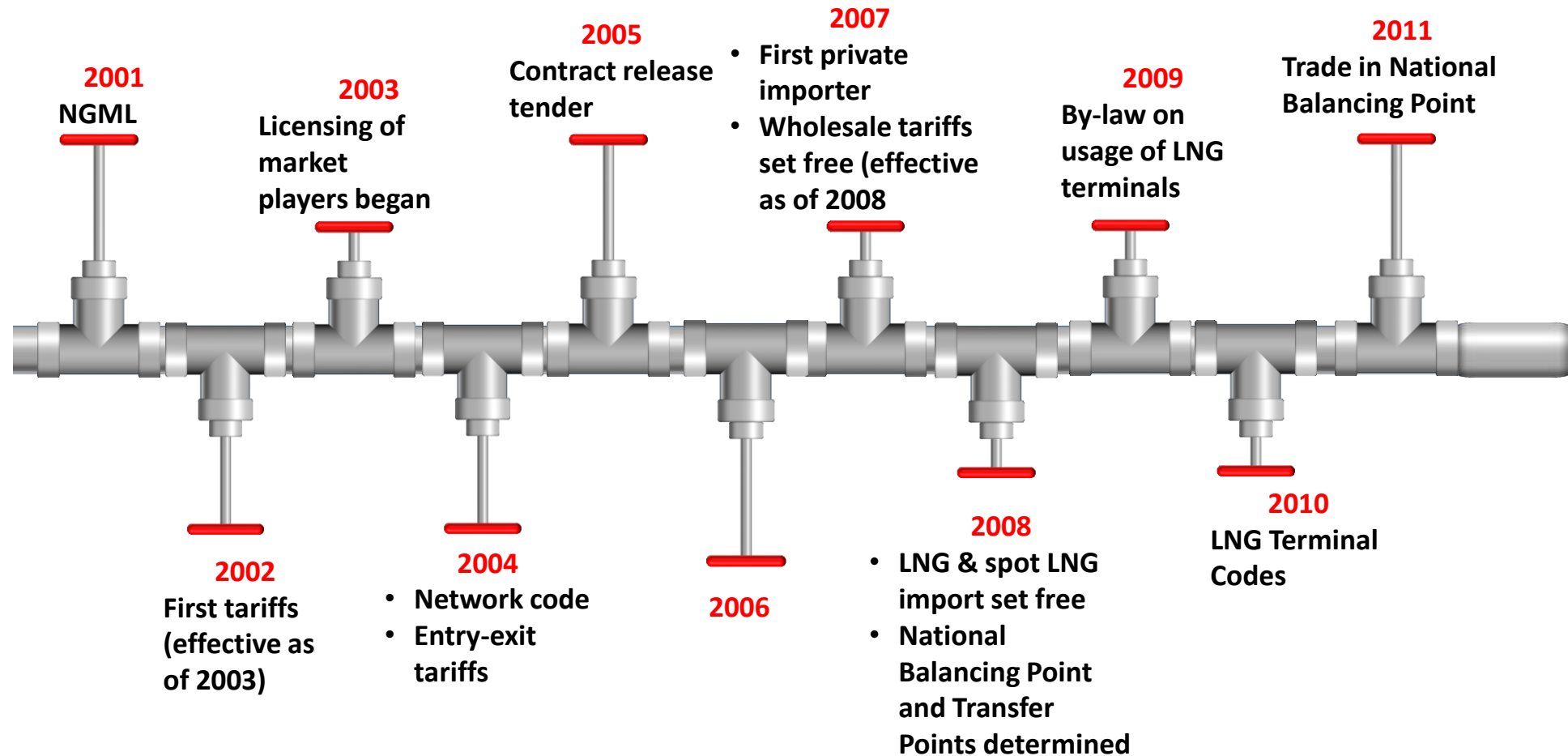


Access to LNG Terminals/Turkish Experience

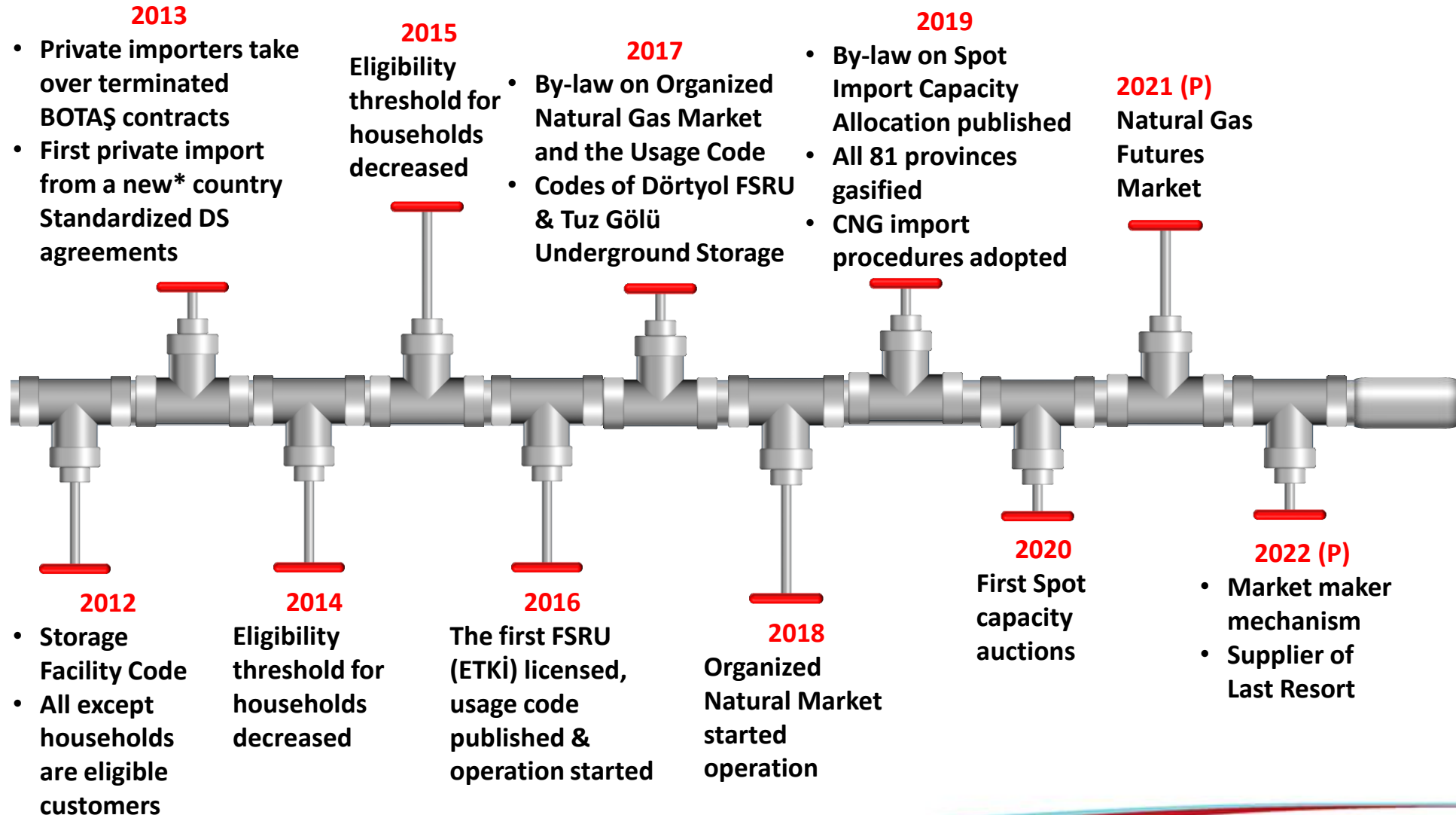
Dr. Bađdagöl KAYA CANER

