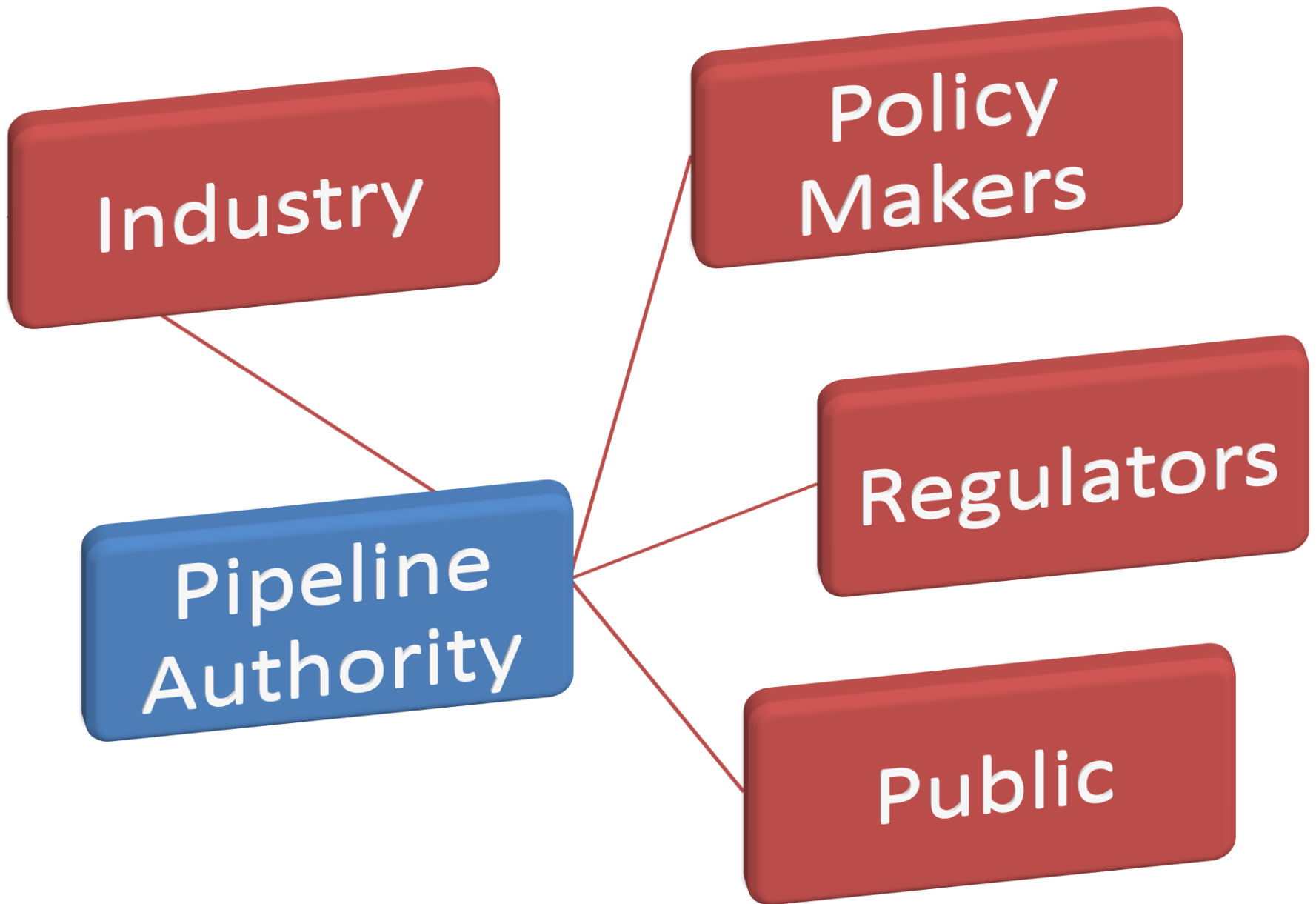


North Dakota Pipeline Authority

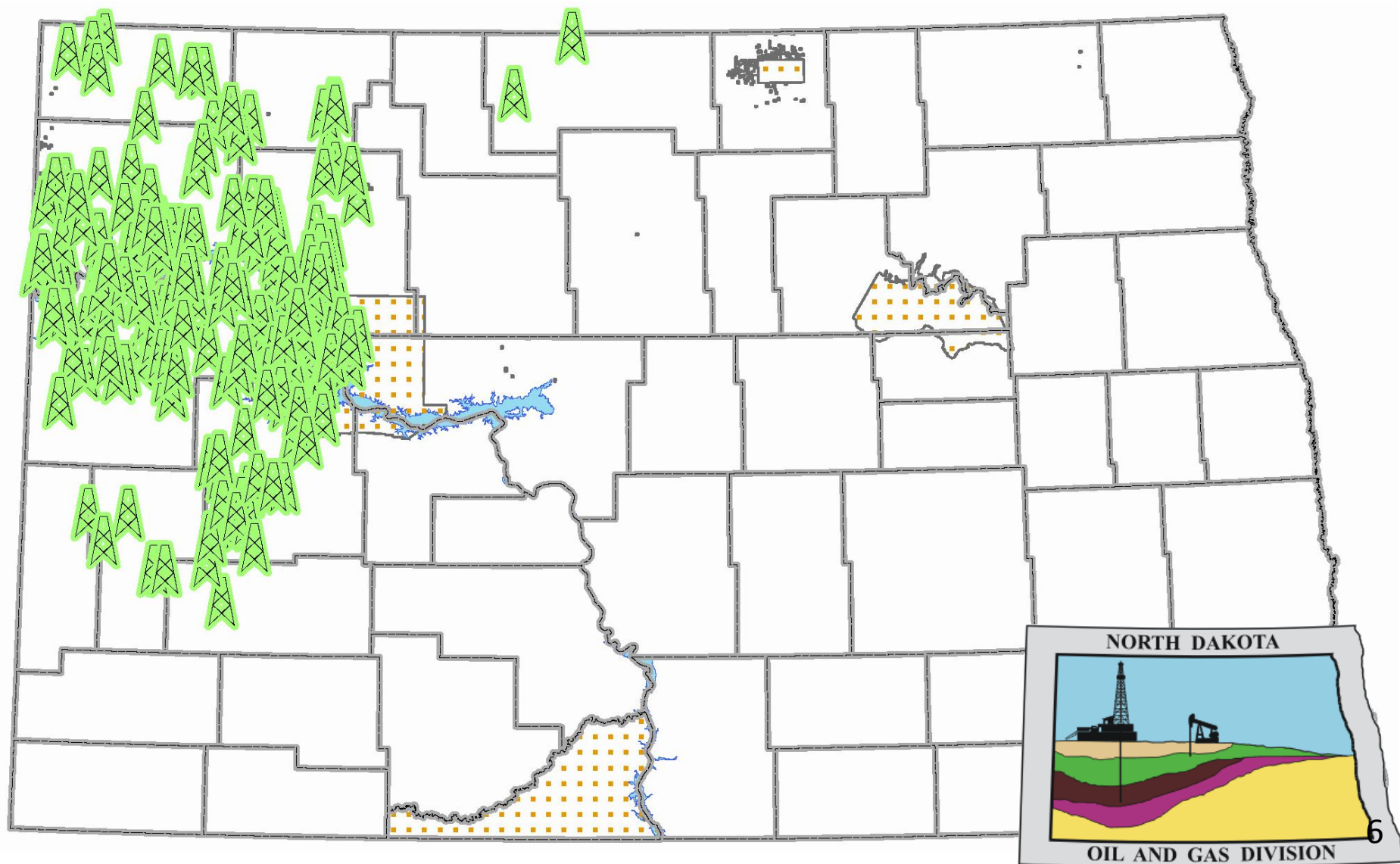
Justin J. Kringstad

July 29, 2011

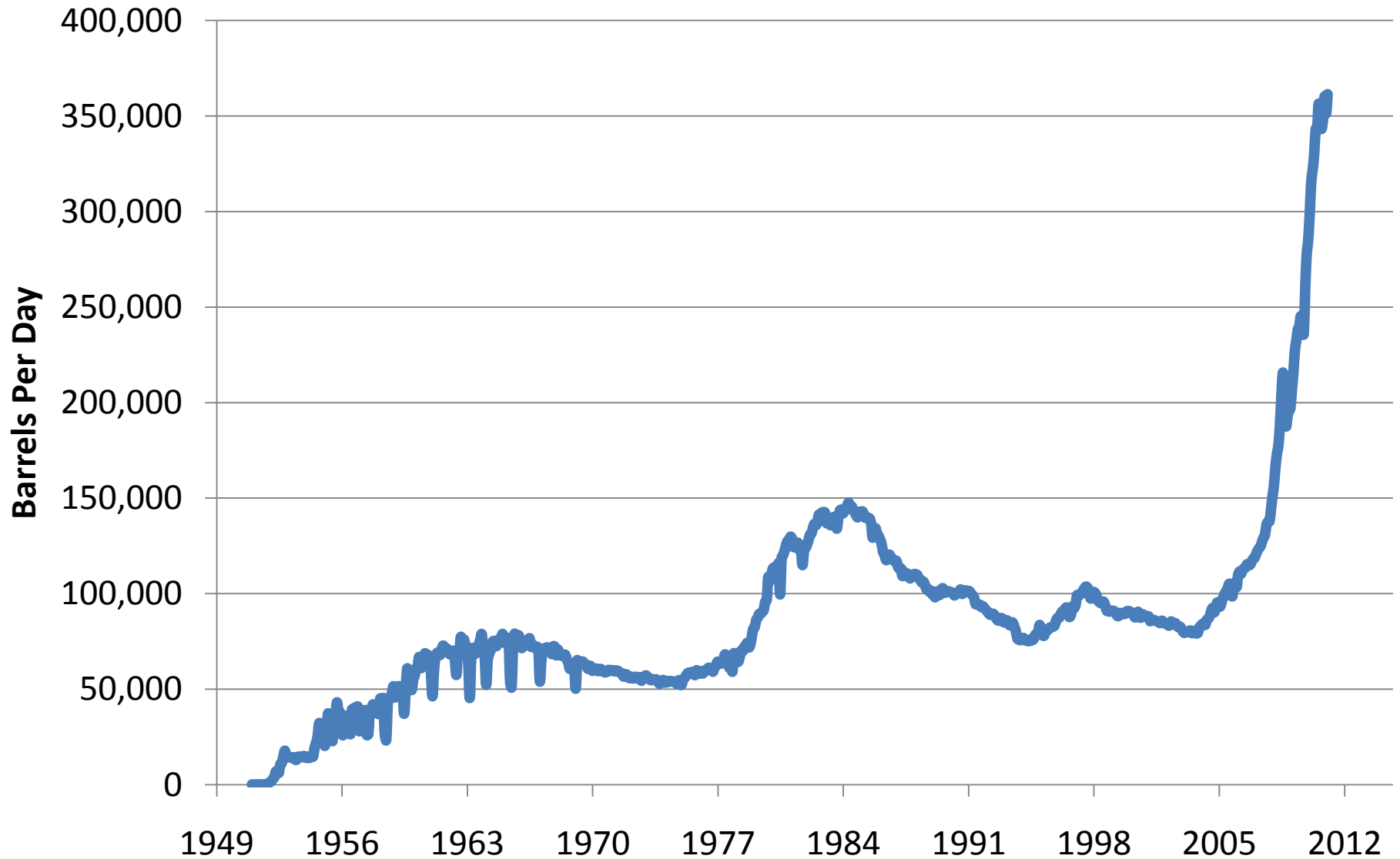
Pipeline Authority Webinar Series



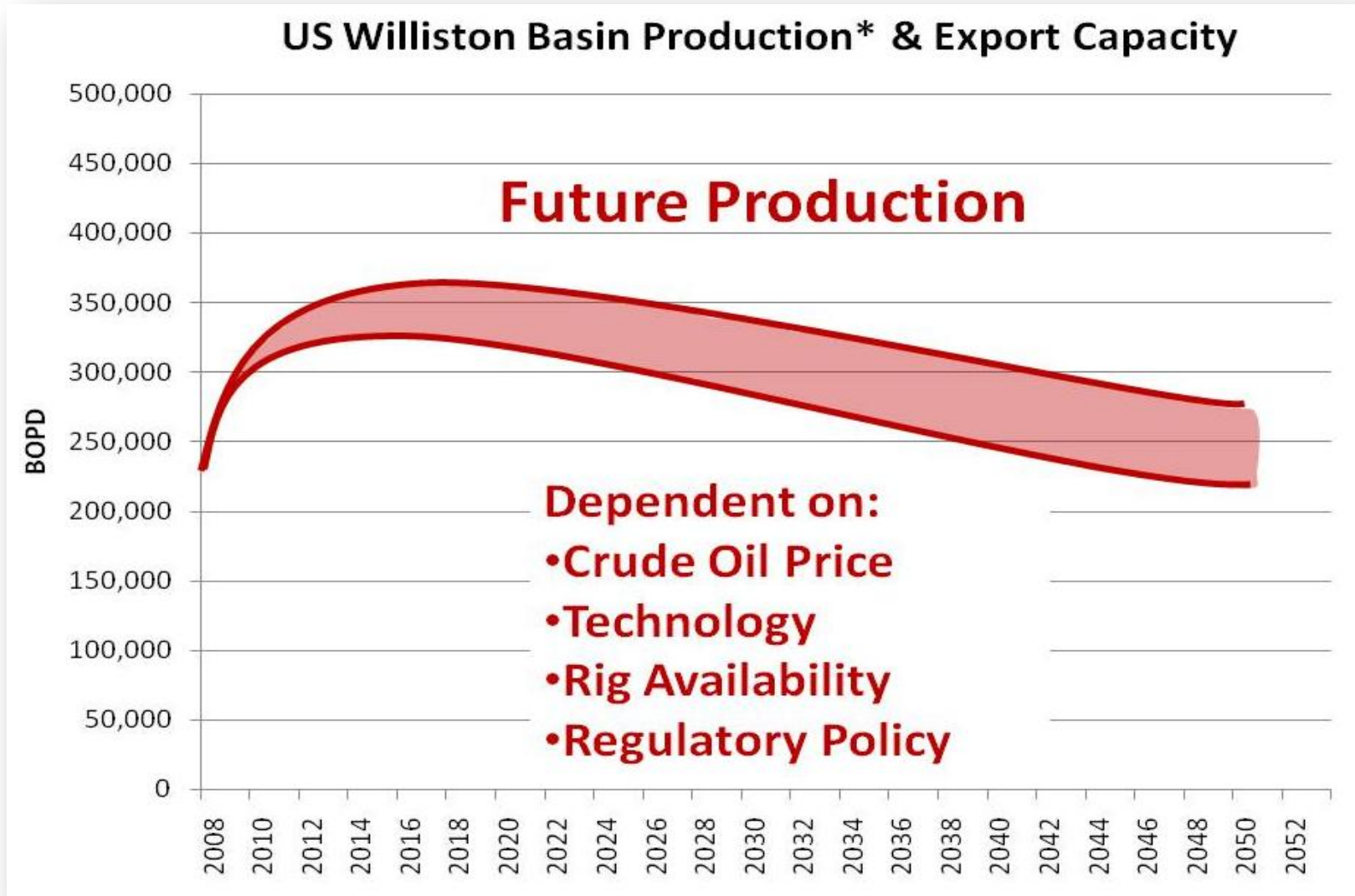
July 29, 2011: 183 Drilling Rigs



North Dakota Crude Oil

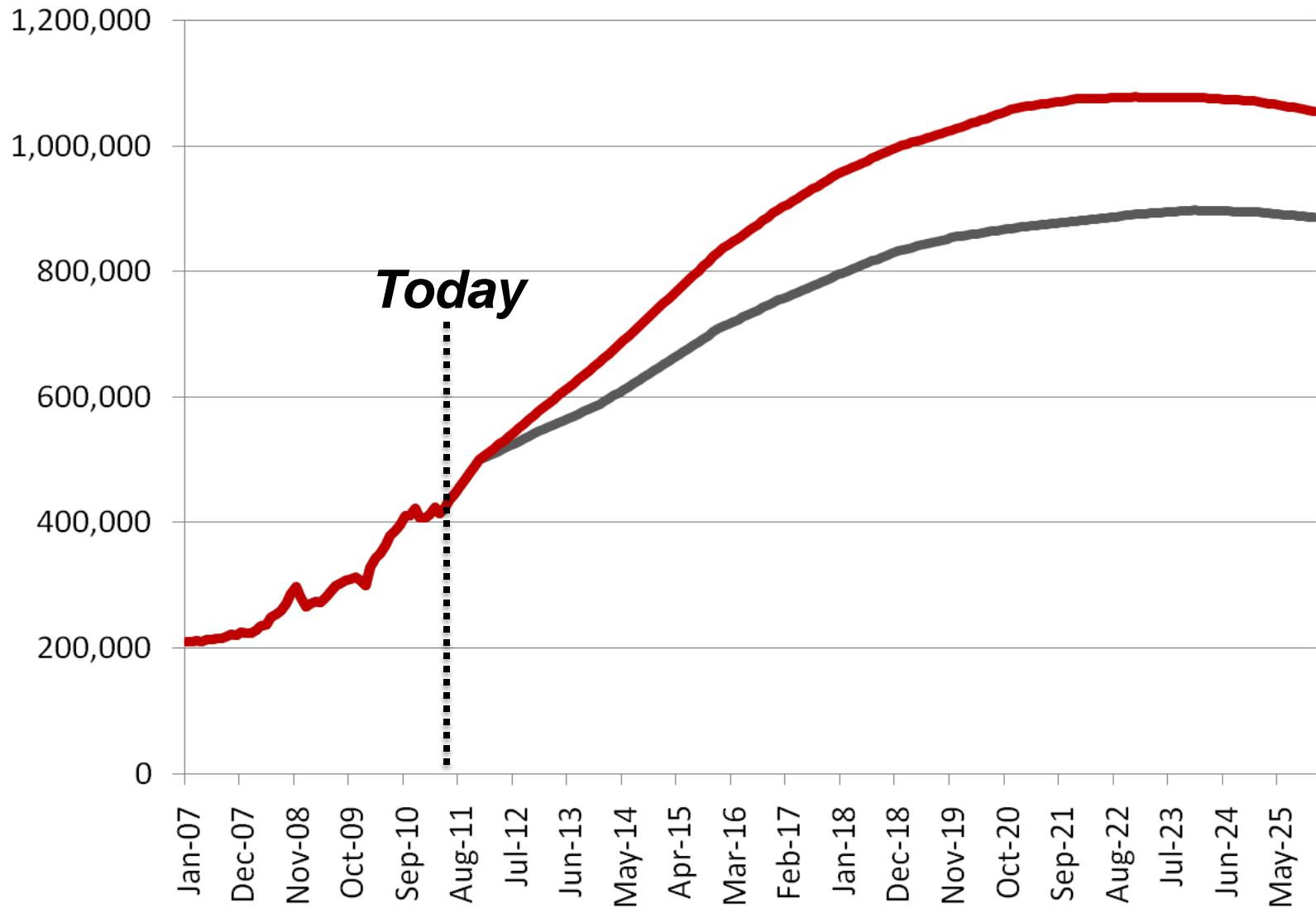


Looking Back to March 2009...



