OPI NEWSLETTER

THE VOICE OF THE ONTARIO OIL AND NATURAL GAS INDUSTRY SPRING 2016

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Encouraging responsible exploration and development of the oil, gas, hydrocarbon storage and solution-mining industries in Ontario

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OPI holds meetings with Government of Ontario

Board of Directors meet with Deputy Minister

Bill Thornton, Deputy Minister
Ontario Ministry of Natural Resources and Forestry

The OPI held a series of meetings in recent weeks with the Government of Ontario to discuss a number of issues and concerns affecting Ontario oil and natural gas production.

On March 3rd at the OPI office in London the Board of Directors met with Ontario Ministry of Natural Resources and Forestry Deputy Minister Bill Thornton and his colleagues Monique Rolf von den Baumen-Clark, Director, Integration Branch, Sherry Pineo, Acting Manager, Petroleum Operations Section. The Ontario Oil, Gas and Salt Resources Trust was in attendance on behalf of the Ontario Oil, Gas and Salt Resources Library.

The OPI requested the meeting with the Deputy Minister to discuss the current critical situation as a result of low commodity prices, and to advocate for the development of an industry strategic plan to reverse the serious decline in production in recent years.

In exploring alternative and temporary measures to deal with the current situation the topics discussed included suggested changes to policy on suspended wells and disposal wells as well as the formation of a facilitation committee to deal with disputes. There was genuine support from the Board of Directors and the Deputy Minister for a commitment to a co-operative relationship on all matters related to applications, inspections, and regulatory and standards reviews.

As an important first step to address and reverse the continuous decline in production the Deputy Minister acknowledged the need for a sector strategy that would involve the Ministries of Natural Resources and Forestry, Energy, Economic Development, Employment and Infrastructure, and the OPI.

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At the Ontario Legislature in late February the OPI met with Bob Delaney, Parliamentary Assistant to the Ontario Minister of Energy; Peter Milczyn, Parliamentarty Assistant, Infrastrucure to the Minister of Economic Development, Employment and Infrastructure; and Progressive Conservative MPPs Monte McNaughton, Lambton-Kent-Middlesex and Rick Nicholls, MPP Chatham-Kent-Essex.

The OPI provided the Government with an update on the current situation including the fact that no new oil wells and just one natural gas well was drilled in Ontario in 2015.

To address the decline in production the OPI was encouraged by the indication from Bob Delaney for the industry to potentially provide 2% of the yearly supply of oil and natural gas to *Achieving Balance – Ontario's Long Term Energy Plan.* Mr. Delaney offered his support for the Ontario Ministries of Energy, Natural Resources and Forestry and the OPI to develop an industry strategic plan to achieve the 2% target.

The OPI provided a full briefing on the Ontario oil and natural gas E&P sector to the Minister of Economic Development, Employment and Infrastructure Minister Brad Duguid's Chief of Staff Charles Finlay and Policy Advisor Chris Salloum. The OPI believes that the Ministry has a pivotal role to play to stimulate exploration throught its supoprt for a sector strategy, and working with the indsutry to promote Ontario's oil and natuial gas exploration potential throughout North America.

As well it was recgonized that the Ontario industry has the experience and expertise to develop the Government of Ontario's program to extend access to natural gas to underserviced communities in the province.

In the meetings with Rick Nicholls and Monte McNaughton whose Southwestern Ontario ridings are central to the oil and natural gas industry, Mr. McNaughton, the Official Opposition Critic, Economic Development, Employment and Infrastructure, advised the OPI of his intention to write the Ontario Minister of Natural Resources and Forestry to encourage him to support the development an industry strategic plan to address declining production.

Message from the Executive Director

The first three months of 2016 has found the OPI active on a number of fronts. The focus has been on a range of industry issues that include addressing the critical situation resulting from plunging commodity process, promoting the industry, discussions with the province on a sector strategic plan, and the industry's involvement in Ontario's long-term energy planning.