Energy Market Regulatory Authority of Türkiye

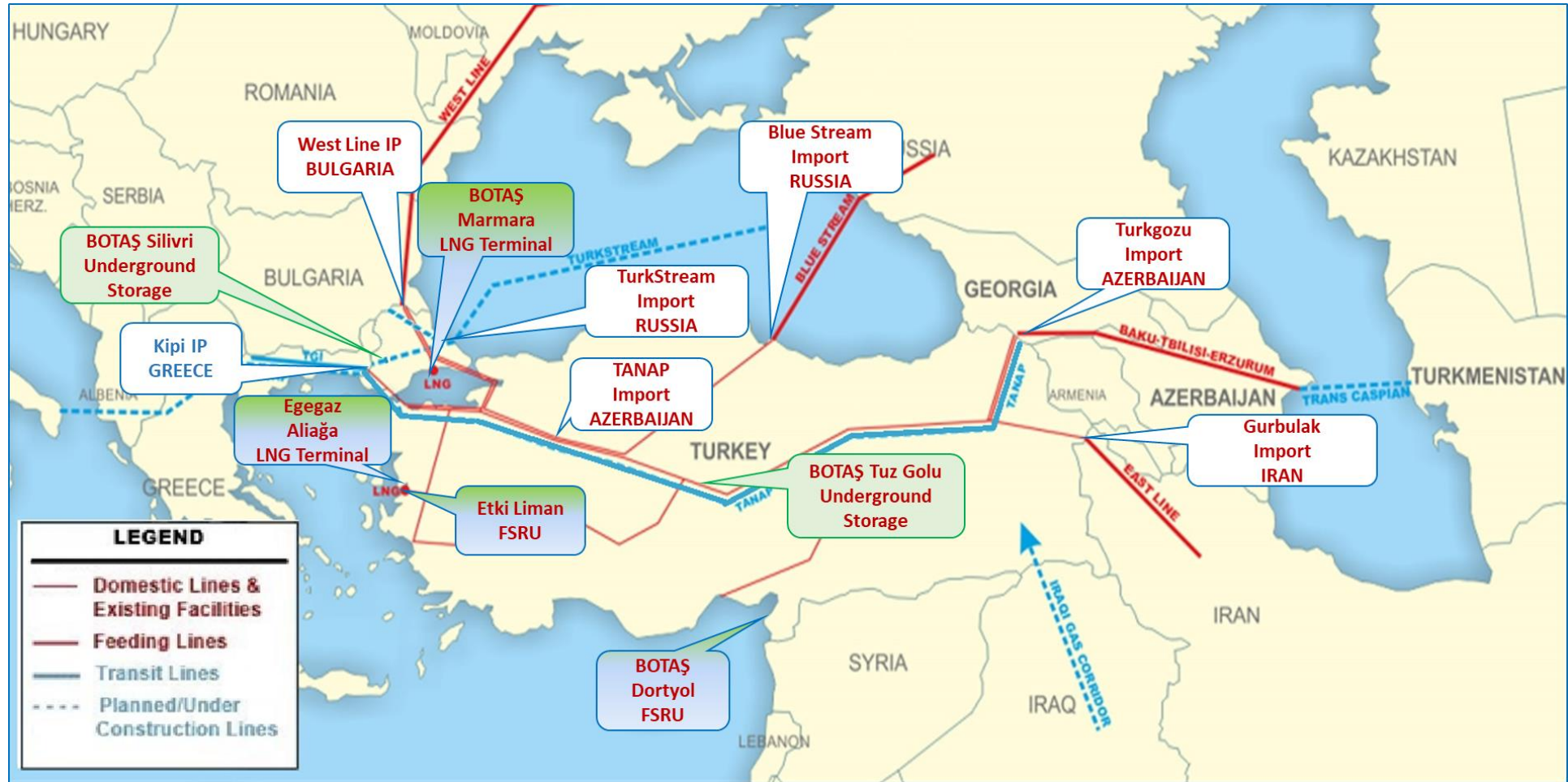
Milestones in Turkish Gas Market Liberalization



