

Importance of Turkey for Energy Supply Security and Energy Transition within the region

25 April 2024, Istanbul



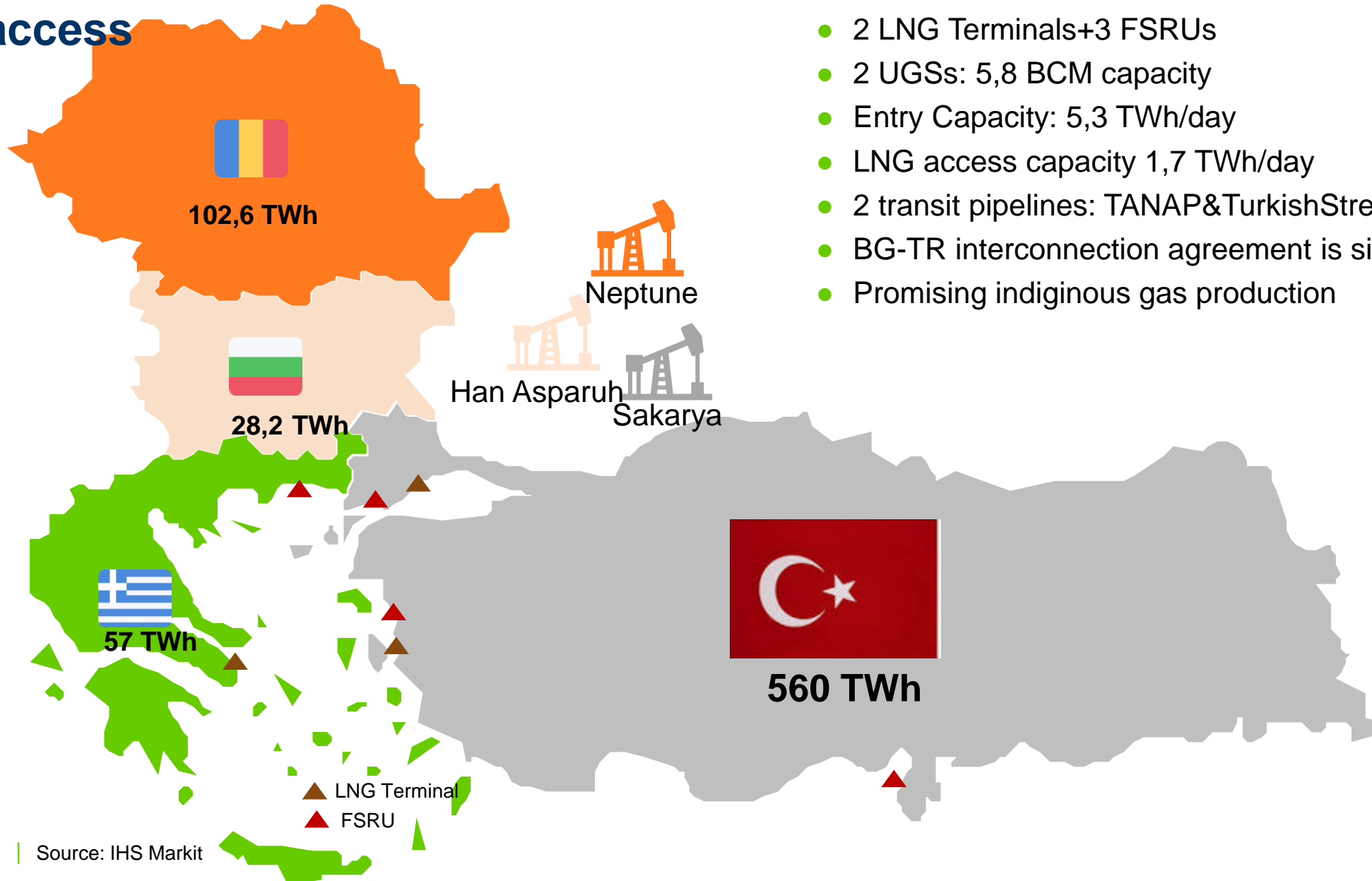
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Regional Demand Turkey/Greece/Bulgaria/Romania

