

ENERGY and DEVELOPMENT

«The Energy Crisis and the Global and Regional Gas Markets»

Turkey
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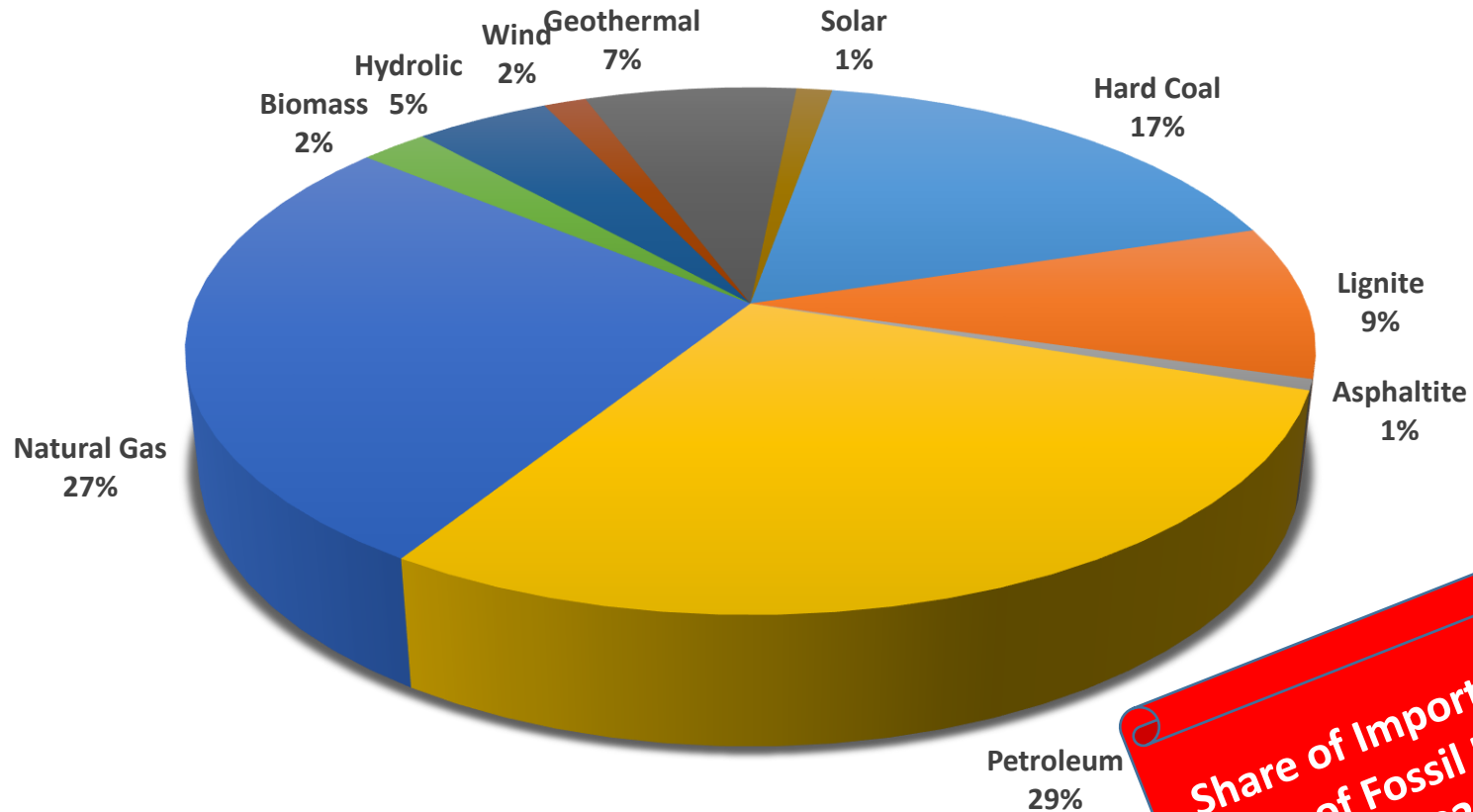
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Turkey Primary Energy Supply 2020 by Resources