Milestones in Turkish Gas Market Liberalization

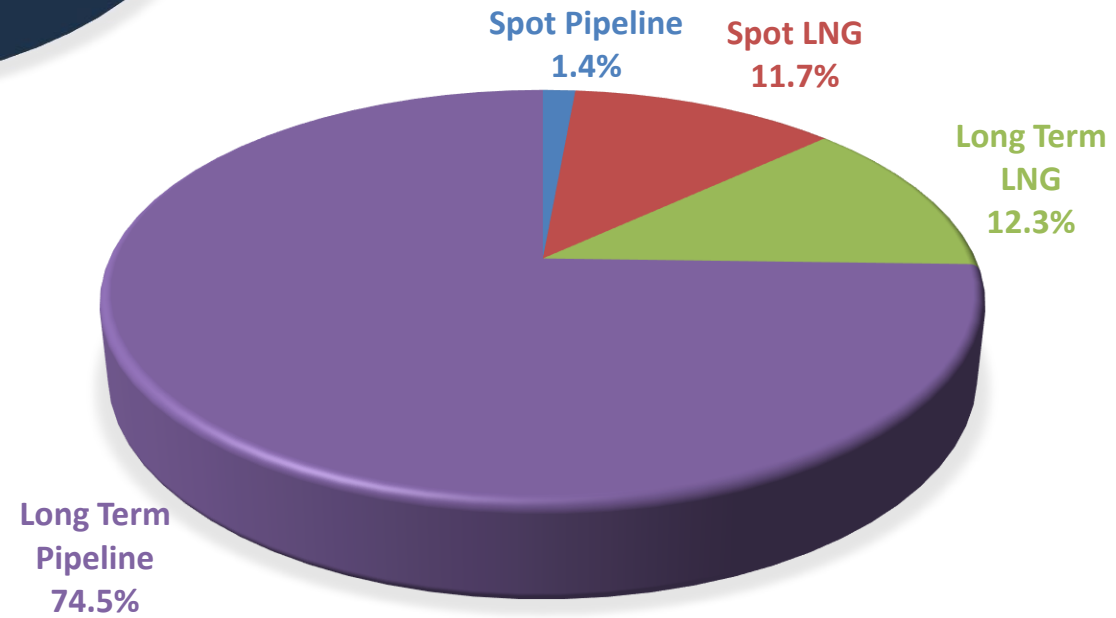
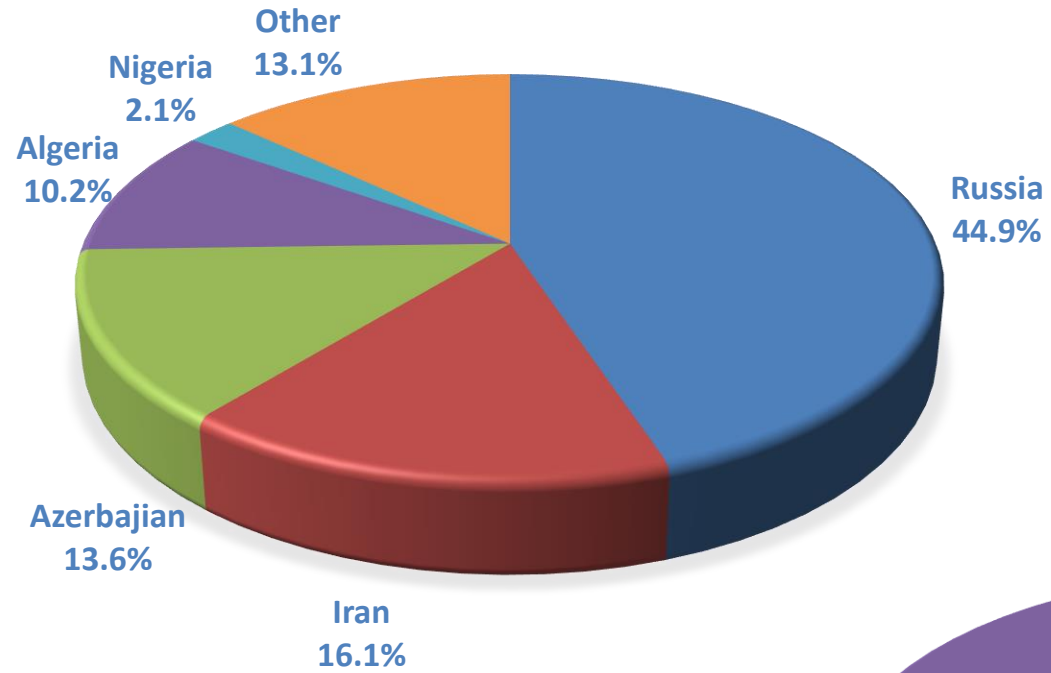