Ontario exploration and production remains front and centre as the industry is factors that have both short and long-term consequences. At the January 2016 Board of Directors meeting concerns were raised about the difficulties companies are encountering. In an effort to obtain support during this critical period the OPI wrote to the Ontario Ministry of Natural Resources and Forestry requesting a meeting to discuss the situation.

The OPI Board of Directors, Producers Committee and the Ontario Oil, Gas and Salt Resources Trust Advisory Committee met with Bill Thornton, Deputy Minister of the Ontario Ministry of Natural Resources and Forestry on March 3rd for a discussion regulations related to suspended wells, the need for a co-operative relationship between industry and government, and the long-term future of the industry and its ability to contribute to Ontario's energy requirements and the economy..

The OPI is continuing to promote "The Ontario Advantage" as a profitable exploration and development opportunity throughout North America recently attending the 2016 the North American Prospect Expo in Houston, Texas. Upcoming is the 2016 Michigan Petroleum Conference, Traverse City, Michigan and the AAPG 2016 Annual Convention in Calgary.

The most important conference for 2016 is Discover the Future – 54th Annual OPI Conference and Trade Show being held May 4-6th in London. The conference will feature the ***Ontario Prospect Expo*** in the program to offer Ontario oil and natural gas producers the opportunity to meet potential investors and E&P companies interested in prospects, partnerships and joint venture opportunities.

The Government of Ontario is progressing with the development of a Cap and Trade Program, a key component of the province's policy for managing climate change. The OPI continues to monitor develops to determine what, if any, impact the program will have on Ontario producers.

The Ontario Oil, Gas and Salt Resources Library has received production reports for 2015 that indicate oil production for the year at 385,000 barrels and 5.5 billion cubic feet of natural gas. The Library hosted a lunch and provided a tour of the facility to the Ontario Ministry of Natural Resources and Forestry officials during their visit to London.

Please enjoy this issue of the OPI Newsletter and contact me anytime at 519-630-4204 or at hughmoran@ontpetroleuminstitue.com.

Hugh Moran, Executive Director

OPI Talking Points

OPI attends conference in Houston

The OPI attended the NAPE Summit 2016 in Houston the largest prospect expo in North America.in February. The exhibit booth had a steady stream of visitors over the day and a half expo. The OPI received serious attention from investors and E&P companies interested in what Ontario has to offer. Those benefits include the exchange on the dollar, mineral rights and land easing arrangements, and the ability to shoot seismic. While the overall conference attendances was reportedly lower than the 2015 summit the traffic at the OPI booth was comparatively higher.

Ontario Oil, Gas and Salt Resources Trust Advisory Committee (TAC)

The TAC is pleased to announce that it has two new committee members, Terry Carter and Scott Lewis. The appointments were made by the Ontario Oil, Gas and Salt Resources Corporation. Terry Carter is a consulting geologist who for many years was the chief geologists at the Ontario Ministry of Natural Resources and Forestry, and Scott Lewis, is a geologist with Clearbeach Resources.

Access to Natural Gas for Underserviced Communities

The government of Ontario is developing a program to extend access to natural gas to underservices communities in the province. The program is being developed by the Ontario Minister of Economic Development, Employment and Infrastructure. The project presents the OPI with a window to speak to the Government about the program and the benefits it offers to the industry to increase production. As well industry can provide the Government with a "template" for a cost-efficient program to provide natural gas to these communities.

Private Natural Gas Wells Association

The OPI was invited to attend a meeting that the Private Natural Gas Well Association of Ontario (PNGWA) held with the Ontario Ministry of Natural Resources and Forestry, Petroleum Operations Section on February 17th. The meeting was arranged to enable the PNGWA discuss their concerns on regulations and inspections in particular problems with well plugging orders, bio-security and the lack of experienced inspectors. Officials with the PNGWA have expressed an interest in the possible benefits of the Association becoming part of the OPI.