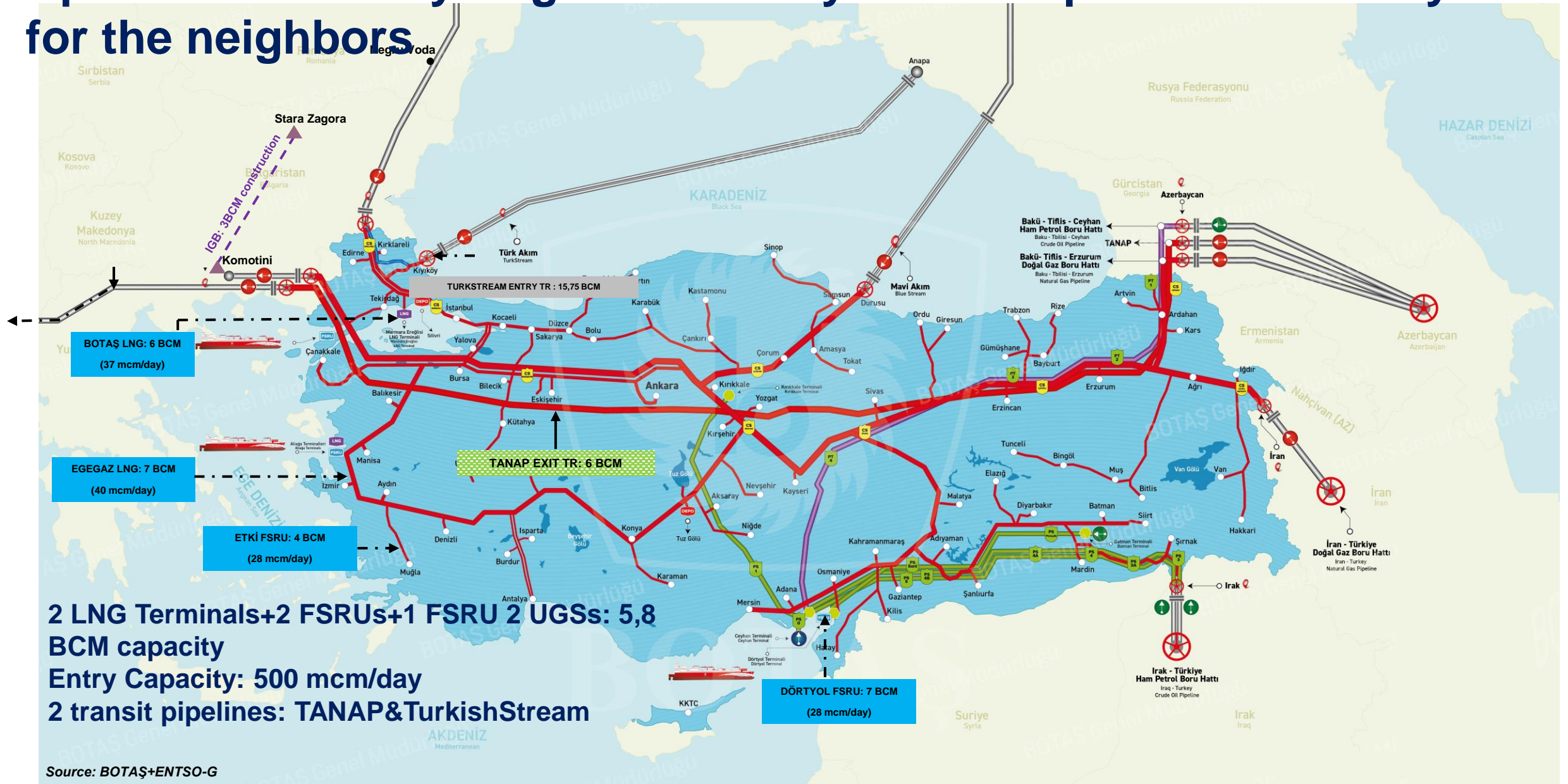
Turkey has 75% of gas consumption within the region and diversified supply access

