




The Path Forward

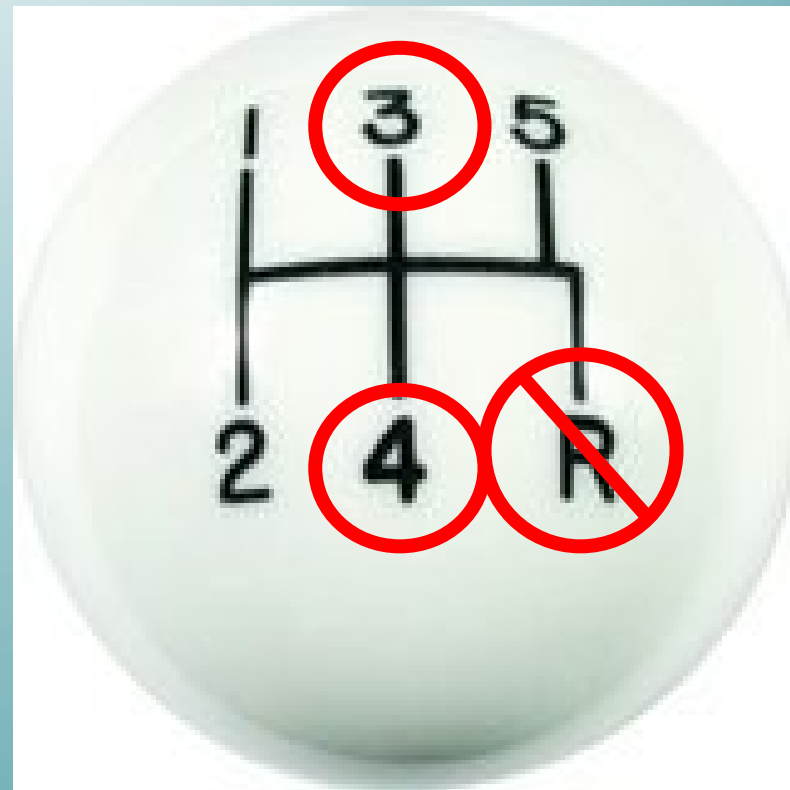
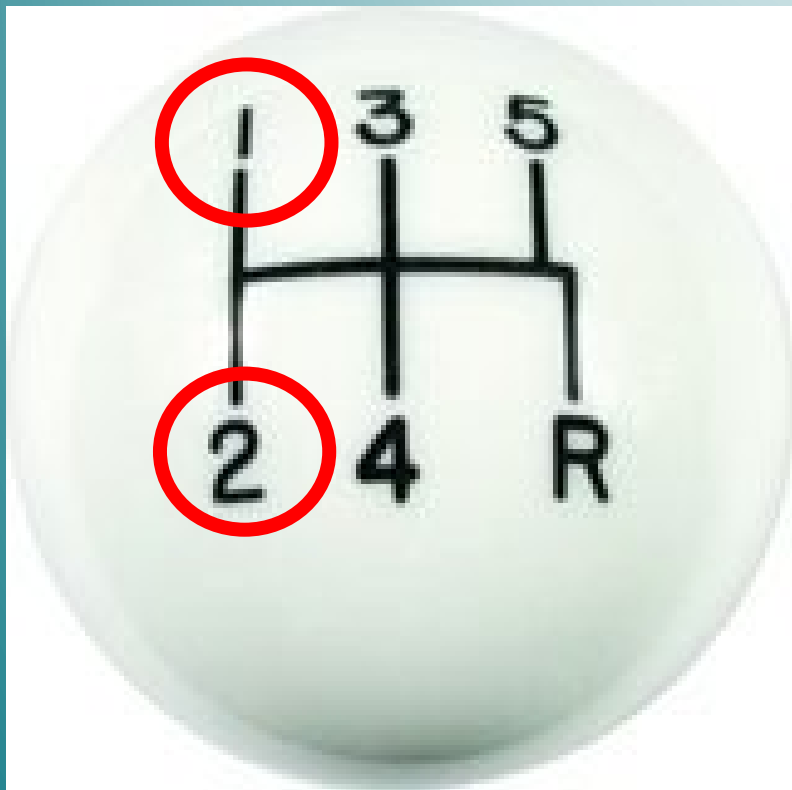
2024 Williston Basin Petroleum Conference