Slide from a presentation given to the ND State Legislature in March 2009.

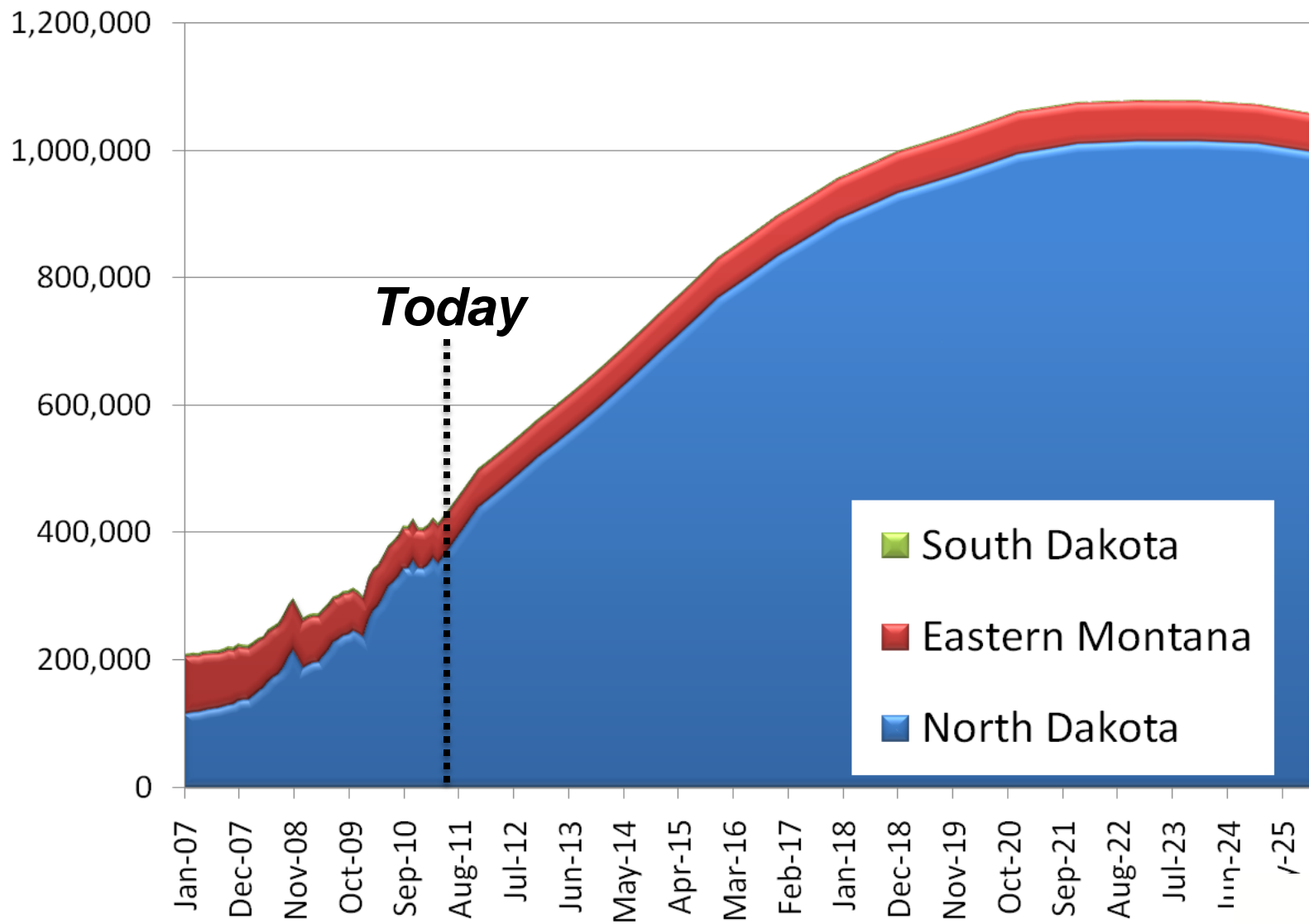
Forecasting Williston Basin Oil Production, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.



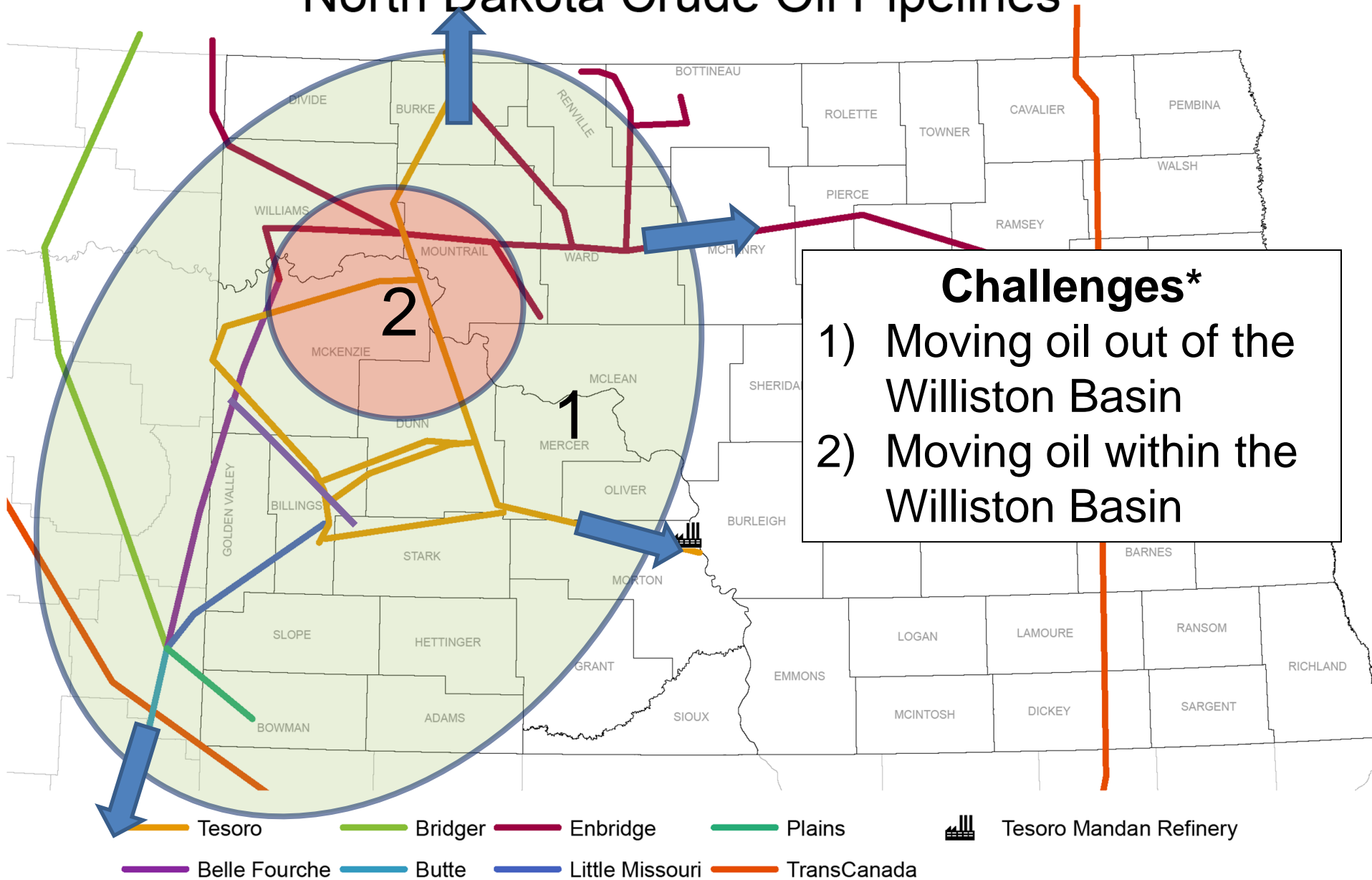
Forecasting Williston Basin Oil Production, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

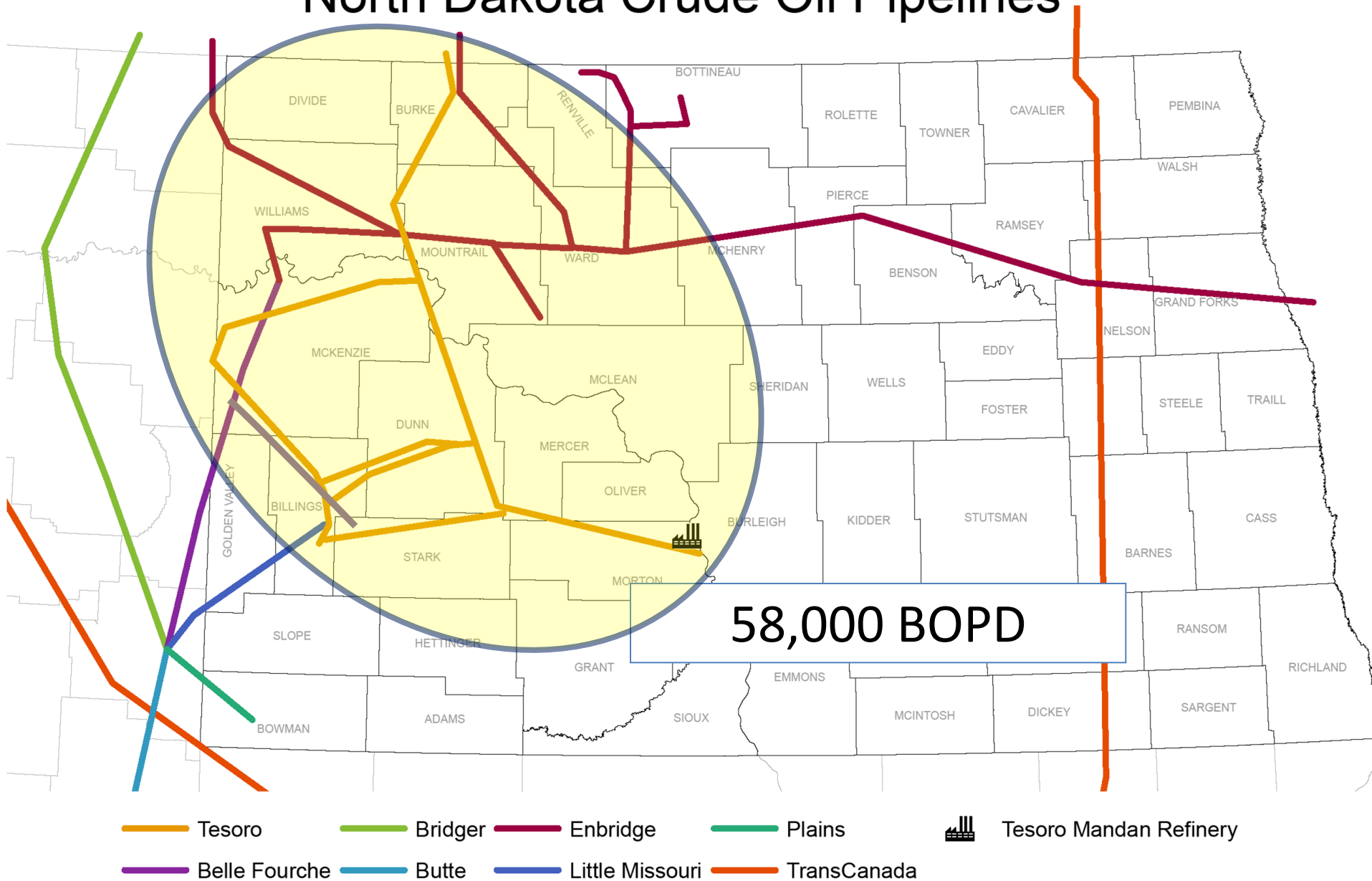


North Dakota Crude Oil Pipelines



*Modified from Bridger and Belle Fourche Pipelines

North Dakota Crude Oil Pipelines



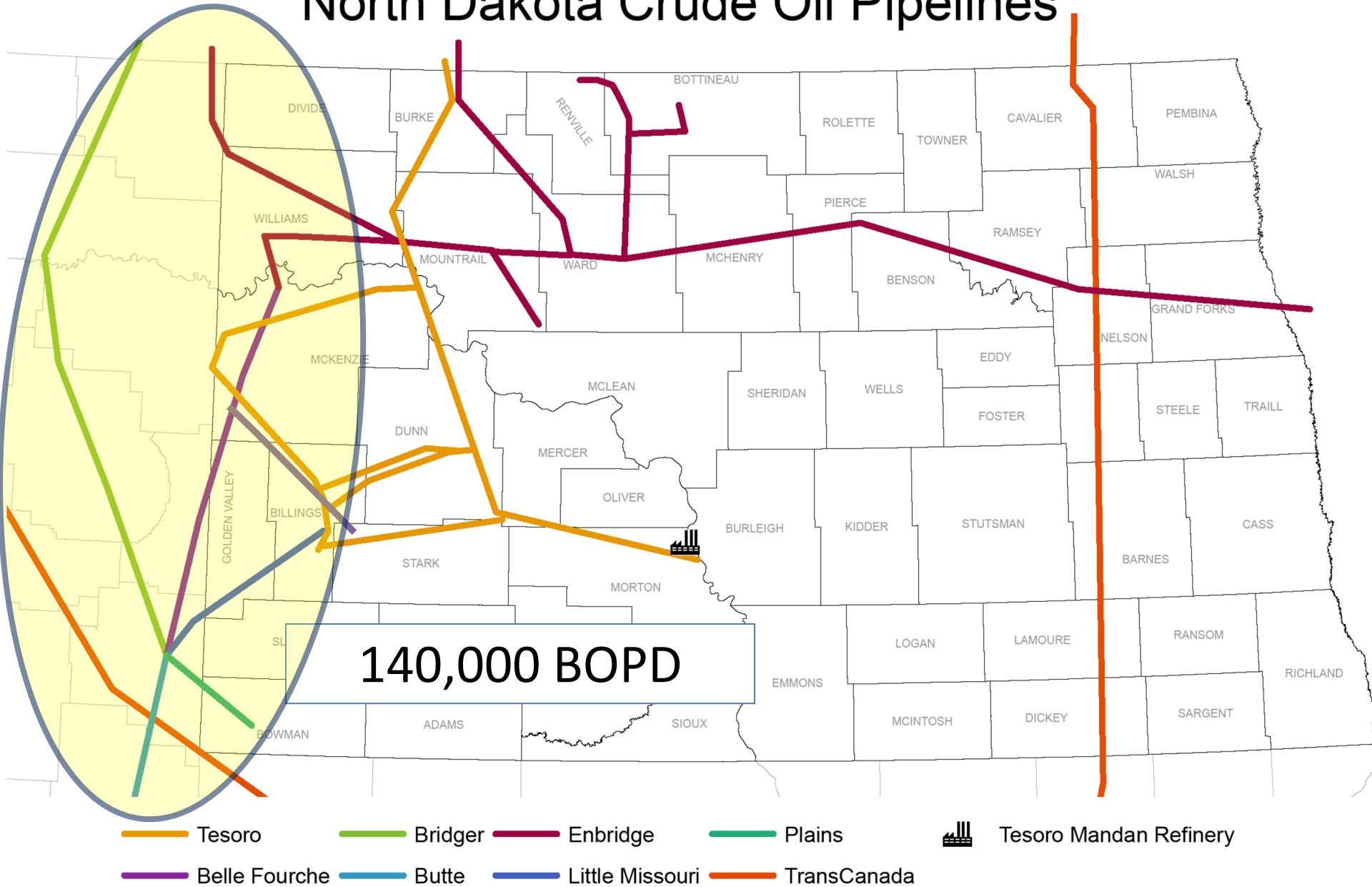
North Dakota Crude Oil Pipelines

18,000 - 25,000 BOPD

185,000 BOPD

— Tesoro — Bridger — Enbridge — Plains —  Tesoro Mandan Refinery
— Belle Fourche — Butte — Little Missouri — TransCanada

North Dakota Crude Oil Pipelines



Current Rail Transportation

EOG – Stanley, ND



Others Include:

Minot

Dore

Stampede

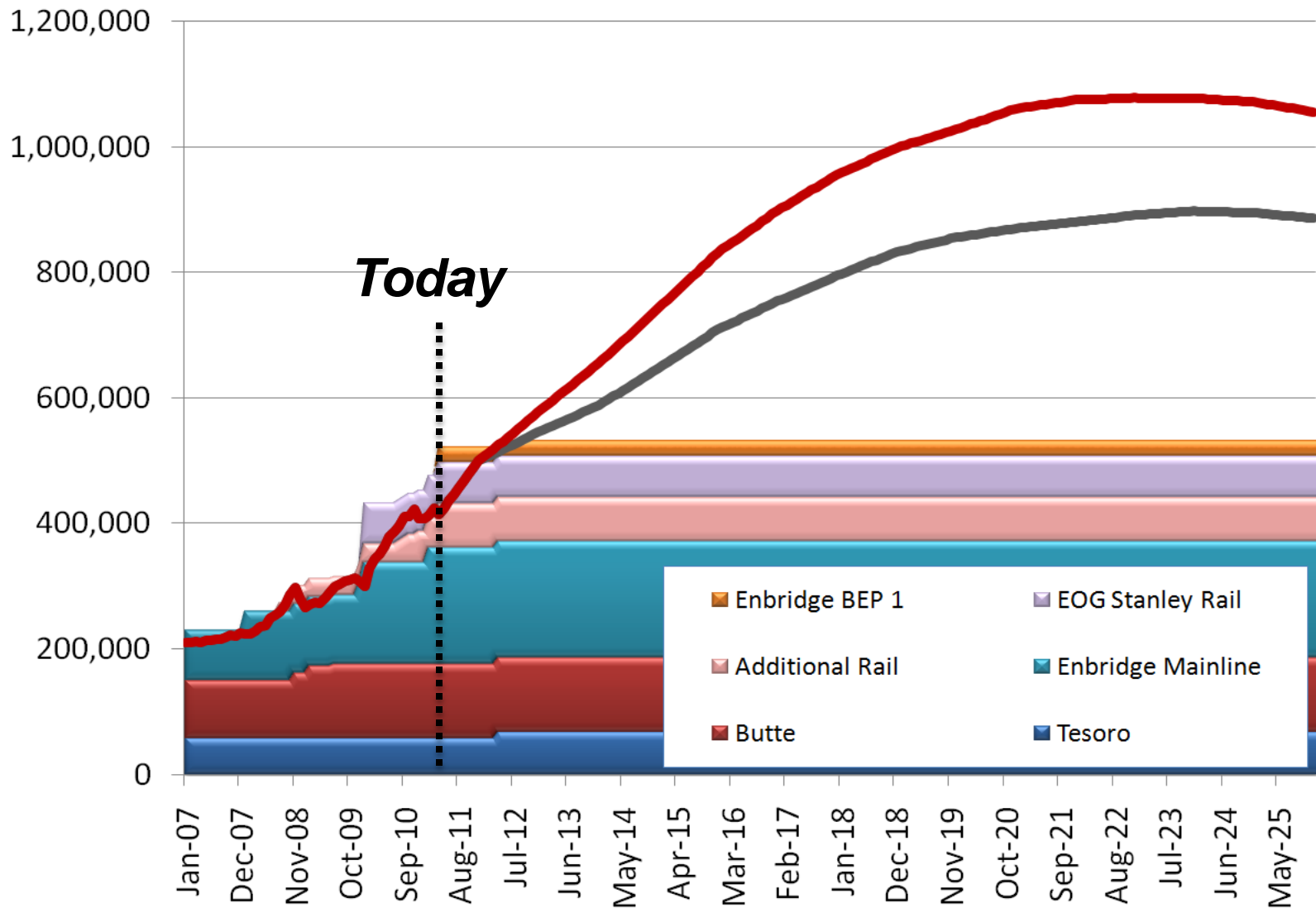
Donnybrook



Dakota Transport Solutions – New Town, ND

**Images Provided By:
Loren Kopseng**

Williston Basin Oil Production & Export Capacity, BOPD



Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.



Several Exciting Developments For Post 2010 Crude Oil Transport

Enbridge Bakken Expansion Program

Keystone XL Marketlink

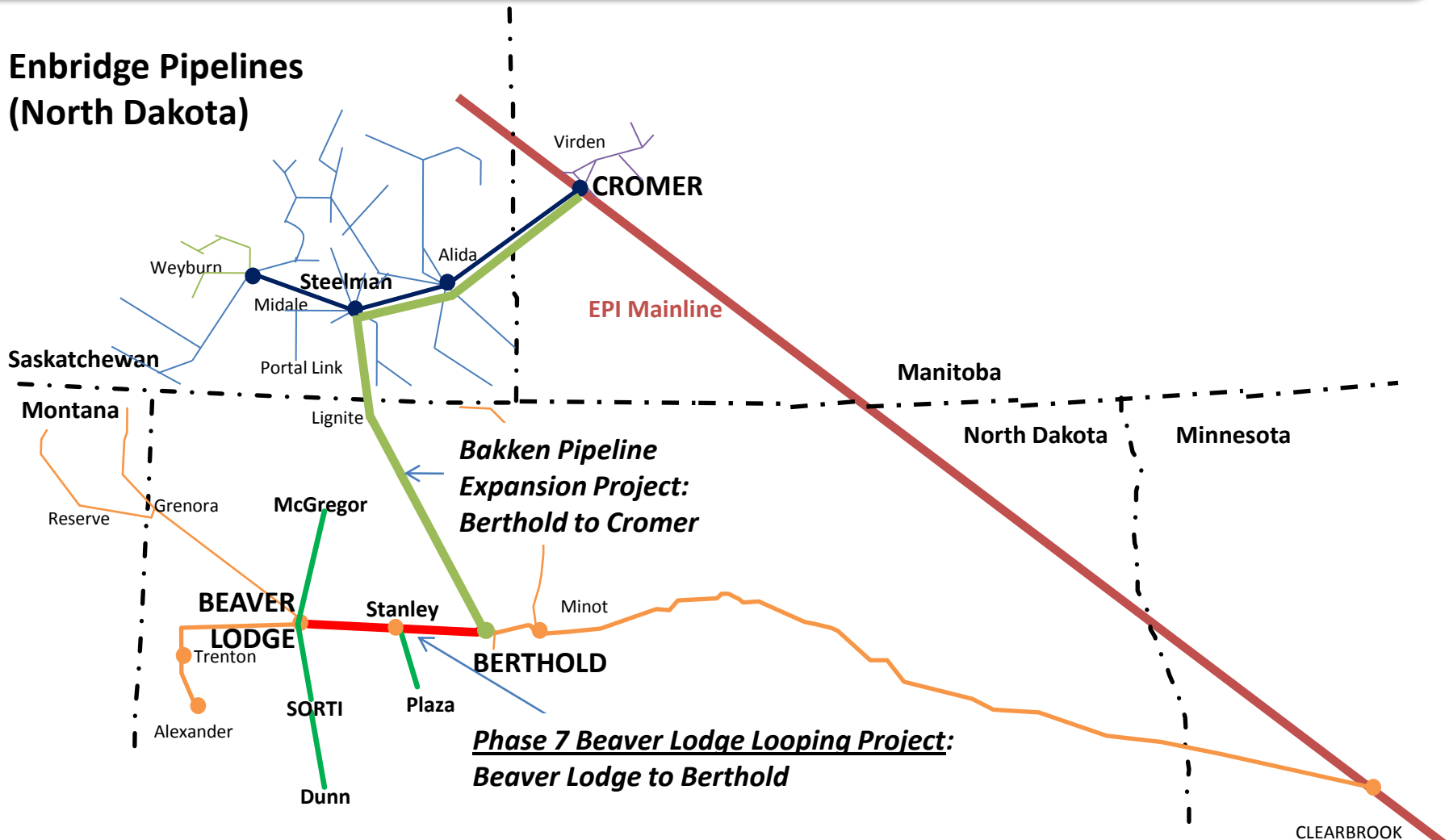
True Co.'s Baker 300

Plains Bakken North

Unit Train Development

Bakken Pipeline Expansion

Enbridge Pipelines (North Dakota)



EPND Phase 7 Gathering Projects: SORTI, Dunn, Plaza and McGregor

CLEARBROOK

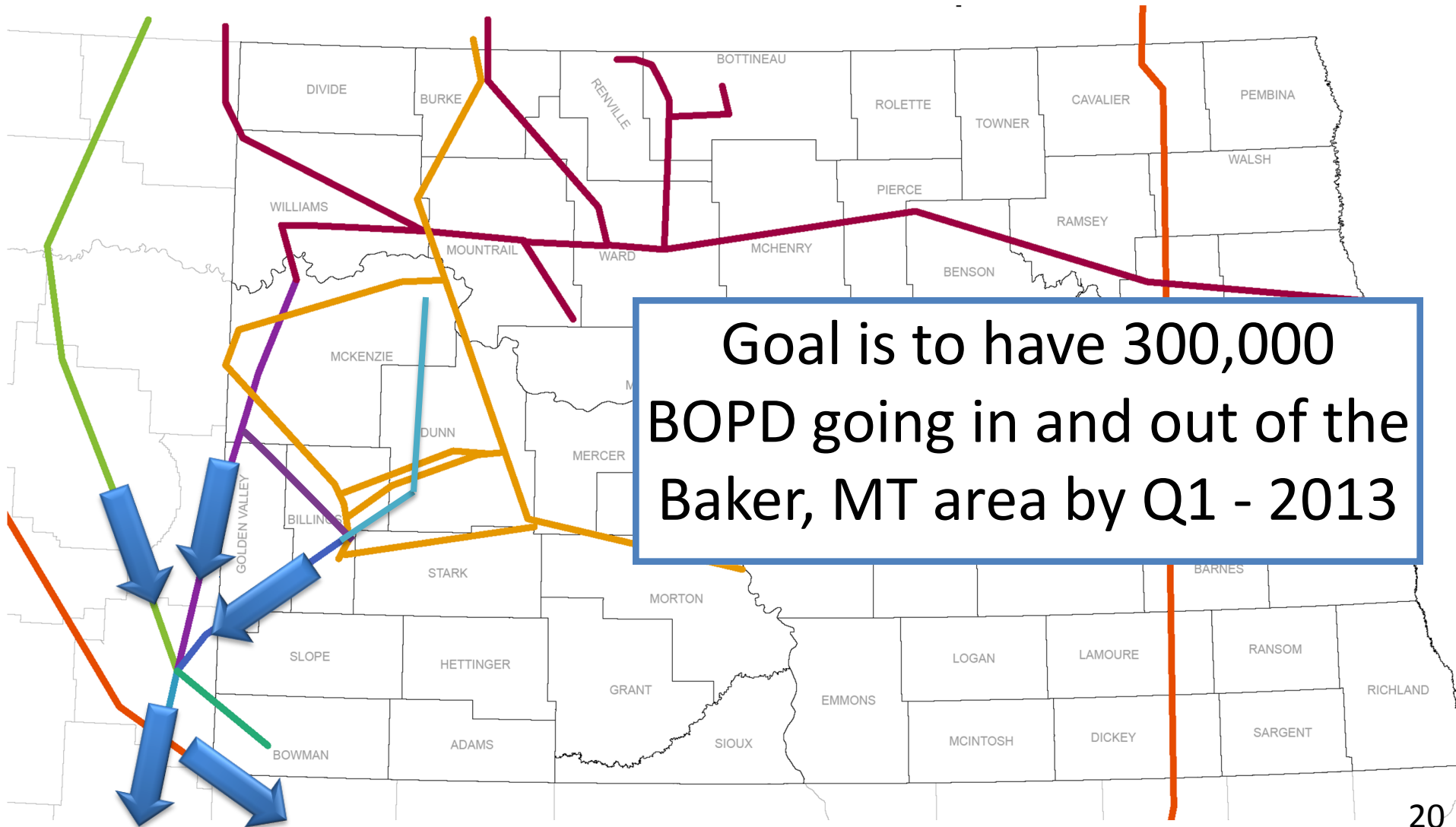
Proposed TransCanada Marketlink

- Successful Open Season in 2010
- 2013 Startup (Subject to Presidential Permit)

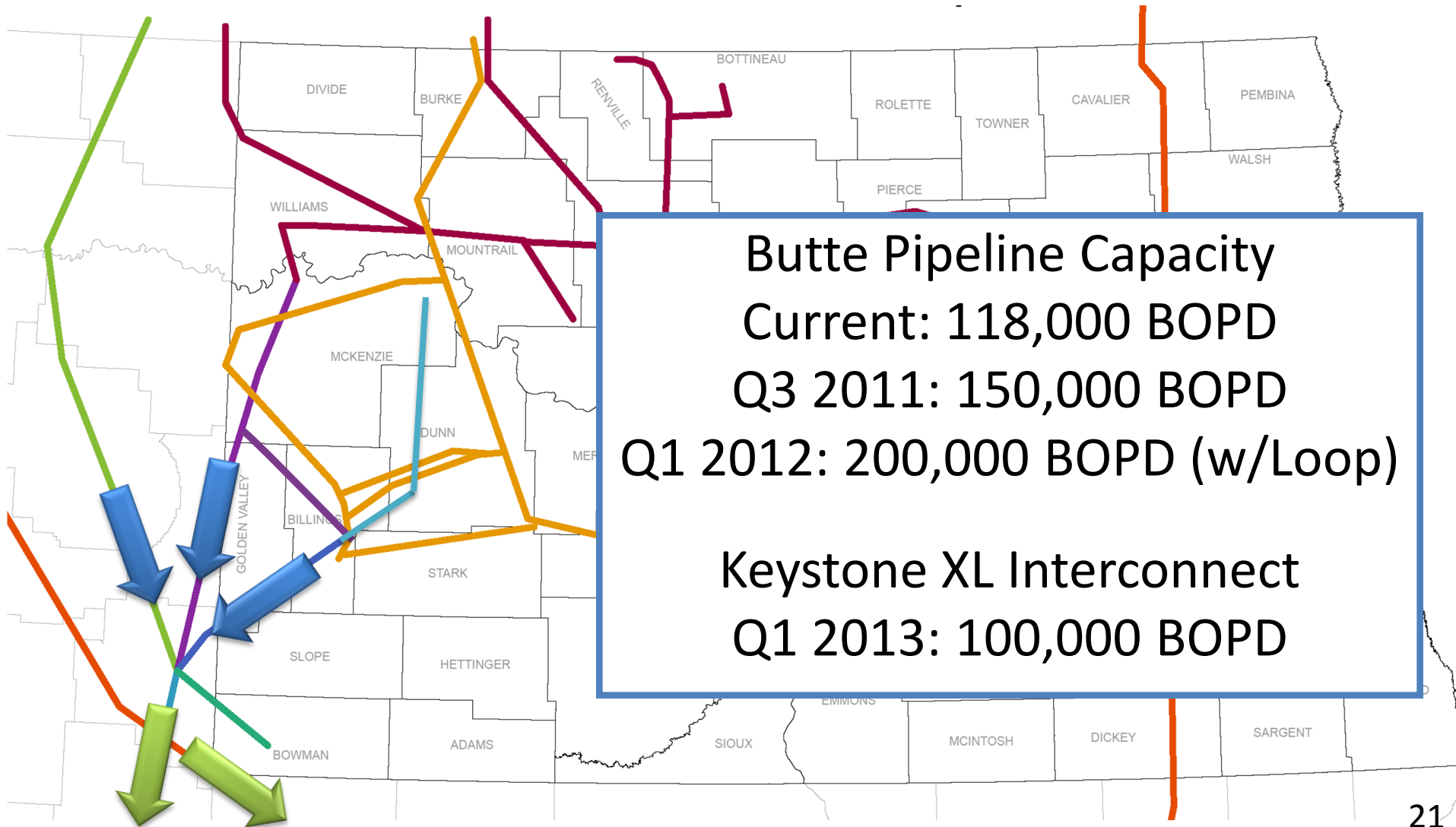
Image: TransCanada Notice of Open Season



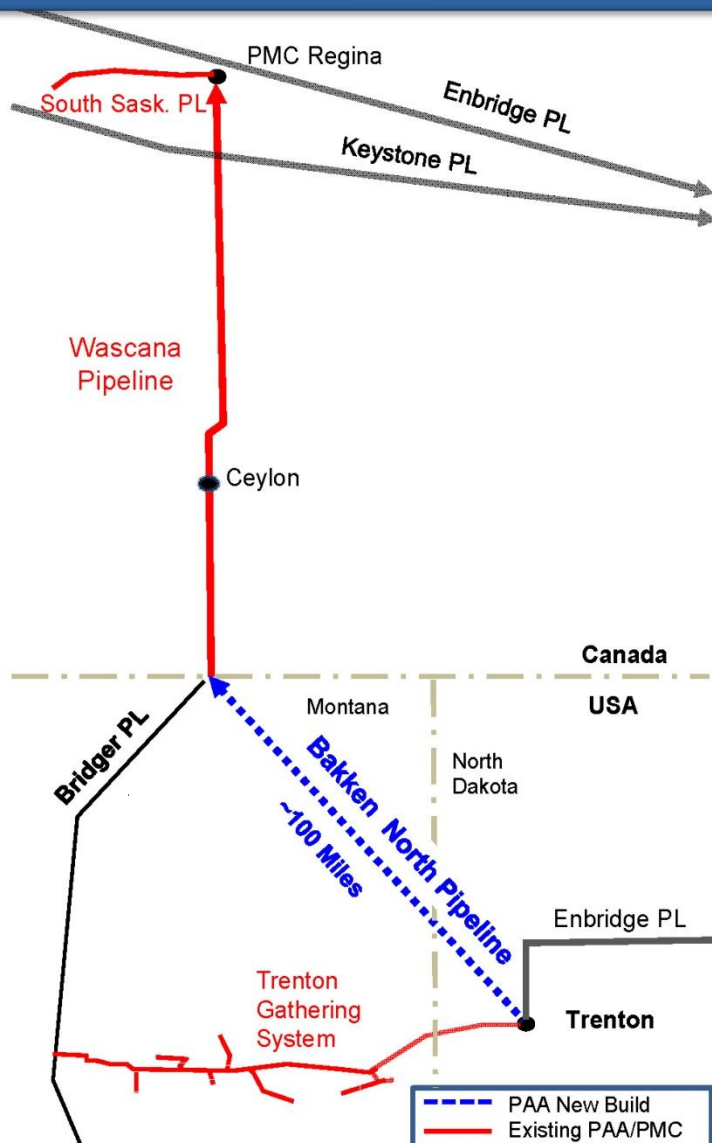
True Co.'s Proposed "Baker 300"