- 2 LNG Terminals+3 FSRUs
- 2 UGSs: 5,8 BCM capacity
- Entry Capacity: 5,3 TWh/day
- LNG access capacity 1,7 TWh/day
- 2 transit pipelines: TANAP&TurkishStream
- BG-TR interconnection agreement is signed in Jan 2024
- Promising indigenous gas production



Well established gas entry network has a unique position for supply security of SEE

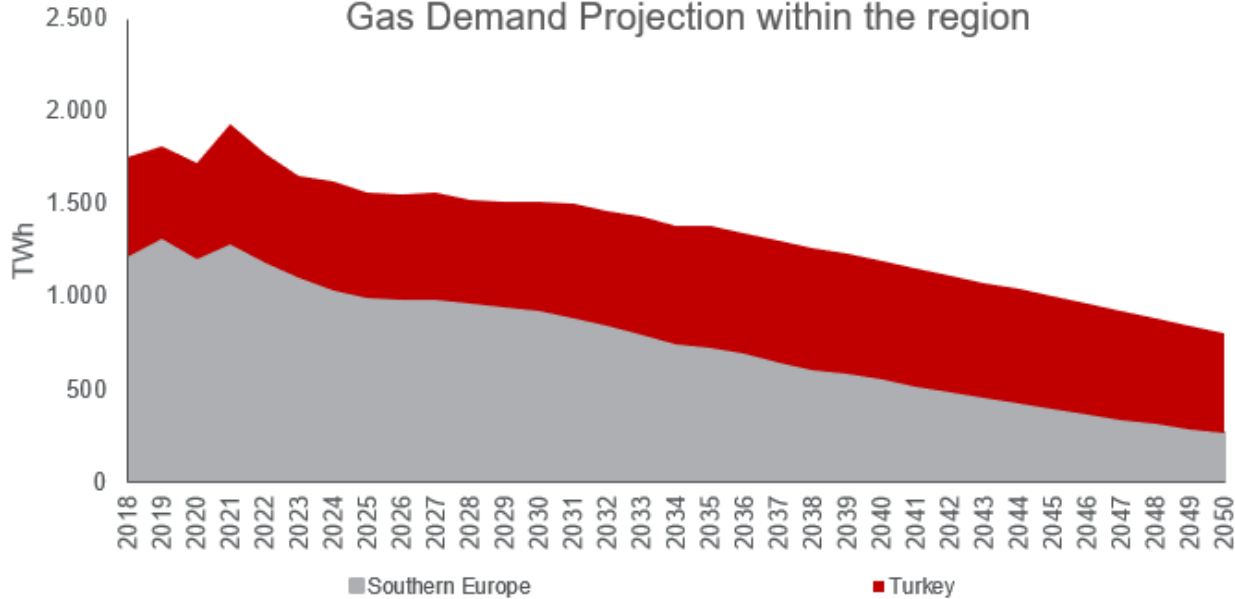
Up to 500 mcm/day targeted delivery can also provide flexibility for the neighbors



