## Turkey's Opportunities

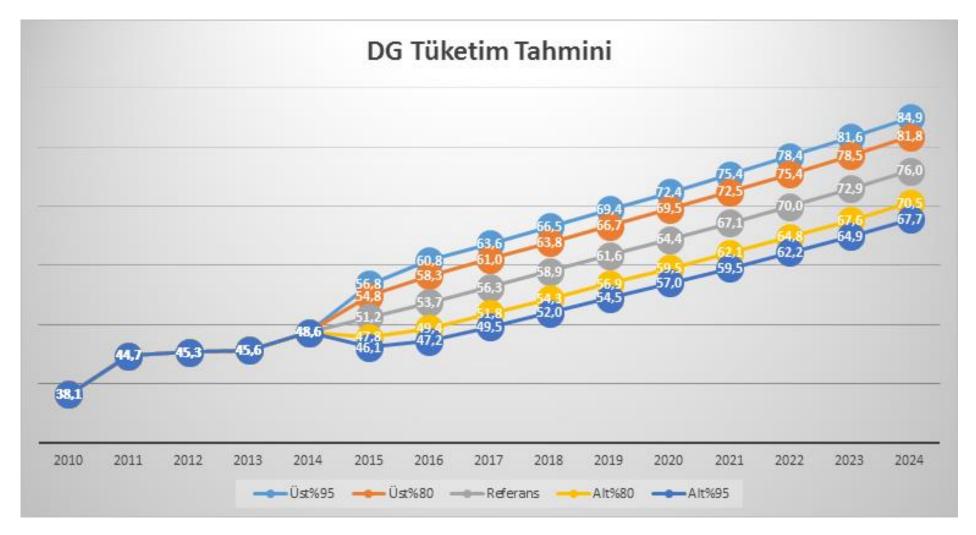
Why TANAP & TurkStream & TAP can coexist? (+Iraq+Med)

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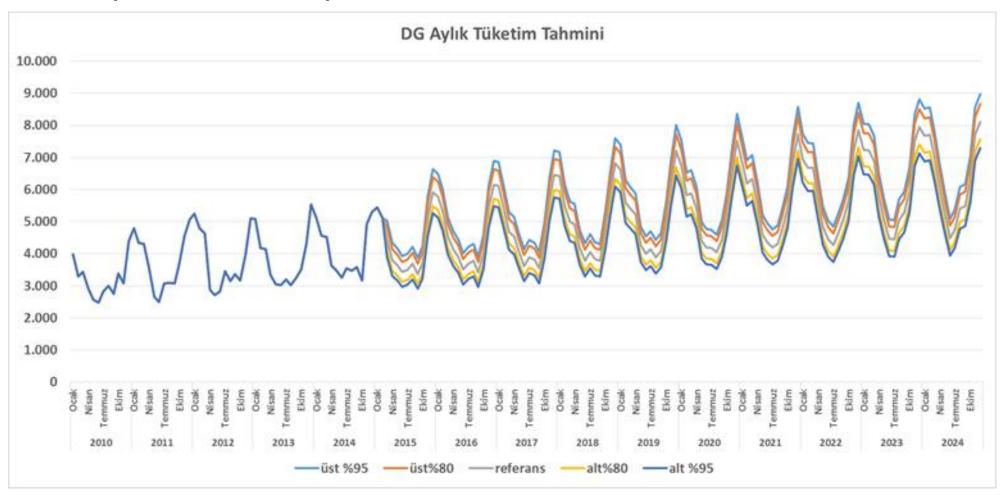
All ideas in this presentation are personal ideas, can not be attributed to any specific instutition or government

