



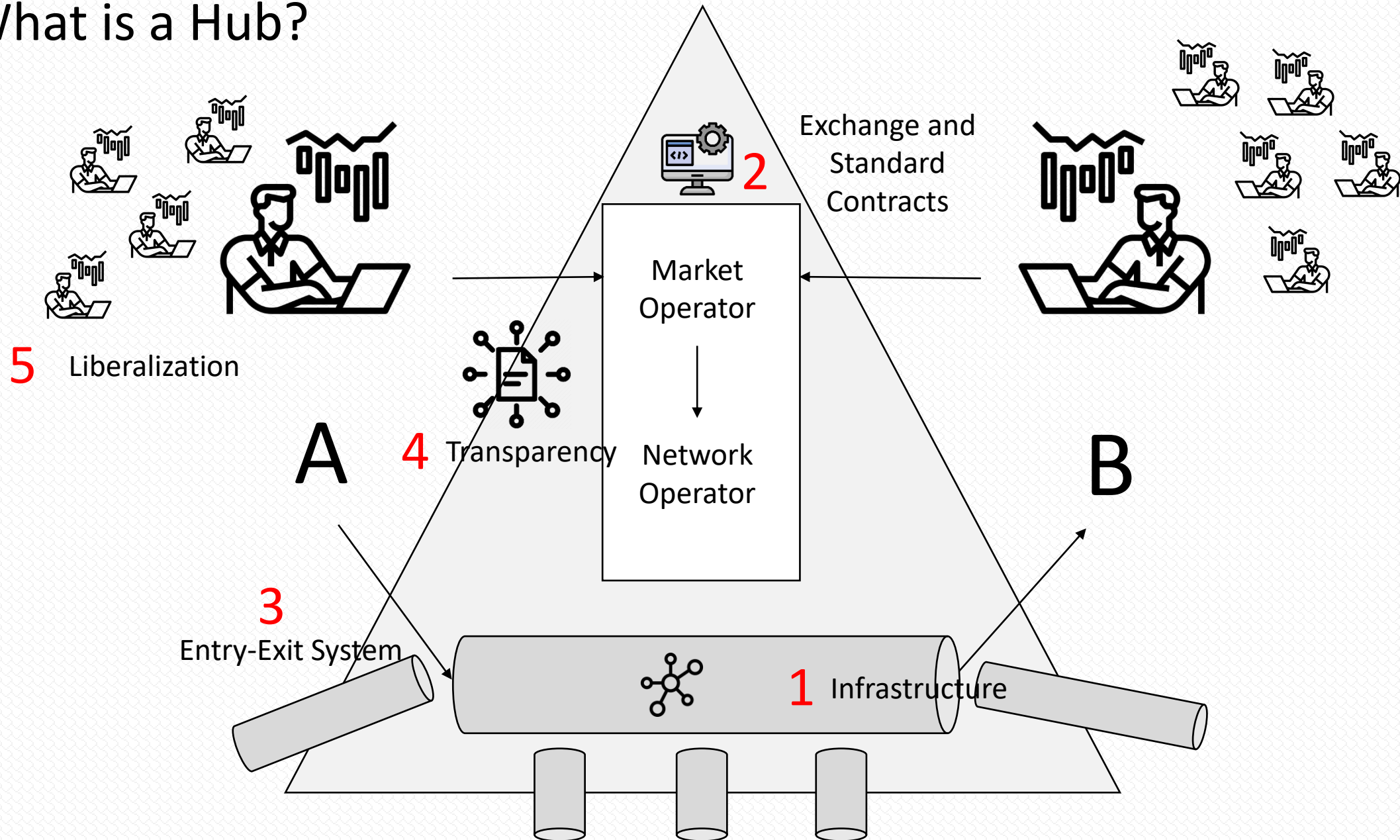
BOTAŞ

Turkish Natural Gas Hub



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What is a Hub?