WHERE WE ARE

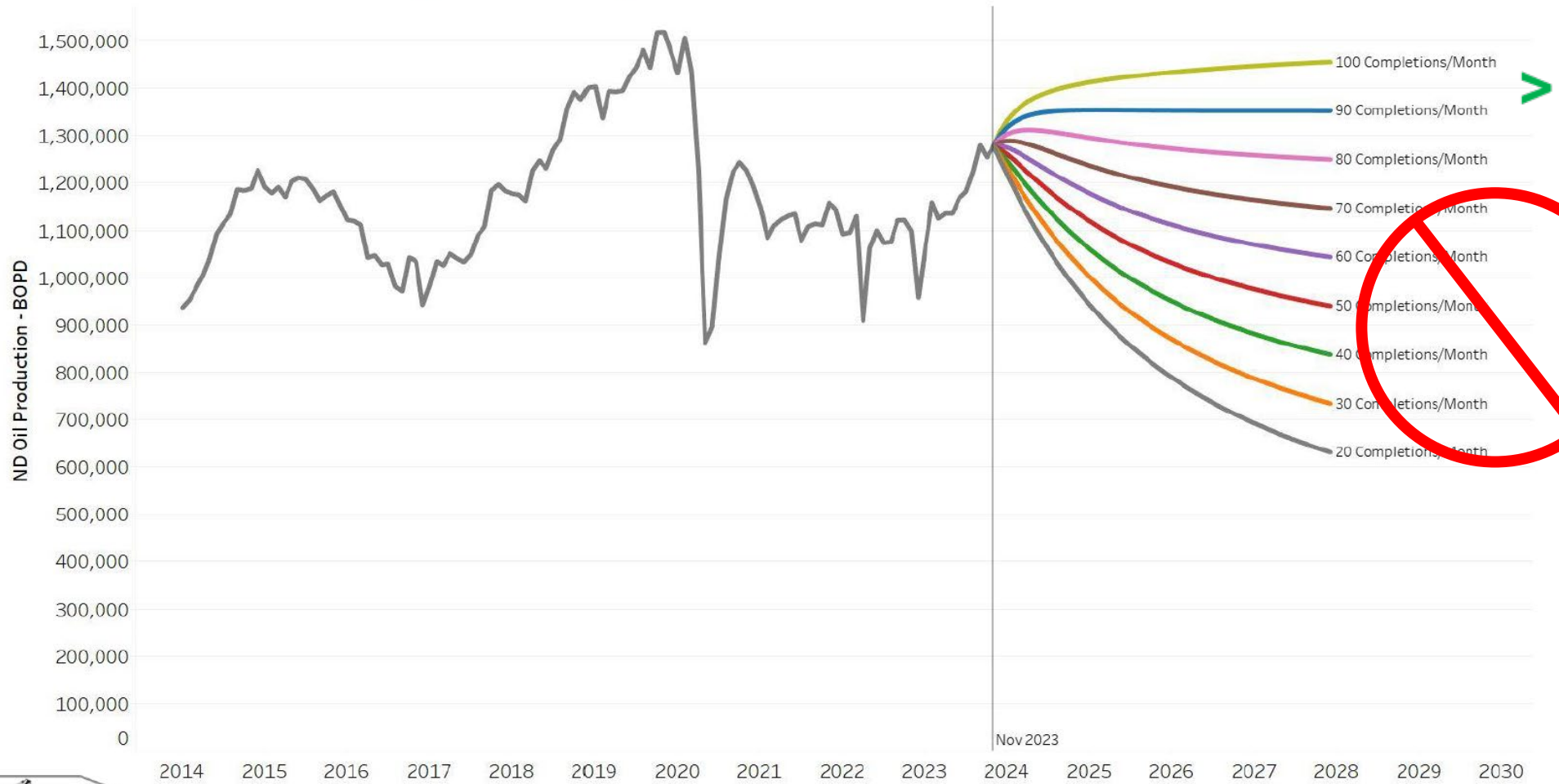
Active March 2021 Conventional Bakken/Three Forks		16,205 2,149 14,056	Active March 2024 Conventional Bakken/Three Forks		18,857 2,171 16,686
Inactive March 2021		2,351	Inactive March 2024		1,560
Waiting on Completion March 2021		628	Waiting on Completion March 2024		334
Rigs March 2021		15	Rigs March 2024		38
Increased Density March 2021 		45,816	Increased Density March 2024 		19,249
Total		65,000	Total		40,000

