



NOC-IOC Forum

Enhancing Global Energy Security through Cooperation and Partnership

30-31 March, 2009 - Kuwait

Turkish Petroleum Corp. and Cooperations with NOCs and IOCs

**Mehmet UYSAL
President & CEO
TPAO**



- Reserve: ~ 1 billion boe
- 2P Reserve: ~ 9 billion boe
- Current Production: ~ 80.000 boe/d
- E&P experience over 50 years
- Recent Offshore Discoveries
- Intense Deep Offshore Exploration Activities
- Focus: Middle East, North Africa, Caspian Region and South America
- Target: E&P Growth, Transportation & Retail Expansion
- Current Cash Flow: \$ 2,2 billion
- 5 year E&P Investments (2004-08): \$ 3.54 billion



Energy Corridor and CEYHAN

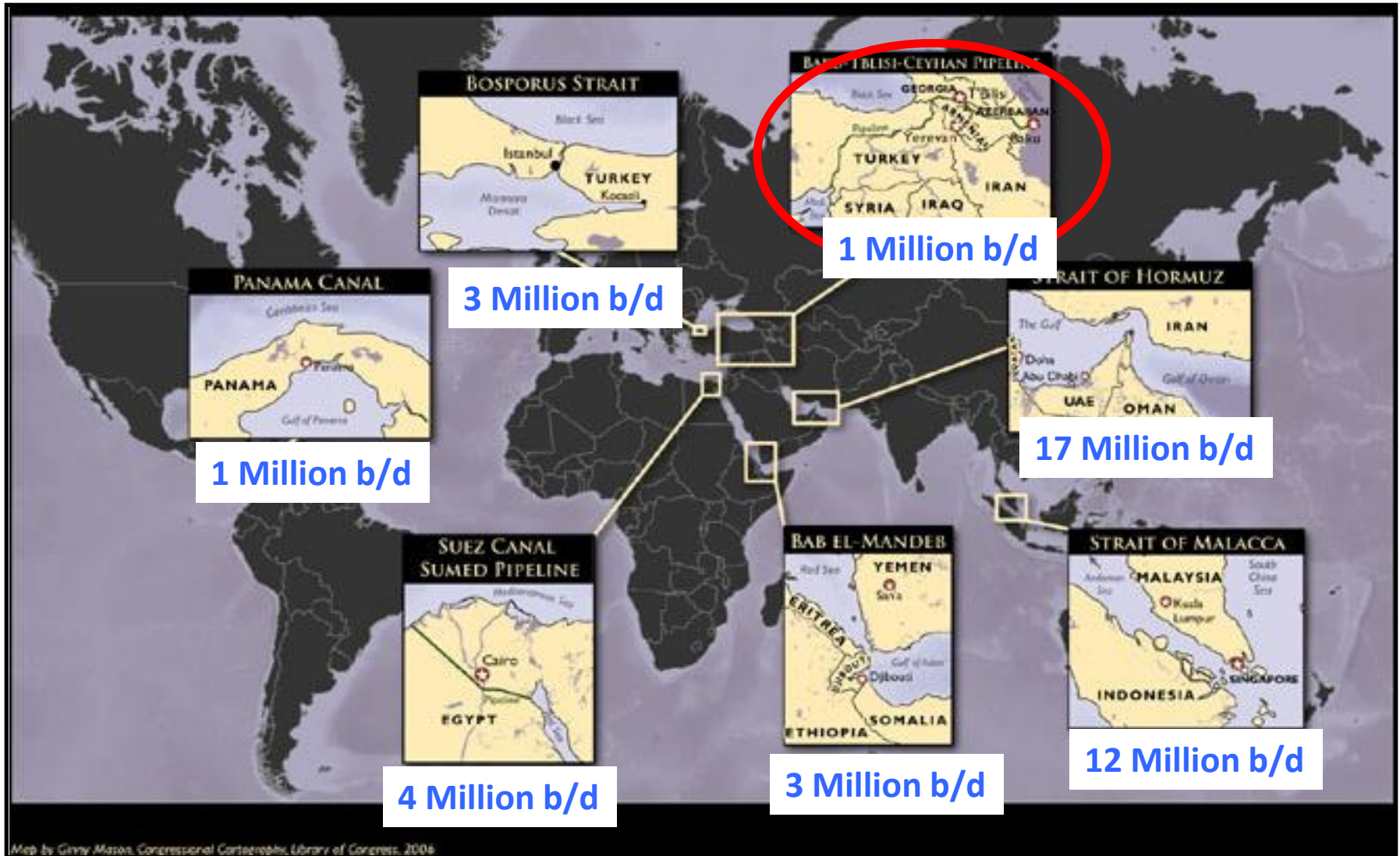


Ceyhan Energy Hub



IRAN – TURKEY PIPELINE
LNG (NIGERIA-ALGERIA)
NATURAL BRIDGE.

Bottlenecks of transportation :

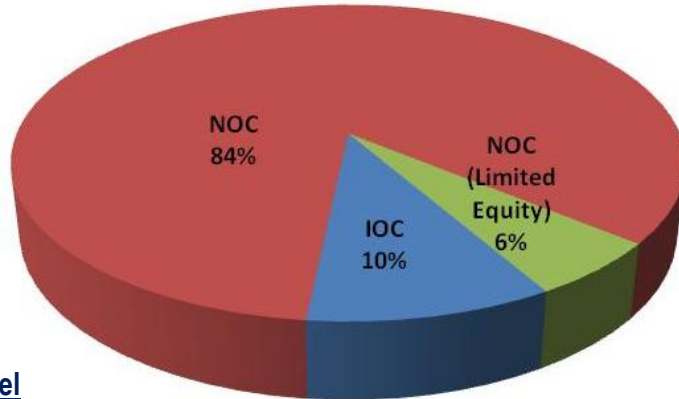


6,5 – 7 Million barrel of oil will be marketed via Turkey.