Upper Thames River Source Protection Authority

The OPI's membership on the Upper Thames River Source Protection Authority Source Water Protection Committee in the Thames-Sydenham and Region has been extended to June 30, 2016. The Thames-Sydenham Source Water Protection Plan was approved effective December 31, 2015. This is the culmination of years to preparing the plan involving an extensive and comprehensive amount of work dating back to November of 2007.

54th OPI Conference & Trade Show "Discover the Future"

The 54th Annual Conference & Trade Show is quickly approaching. It is being held from May 4 – 6, 2016 at the DoubleTree by Hilton in London. Plan to attend one of the Special Events being offered as part of the conference such as the Collingwood Shale Core Workshop presented by Al Phillips, being held at the OGSR Library, or the St. Mary's Quarry Tour being led by Terry Carter, or the Short Course "Introduction to Well Test Analysis" by Darryl Tompkins. To register for the event visit our website at http://www.ontariopetroleuminstitute.com/news-events/conferences/ Hope to see you in May at the Conference.

OPI Member Articles

Achieving Methane Emission Reductions in the North American Oil and Gas Sector: Advantage Ontario?

The recent Washington meeting of Prime Minister Justin Trudeau and President Barack Obama resulted in the issuance on March 10, 2016 of a US Canada Joint Statement on Climate, Energy, and Arctic Leadership. Prominent in the document were mentions of efforts aimed at the reduction in methane emissions in the existing oil and natural gas sector, including the following:

-The U.S. Environmental Protection Agency (EPA) will begin developing regulations for methane emissions from existing oil and gas sources immediately and will move as expeditiously as possible to complete this process. Next month, EPA will start a formal process to require companies operating existing methane emissions sources to provide information to assist in development of comprehensive standards to decrease methane emissions.

-Environment and Climate Change Canada will also regulate methane emissions from new and existing oil and gas sources. Environment and Climate Change Canada will move, as expeditiously as possible, to put in place national regulations in collaboration with provinces/territories, Indigenous Peoples and stakeholders. Environment and Climate Change Canada intends to publish an initial phase of proposed regulations by early 2017."

It will be important for the Ontario natural gas production industry to deal with this situation proactively, hopefully by finding an advantage in the situation and**,** at minimum**,** to ensure that the industry is not disadvantaged as compared to its competitors. The commitment to involve stakeholders includes the Ontario industry and our potential ally, the Ontario government, and our neighbouring First Nations.

It should be noted that American suppliers of natural gas, including those directly south of Ontario, should face as much pressure or more as Canadian/Ontario producers. We need to be sure that the playing field stays at least level; if we can tilt it in our favour, so much the better.

In Canada, the focus for Environment and Climate Change Canada will be on natural gas production in Alberta and BC; indeed it can be expected that Ontario producers will face the same requirements as their Western competitors by default, absent a successful effort to differentiate the regulatory regime. In that regard, the OPI and the Ontario government could be the Ontario producers' best friends as those entities can make the case for regulatory treatment appropriate to the Ontario industry's circumstances. Alberta has committed to reduce oil and natural gas methane emissions by 45% by 2025 using a range of voluntary and regulatory measures as well as incentives; adopting the best from

Alberta (voluntary and/or incentive driven) while seeking reasonable treatment under any regulatory requirements could give Ontario natural gas producers and transporters an advantage.

On the incentive side, it is noteworthy that Ontario is introducing a cap and trade system within which reductions in methane emissions could be rewarded with tradeable "carbon offset credits". Two protocols for creation of such credits in Alberta exist already in that Province's system; surely a lobbying effort to have methane capture and/or other emission avoidance projects in the Ontario oil and natural gas sector rewarded in the Ontario cap and trade system would make sense? For example voluntary efforts to reduce emissions from the wells and collection systems in Ontario which go beyond what is mandated by law could be rewarded with carbon offset credits with real value in the Ontario cap and trade system.

It is also the case that the current federal environmental law, the *Canadian Environmental Protection Act, 1999*, contains a provision allowing the federal government to suspend the application of certain federal regulations in any province where the province has "equivalent" laws. An Ontario-centric methane emission reduction regulation that assisted the industry to achieve targets rather than forcing compliance could, particularly given that the Ontario industry is so different from its Western Canadian cousins, be seen as equivalent while providing a "win" for Ontario natural gas producers.