BAKKEN NOW

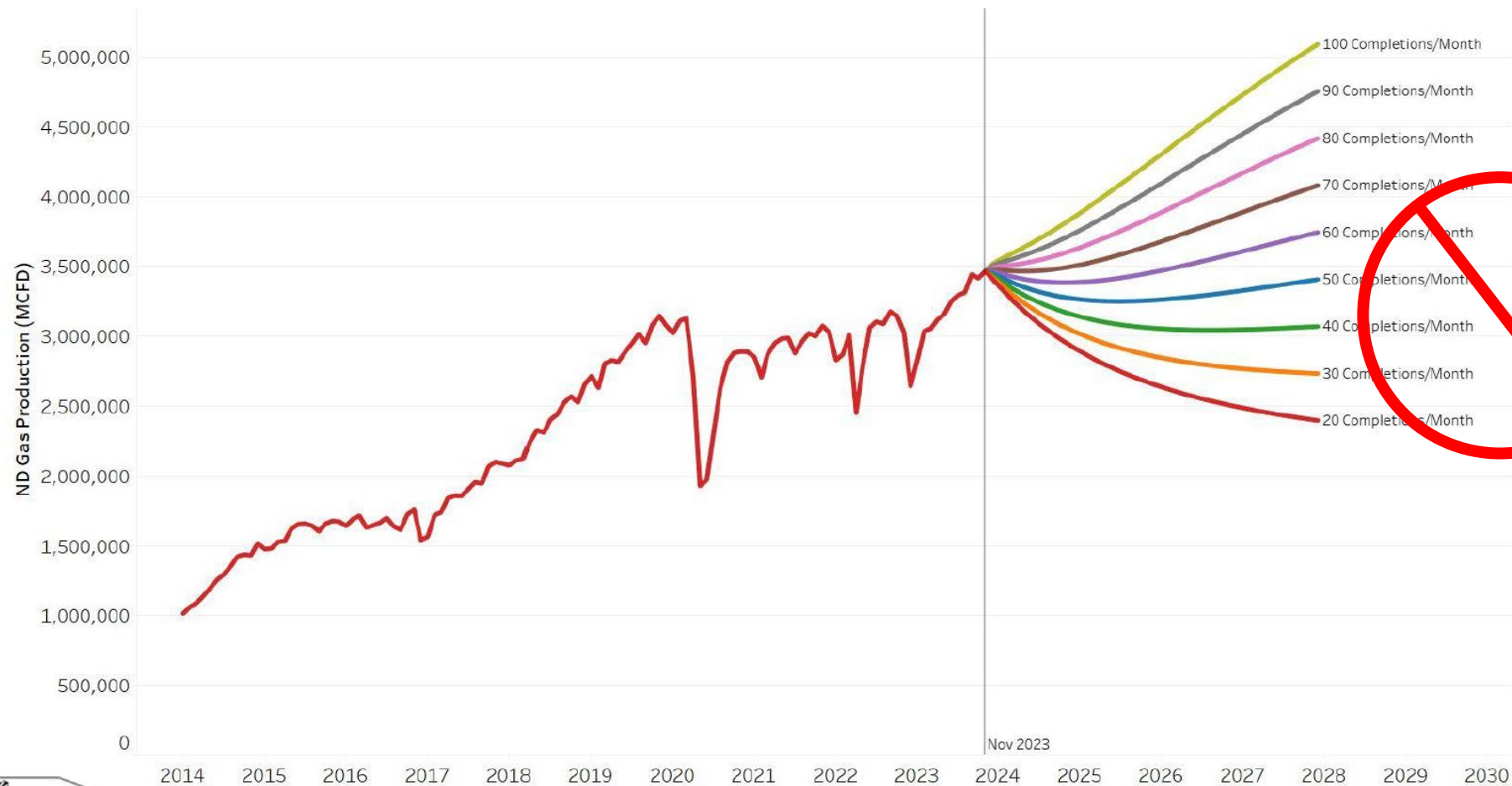
The Path Forward > > >



Monthly Completion* Scenarios - Oil

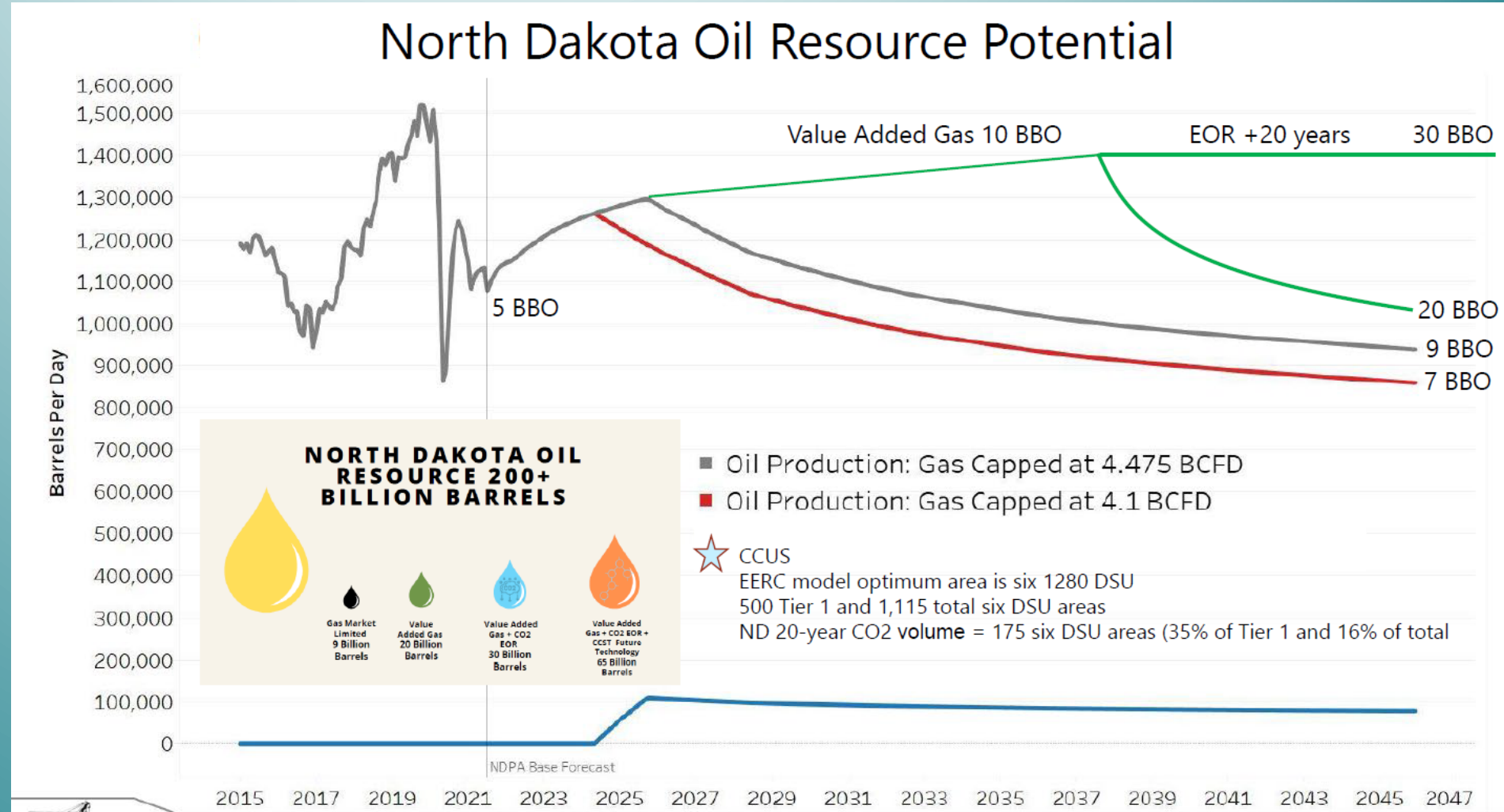


Monthly Completion* Scenarios - Gas



**North Dakota
Gas Export
Pipeline Expansion**

**Gathering Expansion
Processing Expansion
Export Pipeline Expansion
NGL Pipeline Expansion**



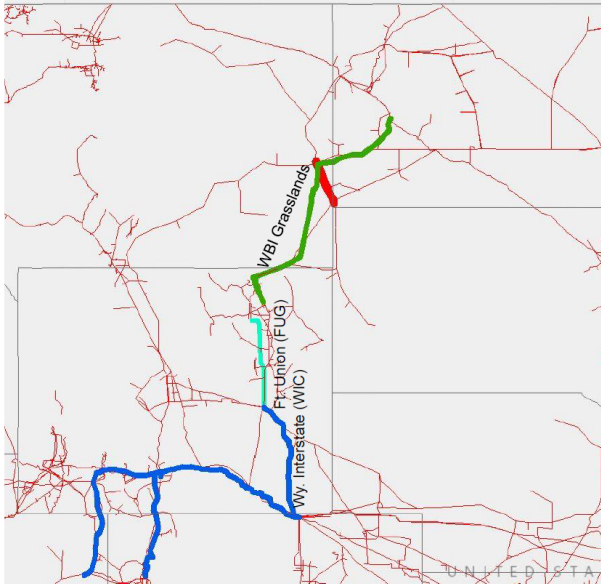
WBI Energy – Grasslands South Project

Project Highlights

- Binding open season Jan 10 – Feb 25, 2022
