DBDH, The Danish Trade Council, and the Danish Embassy of Denmark in Turkey hereby have the pleasure of inviting you to join a District Heating export promotion tour to Turkey the 4-8th May. The joint export promotion tour includes a full day seminar and visits to Izmir, participation in the Danish exhibition at the annual energy fair @ICCI Istanbul and a presentation at the Danish seminar “District Heating and Cooling – An Integral Part of the Smart City”.
THE TURKISH ENERGY MARKET IN BRIEF

The Turkish government has initiated a number of measures designed to diversify energy sources and increasing renewables in the energy mix (target of 30% renewables in the energy mix towards 2023). As part of the overall energy strategy, the government has completely privatized the energy distribution, and within 5 years, it is expected that the total power generation assets also will be entirely privatized. The privatization of the energy sector has led to an increased focus on energy efficiency and the use of local energy resources. The recent privatization entails great investment opportunities in the energy sector. By 2023 the total investment in the energy sector is estimated to amount to USD 120 billion, which is more than the double of the investment in the previous decade.

Turkey is poor in fossil fuels, but is rich in renewable energy resources. In particular, Turkey is rich in geothermal energy. Turkey ranks as no. 7 on the world list and no. 3 in Europe of countries with geothermal energy potential. Turkey has 170 geothermal areas, but the potential is far from realized.

It is expected that 100 wells will be established per year, and the Turkish stakeholders are willing to enter into international cooperation. Geothermal district heating has in recent years been high on the agenda. Today almost 90,000 households have their need for heat covered by geothermal district heating. The current production of geothermal district heating is approximately 805 MW. As part of the Government’s 10th Development Plan (2014-2018) they have projected an investment of $ 1.4 billion. The potential is that one million households can have geothermal district heating up to 2018. This will lead to a production level increase up to 4000 MW (an increase of 80%), in the next four years.

The government also plans a major expansion of power production in Turkey, including from new power plants, totaling 18,500 MW. Here there are good opportunities that some of these can be established as CHP.

Since 1983, district heating growth increased annually by 23%, and the potential is still substantial. It is estimated that 30% of Turkey's total heating needs can be met by geothermal energy. The potential becomes more acute since Turkey is experiencing a great urbanization growth (2% annually), which puts great pressure on heat supply in the urban areas. At the same time it means a market increase for district heating due to the high population density in cities which enables the construction of district heating and thus makes district heating more relevant.

Based on the above knowledge DBDH assesses that there is significant export potential for Danish district heating technology and know-how to Turkey.
IZMIR

Izmir is a strategically important city for district heating and cooling growth. The city houses the geothermal district heating systems (GDHS) Balcova-Narlidere, which supply 11,500 households with a capacity of 72 MW. The plant is the largest in Turkey with a market share of almost 40%. Among the cities with the highest expected growth are Aydin and Manisa, located within 90 kilometers from Izmir (see Figure 1).

![Figure 1 - Cities with large district heating and cooling potential around Izmir](image)

In Izmir, the Danish players get the opportunity to meet key stakeholders and potential customers, partners and subcontractors. Izmir Development Agency will introduce the development of district heating sector in Izmir. There will be additionally a visit to a local district heating systems.

@ICCI EXHIBITION AND CONFERENCE - ISTANBUL

A “Joint-Danish District Heating and Cooling Pavillion”, at the international energy exhibition, @ICCI 2015 in Istanbul, is organized in collaboration with the Danish Consulate General in Istanbul.

This will bring together the Danish participants at a joint stand at the biggest and most significant energy fair with more than 400 exhibitors and 16,000 visitors. ICCI 2015 Fair and Conference brings together major decision-makers of the industry and it is the only international platform, where conference, B2B meetings and fair activities are carried out concurrently.

The ambassador will open the Danish stand on the first day of the fair, where specially invited guests will be present.

ICCI seminar

At the @ICCI exhibition, there is a parallel conference. As part of this, DBDH cooperates with @ICCI to hold a Danish seminar entitled “District Heating and Cooling - An integral part of the Smart City”. Here the participating Danish companies can give a presentation.
PRELIMINARY PROGRAM

4th May Monday: travel to Izmir

5th May Tuesday in Cooperation with Izmir Development Agency@izmir
09:00-10:00 Briefing on the Turkish district heating and cooling market by Izmir Development Agency
10:00-12:00 B2B meetings with potential customers/partners/ sub-suppliers in Izmir

(B2B meetings will take place 120 minutes and each meeting will be 15 minutes or 20 minutes depending on the number of pre-arranged meetings.)

13:00-17:00 Visit to a local district heating site of an investor

19:00-21:00 Networking dinner in Izmir with energy related public and private stakeholders

6th May Wednesday@ ICCI Istanbul
Departure to Istanbul

ICCI 2015 will take place on 6th of May - 8th of May in Istanbul where there will be a joint Danish District Heating and Cooling Pavilion.

9:00-18:00 First day of the Congress and Exhibition

17:00 Official opening of the booth with the participation of the Danish Ambassador and or Danish Consul General with pre-invited guests/press/stakeholders

7th May Thursday @ ICCI Istanbul
10:00-18:00 2nd day of the Congress and Exhibition

Danish District Heating and Cooling Seminar with the title “District Heating and Cooling – An integral part of the Smart City” in connection with ICCI Conference part will be arranged in coordination with the ICCI Management Team.

8th May Friday @ ICCI Istanbul
10:00-18:00 3rd day of the Congress and Exhibition

Evening: travel back to Denmark
**PRICES**

**Full exhibition package DKK 26,500 that includes:**
- Full day program in Izmir incl. networking dinner
- 6m² own exhibition area + (booth, set-up, service etc. all included) + common area
- Full access to the exhibition
- Official opening of the booth
- Presentation at the “Danish District Heating and Cooling Seminar - An integral part of the Smart City”

**Semi exhibition package DKK 19,500 that includes:**
- Full day program in Izmir incl. networking dinner
- 3m² own exhibition area + (booth, set-up, service etc. all included) + common area
- Full access to the exhibition
- Official opening of the booth

**None exhibition package DKK 9,500 (for companies with their own exhibition) that includes:**
- Full day program in Izmir incl. networking dinner
- Official opening of the booth
- Presentation at the “Danish District Heating and Cooling Seminar - An integral part of the Smart City”

Prices are based on participation of min. 10 companies, and include all shared costs for the visit, participation with an exhibition, local transport/transfer during the stay, common buffet lunches and dinner arrangements that are stated in the program.

Only individual costs, such as travel to and from Turkey, flight to and from Izmir, non-common meals/lunches and accommodation, are not included.

Pre-booking of hotels will be arranged; however, referring to the above, the hotel cost is not included in the participation fee.

**DO YOU WANT TO JOIN?**

Please fill out the last page and e-mail it to the DBDH secretariat (Lars Hummelmose, lh@dbdh.dk) before the 16th January 2015, providing all relevant contact details for the participant(s) (name, number, title, e-mail).
Yes, our company will participate. The prices based on the participation of 10 companies and co-financing from Danish Export Council are:

- DKK 26,500 for the full exhibition package including presentation at the seminar
- DKK 19,500 for the semi exhibition package
- DKK 9,500 None exhibition package including presentation at the seminar (only for companies with own exhibition area)
- No, thank you, we will not participate

Company (stamp): __________________________________________________________

Contact: _________________________________________________________________

E-mail: _________________________________________________________________

Return to DBDH before 16th January 2015

DBDH
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2000 Frederiksberg
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