Making common cause with our First Nations neighbours will be a challenge but is one worth making in my view in light of our moral obligations and the simple fact that First Nations can be loyal and trustworthy customers, partners and investors. Implementation of methane emission reductions in partnership with Ontario First Nations could facilitate the political acceptability of such an approach and facilitate supportive government financing while creating employment and other financial as well as environmental benefits for First Nations people and groups involved.

Methane emission reduction requirements are coming and we can be takers or makers in this situation. I know which one I favour!

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From The Newsroom

No time to dither on energy pipelines

There's no doubt that Leonardo DiCaprio, star of the blockbuster film The Revenant, has a flair for the dramatic — and not just on the big screen. The Hollywood actor was honoured for his environmentalism earlier this week at the World Economic Forum in Davos, Switzerland, where he wasted no time in savaging the energy industry.

"We simply cannot afford to allow the corporate greed of the coal, oil and gas industries to determine the future of humanity," he told a who's-who of world leaders and captains of industry. "Those entities with a financial interest in preserving this destructive system have denied, and even covered up, the evidence of our changing climate.
"Enough is enough. You know better. The world knows better. History will place the blame for this devastation squarely at their feet."

DiCaprio has been an outspoken critic of the energy industry before, even though he, like all of us, depends on fossil fuels for the essentials of life. It's fine to advocate for a transition to greener sources of energy, but the sort of rhetoric DiCaprio continues to espouse reveals ignorance, at worst, and naivete, at best.

The actor's remarks aren't unexpected for a member of Hollywood's insulated elite, but what is surprising is the attitude of the federal Liberal government, which still fails to present a cohesive approach to the pipeline projects that are necessary to get Canadian oil to new markets.

Natural Resources Minister Jim Carr said earlier this week that the government won't rush to meet its election promise to design a new environmental review process for pipeline projects. It's a statement that does nothing to instil confidence in the belief the Liberals understand the importance of the energy industry to the nation's prosperity. More worrying yet, Carr said the Liberals are looking for an "interim process" for applications that are already under review, which includes expansion of the Trans Mountain pipeline to B.C. and the Energy East project. Any action that would further chill the glacial pace at which pipeline proposals proceed would be another setback for a pillar of the economy.

And yet, last Friday, Calgary MP and cabinet minister Kent Hehr said Prime Minister Justin Trudeau can deliver on gaining access to new markets, citing the PM's pledge to engage with aboriginals and provincial premiers.

"We've seen the former (Conservative) government really, for the past 10 years see no progress on pipelines. . . . We're going to find more success on this," said Hehr.

Let's hope Hehr has a better bead on the government's intentions than the Liberals' natural resources minister. The time for dithering has long since passed.

London Free Press
January, 2016

Oil is still in demand – it's the glut that's hurting the price

Everything about the oil market – 2015 and 2016 edition – is peculiar. Oil prices have plummeted, yet production has not, defying textbook economics. In some big oil-producing regions, output is actually rising. Demand is up too, yet prices could keep falling. Still, oil could be the commodity bargain of the decade.

How to make sense of all of this? Not easily, because this particular price collapse is unlike the others, so history provides a lousy playbook.

American shale oil was not a factor in the last big collapses, for the very good reason that there was no way to get it out of the ground economically. Now, it's gushing forth in quantities that could fill small ocean basins. The Organization of Petroleum Exporting Countries (OPEC) was still the price setter – had been since the early 1960s – ensuring that most severe price downturns were fairly short-lived. Today, OPEC is pumping like mad, seemingly happy to cast off its previous status as a ghastly, though effective, price-supporting cartel. And there is no recession this time around, even if growth is weak in some parts of the world.