Main Natural Gas Infrastructures



↑16 000 km pipeline length ↘6 entry points ↘1 exit point ₺9 compressor stations

Breakdown of Imports in 2021



Turkish Natural Gas Market Statistics (2021)

Long Term LNG Imports between 2013-2021 (bcm)

	2013	2014	2015	2016	2017	2018	2019	2020	2021
Algeria	3 684	4 179	3 916	4 284	4 617	4 520	5 678	5 573	5 987
Nigeria	1 274	1 414	1 240	1 220	1 344	1 667	1 756	1 358	1 249
Total	4 958	5 592	5 156	5 504	5 961	6 188	7 435	6 931	7 236

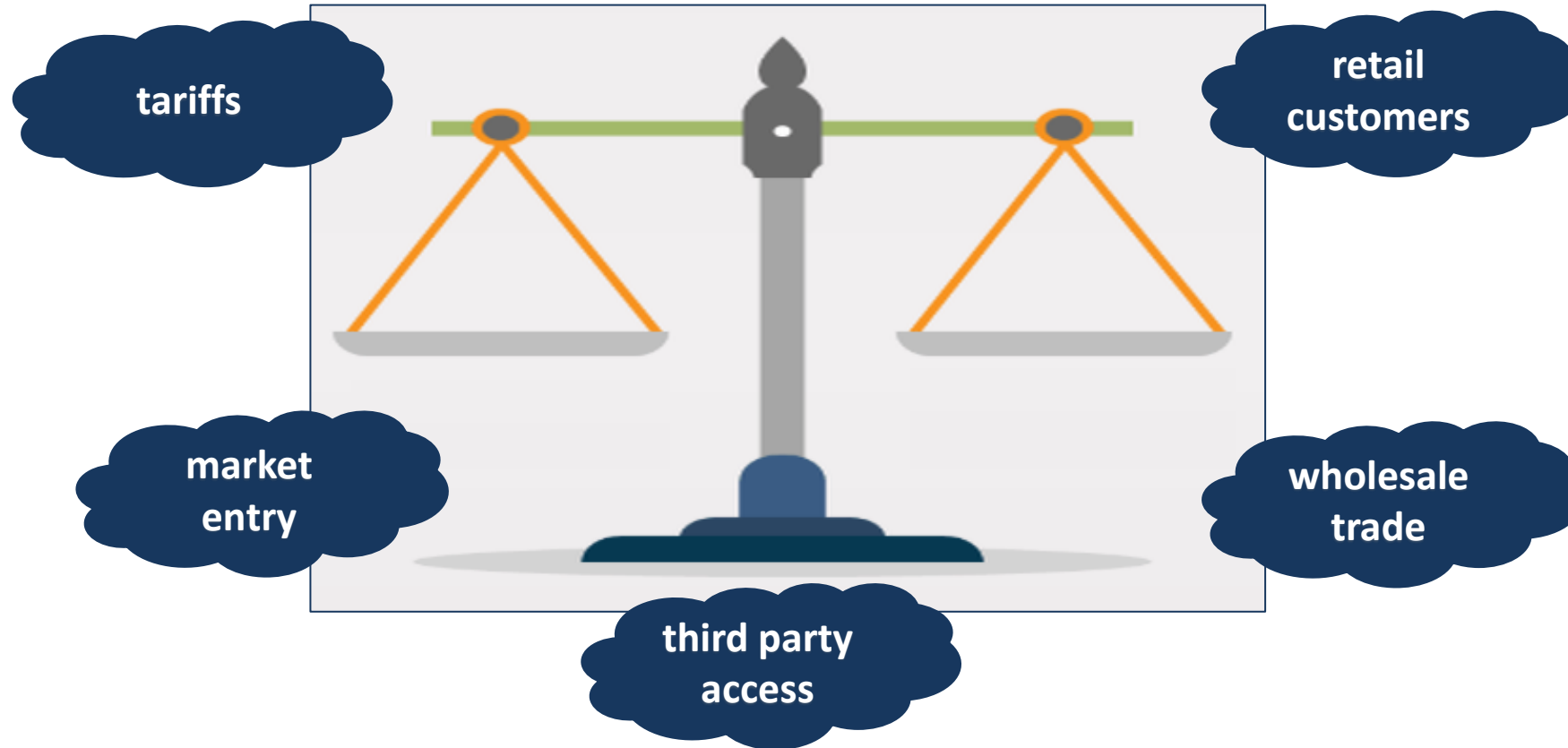
Spot LNG Imports in 2021 (bcm)

Country	Amount	Share (%)
USA	4 740	8.1
Egypt	1 351	2.3
Qatar	299	0.5
Trinidad and Tobago	195	0.3
Nigeria	182	0.3
Spain	106	0.2
TOTAL	6 871	11.7