- Repurpose Grasslands Pipeline (16")
- Proposed Capacity 94,000 Dth/Day
- Access to Baker storage field
- Q4 2023 proposed completion
- Seeking commitments 10yrs or Longer
- Fort Union Gas Gathering and Wyoming Interstate Company provide further transport to Cheyenne hub.

Proposed Tariff Rates

- WBI \$0.32356/Dth + Fuel/Elec to WIC/FUG Interconnect
- FUG/WIC to Cheyenne \$0.2899/Dth + Fuel/Elec



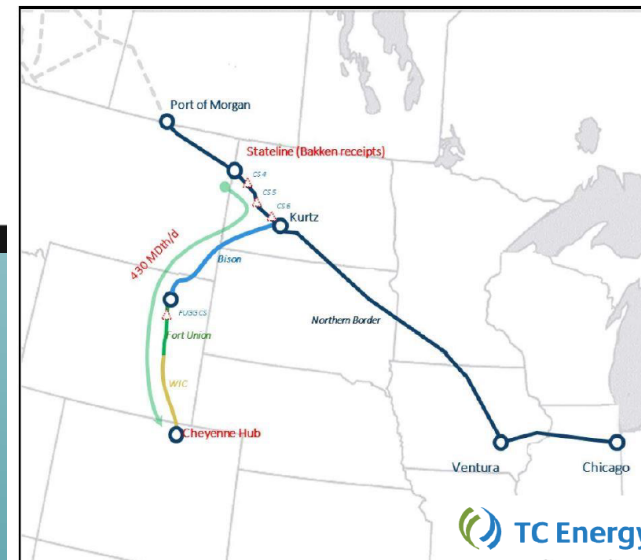
TC Energy / Kinder Morgan: Bakken xPress Project

Project Highlights

- Non-binding open season April 4 - May 6, 2022
- Binding Open Season: June 1-30, 2023
- Three compressor upgrades in North Dakota
- Reverse the idle Bison Pipeline (30" – 302 Mile)
- Capacity 300,000 Dth/Day (430,000 Offered)
- March 2026 targeted in-service date
- Fort Union Gas Gathering and Wyoming Interstate Company provide further transport to Cheyenne hub.
- Seeking commitments 10yrs or Longer
- \$555 million: \$347 Replacement/\$208 Expansion