Total 147,2 Million TOE, Per Person 1,75 TOE

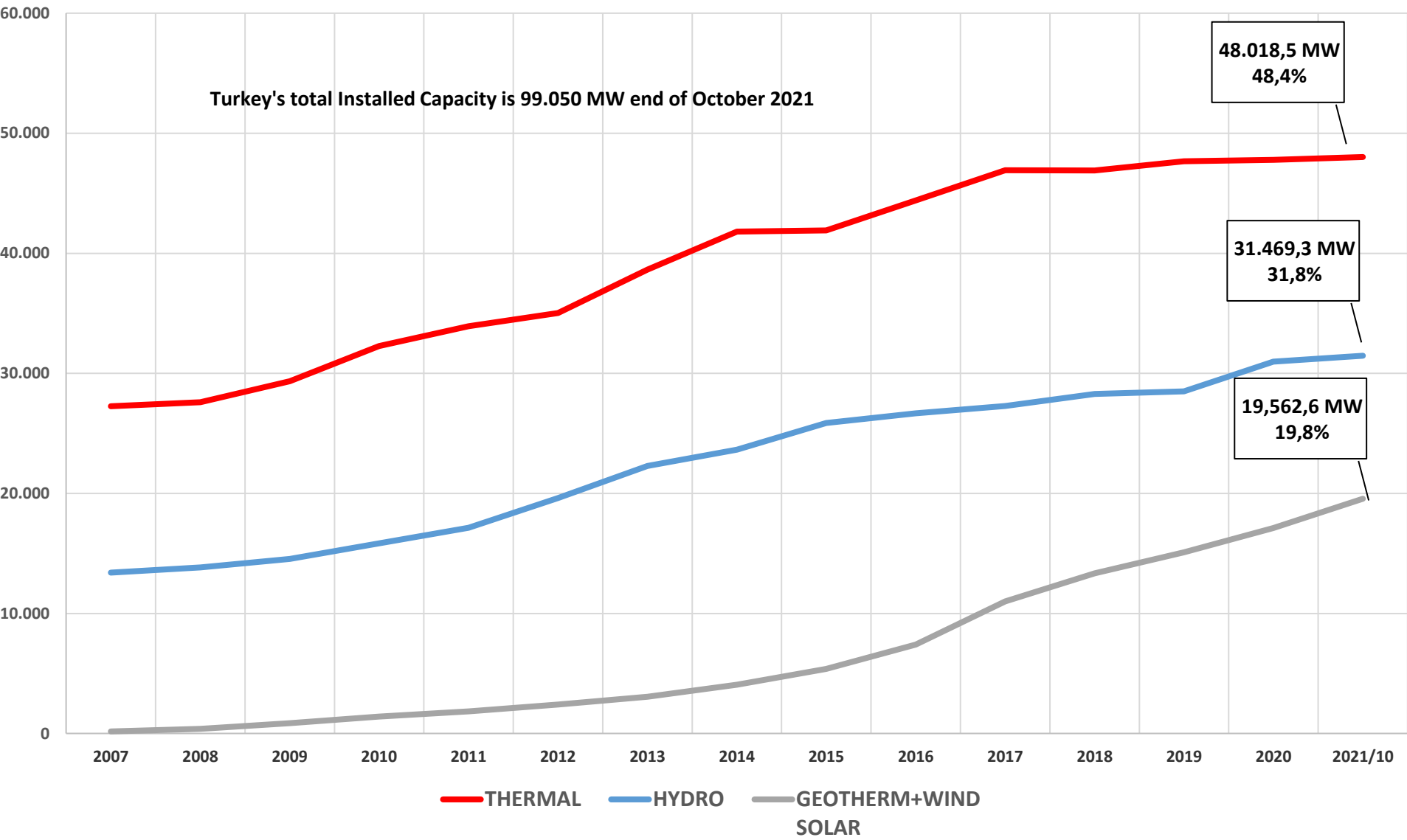
(Energy Supply 144,2 Million TOE, Per person 1,75 TOE in 2019 and 4,5 TOE in IEA Members)



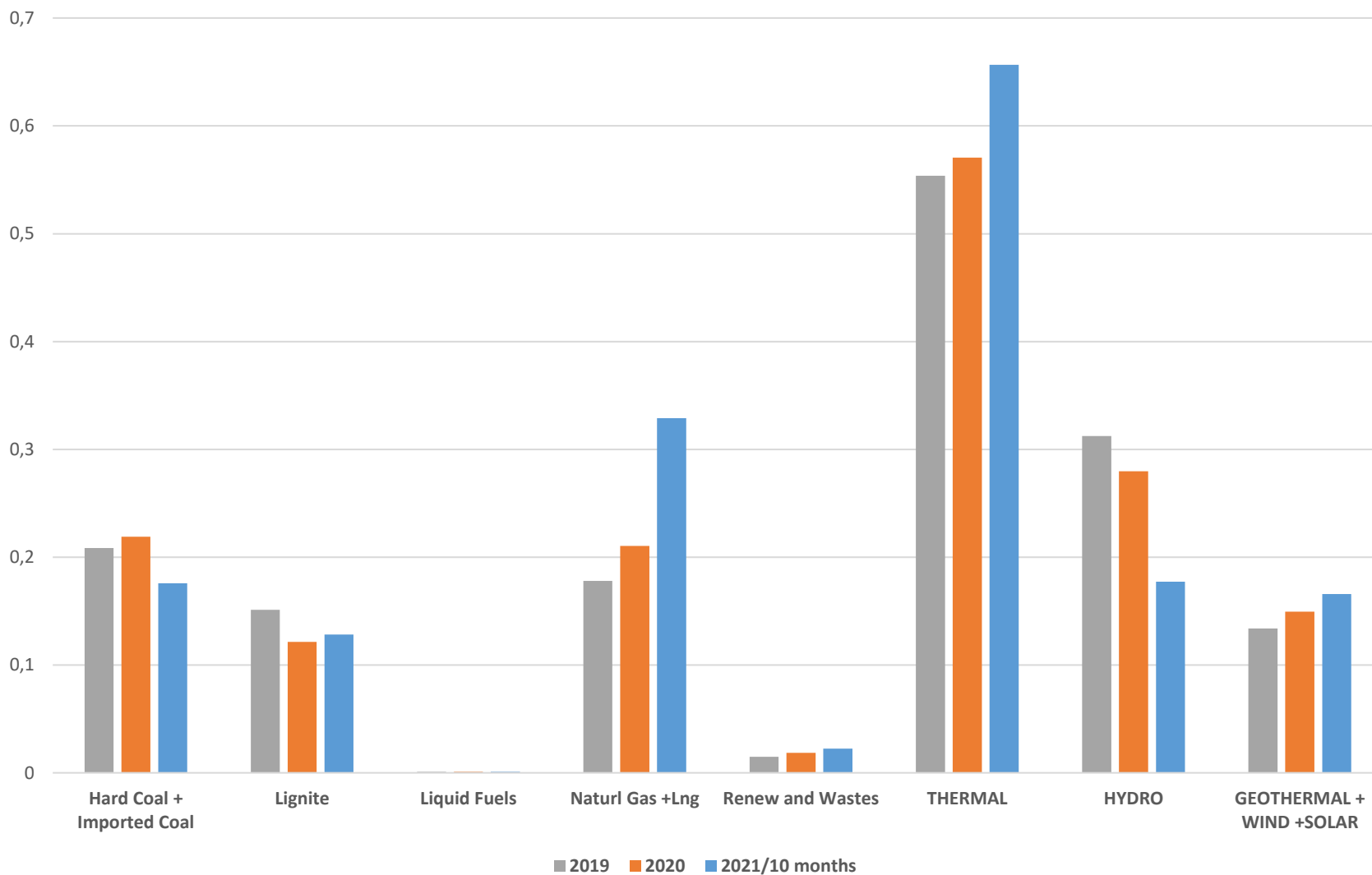
Share of Import: % 70.2
Share of Fossil Resources % 83,3