Commodity prices are notoriously hard to analyze and forecast because so many dizzying factors are involved – supply, demand, geopolitics (including embargoes and sanctions), technology (as with hydraulic fracturing, horizontal drilling and other clever extraction gizmos that only oily nerds understand), car fuel economy, carbon taxes, fuel subsidies and wars.

But the variable that seems to apply most to this particular price disintegration is supply, and lots of it. Supply has been outpacing demand, which is why any rally since the great price downturn that started in mid-2014 has been short-lived. The surge that began late last week and took oil prices to more than $34 (U.S.) a barrel from $28 seems unlikely to last. Prices are still down about 35 per cent in the past year and about 70 per cent in the past year and a half.

It is fashionable and facile to blame China and its waning annual growth rates – now down to less than 7 per cent, if you believe the figure, from 11 per cent or so for the past decade. Were it all so simple. China's economic growth rate may be down, but the country is still growing, from an ever-larger economic base, and oil consumption is hardly collapsing – the opposite in fact. The International Energy Agency (IEA) says China's oil consumption climbed about 600,000 barrels a day in 2015, or 6 per cent, which should not be surprising since popular products that come with deep-discount stickers tend to pick up sales. Global consumption rose almost 2 per cent.

So much for the theory that weak demand is to be blamed – or credited, depending on your point of view – for oil's capitulation. Far more sensible to blame rising supplies. Shale production in the United States is now falling as drilling rigs are sent into early retirement, but production still increased last year and the shale bonanza has boosted global supply by 4.2 million barrels a day over the past five years.

Output in the North Sea and Russia is up, and Canada's oil sands production is set to rise substantially by 2020. Sanctions-free Iran, which is sitting on the world's fourth-largest reserves, intends to throw another 500,000 b/d onto the export market. Saudi Arabia isn't scaling back, in the hope that opening the spigots will choke off non-OPEC production. The strategy hasn't worked so far, in good part because expensive projects, like the oil sands, cost more to shut down and restart than to keep running, even when oil prices are low.

As the supply glut builds, oil prices could fall even if global demand stays intact or rises. On Tuesday, the World Bank sliced its 2016 forecast for an average crude oil price of $37 a barrel from the previous forecast, made only three months ago, of $52. Even the new figure may be ambitious. In his popular Energy Matters blog, Scottish oil writer Euan Mearns observes that oil, adjusted for inflation, would have to slump to $20 to hit the low seen in 1998; he expects oil to fall. Given the supply overhang, the question should not be "Why has oil fallen so far?" but "Why has it not fallen further?"

For oil bulls, the good news is that, at some point, low oil prices will choke off production as projects are scaled back or abandoned. Already, almost $400-billion of projects have been suspended. The IEA says energy-project spending fell 20 per cent last year and is on course for a similar fall this year – an unprecedented back-to-back, double-digit investment plunge.

The best cure for low prices is low prices, as market economists say. The questions, though, are whether $30 oil is really low, given the supply glut and, when the inevitable rebound comes: will it be in 2017 or years later? What does seem likely is that oil below $30 is as unsustainable as $110 oil. Demand, after all, has not collapsed, no matter what nonsense you read about China sinking the oil industry.

Eric Reguly, The Globe and Mail
January, 2016

Our energy economy should be celebrated, not shunned

It is encouraging to see some early signs that Canada's new governments understand that export pipelines are vital to Canada's economic future.

Canada is one of the world's largest exporters of crude oil. We produce four million barrels of oil a day and export three million barrels of it. We are also the world's fourth-largest exporter of natural gas.

Sadly, we are not a global presence when it comes to our energy resources. Canadian governments play checkers, while others play chess.
The critical problem is that we have effectively landlocked ourselves and lack the pipeline or port infrastructure to access global markets or realize global ambitions. Instead, we serve as a supplier to one customer, admittedly an important one, the United States.

The United States has been a comfortable energy market for Canada for many years, but today, the American market is saturated with competing oil-supply sources and new technologies have opened up its own oil and gas supplies. Those new supplies have pushed aside Canadian natural gas and have suppressed the prices for continental oil, including Canada's. This isn't because the Americans are taking advantage of us; it is what free markets do when they are oversupplied and it is costing Canadian governments billions of dollars every year.