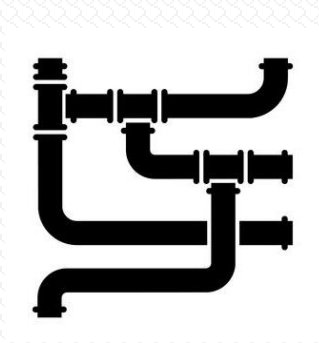


Physical and Virtual Natural Gas Hubs

Natural gas hubs are divided into two as physical and virtual hubs.

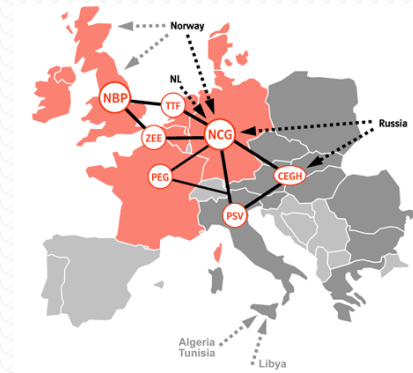
Physical hubs are systems where the physical delivery resulting from trade is made to a network that is the intersection of more than two pipelines.

Systems where the physical delivery resulting from trade is made to a large network, not an intersection point, is called a virtual hub.



Physical Hub

- Henry Hub (U.S.)
- Zeebruge (Belgium)
- Baumgarten (Austria)



Virtual Hub

- NBP(UK)
- TTF(Netherlands)
- PSV(Italy)

Türkiye's Current Position in terms of Hub Requirements



Infrastructure

- Entry Capacity
- Storage and Regas Capacity
- Transmission Capacity
- Interconnections



Entry-Exit System

- Capacity Mechanism (Prizma/RBP)
- Tariff



Exchange and Standard Contracts

- Organized Market Rules
- Exchange Software
- Standard OTC Contracts



Market Based Balancing

- Balancing Code
- Balancing Software



Liberalization

- Market-based pricing
- Third-party access



Transparency

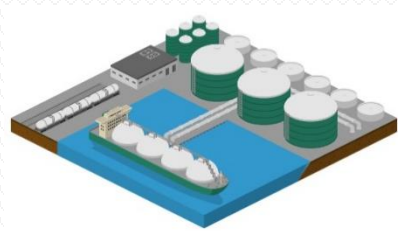
- BOTAŞ Data
- EPIAŞ Reports
- Price Reporting Agencies



Financial Products and Institutions

- Future Products
- Financial Institutions

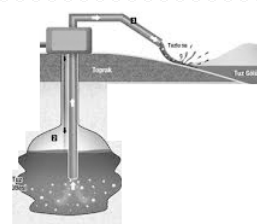
Türkiye's Gas Infrastructure Capabilities