True Co.'s Proposed "Baker 300"



Plains Bakken North Pipeline

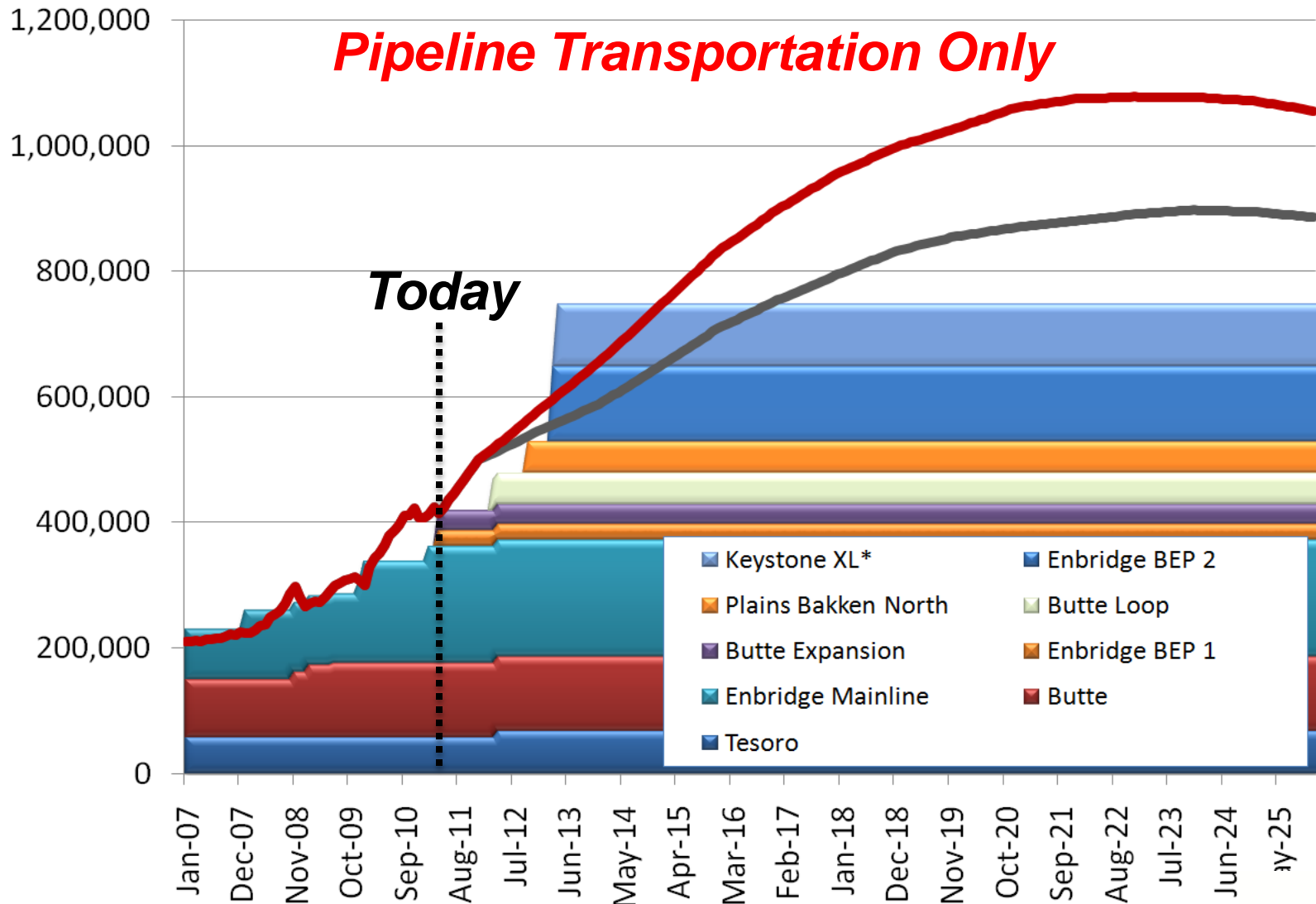


Proposed Capacity
50,000-75,000 BOPD
Q4 2012

New 103 Miles, 12" Pipeline
Reverse Wascana Pipeline

\$160-\$200 Million

Williston Basin Oil Production & Export Capacity, BOPD

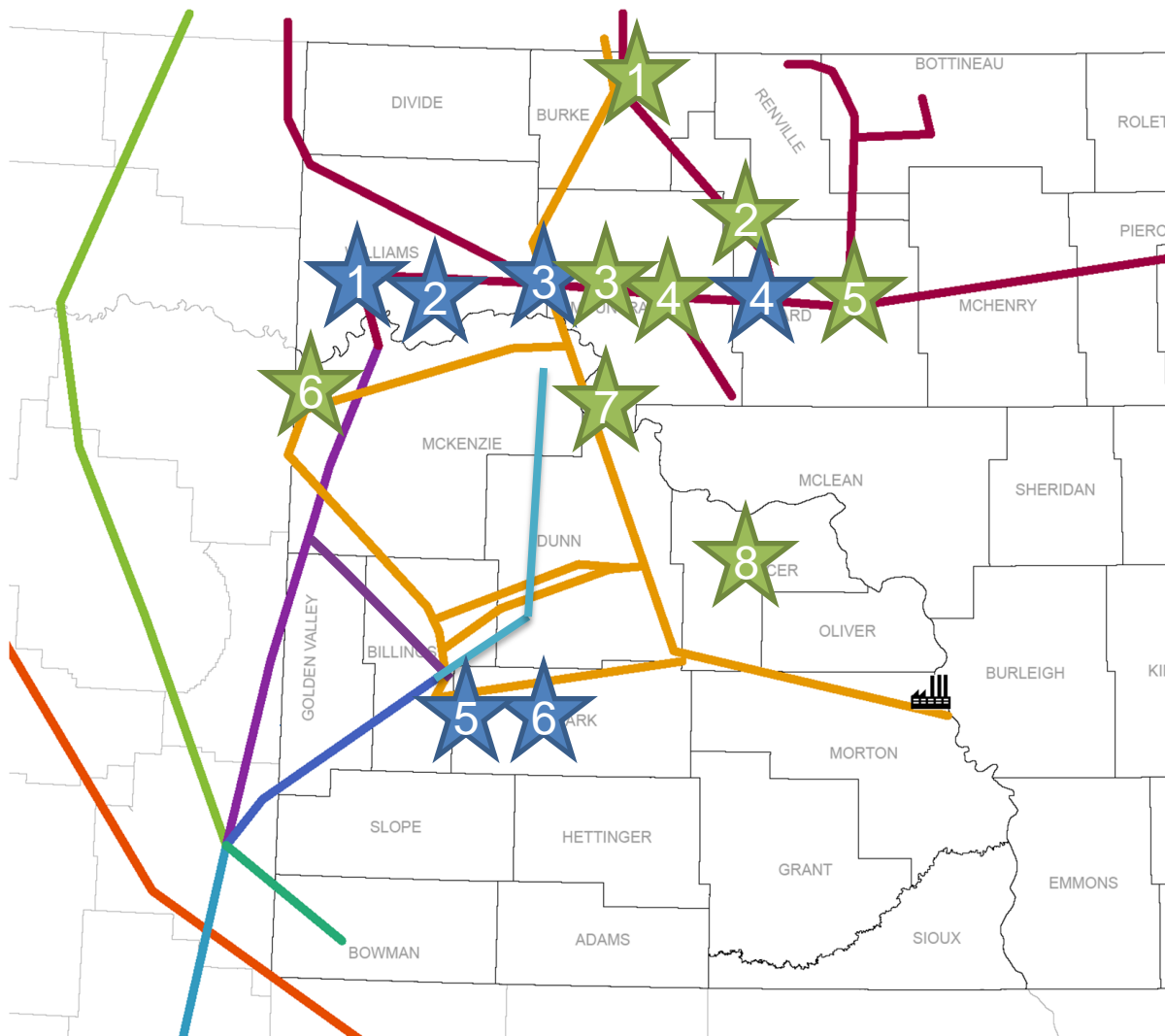


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process



Existing & Planned Rail Locations



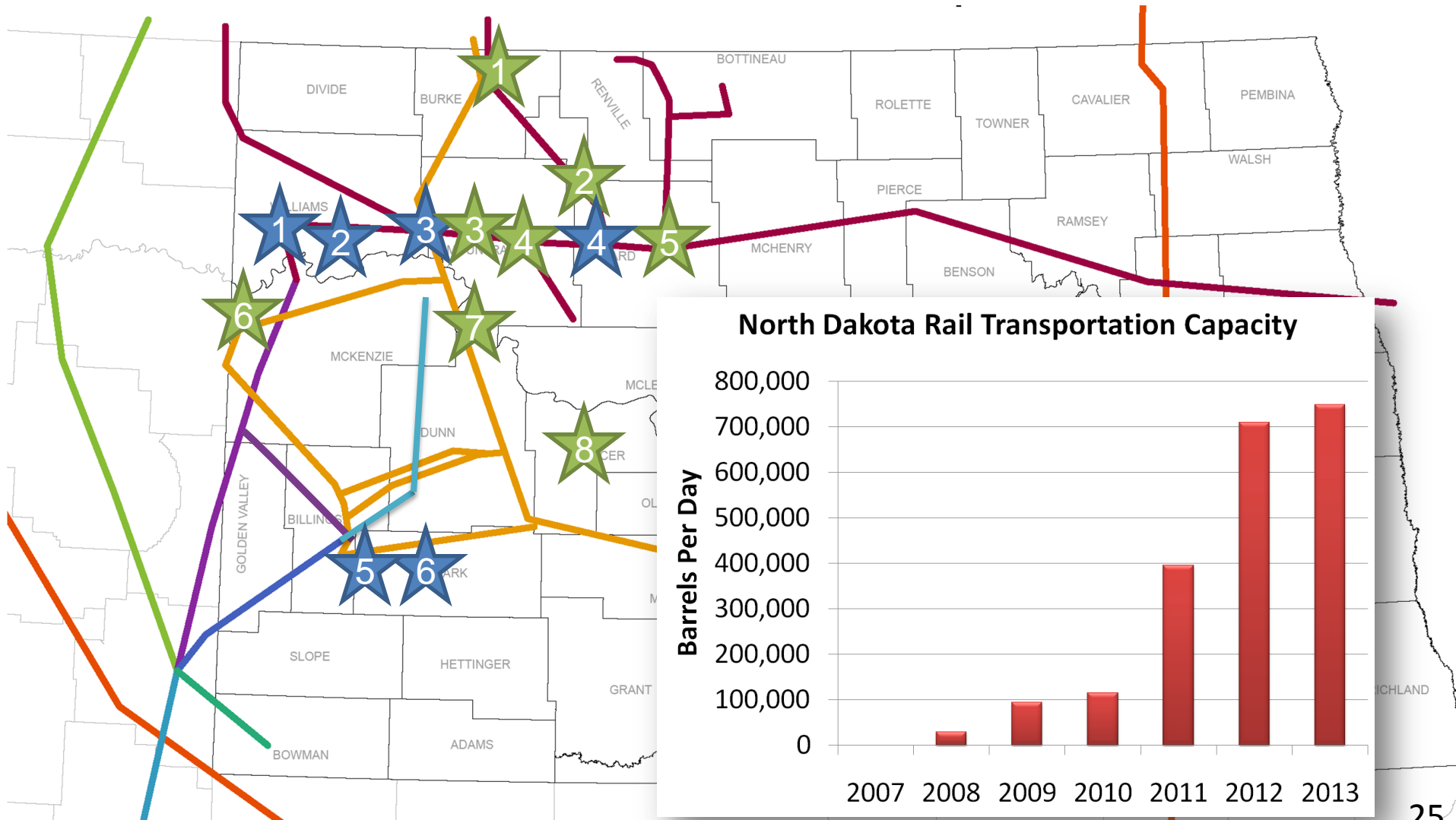
★ Existing

- 1) Stampede
- 2) Donnybrook
- 3) Ross
- 4) Stanley – EOG
- 5) Minot – ND Port Services
- 6) Dore
- 7) New Town – Dakota Transport Solutions
- 8) Beulah

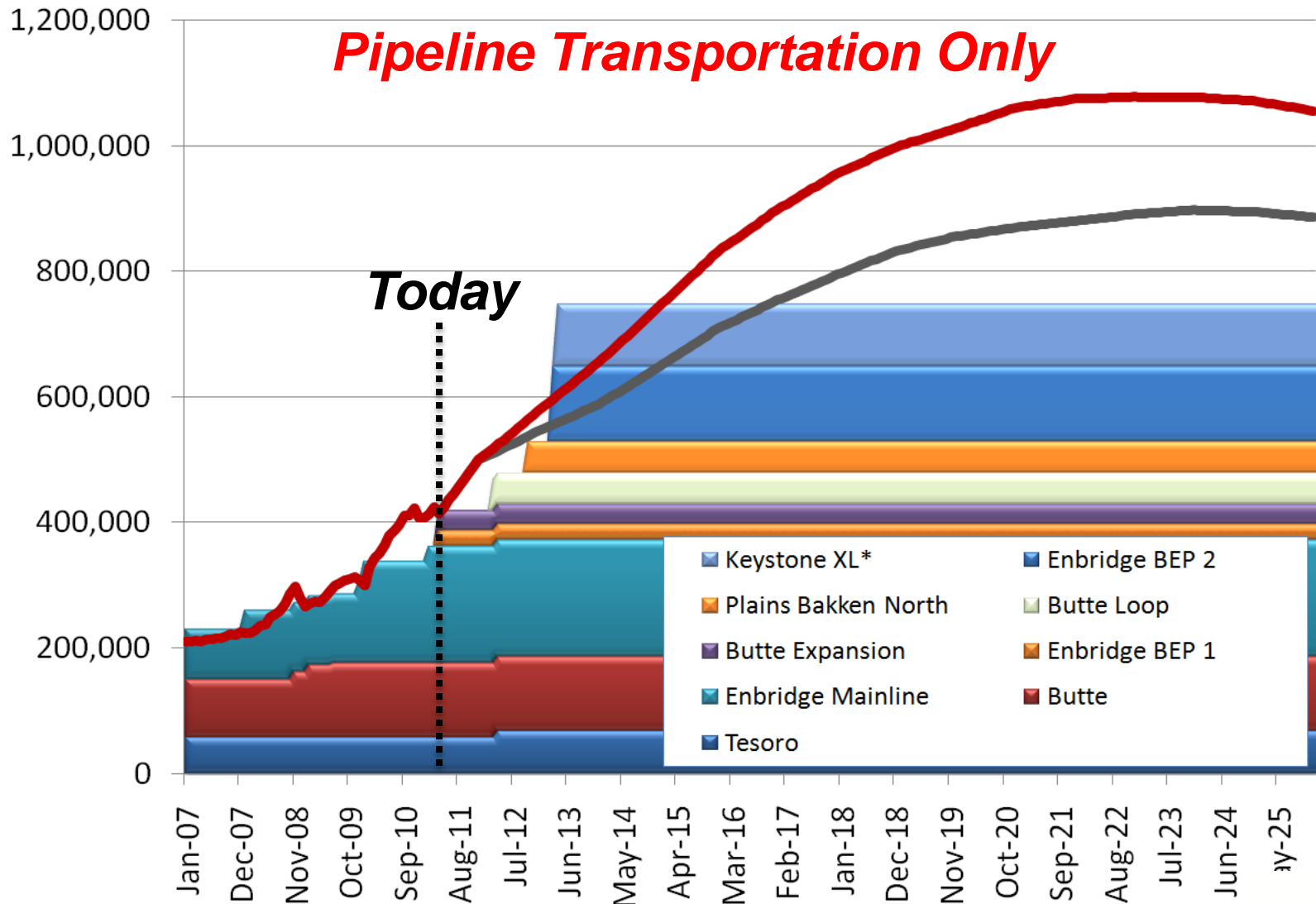
★ Planned

- 1) Trenton – Savage
- 2) Epping – Rangeland
- 3) Tioga – Hess
- 4) Berthold – Enbridge
- 5) Belfield - BakkenLink
- 6) Dickinson – EDOG