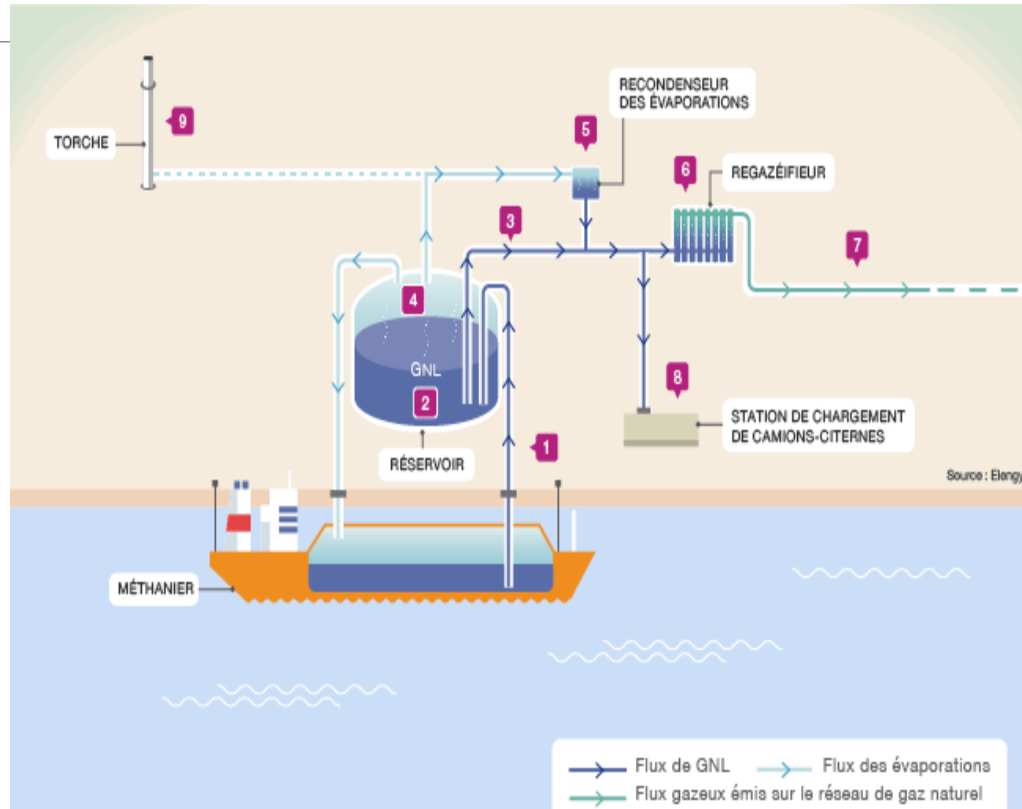
LNG Terminals

Name of the facility	Operating Year	Regasification Capacity (mcm/day)	Annual Capacity (bcm)	Tank Capacity (mcm)	Access Conditions: rTPA or nTPA
BOTAŞ Marmara LNG Terminal	1994	37 mcm	13.5 bcm	153 mcm (255 000 LNG m ³)	rTPA
EGEGAZ Aliaga LNG Terminal	2006	40.6 mcm	14.8 bcm	168 mcm (280 000 LNG m ³)	rTPA
Etki Liman FSRU	2016	28.3 mcm	10.3 bcm	100 mcm (166 631 LNG m ³)	rTPA
BOTAŞ Dörtyol FSRU	2017	21 mcm	7.7 bcm	102 mcm (170 000 LNG m ³)	rTPA

To Regulate or not to Regulate...



Access to LNG Terminals



The US Experience

- FERC Decision 2002 (Hackbery)
- Merchant Terminals
- FCFS /Non-Discrimination
- Negotiated Access