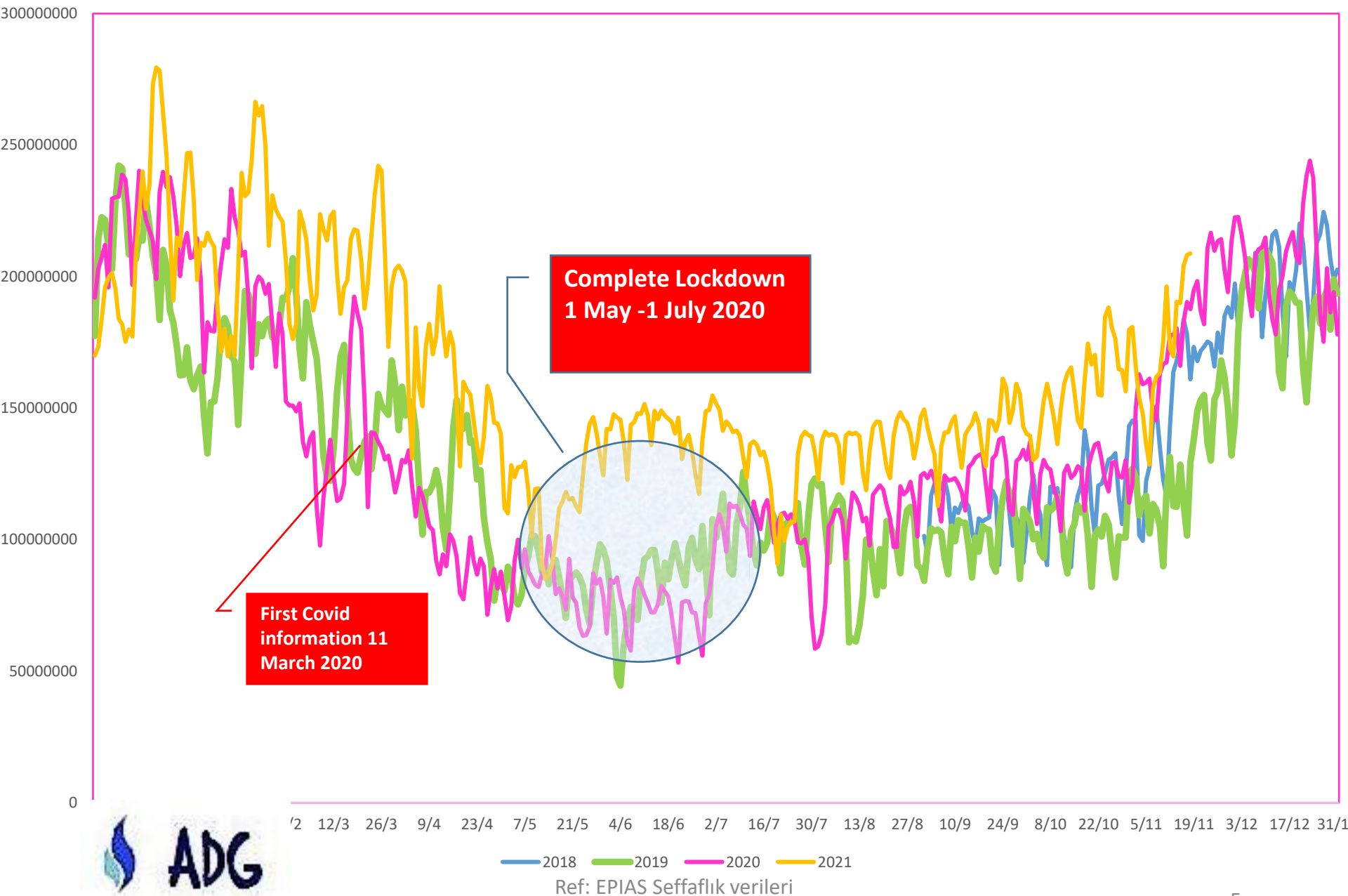


Annual Development of Turkey's Installed Capacity, MW



TURKEY'S GROSS ELECTRICITY GENERATION SHARES BY PRIMARY ENERGY RESOURCES