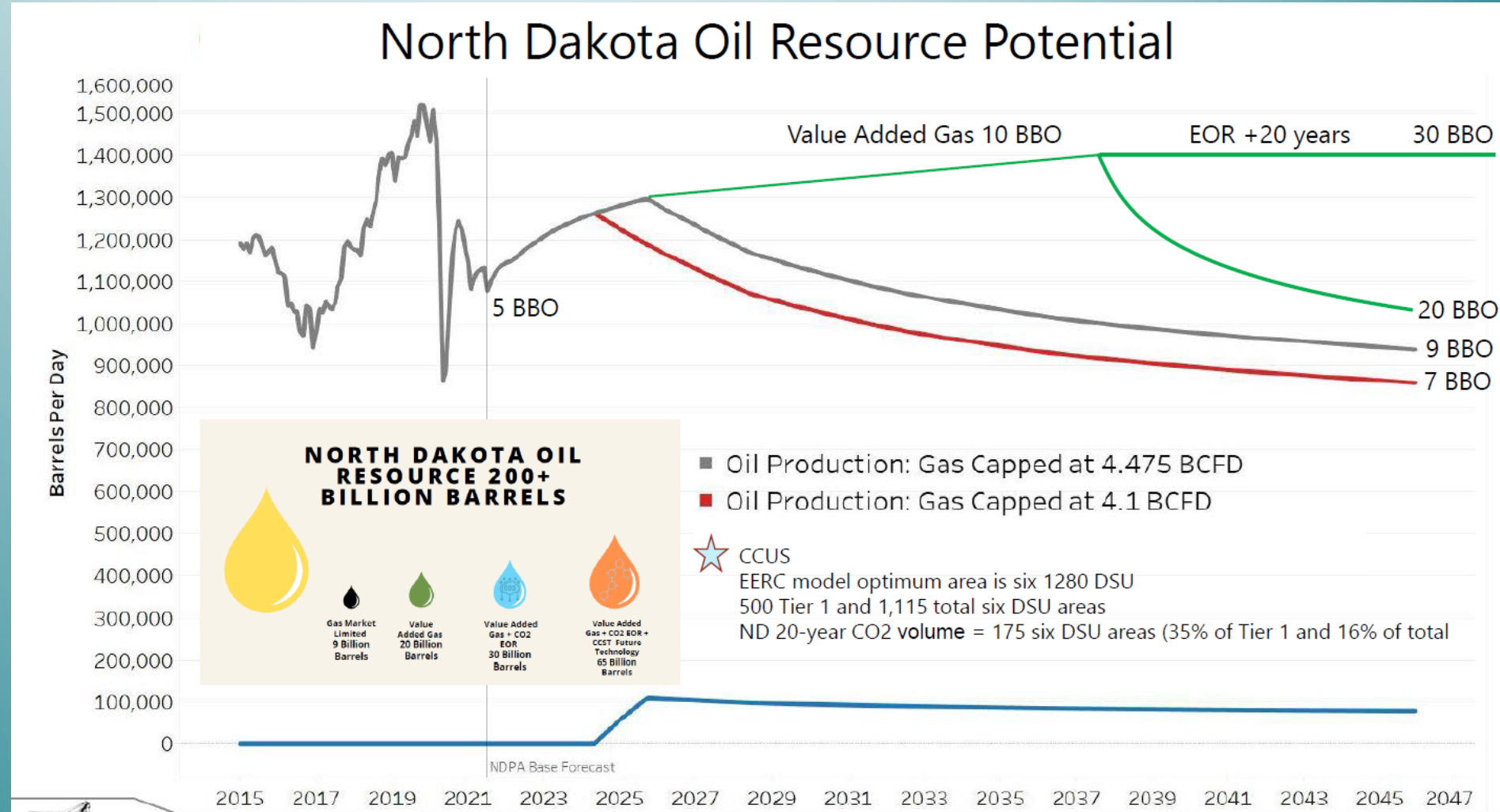
Proposed Tariff Rates

- NBPL/Bison \$0.45/Dth + Fuel/Elec to WIC/FUG Interconnect
- WIC/FUG to Cheyenne \$0.30/Dth + Fuel/Elec
- Anchor Shipper Minimum: 50,000 Dth/Day



North Dakota Value added Gas

- Gathering Expansion
- Processing Expansion
- Electricity Generation
- Enhanced Oil Recovery
- Storage
- Gas to Liquids
- Fertilizer
- Hydrogen
- Petro Chemical

