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Türkiye's Role in Regional Energy Security: Deliverability and Flexibility

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Context and the IENE Study

- IENE M72: options vs. what can be delivered
- Practical focus: realism and implementation
- Market view (not politics)



From Resources to Delivery

- Resources alone do not create supply
- Infrastructure + operations decide outcomes
- Reliability is proven over time



EU Phase-out Timeline (REPowerEU / 2027)

- EU policy: Russian gas phased out by 2027
- Key implication: more value for LNG flexibility, storage, corridors



Türkiye as a Gas Transit Country

- Southern Gas Corridor (TANAP) as a proven route
- New Azerbaijan deal: 2.25 bcm/y from Absheron (from 2029, 15 years)
- SCP delivery into Türkgözü entry point
- Recent additional supply contracts reach ~18 bcm (incl. Absheron)



From Transit to Gas Supplier

- Gas deliveries to the Balkans
- Long-term contract with Bulgaria
- BOTAŞ–DEPA 15-year contract operated smoothly
- Greek private sector imports spot gas via Türkiye–Greece line
- Continued deliveries to Bulgaria and Balkan markets (physical flows)



LNG Infrastructure and Flexibility

- LNG as a flexibility tool in the region
- Regas capacity: 161 mcm/day → target 200 mcm/day
- Two additional FSRUs may join the system
- Long-term LNG contracting supports resilience



Domestic Production and Gas Storage

- Storage expansion targets
- Silivri: target 6 bcm by 2028
- Tuz Gölü: target 8.5 bcm by 2032
- Black Sea gas started; target 15–16 bcm by 2028
- Storage + Domestic gas + LNG flexibility strengthen security of supply



A Diversified Energy System

- Pipelines
- LNG
- Storage
- Domestic production



Regional Implications for Southeast Europe

- Functional importance, not politics
- Interconnected systems and flexible routes
- Türkiye can contribute via LNG, storage and interconnections
- IENE terminology: Expanded South Corridor (ESC) / Vertical Corridor logic



Key Takeaways

- Reliability is proven by operations
- Flexibility matters more than scale
- Markets integrate faster than politics



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