Blacksea Gas for the region; Supply and market balance for South Eastern Europe

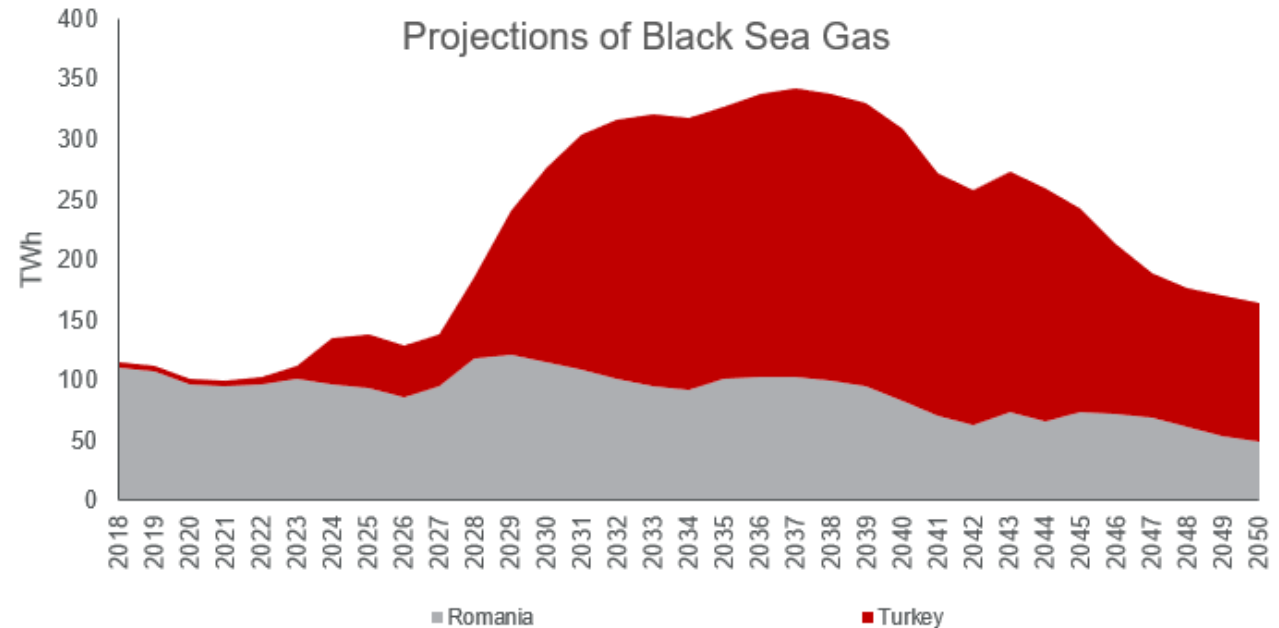
Up to 20% of regional demand at plateau value