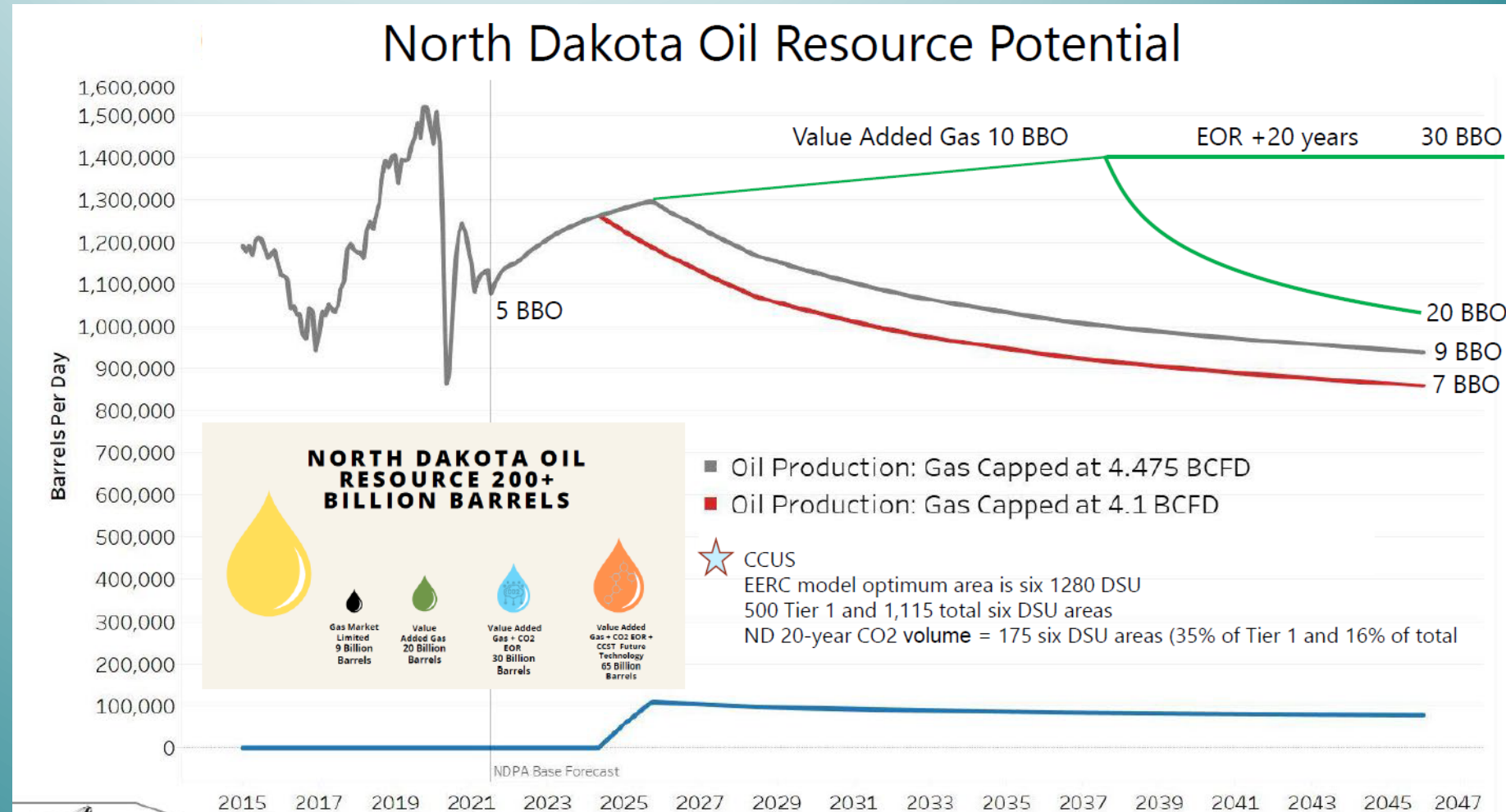


North Dakota
Enhanced Oil Recovery

Cedar Hills South Unit RR B

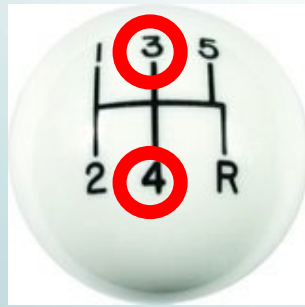
Bakken Pilot Projects
 East Tioga – Liberty
 Big Butte – Hess (Chevron)
 East Fork - Continental
 Lost Bridge – XTO (ExxonMobil)

CCUS
 Produced Gas < 10%
 ND CO₂ < 15% < 35% of Tier 1



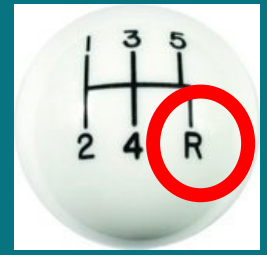
NORTH DAKOTA

- **Regulatory Primacy**
 - UIC Class I, II, III, IV, VI
 - CWA, SDWA
 - CAA, OOOO
- **Research**
 - Clean Sustainable Energy Authority
 - Energy & Environmental Research Center
 - Oil & Gas Research Program
 - Lignite Research Program
 - Renewable Energy Program
 - State Energy Research Center
- **Industrial Commission Budget**
 - Pipeline Authority
 - Transmission Authority
 - Underground Energy “Salt Cavern” Storage Study
 - CCUS Education
 - Lignite and Oil & Gas Litigation
 - Hydrogen Development
- **National Leadership**
 - Energy Council
 - GWPC
 - IOGCC