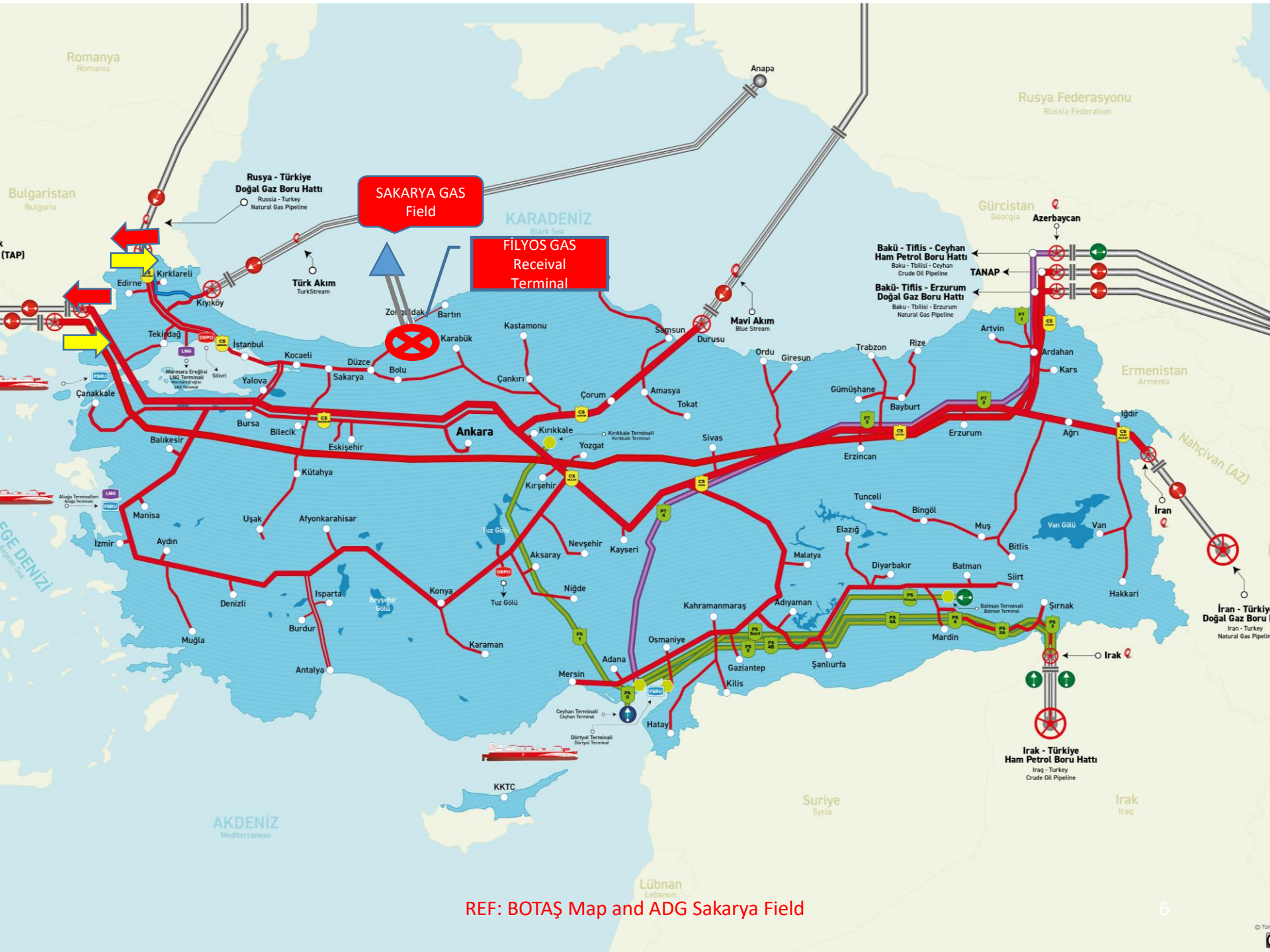




'2 12/3 26/3 9/4 23/4 7/5 21/5 4/6 18/6 2/7 16/7 30/7 13/8 27/8 10/9 24/9 8/10 22/10 5/11 19/11 3/12 17/12 31/1