Existing & Planned Rail Locations



Williston Basin Oil Production & Export Capacity, BOPD

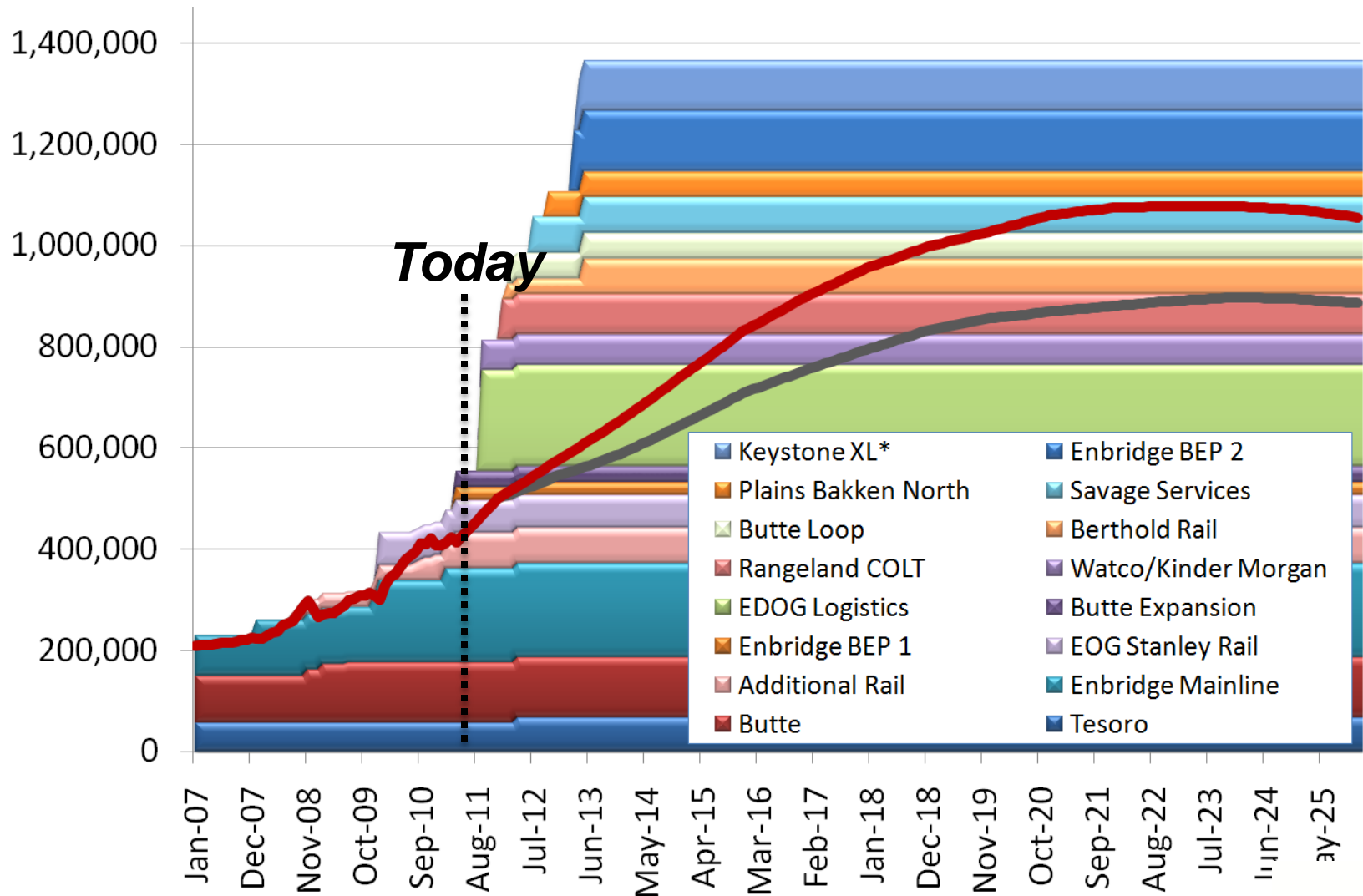


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process



Williston Basin Oil Production & Export Capacity, BOPD

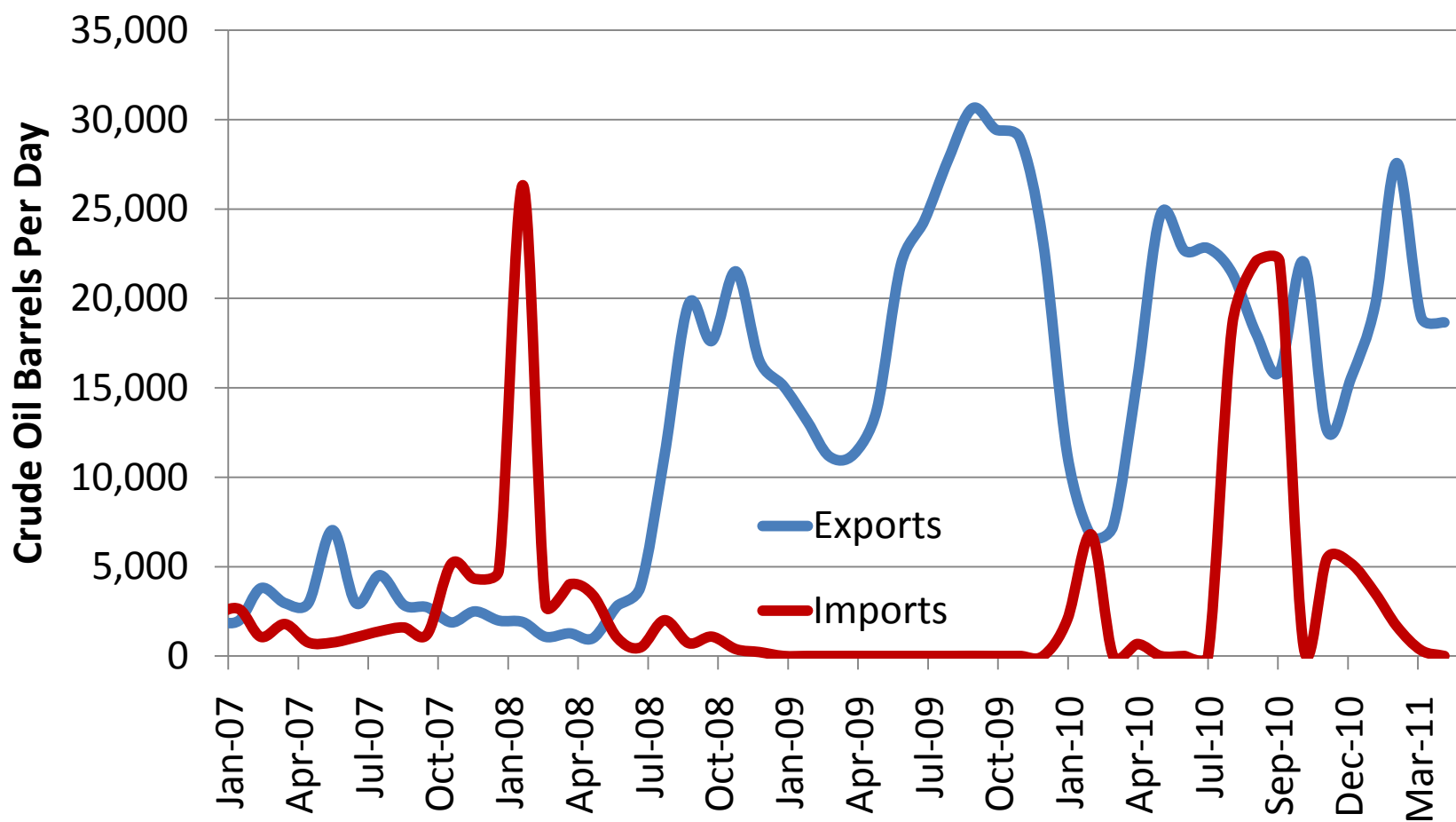


Production forecast is for visual demonstration purposes only and should not be considered accurate for any near or long term planning.

*Projects still in the proposed or internal review process

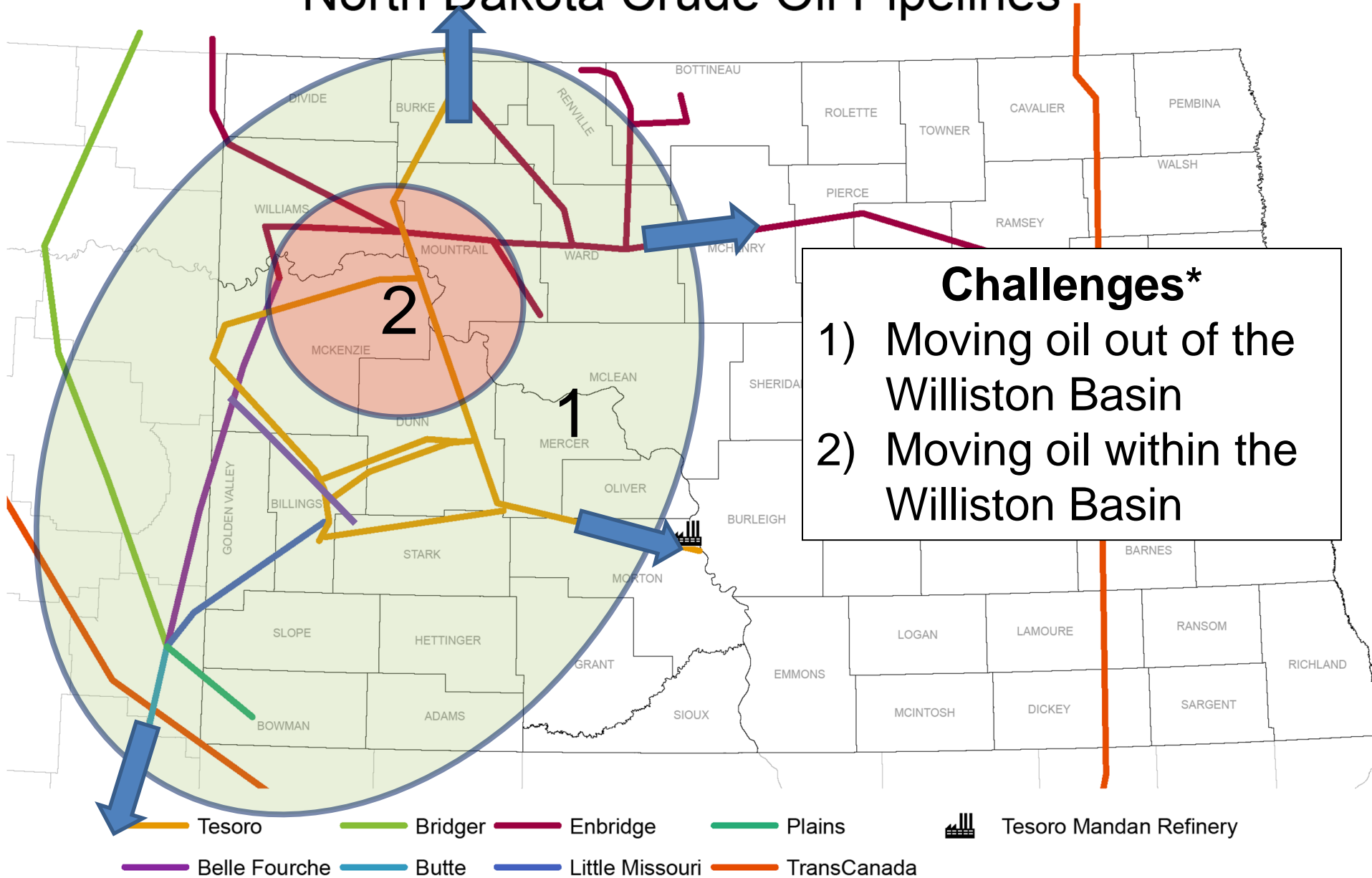


Williston Basin Truck Imports/Exports



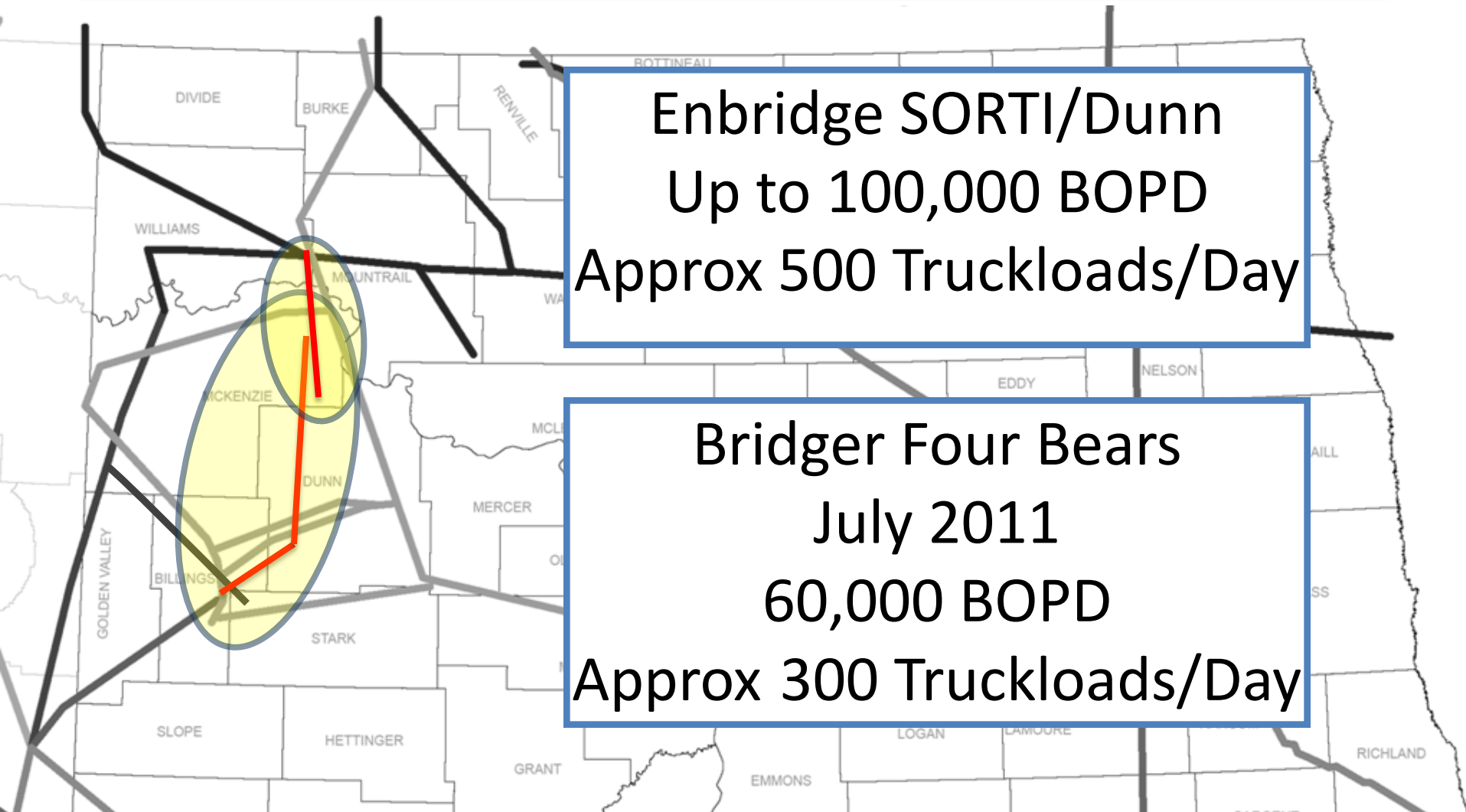
Information collected through the United States International Trade Commission's *Interactive Tariff and Trade DataWeb*

North Dakota Crude Oil Pipelines

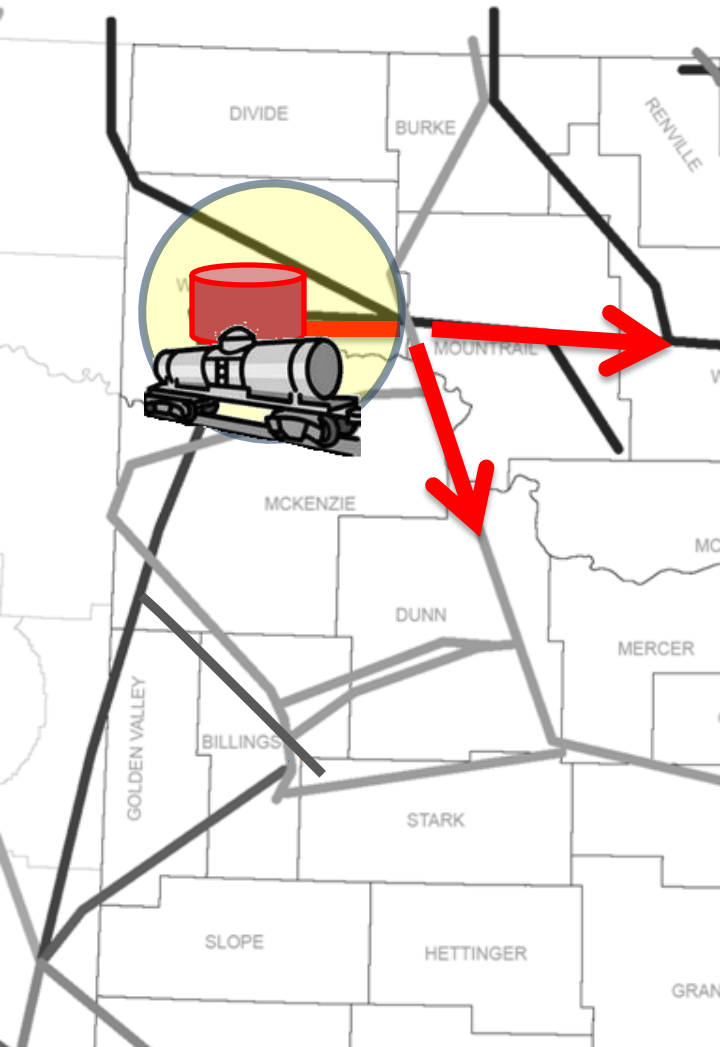


*Modified from Bridger and Belle Fourche Pipelines

Reducing Truck Traffic



Rangeland COLT Hub and Pipeline



Gathering, Storage, &
Transportation

Tie into Enbridge & Tesoro
(20 Mile - 8" - 40,000 BOPD)