The EU Experience

Internal Gas Market Directives

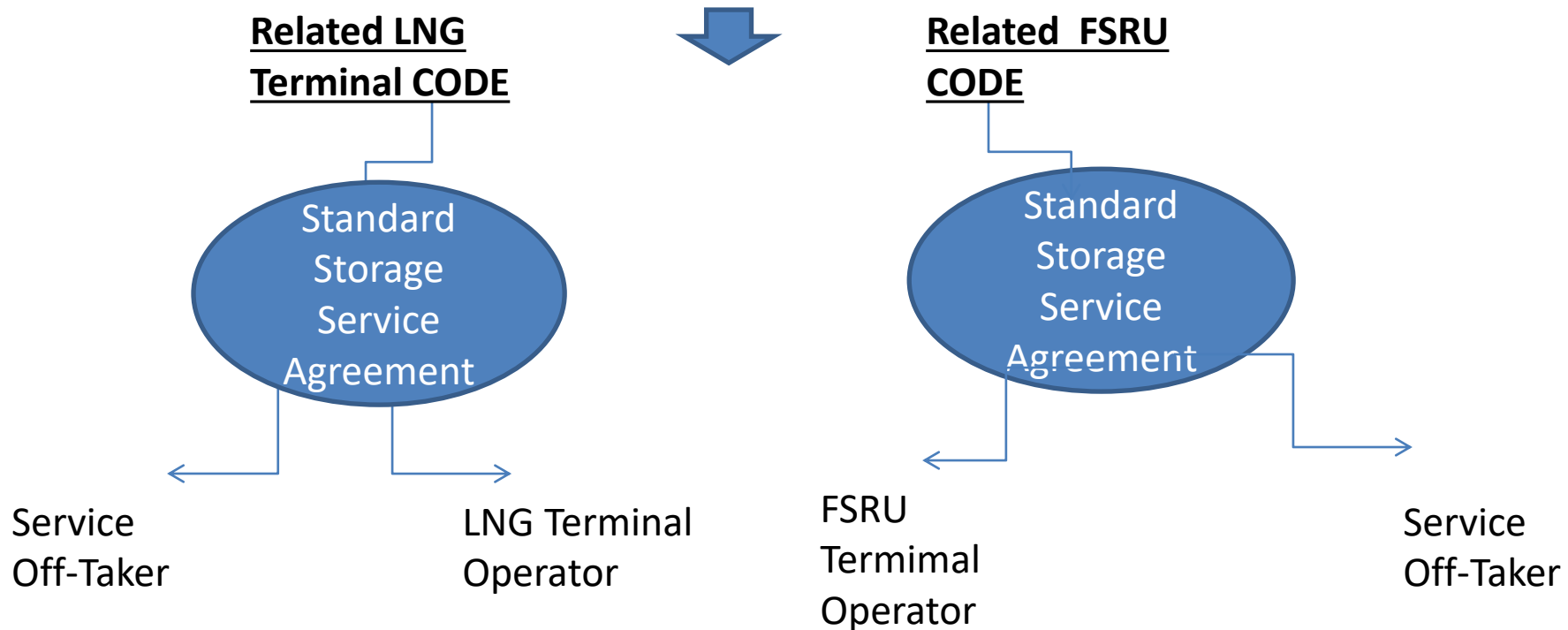
Non-Discrimination/Transparency

Regulated Access /Exemptions for
New Investment

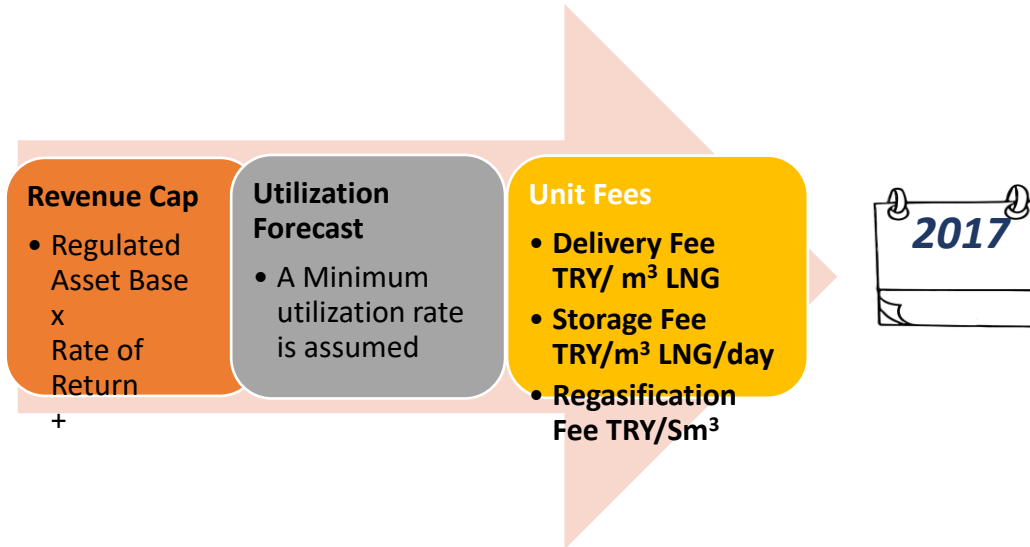
Turkish Law on Natural Gas Market No. 4646 Storage License (ground or underground, LNG)

- Technical and economical capability
- Contribute to safe and coordinated system operation in storage capacity management
- Non-discriminatory service subject to system availability
- Storage capacity access disputes settled by EMRA

- Turkish Natural Gas Market Law No.4646 dated 2001
- By-Law on Determination of Usage Principles of LNG Facilities