2 Land-based terminals



3 FSRUs



1 Depleted Field UGS



1 Salt Cavern UGS

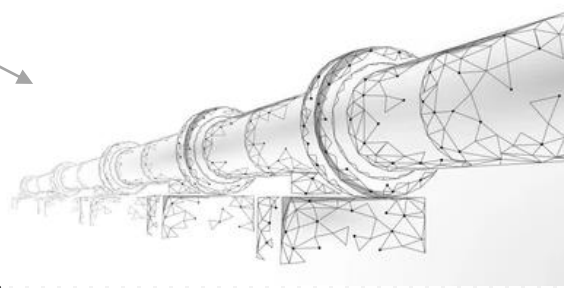
161 mcm
daily send-out

115 mcm
daily send-out

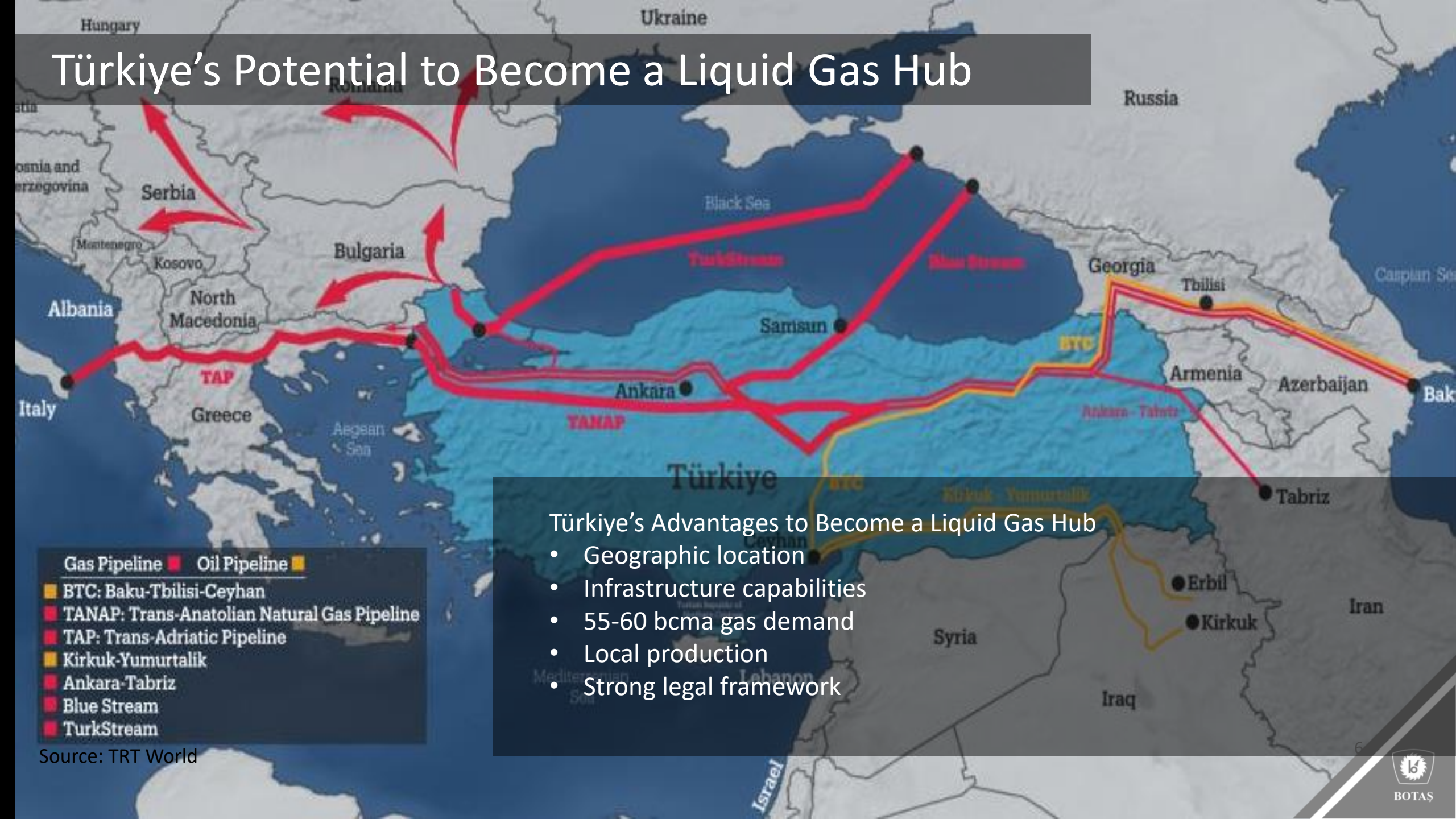
20.000 km pipeline

5 Import Points

2 Export Points



Türkiye's Potential to Become a Liquid Gas Hub



Türkiye's Advantages to Become a Liquid Gas Hub

- Geographic location
- Infrastructure capabilities
- 55-60 bcma gas demand
- Local production
- Strong legal framework

Thank you



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