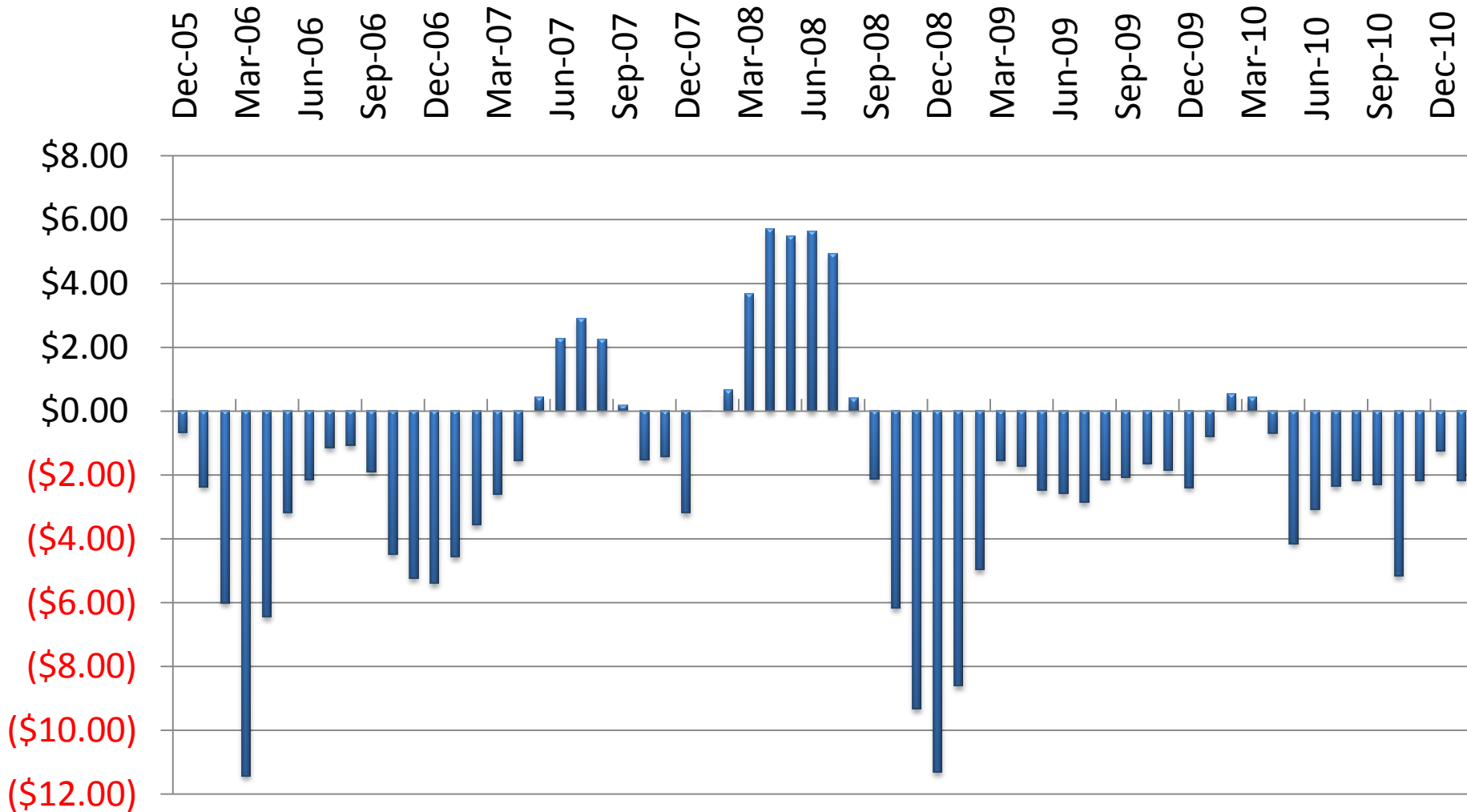
Anticipated Q1 2012

210,000 Barrels of Tankage

Rail up to 80,000 BOPD initially

North Dakota Crude Pricing

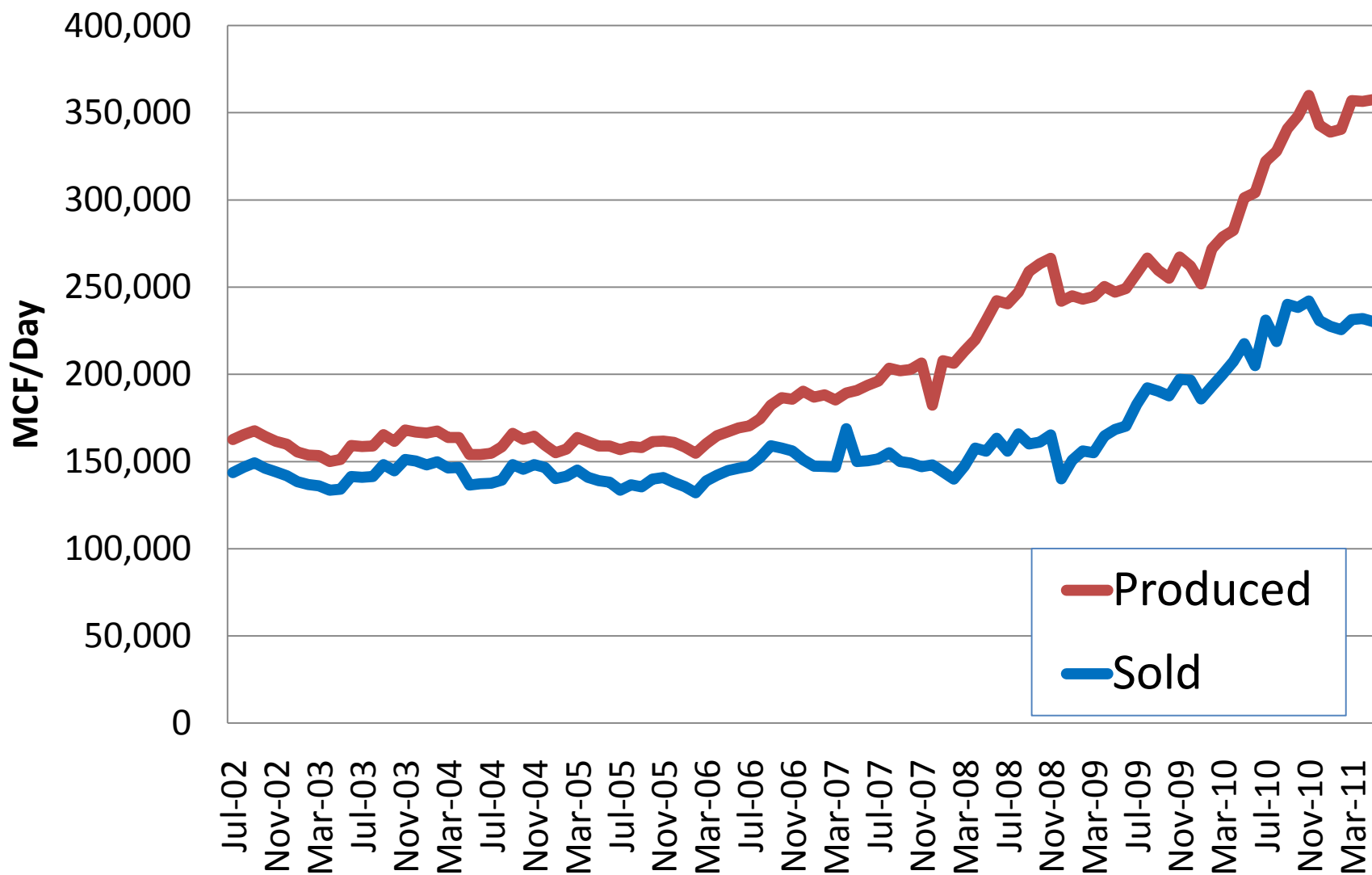
ND Tax Department Average Crude Oil Discounts - 90% NYMEX



