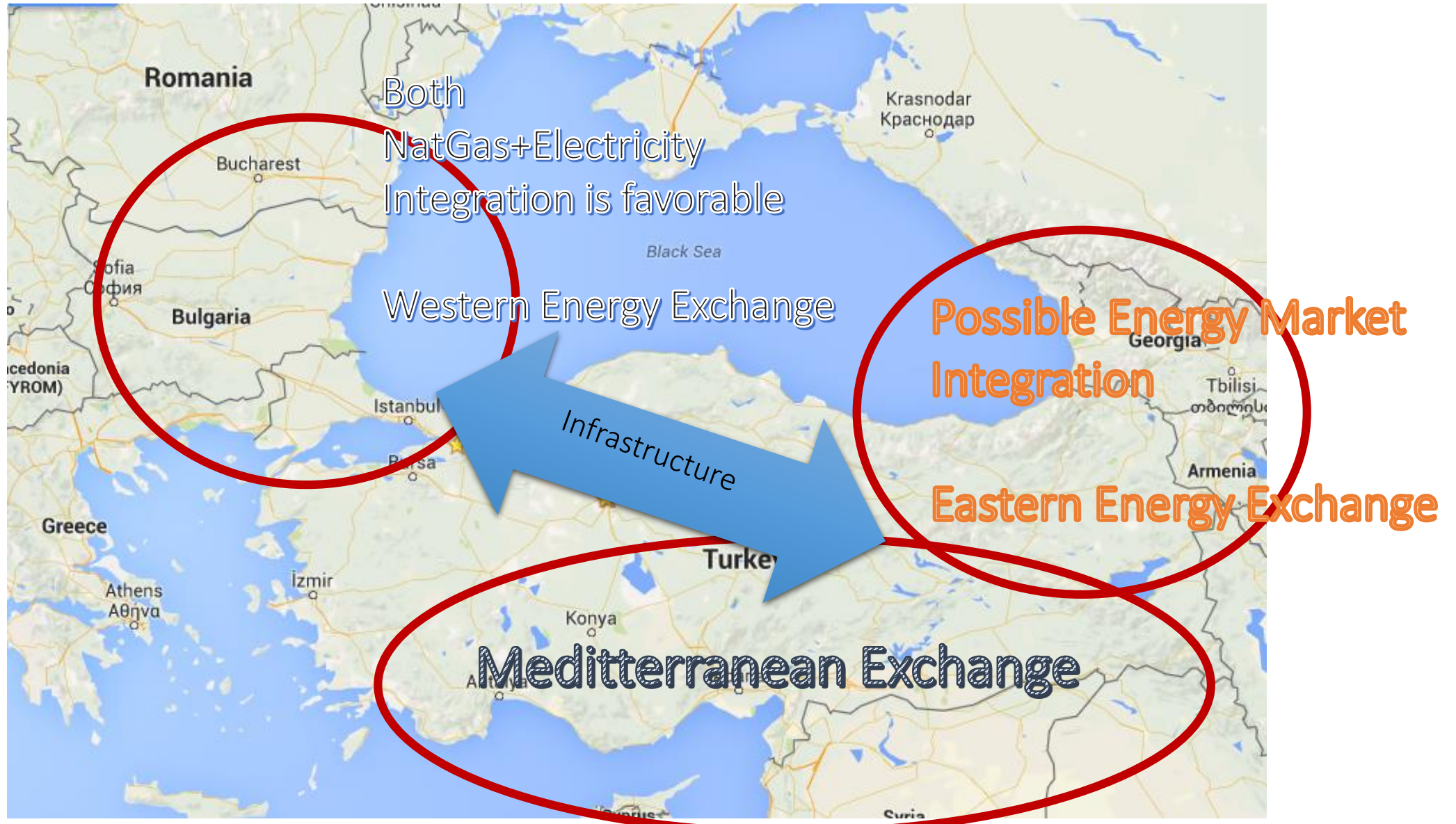
Turkey Monthly Nat Gas Forecasts



Turkey's Energy Geography



Sky is the limit!



TETAS Portfolio

ENERJİ ALIM KAYNAKLARI ENERGY ACQUISITION	ALINAN ENERJİ ENERGY PURCHASED	
	kWh	(%)
EÜAŞ/EUAS	20.000.187.800	23,94
OVA ELEKTRİK AŞ.	1.928.387.460	2,31
DOĞA ENJ.LTD.ŞTİ.	1.320.203.800	1,58
TRAKYA ELK.AŞ.	3.434.133.780	4,11
UNİMAR ENJ.YAT.AŞ.	3.505.409.424	4,20
YİD TERMİK TOPLAM	10.188.134.464	12,19
YİD HİDROLİK TOPLAM	3.570.492.355	4,27
YİD RÜZGAR SANT.TOPLAMI	47.748.927	0,06
YİD SANTRALLARI GENEL TOPLAMI/BOT TOTAL	13.806.375.746	16,52
ADAPAZARI LTD.ŞTİ.	5.651.131.200	6,76
GEBZE ELK.LTD.ŞTİ.	11.420.786.882	13,67
İZMİR ELK.LTD.ŞTİ.	10.363.278.500	12,40
BAYMİNA ENJ.AŞ.	5.131.360.797	6,14
İSKENDERUN ENJ.AŞ.	9.244.446.060	11,06
Yİ SANTRALLARI GENEL TOPLAMI/BO TOTAL	41.811.003.439	50,04
BİLGİN ELK.AŞ.	0,0	0,00
PARK ENJ.AŞ.	3.687.056.910	4,41
İŞLETME HAKKI DEVİR GEN.TOPLAMI/TOR TOTAL	3.687.056.910	4,41
TEİAŞ (PMUM)/TEİAŞ MFSC	3.935.745.438	4,71
YURT İÇİ TOPLAMI/TOTAL DOMESTIC	83.240.369.333	99,62
İTHAL ENERJİ/IMPORTED ENERGY	316.941.037	0,38
TOPLAM/TOTAL	83.557.310.370	100

2.17 bcm

6.5-7 bcm

İskenderun is
coal

BOTAŞ Map



Electricity Map



Some scenarios

- Currently whole sale electricity prices in Turkey 4.5-5.5 \$cent/kWh
- Natural gas plants can not compete
- With this electricity prices energy intensive industries are not in good shape too
- In the short term high prices are crowding out nat gas investments
- However, Marmara is a bottleneck region, may be decoupled from the rest of Turkey
- BOT aggrements ending by 2019, İstanbul is undergoing massive expansion (3rd airport, etc)