NOC's and IOC's Oil & Gas Reserves and Daily Productions



Oil Reserves

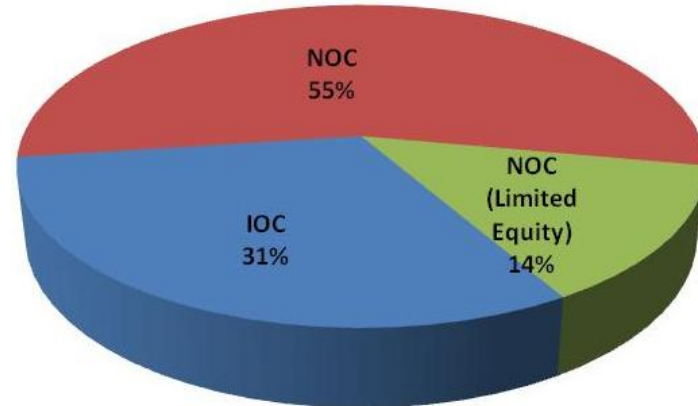


Billion Barrel

EI TOP 100 : 1.059,4 (%86)

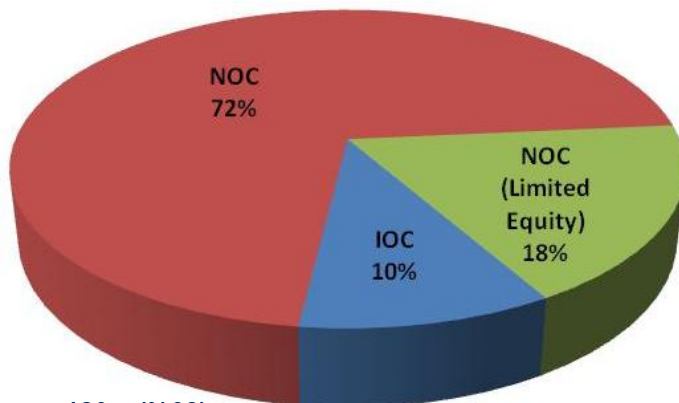
World Reserve: 1.237,9

Oil Production



2008- EI TOP 100 COMPANIES

Natural Gas Reserves

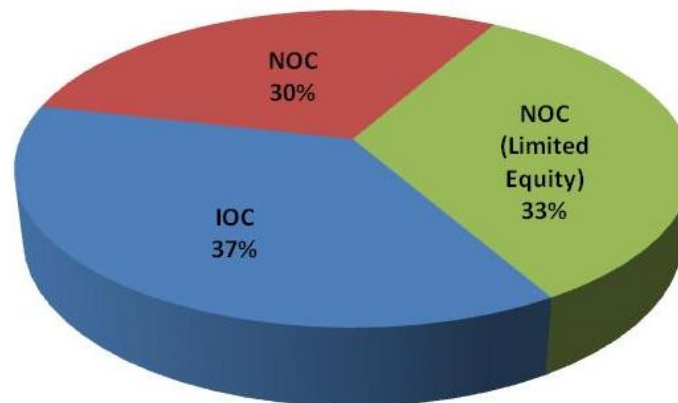


Tcm

EI TOP 100 : 120 (%68)