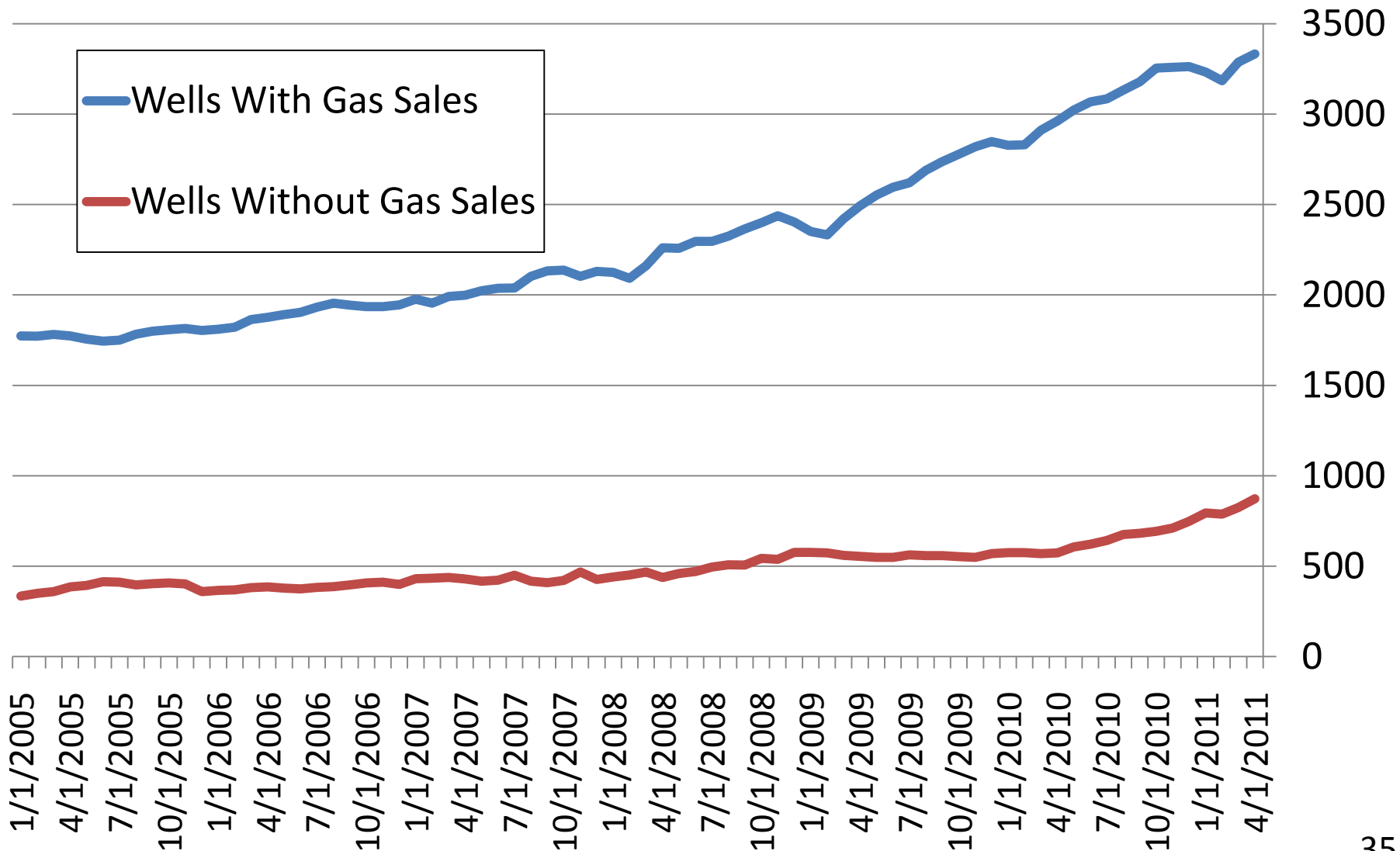
Natural Gas Projects



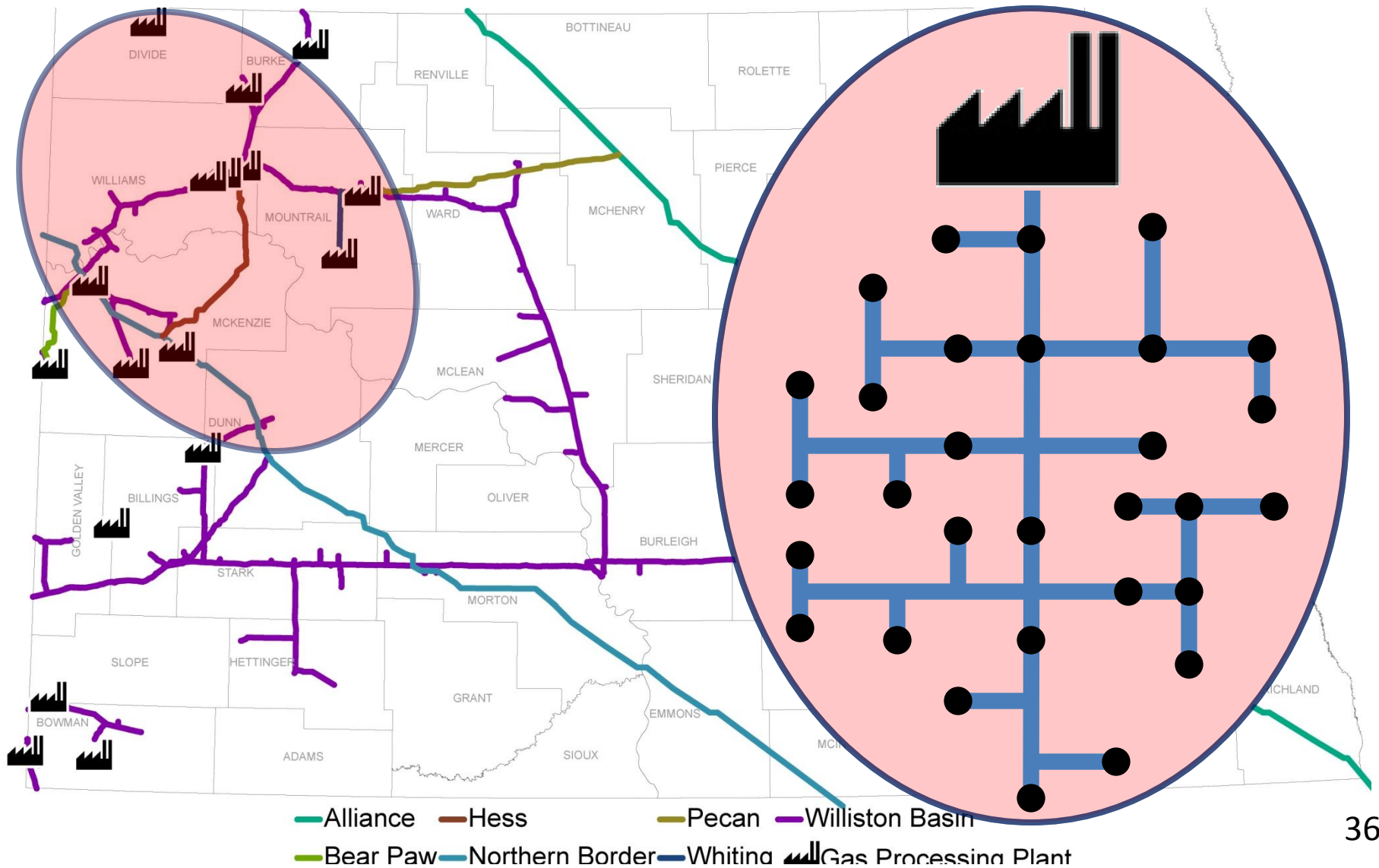
ND Gas Production



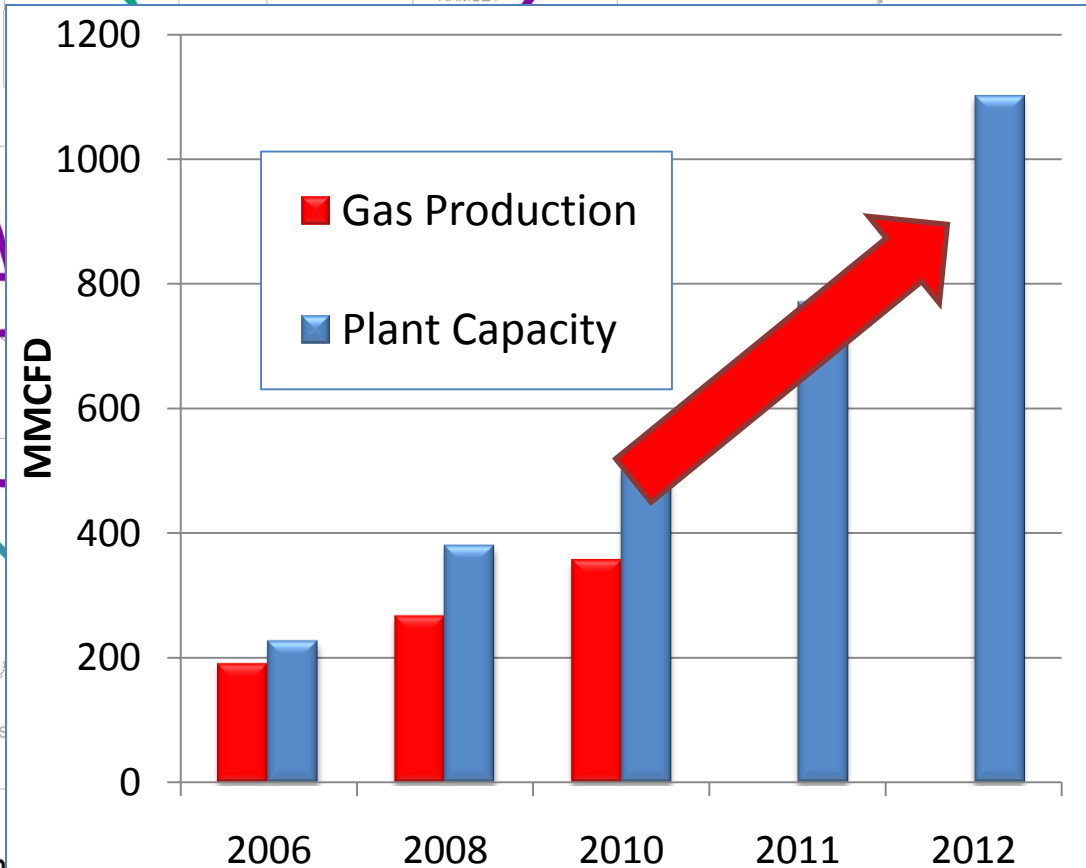
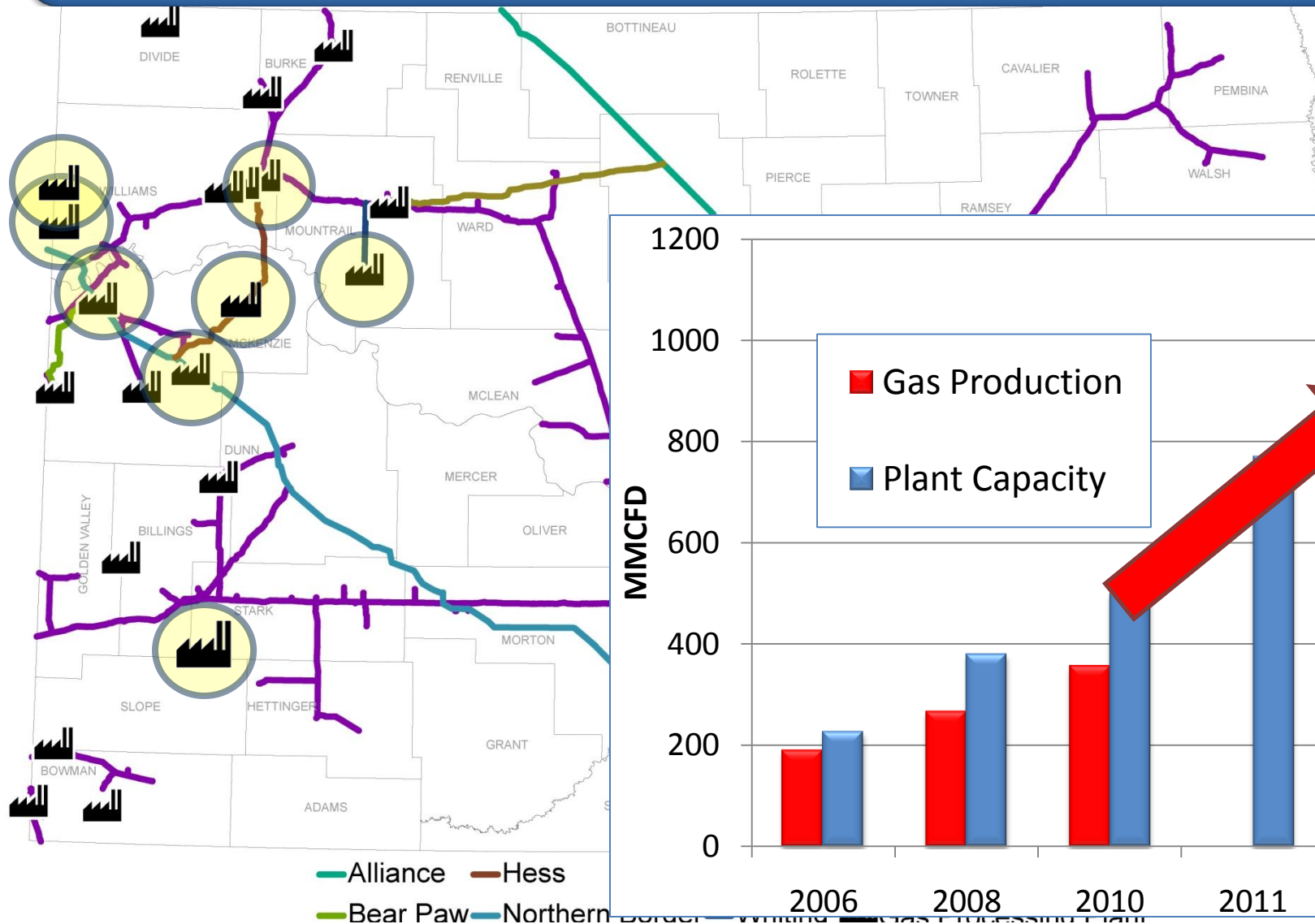
ND Gas Gathering Statistics