— 2018 — 2019 — 2020 — 2021

Ref: EPIAS Seffalık verileri

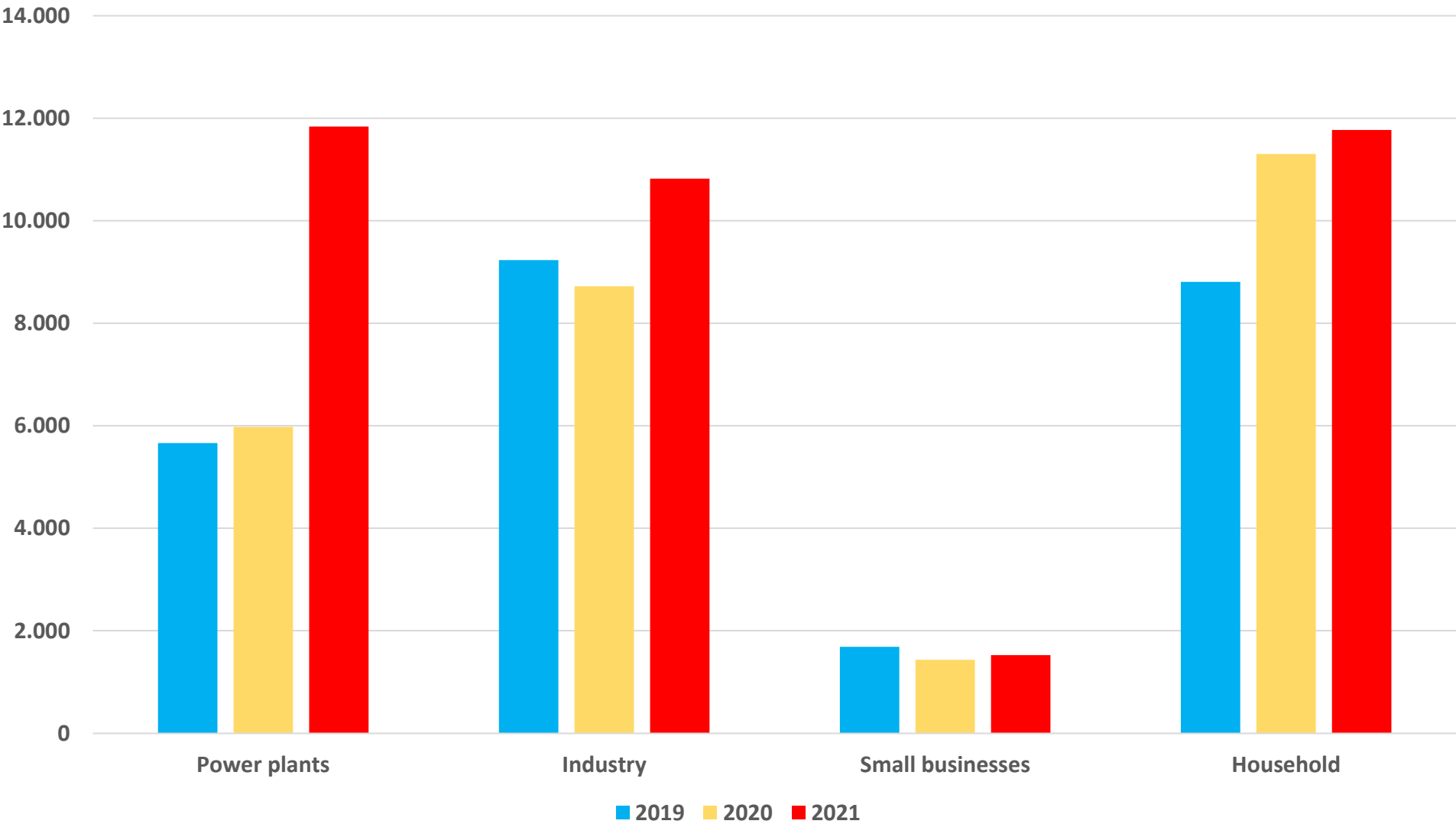


SAKARYA GAS Field

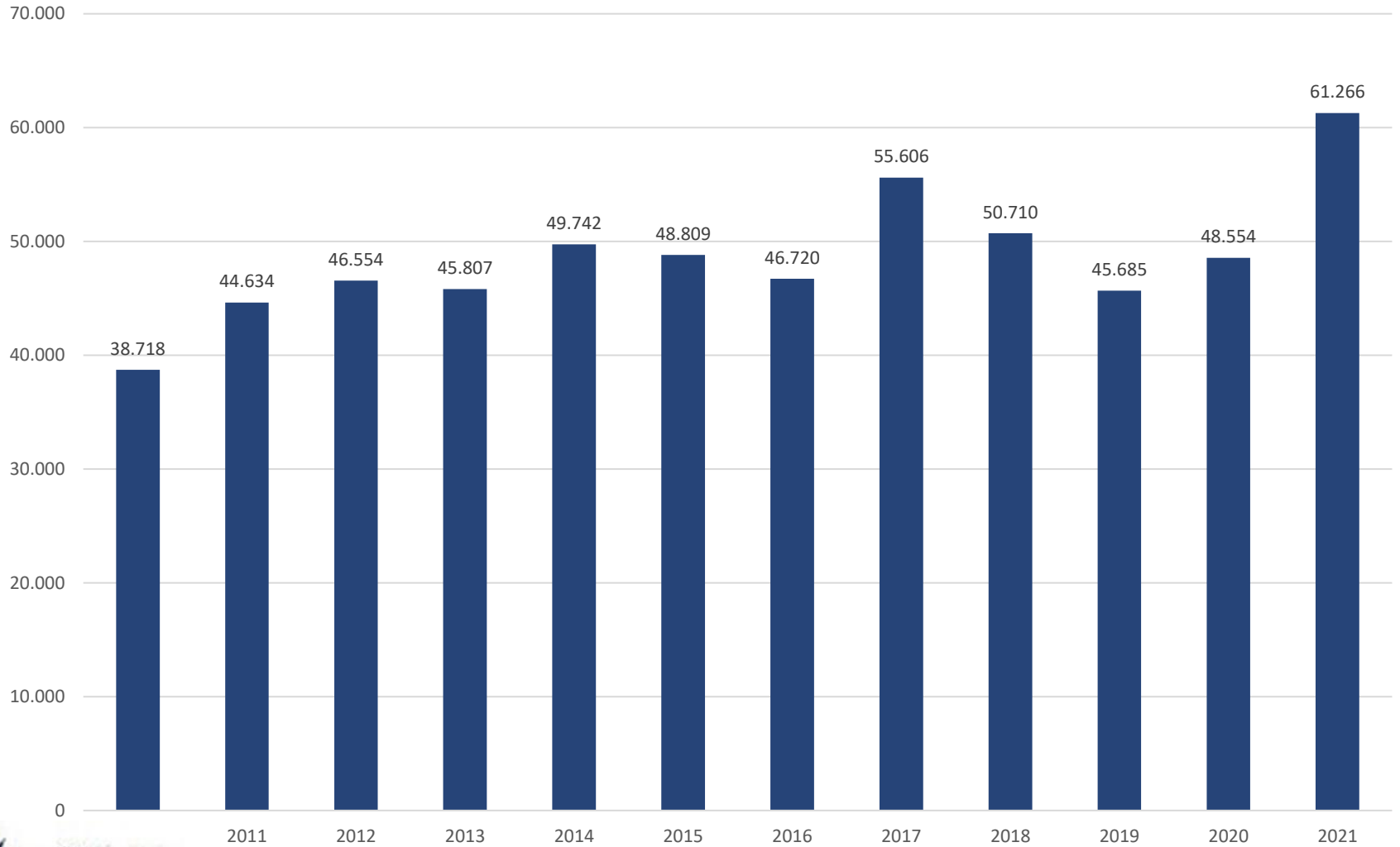
FİLYOS GAS Receive Terminal

REF: BOTAŞ Map and ADG Sakarya Field

Gas Consumption by Sectors

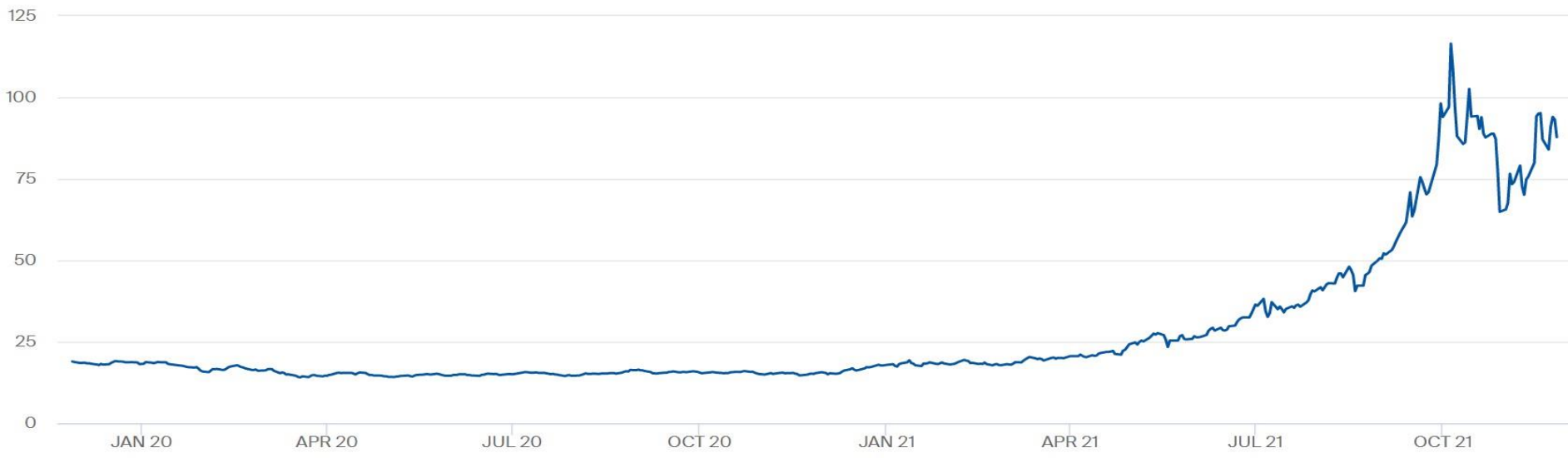


Gas Consumption



LT Natural Gas Import Agreements

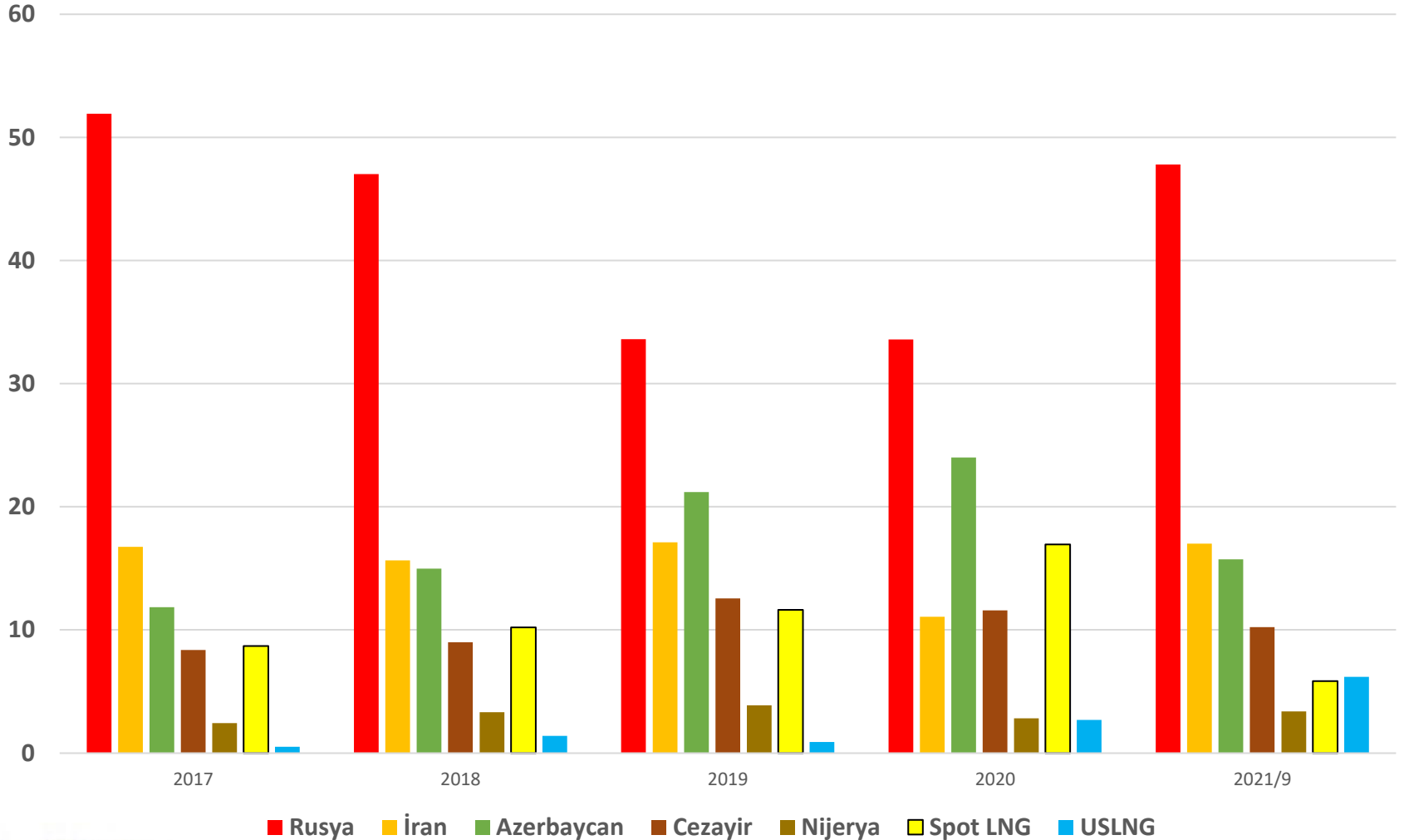
Source	Type	Volume bcm/year	Duration	Start Year	End Year	Licence Duration
Russia West Route	Pipeline	4	23	1998	01/01/2022	12/07/2022
Russia West Route	Pipeline	4	23	1998	01/01/2022	2022
Russia Blue Stream	Pipeline	16	25	2003	2025	15/05/2023
Russia West Route	Pipeline	1	20	2013	2032	26/11/2035
Russia West Route	Pipeline	5	30	2013	2043	26/11/2042
Iran	Pipeline	10	25	2001	2026	18/04/2023
Azerbaijan	Pipeline	6,6	15	2007	16/04/2021	15/05/2023
Azerbaijan	Pipeline	6	15	2018	2033	
Algeria	LNG	4	30	1994	2024	18/04/2023
Nigeria	LNG	1.2	22	1999	2021	18/04/2023
TOTAL		52.2				



Euro/MWH



Shares of Import Country by Years



Turkey aims to contribute to regional and global energy security and to become a regional trade center in energy.