World Reserve: 177,4

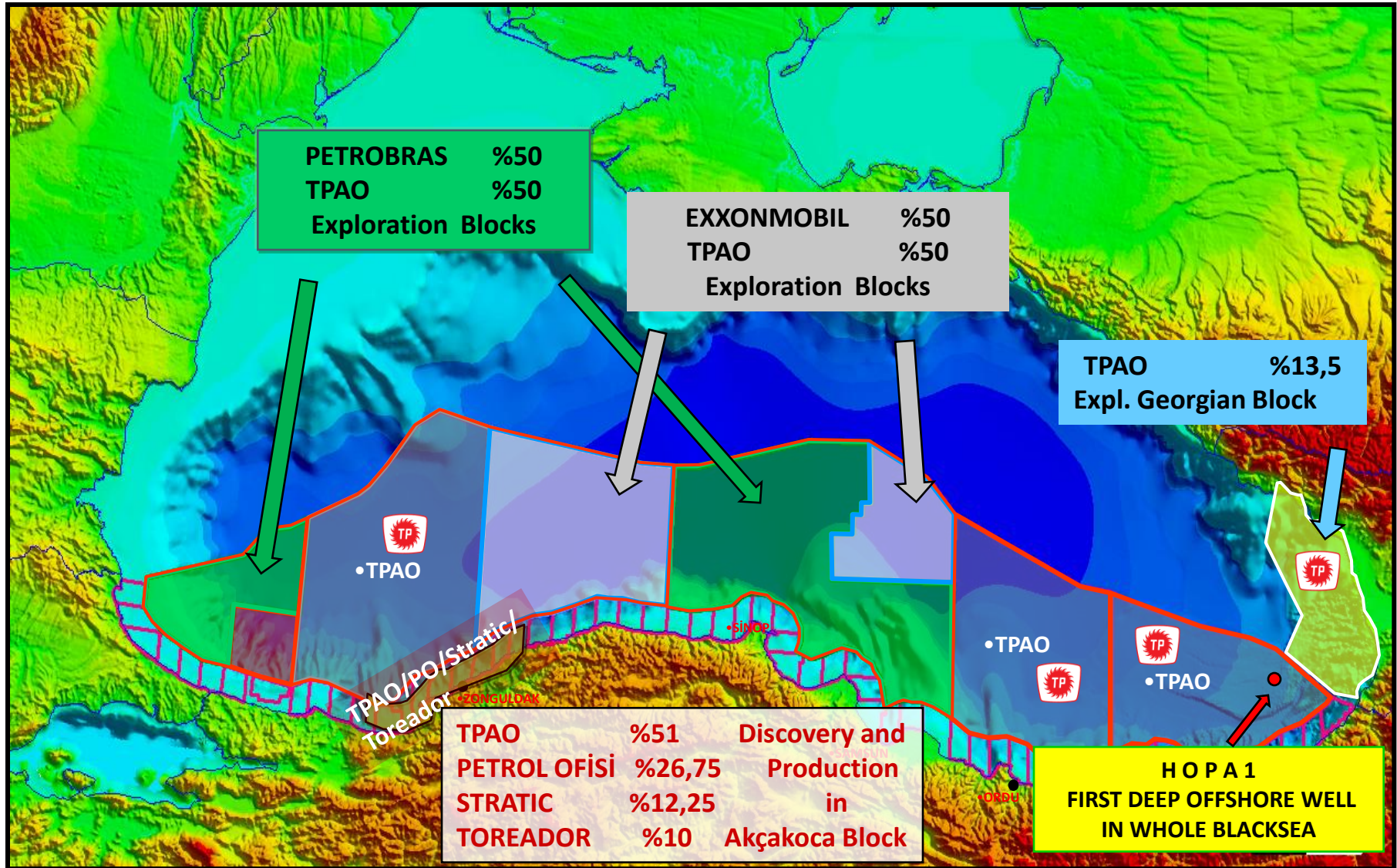
Natural Gas Production



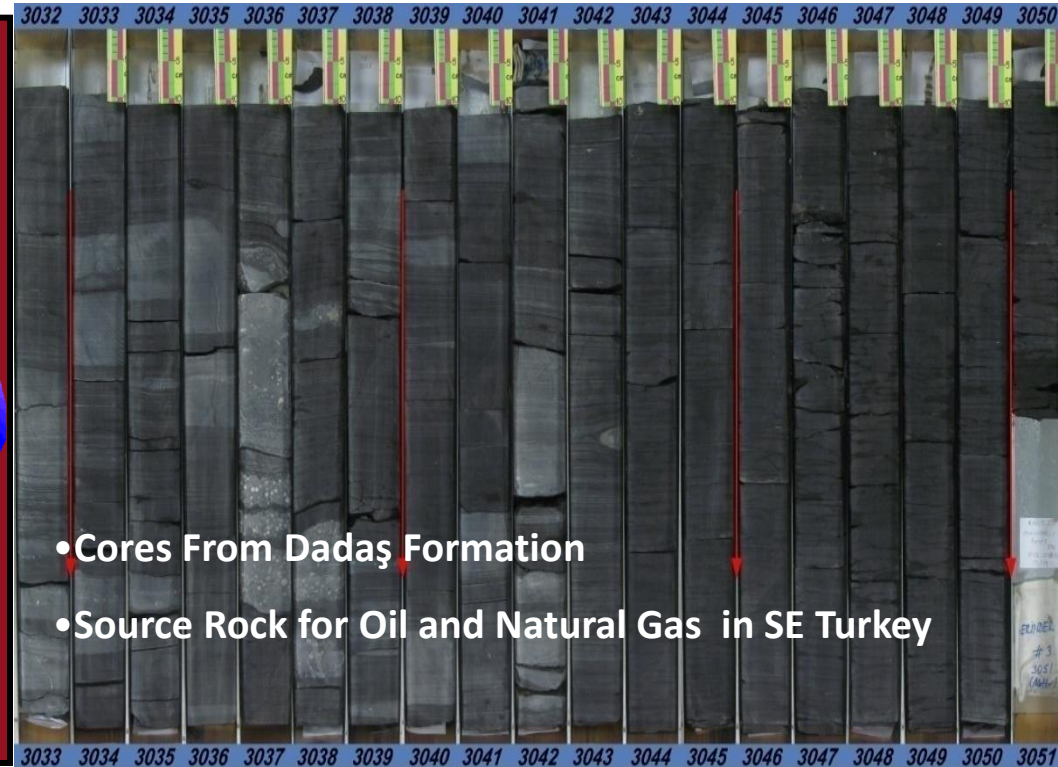
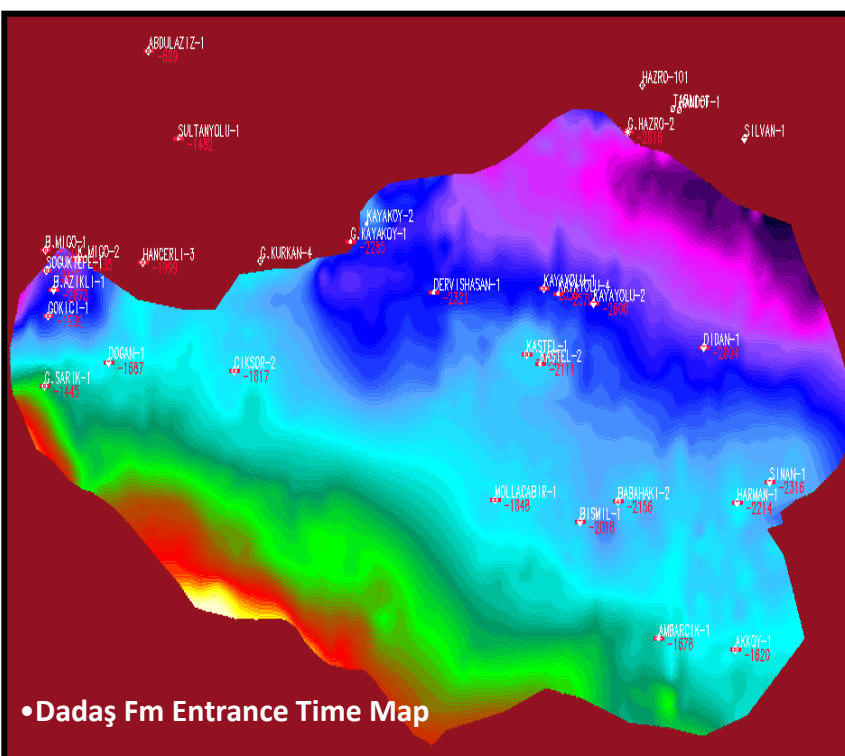
Cooperations in BLACK SEA