Gas Demand Projection within the region



Source: Wood Mackenzie

Projections of Black Sea Gas

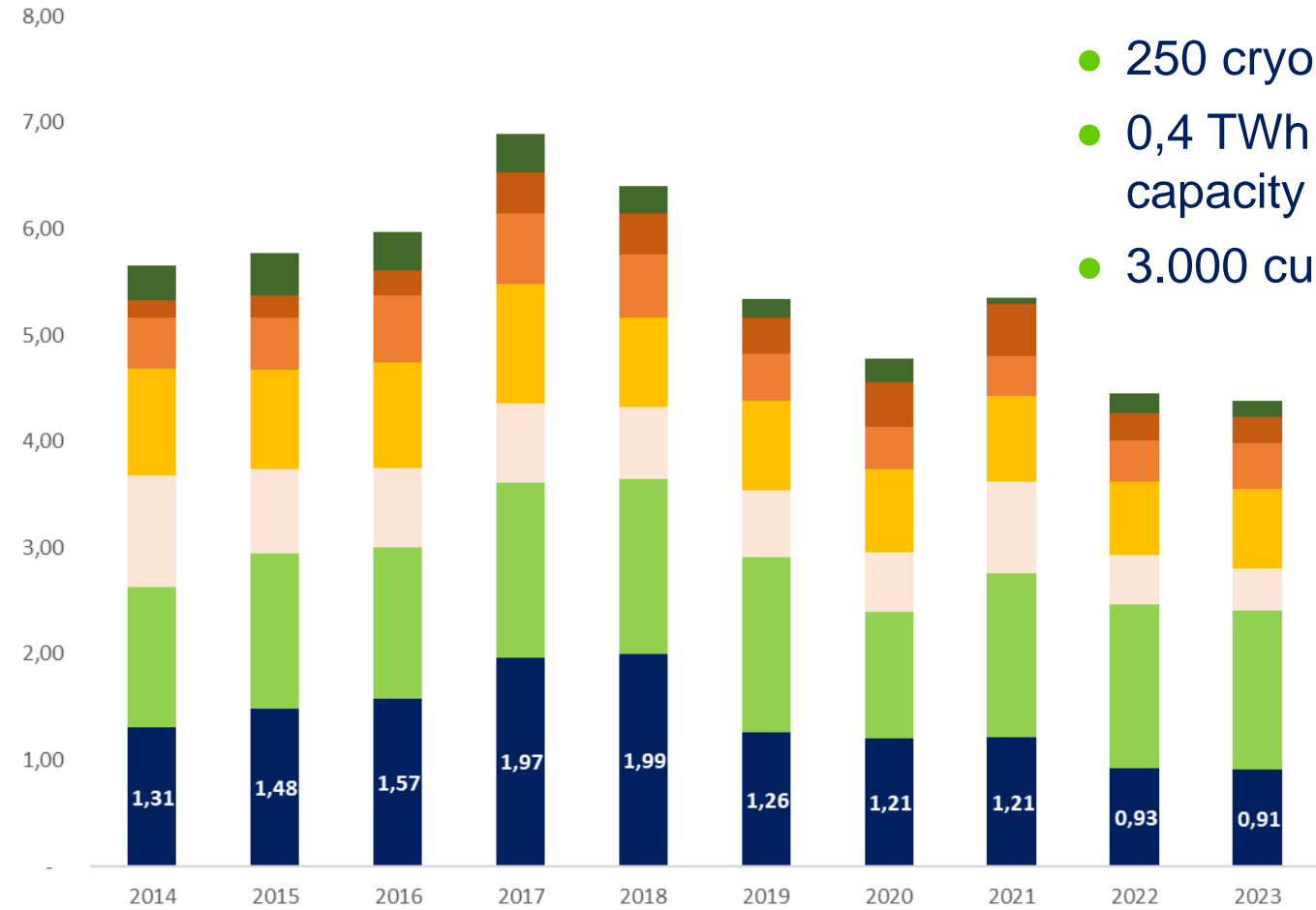


Source: Wood Mackenzie

Turkey is the second largest ssLNG market in Europe after Spain with 5 TWh per annum

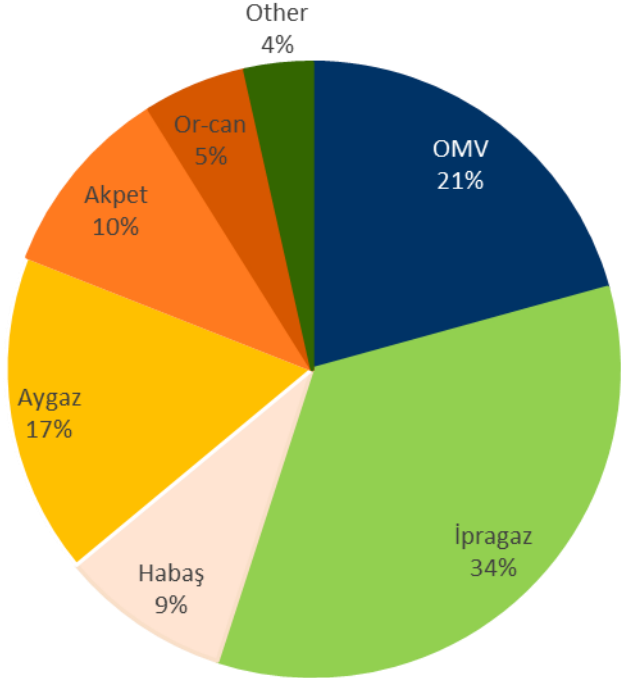
ssLNG Market experience Turkey

LNG Market Volume by Years (TWh) excluding LDC sales



2023 LNG Market Share

- 250 cryogenic LNG trailers
- 0,4 TWh cryogenic tank storage capacity
- 3.000 customers