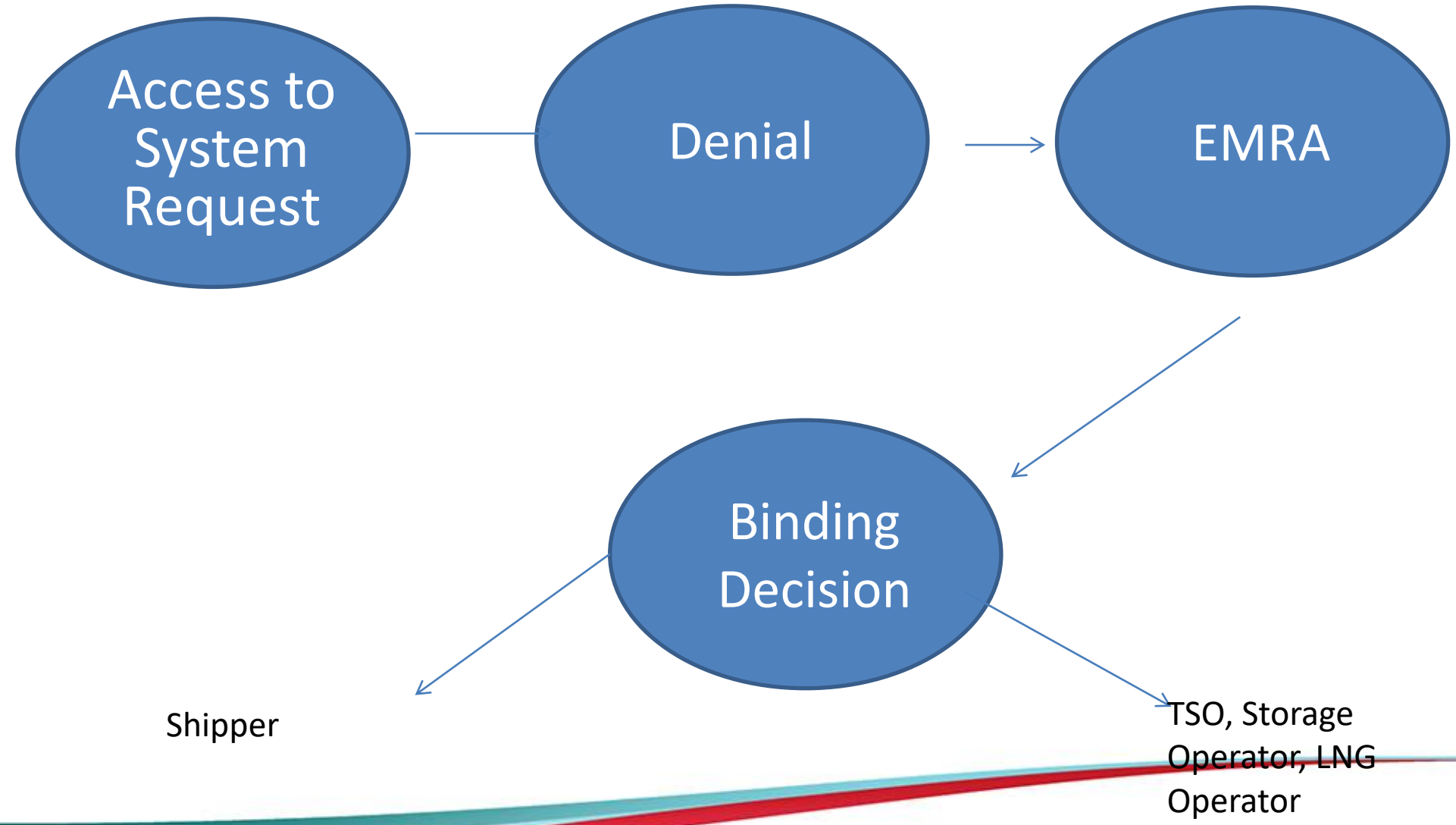
LNG Terminal Tariffs in Turkey



Tariffs of LNG terminals including FSRUs have been liberalized as of the end of 2017, by the Board Decision dated 28/12/2017 and numbered 7611

in line with the Natural Gas Market Law article dictating that storage tariffs should be freely set between parties provided that there is sufficient capacity to meet the current demand and a higher level of competition in the market.

Third Party Access to Natural Gas System/ NGML



By-Law on Determination of Usage Principles of LNG Facilities

Standard service : Provision of the services of unloading the LNG carrier, storing the LNG for a period to be determined in the basic procedures and principles of use, gasifying the LNG within the framework of the gasification capacity allocated within this scope and providing it to the national transmission network as a whole.

Additional services: Provision of the services of docking the LNG carrier to the port, unloading the LNG carrier, storing the LNG in tanks, gasifying and feeding the LNG to the national transmission network, loading the LNG to road tankers or to carriers, and other similar services independently from each other

Standard services may be **bundled as standard services**; they can be **unbundled when given as additional services**.

TERMINAL SERVICES



BERTHING

UNLOADING



TERMINAL SERVICES



STORAGE of LNG in TANKS



**SEND OUT TO
TRANSMISSION NETWORK**



TRUCK LOADING SYSTEM

By-Law on Determination of Usage Principles of LNG Facilities CAPACITY

Regarding standard and additional services, in line with the basic principles of non-discrimination and ensuring competition between equal parties, the storage company shall be obliged to clearly designate the following matters in the LNG CODE and to provide the requested information on these matters to suppliers and export companies:

- a) Capacity reservation method;
- b) Capacity allocation process;
- c) Applicable reservation method for cases where demand exceeds the storage capacity;
- d) Applicable procedures and principles if the reserved capacity is not used;
- e) Procedures and principles regarding capacity transfers;
- f) Idle capacity reservation method.

By-Law on Determination of Usage Principles of LNG Facilities FEES

The storage company shall specify the definitions of the fee for standard and additional services, the criteria on which the calculation method of the fees shall be based, the payment dates and invoice content subject to the fees, the manner and method of payment, and the practices in case of non-payment in the LNG CODE.

The fees in cases where the storage company and the service recipient are unable to fulfill their obligations regarding standard and additional services shall be designated in the LNG CODE, based on objective criteria and within the framework of proportional, non-discriminatory, transparent and cost-efficient principles encouraging appropriate capacity usage. (3) Provisions regarding the terminal operating gas shall be included in the LNG CODE in detail.