ExxonMobil



Unconventional Gas From Rource Rock



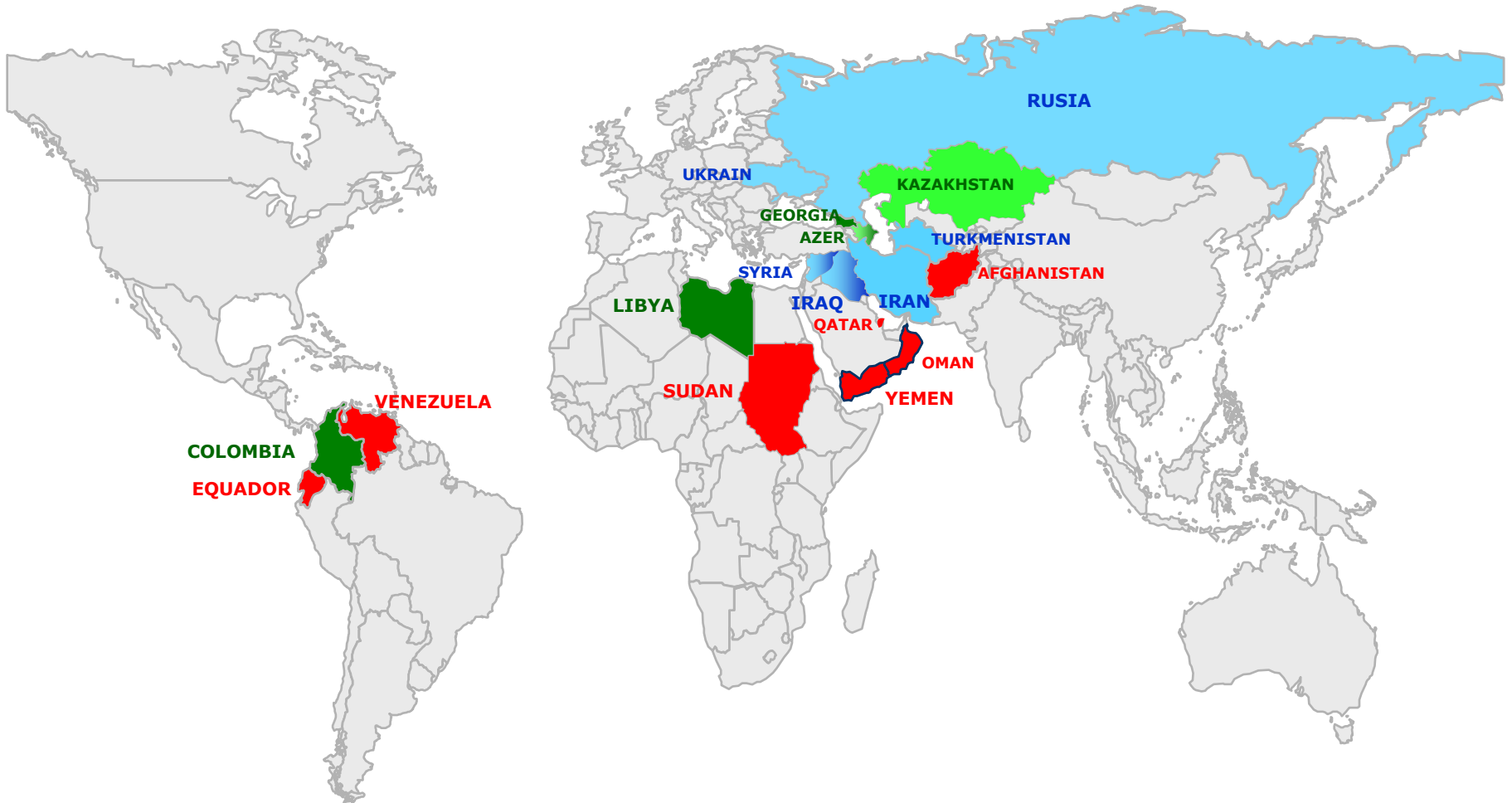
- Natural Gas Production in Barnett shales which very similar to Dadaş Shales: 100 bcm
- Planning date to start drilling: End of 2009