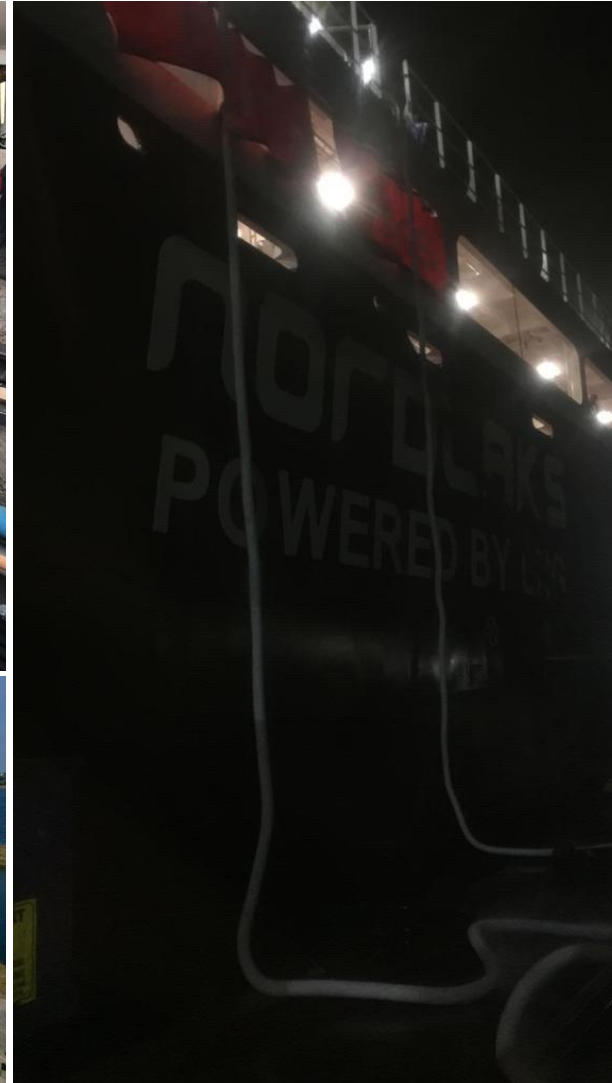
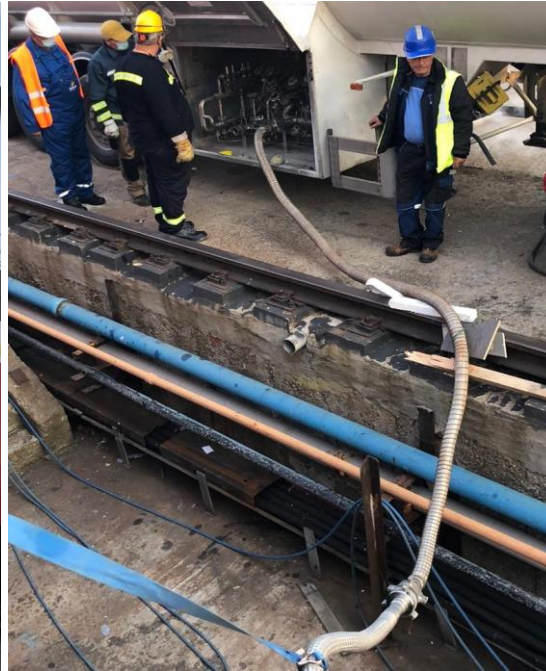


Variable applications of satellite plants

Comfortable and immediate solution for off grid regions



Truck to ship operations



Opportunities in the region for better supply/demand balance

Cooperation is essential for predictable liberalized markets



▲ Represents LNG access Point Terminal or FSRU

- ▶ Cross border gas/power trading will provide less volatile gas price environment
 - ▶ Physical deliveries
 - ▶ Volume SWAPs
 - ▶ Seasonal SWAPs
 - ▶ Better utilization of assets in the region
- ▶ Transferring ssLNG expertise of Turkey within the region
 - ▶ LNG for mobility
 - ▶ LNG for marine
 - ▶ LNG for underserved areas

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