



NATURAL GAS CONSUMPTION

Natural Gas Consumption in 1987

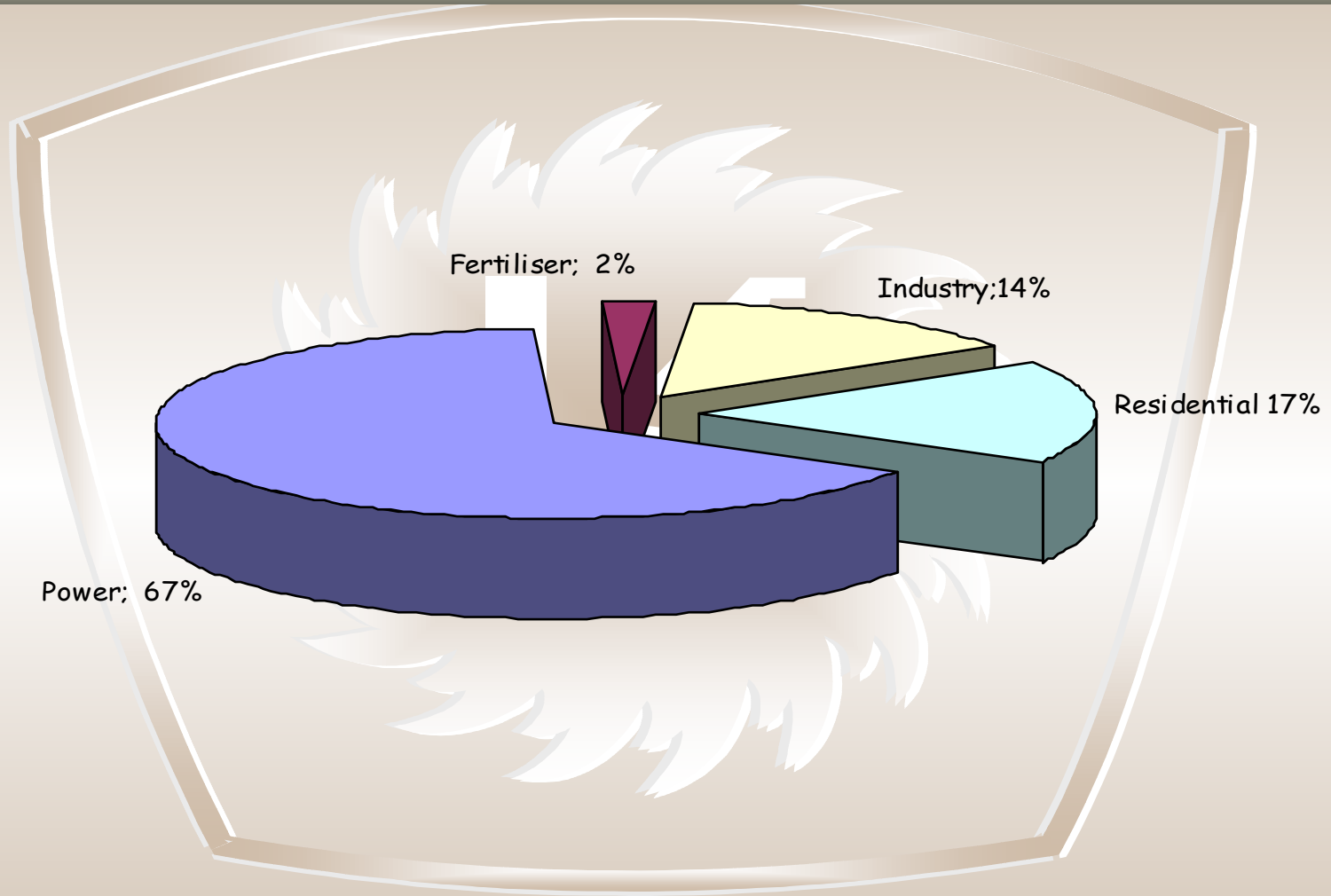
500 Million m³

Natural Gas Consumption in 2003

21 Billion m³

- 6 Cities have been using natural gas
- Natural gas city distribution systems of 17 cities have been tendered by EMRA and all of them under construction.
- 60 cities will be using natural gas by the year 2005.

SECTORIAL USE OF NATURAL GAS IN TURKEY IN 2003



NATURAL GAS PIPELINE SYSTEM IN TURKEY



NATURAL GAS IN TURKEY

Natural Gas Supply Contracts of BOTAŞ

		Max Capacity (BCM/Year)	Term (Year)	Start	Finish
In Operation	Russian Fed. (West)	6	25	1987	2011
	Algeria (LNG)	4	20	1994	2014
	Russian Fed. (Turusgaz)	8	23	1998	2020
	Nigeria (LNG)	1.2	22	1999	2021
	Iran	10	25	Dec 2001	2026
	Russian Fed. (Blue Stream)	16	25	Feb 2003	2027
	Turkmenistan	16	30	2006	2035
	Azerbaijan	6.6	15	2006	2020
	Total	67.8			

Existing System	4700 kms
Under Construction	2400 kms
Planned	1000 kms

Domestic Gas Transmission and Distribution System of Turkey:

NATURAL GAS PIPELINE SYSTEM IN TURKEY



NATURAL GAS MARKET LAW

- **Natural Gas Market Law no.4646 is enacted on May 2nd, 2001**
- **The objectives are , with liberalization of the natural gas market and thus, formation of a financially sound, stable and transparent market along with institution of an independent supervision and control mechanism over the same, so as to ensure supply of good-quality natural gas at competitive prices to consumers in a regular and environmentally sound manner under competitive conditions.**
- **Energy Market Regulatory Authority has been established.**

WIDENING THE GAS BUSINESS AREA

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- Feeding Most of the Cities with Natural Gas
 - Diversification of Natural Gas Usage, such as CNG Business
 - Entering into Business in Other Countries
 - Diversification of Gas Supply Sources