Turkey's THE FIRST UNDERGROUND Gas Storage Facilities

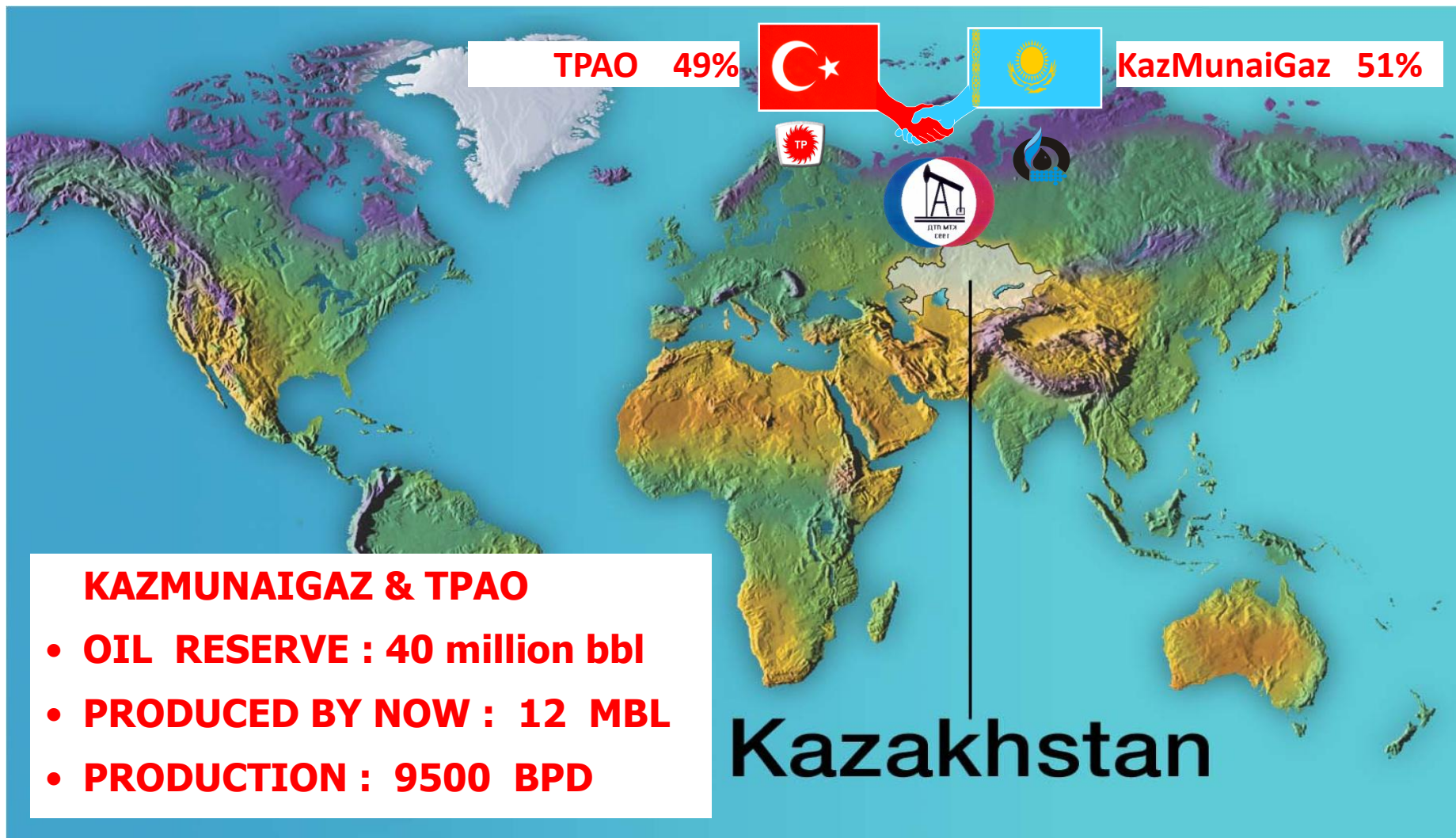


IN 2006 { 1.6 BCM/YEAR STORAGE CAPACITY → 3.2 BCM/YEAR
18 MCM/DAY DRAWBACK → 40 MCM/DAY } IN 2011

International Activities

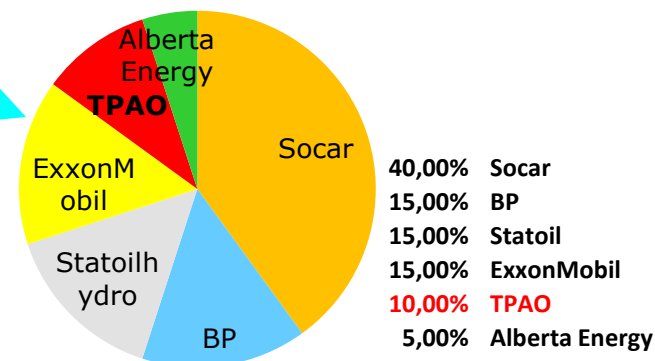
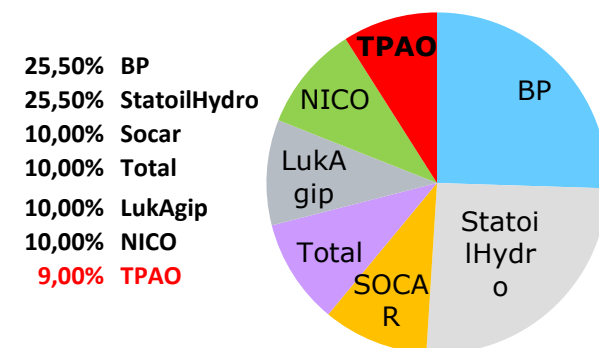
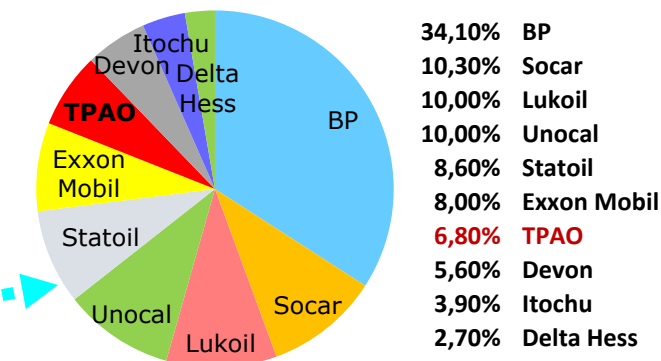
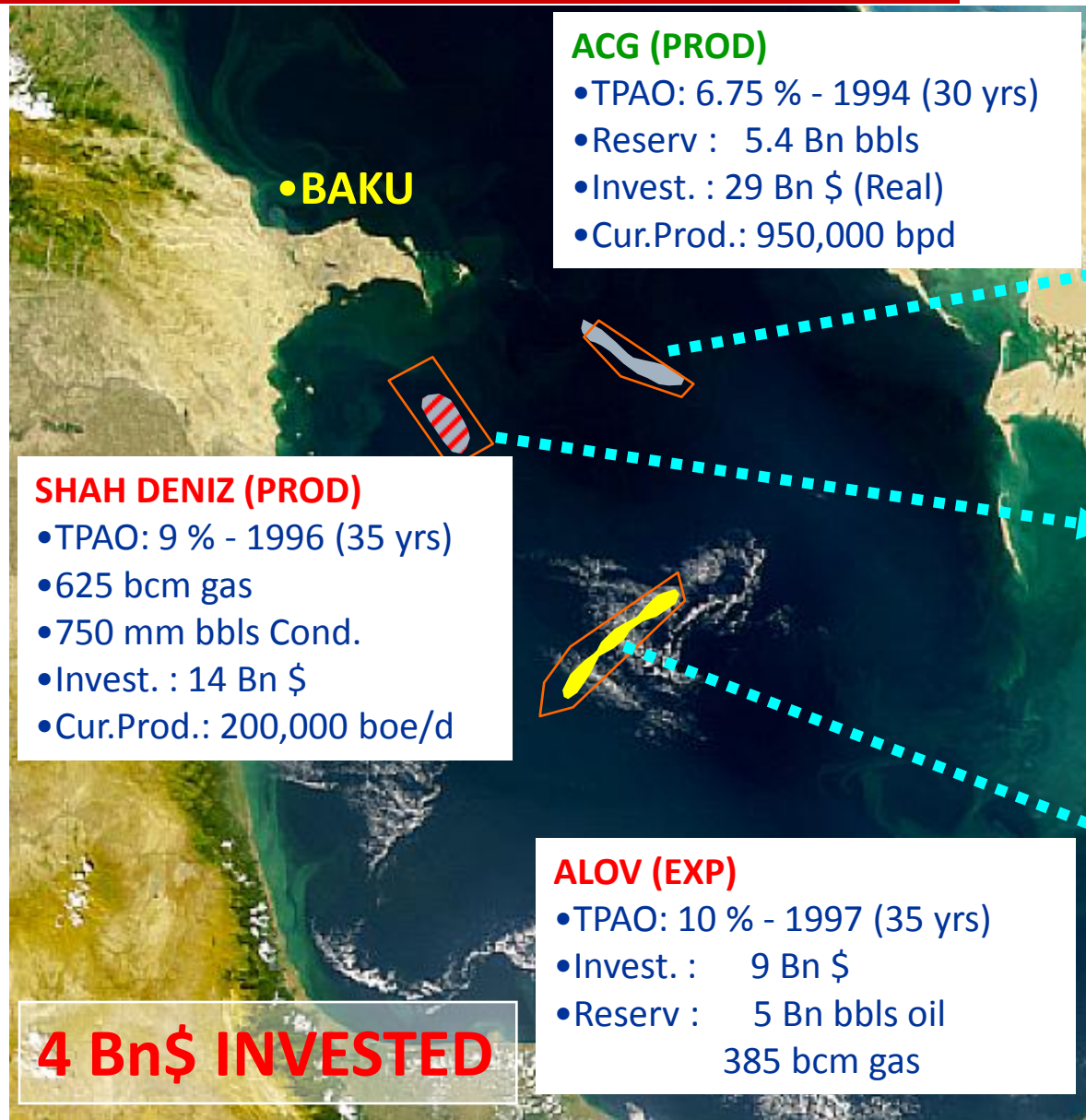


Cooperation in KAZAKHSTAN since 1992



TPAO WAS THE FIRST FOREIGN INVESTOR IN KAZAKHSTAN.