#### Turkey Natural Gas Forecasts



Data: Barış Sanlı, <u>www.barissanli.com</u>, Graph: Aygaz – Rıdvan Uçar

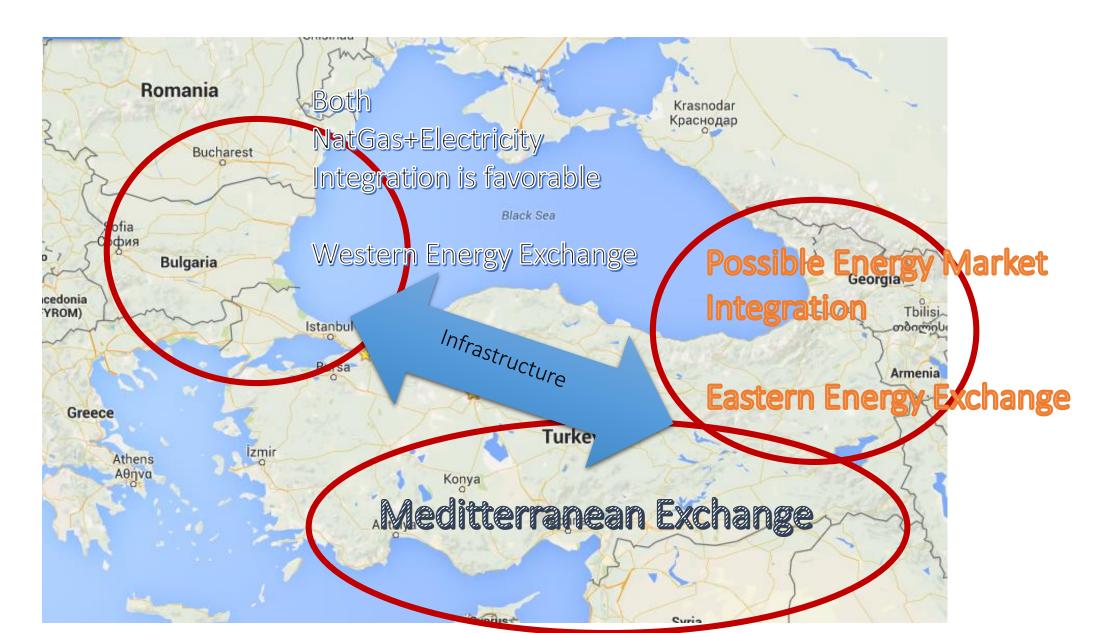
#### Turkey Monthly Nat Gas Forecasts



Data: Barış Sanlı, <u>www.barissanli.com</u>, Graph: Aygaz – Rıdvan Uçar

Turkey's Energy Geography Romania Krasnodar Краснодар Bucharest Possible Black Sea HVDC Sofia София lines 4A line : Antep-Bulgaria Georgia Adana-Ankara cedonia Tbilisi-Adapazari YROM) Istanbul High lands Bursa Fossil generation dominates Armenia Lots of hydro Major Consumption **Less Consumption** High Economic Activity Turkey İzmir Athens Αθήνα Konya Low lands Wind+Solar Consumption centers

# Sky is the limit!



#### TETAS Portfolio

ENERJÍ ALIM KAYNAKLARI ENERGY ACQUISITION	ALINAN ENERJÎ ENERGY PURCHASED		
	kWh	(%)	
EÜAŞ/ <mark>EUAS</mark>	20.000.187.800	23,94	
OVA ELEKTRİK AŞ.	1.928.387.460	2,31	1
DOĞA ENJ.LTD.ŞTİ.	1.320.203.800	1,58	2.17 bcm
TRAKYA ELK.AŞ.	3.434.133.780	4,11	
UNİMAR ENJ.YAT.AŞ.	3.505.409.424	4,20	J
YİD TERMİK TOPLAM	10.188.134.464	12,19	
YİD HİDROLİK TOPLAM	3.570.492.355	4,27	
YÎD RÜZGAR SANT.TOPLAMI	47.748.927	0,06	
YÎD 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	6.5-7 bcm
İZMİR ELK.LTD.ŞTİ.	10.363.278.500	12,40	
BAYMÎNA ENJ.AŞ.	5.131.360797	6,14	
İSKENDERUN ENJ.AŞ.	9.244.446.060	11,06	
Yİ SANTRALLARI GENEL TOPLAMI/ <mark>BO TOTAL</mark>	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 TOTA	L 3.687.056.910	4,41	
TEİAŞ (PMUM)/ <mark>TEIAS MFSC</mark>	3.935.745.438	4,71	
YURT İÇİ TOPLAMI/ <mark>TOTAL DOMESTIC</mark>	83.240.369.333	99,62	
İTHAL ENERJİ/IMPORTED ENERGY	316.941.037	0,38	
TOPLAM/TOTAL	83.557.310.370	100	

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 aggreements ending by 2019, İstanbul is undergoing massive expansion (3rd airport, etc)