Main Provisions of the LNG Terminal Codes

- Responsibilities of parties
- Calender of applications before and within the Storage/LNG Year
- Capacity application, allocation, and usage
- Nomination, program ve allocation
- Operating conditions
- Capacity Interruption and operational orders
- Metering, and payment, bills
- Disputes
- Amendments

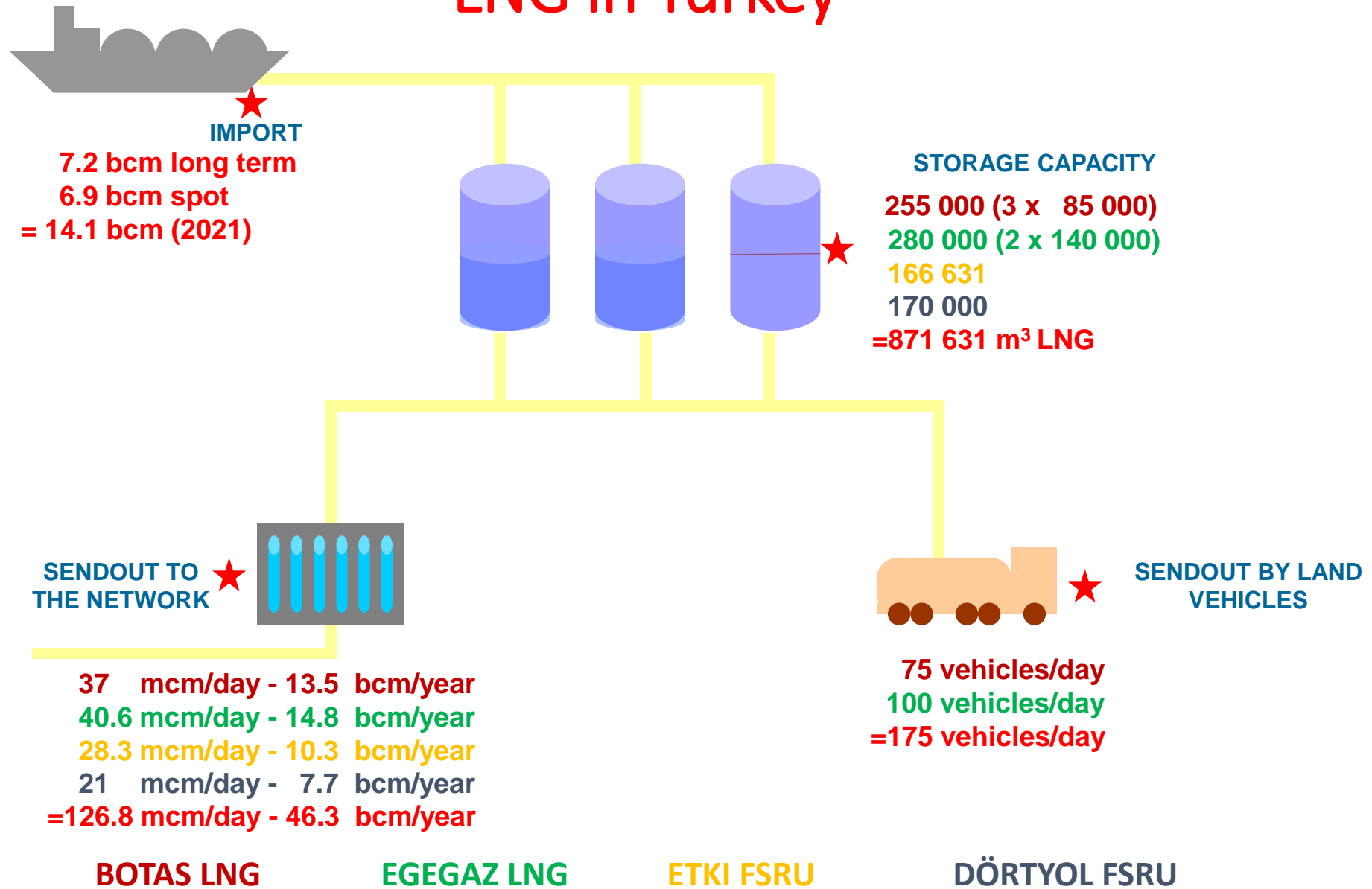
Capacity Application LNG Terminals

	BOTAŞ Marmara Ereğlisi LNG Storage Facility	Egegaz Aliğa LNG Terminal
Capacity Announcement	15th of August	15th of August
Capacity Application	1st of September	1st of September
Review period	15 days	15 days
Declaration period	15 of September	15 of September
Unutilised capacity declaration period	1st of October	1st of October
Unutilised capacity Review period	Until 20th of October	5 days

Capacity Application FSRU's

	Etki Liman Floating LNG Terminal		BOTAŞ Dörtyol Floating LNG Terminal	
	Long Term Capacity (1 – 10 years)	Short Term Capacity (less than a year)	Long Term Capacity (1 – 3 years)	Short Term Capacity (less than a year)
Capacity Announcement	15th of July	15th of August	15th of July	15th of August
Capacity Application	1st of August	1st of September	1st of August	1st of September
Review period	15 days	30 days	15 days	30 days
Depolama şirketinin rezervasyonları bildirim süresi	15th of August	30th of September	15th of August	30th of September

LNG in Turkey



You may add your
LOGO here



THANK YOU FOR YOUR ATTENTION!

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