Cooperation in AZERBAIJAN since 1993



Cooperation in MIDSTREAM (BTC & SCP)



BAKU-TBILISI-CEYHAN (BTC) CRUDE OIL PIPELINE

- 42"-46"-34" line - 1,768 km length
- First oil in Ceyhan May 2006
- Current Capacity : 1.0 mm bbl/day
- (50 mm tonnes/yr)
- Current Usage : 950 bbl/day

SOUTH CAUCASUS (SCP) NATURAL GAS PIPELINE

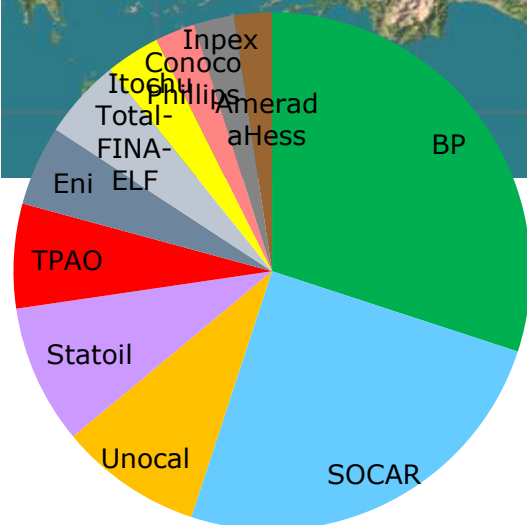
- 42" line - 670 km length
- First gas in Turkey: July 2007
- Current Tec.Ult.Capacity: 20bcm
- Current Usage : 8.0 bcm