The answer obviously lies in keeping our costs down and opening additional global export markets for our oil and natural gas.

Today, a pall has settled over the Canadian energy industry, brought on by OPEC's success in collapsing commodity prices, but also by opposition on every front to the expansion and export of oil from Canada's oil sands.

Our attempts to access the Asia Pacific basin have stalled in the face of opposition to Enbridge's Northern Gateway project and Kinder Morgan's Trans Mountain expansion. Neither is supported by the government of British Columbia and both are actively opposed by many of B.C.'s First Nations. Then there is the Energy East project, which would open up the Canadian market from B.C. to New Brunswick and the Atlantic basin. It had seemed straightforward enough – until recently. Now, Energy East is opposed by Montreal's municipal leaders, by some First Nations and by the province of Quebec. And, of course, there is the Keystone XL Pipeline blocked through the intervention of the President of the United States.

Canada's First Nations have been especially resolute in their opposition, unmoved by promises of economic advantage and unconvinced, especially on the West Coast that the Canadian energy industry or the Canadian government really knows what it is doing when it comes to the protection of the marine environment of Canada's Pacific coast.
All of this is, justifiably, cause for alarm.

The Americans, by contrast, have moved quickly to advance their own commercial interests. American refiners have benefited for years from cheaper oil feedstock, including Canada's, and have therefore enjoyed a competitive global edge for their gasoline and diesel fuel.

They moved with lightning speed to allow export of their natural gas via liquefied natural gas (LNG) facilities. And most recently, the U.S. Congress repealed the United States' 45-year-old export ban on oil. Within 30 days, American light crude oil was loaded in tankers and bound for higher-priced export markets. Meanwhile, Canada procrastinates. We have no operating LNG facilities and no meaningful oil exports.

Most disturbing in all of this is the negligence that Canada is showing in advancing our own world ambitions. The Canadian oil sands are arguably the most important resource asset held by any Western democracy in the world – with enormous geopolitical significance. The development of our oil sands, along with natural gas from both Canada and the United States, now means that the North American goal of energy sufficiency (not independence) has been attained. The Americans are delighted by this, as they should be. Strategic thinkers in the United States (those who play chess) are now equally excited by the parallel objective of using Canadian oil and North American natural gas as global export assets, weakening the global economic and political power of OPEC suppliers.

And yet, Canadian governments dither, without so much as a discussion of the possibilities, timidly viewing the largest democratically held petroleum reserve in the world as an embarrassing environmental problem, rather than an opportunity. Does anyone think that the Americans would cap their oil-sands production or procrastinate in the building of pipelines if the oil sands were located there? Would China or France?

The impact of collapsing commodity prices and lack of export capacity upon Canada's economy and its public finances is profound. The growth in Canada's energy economy, centred in Western Canada, but which is a positive influence in every region of Canada, has stalled. Investment has declined. Projects have been cancelled. Job losses mount. Our national government and the Alberta government face rising budget deficits and the Canadian dollar has plummeted to its lowest levels since 2003.

Low prices will eventually be superseded by higher prices and by even more volatility. By then, the United States will be exporting Canadian crude oil from American ports – to their own advantage.

And we will still be talking endlessly about pipelines, still playing checkers while others play chess.

Jim Prentice, former premier of Alberta and Global Fellow at the Wilson Center's Canada Institute in Washington

Contributed to The Globe and Mail
February, 2016

2016 Upcoming Events

WSBOP Training
April 18 – 21, 2016
Best Western Lamplighter, London

H2S Alive Training
May 2, 2016
Union Gas Limited, Chatham

OPI Annual Conference & Trade Show
DISCOVER THE FUTURE
May 4 - 6, 2016
DoubleTree by Hilton, London

OPI Golf Tournament
Wednesday, September 14, 2016
Oakwood Resort, Grand Bend