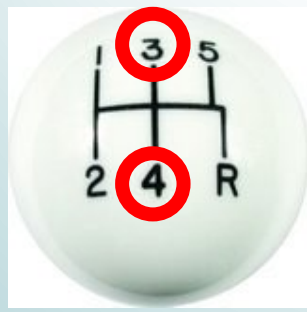


FEDERAL

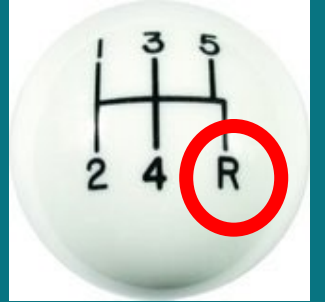
- **EO 14008**
- **BLM**
 - Pause>Slow motion federal oil and gas leasing program
 - North Dakota Resource Management Plan re-write
 - Conservation and Landscape rule
 - Mineral Leases and Leasing Process rule
 - Waste Prevention “Venting & Flaring” rule
- **DPGL**
 - Travel Management Plan
- **EPA**
 - Methane Waste Emissions Charge rule
 - Subpart W Reporting rule
 - Greenhouse Gas rule
- **USACOE**
 - DAPL Environmental Impact Study
- **USFWLS**
 - Endangered Species Act re-write
- **WOTUS 2.0**



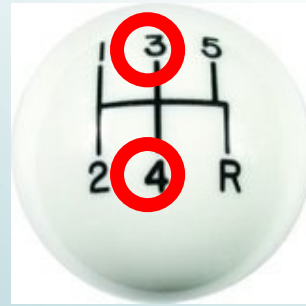
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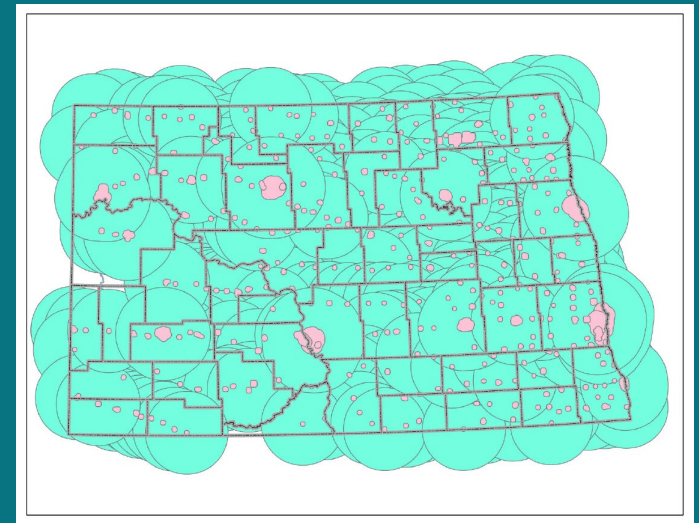
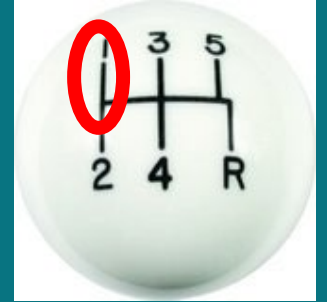
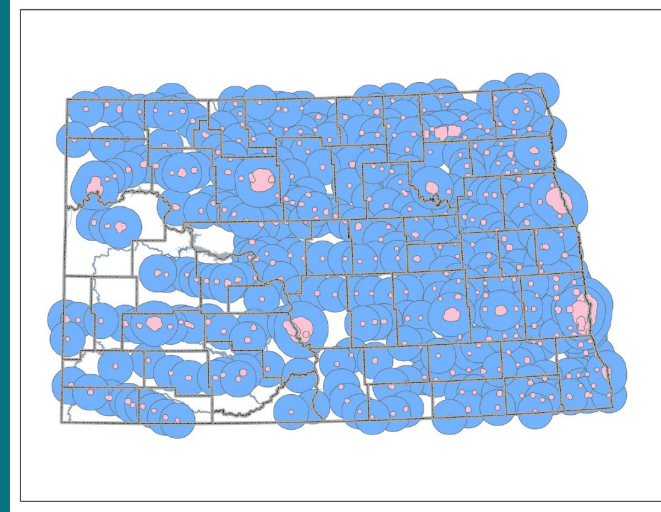


NORTH DAKOTA



POLITICAL SUBDIVISIONS, FAR RIGHT, FAR LEFT, AND NGOS

NIMBY & NOPE





NORTH DAKOTA



LYNN HELMS



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