VIA BTC

- 423 mmb OIL WITH
- 536 TANKERS

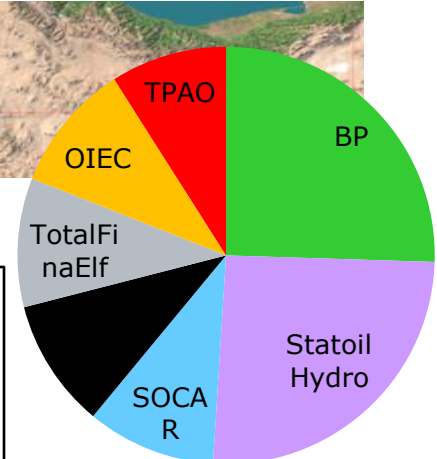
VIA SCP

- Cumulatif 10 bcm Nat. Gas



30,00%	BP
25,00%	Socar
8,90%	Unocal
8,71%	Statoil
6,53%	TPAO
5,00%	Eni
5,00%	Total-FINA-ELF
3,40%	Itochu
2,50%	ConocoPhillips
2,50%	Inpex
2,36%	AmeradaHess

26%	BP
26%	StatoilHydro
10%	SOCAR
10%	LukAgip,
10%	TotalFinaElf
10%	OIEC
9%	TPAO



Cooperation in LIBYA since 1994

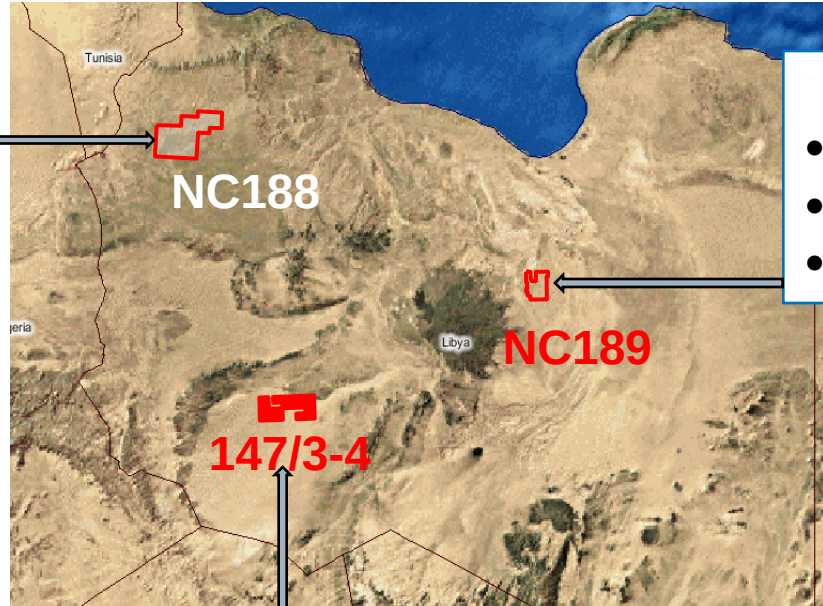


ONGC Videsh
The International Petroleum Company of India



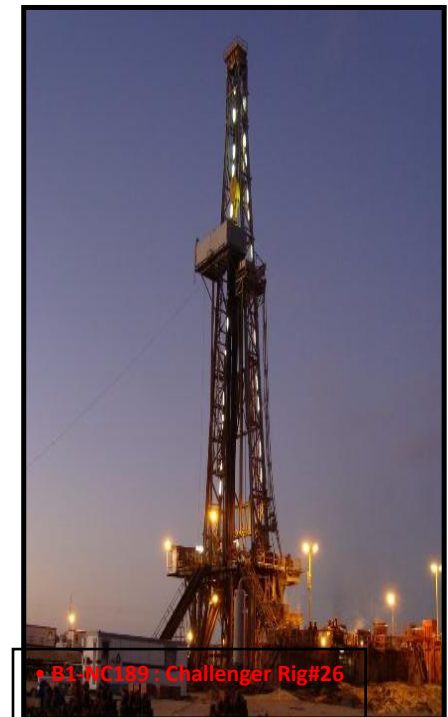
NC 188 GHADAMES

- TPAO 51 %
- ONGC V. Ltd. 49 %
- Relinquishment



NC 189 SIRTE

- TPAO 51 %
- ONGC Videsh Ltd. 49 %
- Exploration; Current Drilling



• B1-NC189 - Challenger Rig#26

NC 147/3-4 MURZUQ

- TPAO 100 %
- Exploration; Seismic Acquisition
- 2009/2010
- 2 + 3 wells drilling campaign



Cooperation in SOUTH AMERICA Since 2005



Colombia



Cooperation with Ecopetrol
in two exploration licences



Ecuador



Cooperation with Petroecuador



Bolivia



Cooperation with YPFM



Venezuela



Cooperation with PDVSA

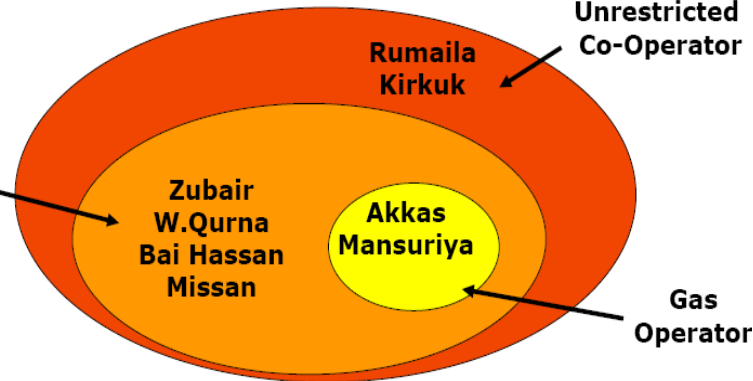


Cooperation Opportunities in IRAQ



Restricted Operators	
Company	Output
CNOOC	455
Inpex	418
Marathon	376
Hess	359
BHP Billiton	318
Maersk Oil	318
Wintershall	305
Pertamina	264