- 1. Turkey – Greece Natural Gas Interconnector (TGI) in operation since 2007.
BOTAS-DEPA SPA

TOTAL QUANTITY **8.783** million m³ (28 /11/2021)

- 2. TANAP – TAP in operation since 31.12.2020

TOTAL QUANTITY TAP KIPI 7.514 million m³ to EUROPE (28/11/2021)

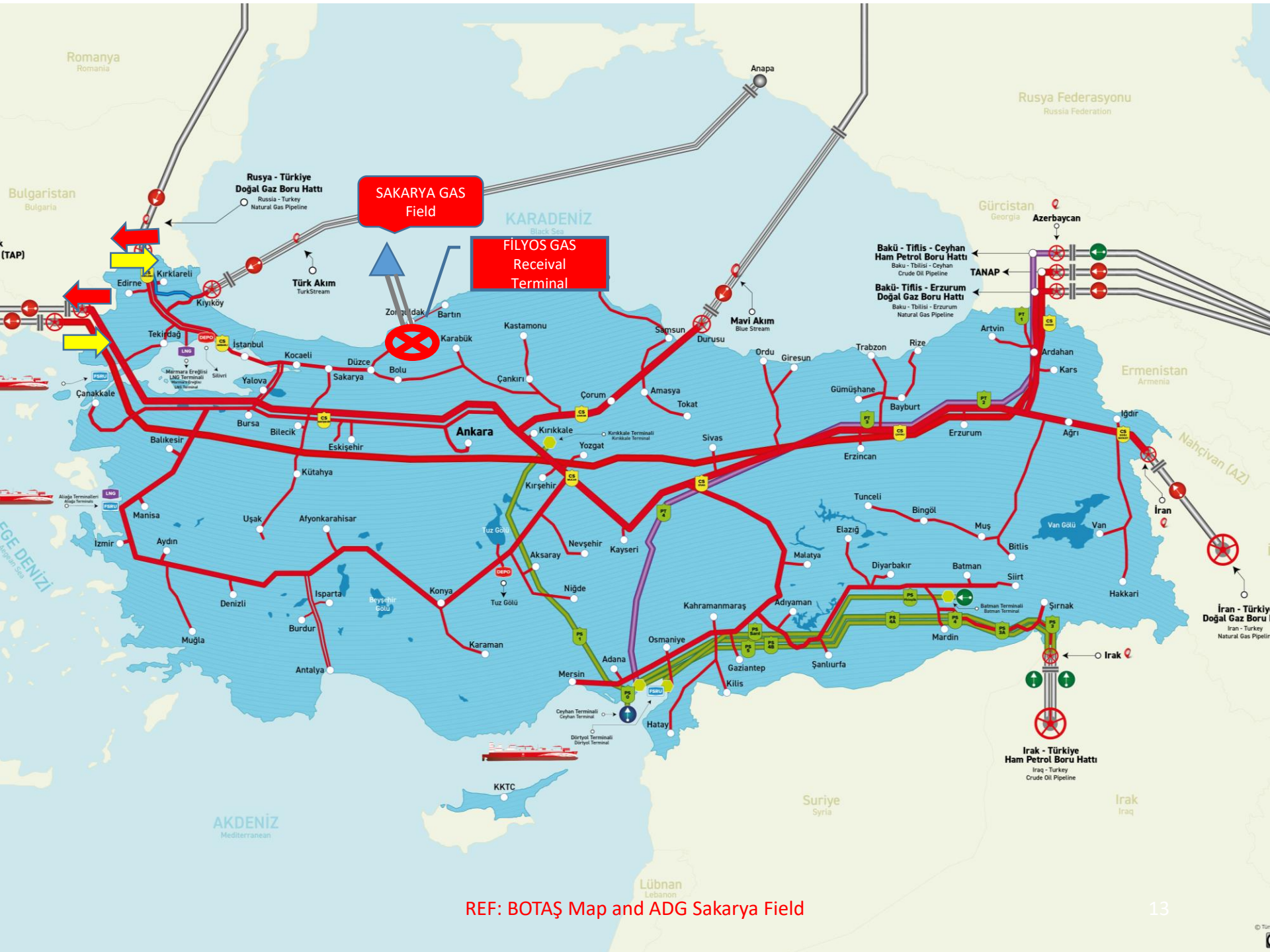
Melendugno **6.289** million m³ to Italy

- Nea Mesimvria **1.151** million m³ to Greece

- 3. Turkish Stream in operation since 08.01.202

Strandza 2 16.507 million m³ to Bulgaria

- 4. LNG by Trucs. Bulgaria (1.7), Macedonia (3.2) and Serbia (0.08) million m³
more than 31 BCM



REF: BOTAŞ Map and ADG Sakarya Field

Thank you for your listening.

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