Restricted Co-Operator



(000 boe/d)

Non-restricted Operators

Company	Output
Gazprom	9,874
Exxon Mobil	4,237
BP	3,878
CNPC	3,479
Shell	3,425
Chevron	2,585
ConocoPhillips	2,567
Total	2,285
Lukoil	1,747
Eni	1,740
Petronas	1,678
StatoilHydro	1,674
ONGC	1,109
Repsol YPF	1,090
Sinopec	898
Occidental	602
BG	601
Anadarko	530

- **Unrestricted Co-Operators**
 - More than 500,000 boepd
- **Restricted Co-Operators**
 - More than 250,000 boep
- **Non-Co-Operators**
 - Less than 250,000 boepd
- **Gas Operators**
 - Separate Advice from PCLD

Non-Operators	
Company	Output
Nexen	156
Nippon	124
Woodside	123
TPAO	79
Kogas	NA
Sinochem	NA
Edison	15

Source: EIG's Ranking the World's Oil Companies

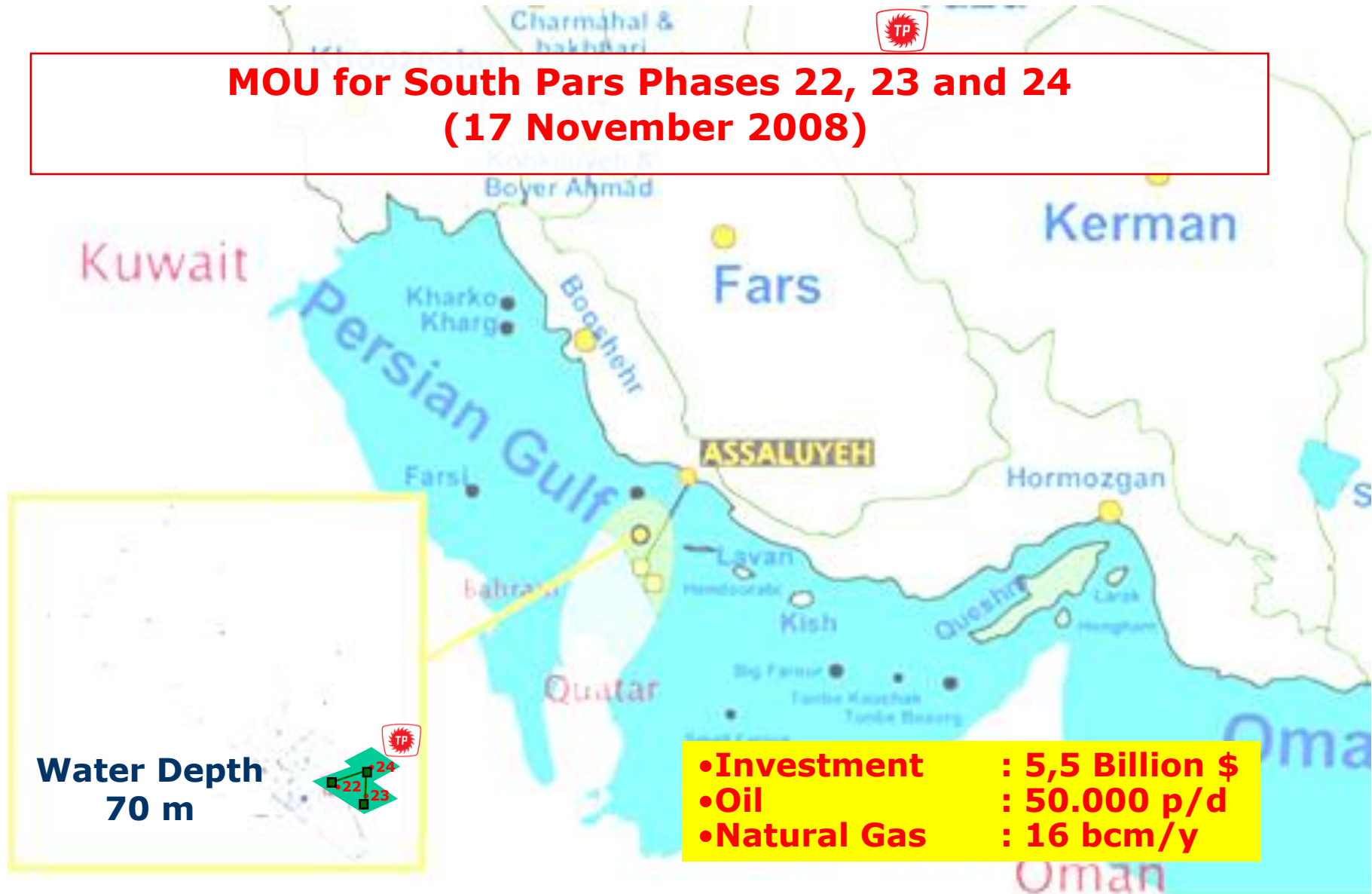
- * Classifications will be advised to companies on an individual basis

TPAO OPENING BAGHDAD OFFICE

Cooperation Opportunities in IRAN



MOU for South Pars Phases 22, 23 and 24 (17 November 2008)



Thank You...