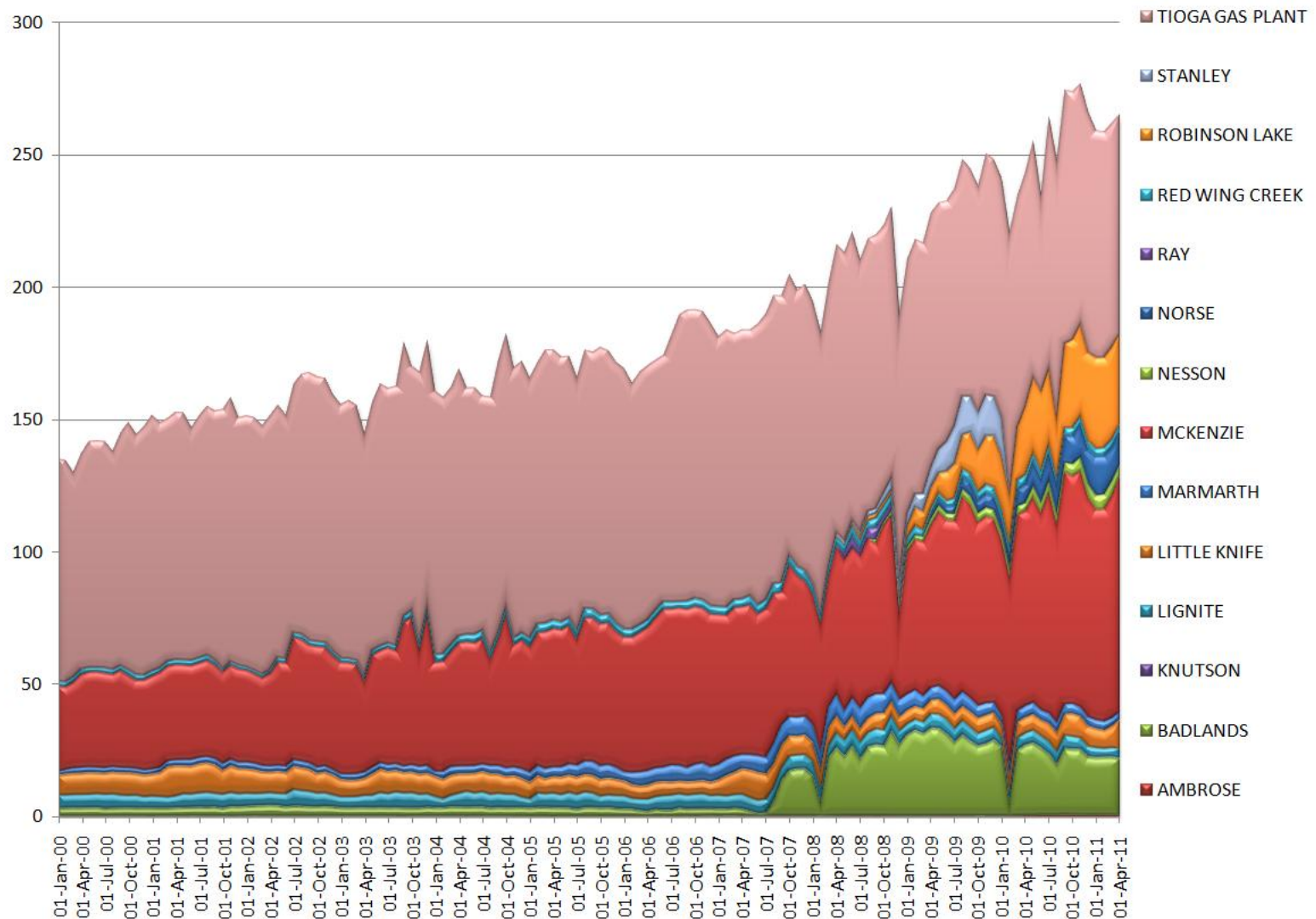
Natural Gas Challenge I



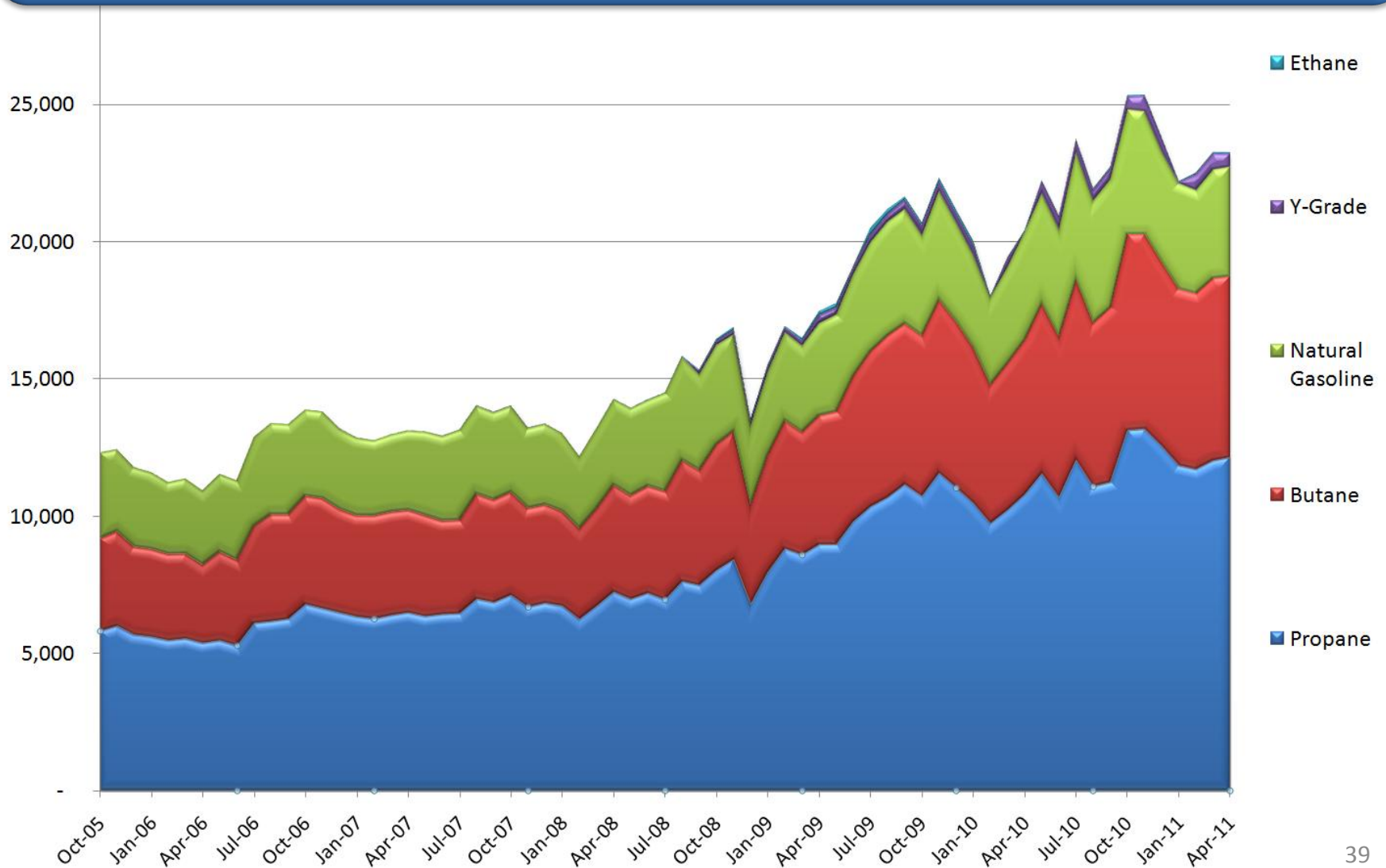
New or Expanding Gas Plants

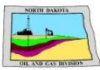


Natural Gas Plant Intake, MMCFD

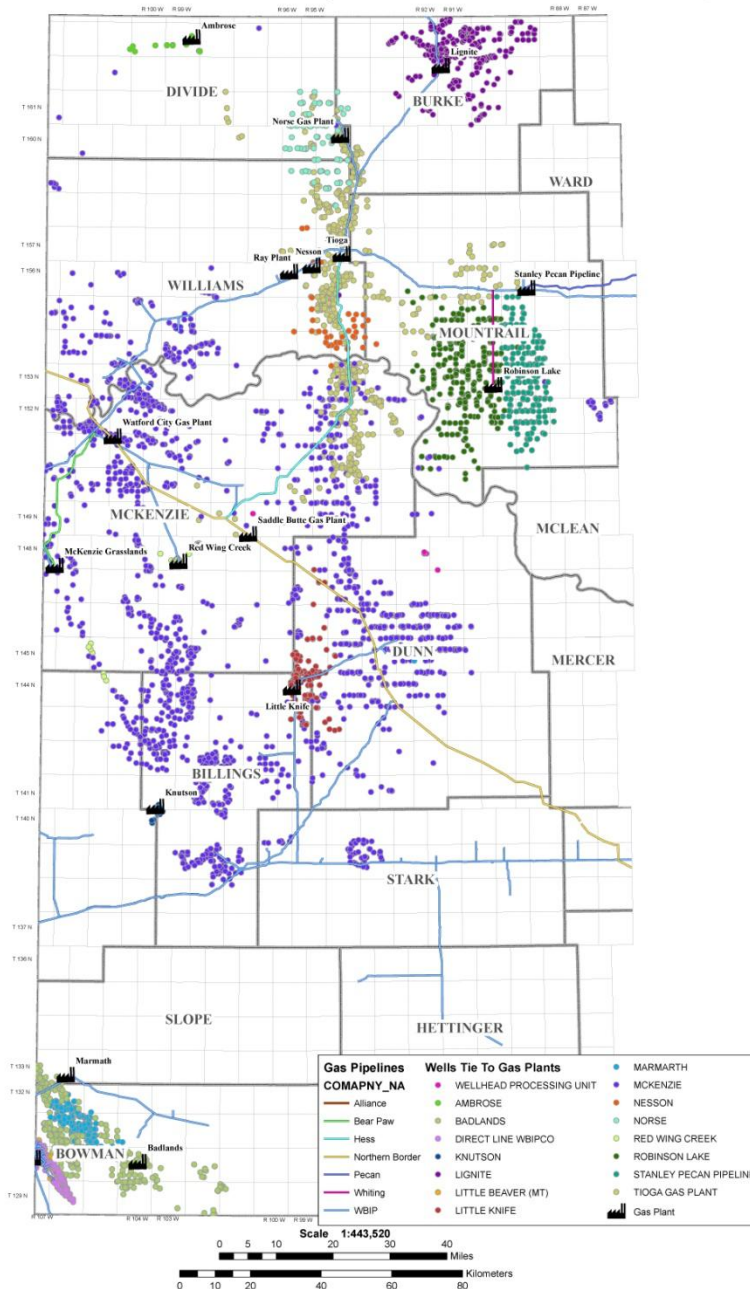


North Dakota Natural Gas Liquids



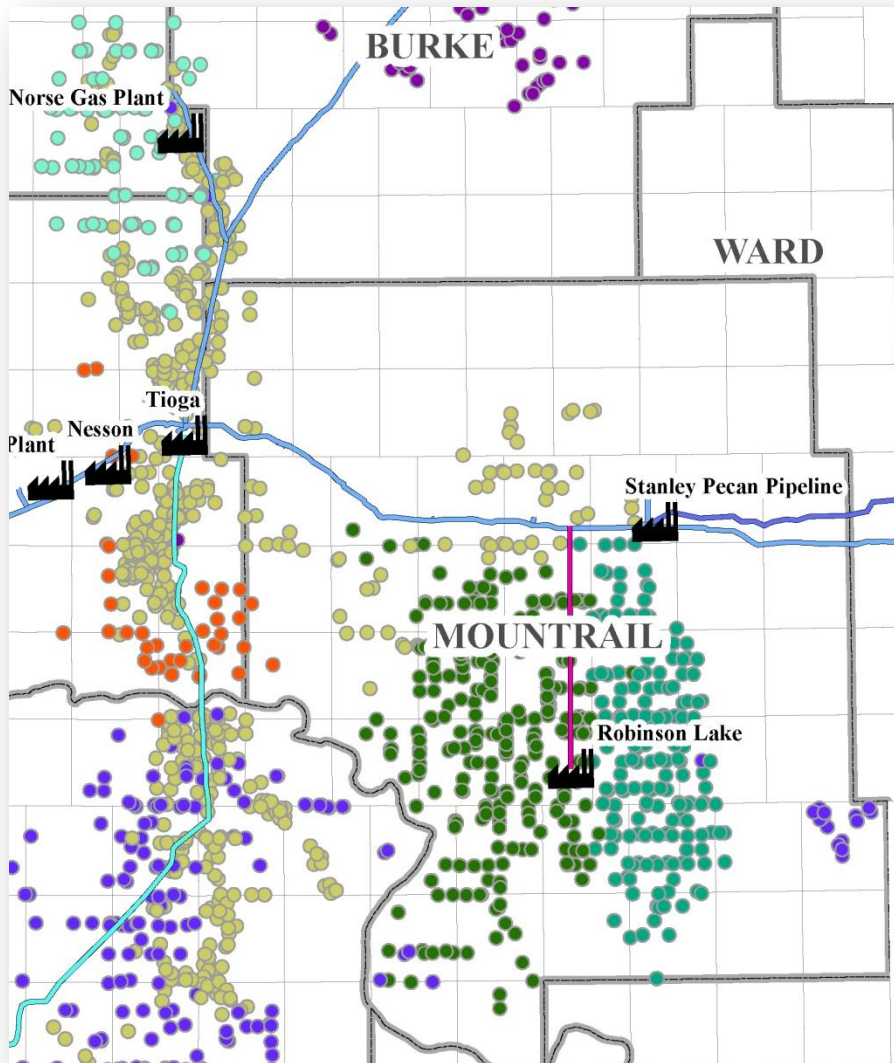


North Dakota Gas Processing and Transportation July, 2011



North Dakota Natural Gas Processing and Gathering

Mountrail/Burke Counties

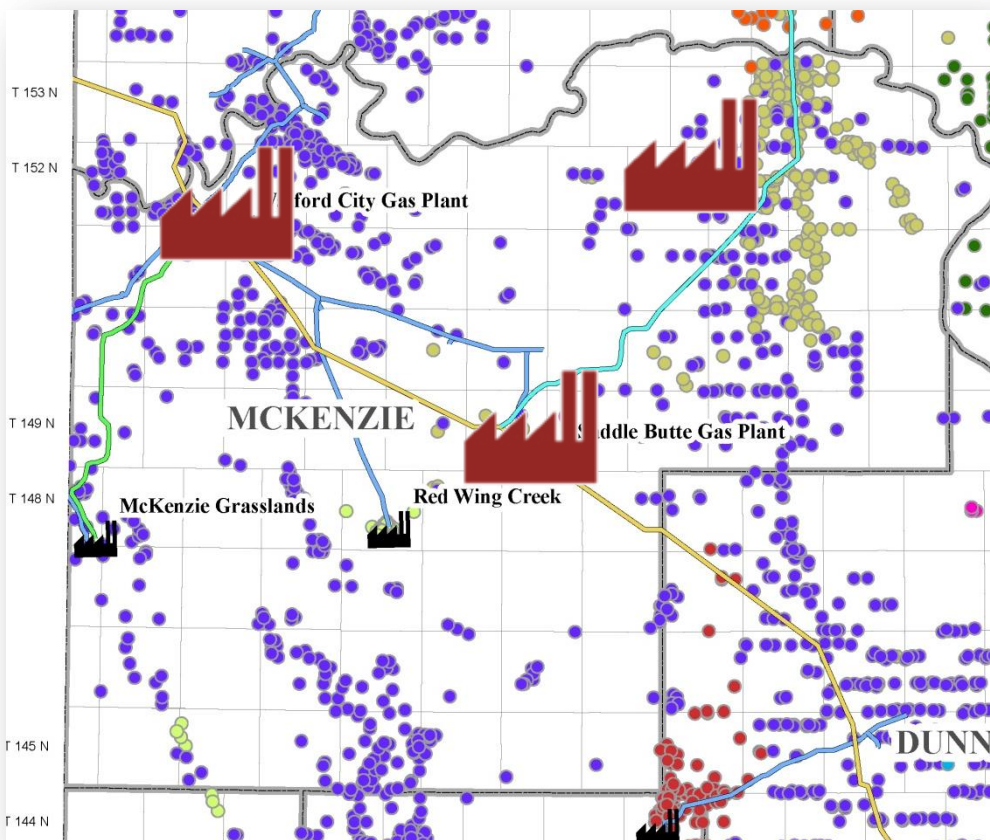


Bear Tracker Energy
150+ Well Connections in
2011

Tie into Pecan's Stanley
Facility

Robinson Lake Expansion

McKenzie County



ONEOK Garden Creek
Plant

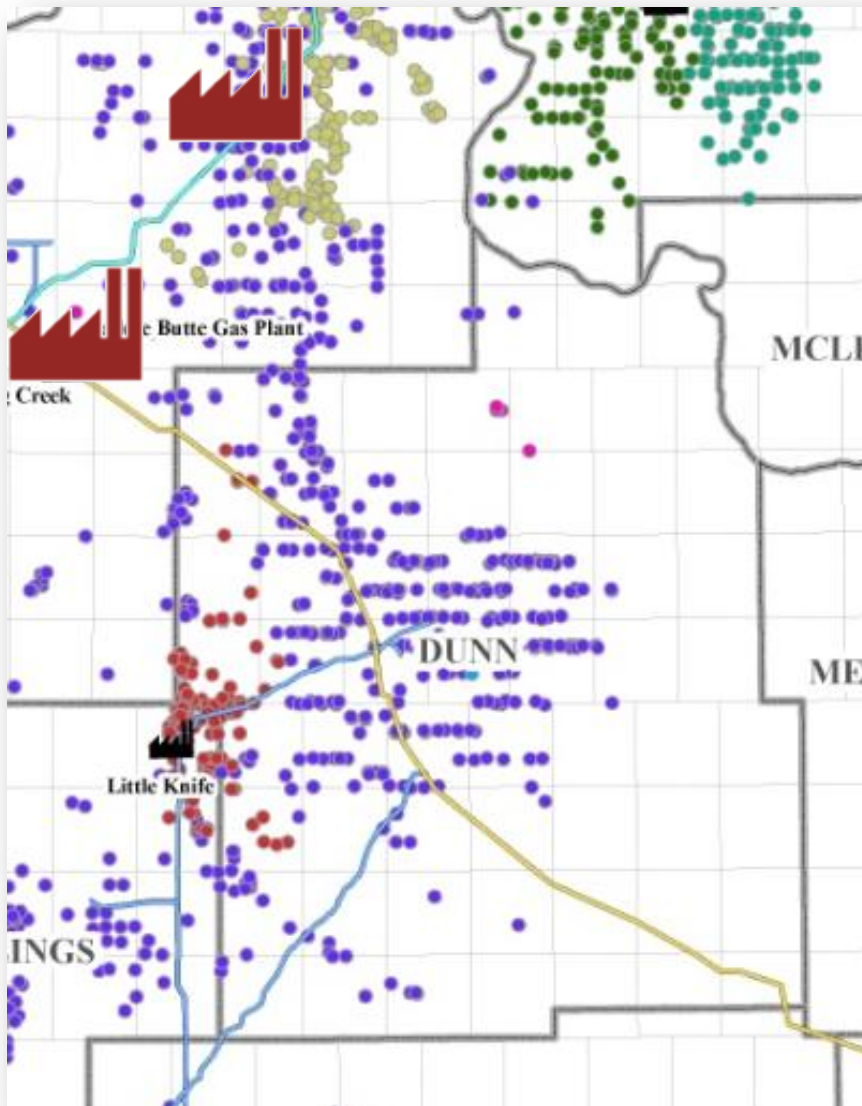
Q4 2011: 100 MMCFD

Hiland Partners Watford
City Plant

June 2011: 50 MMCFD

Saddle Butte Pipeline
July 2011: 45 MMCFD

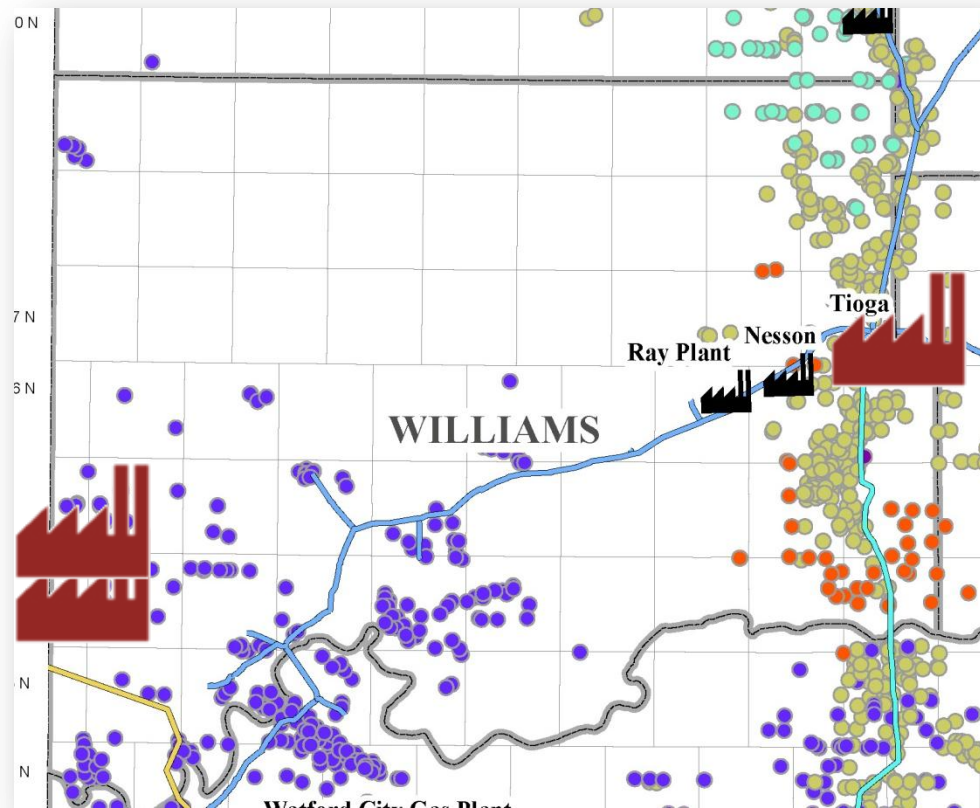
Dunn County



Arrow Pipeline Gathering
System

Saddle Butte Gathering
and Processing
July 2011: 45 MMCFD

Williams County

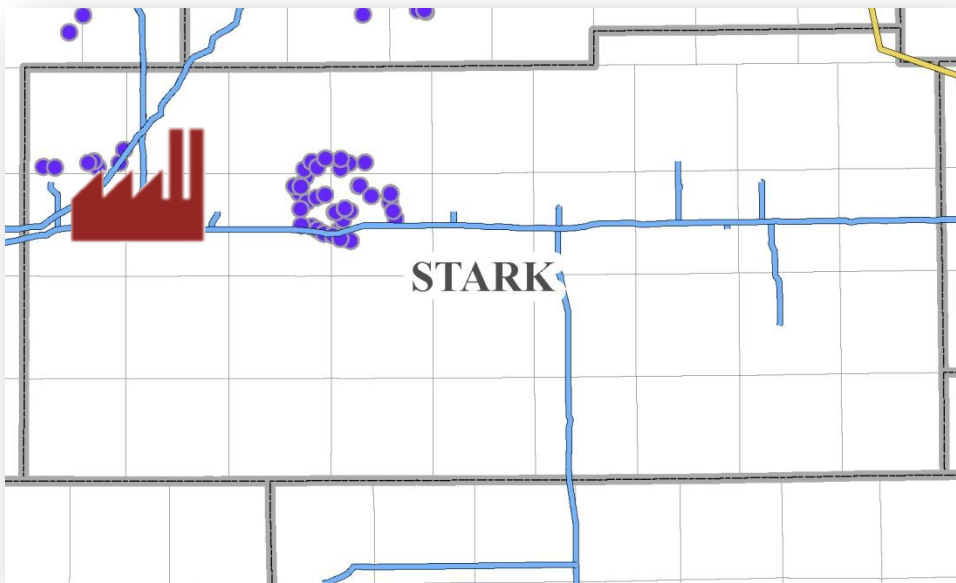


ONEOK Stateline I Plant
Q3 2012: 100 MMCFD

ONEOK Stateline II Plant
Q4 2012: 100 MMCFD

Hess Tioga Plant
Current: 110 MMCFD
Q4 2012: 250 MMCFD

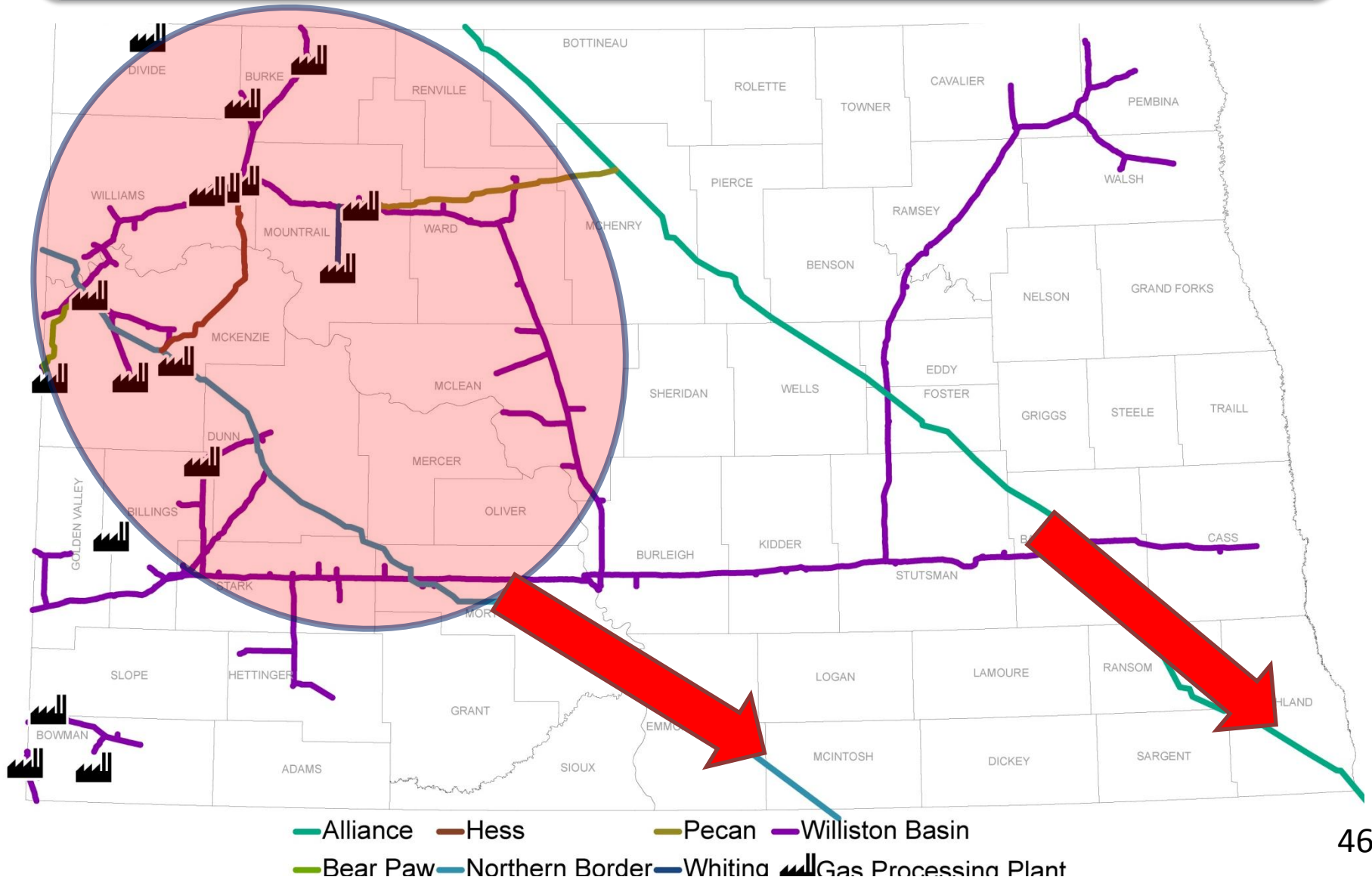
Stark County



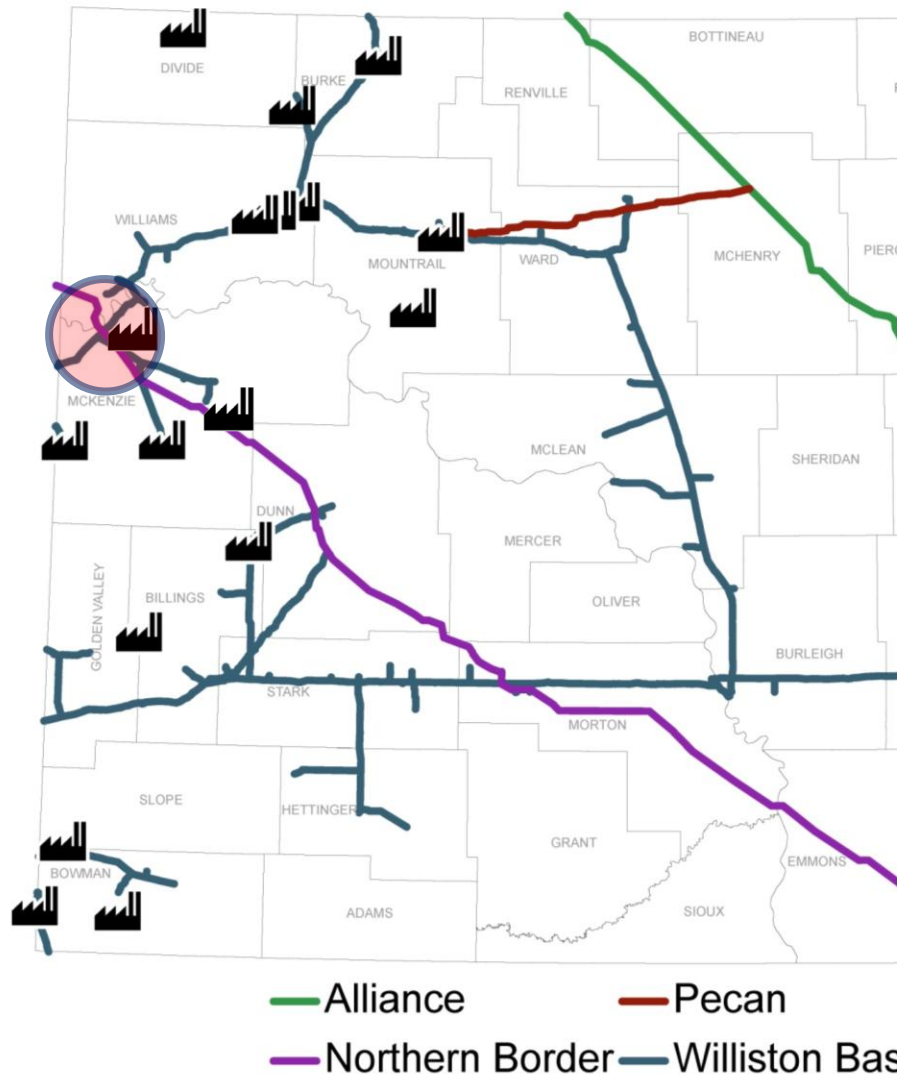
Whiting Pronghorn Plant
Nov 2011: 30 MMCFD

Bakken Express
Natural Gas Trucking
Petro Hunt
Little Knife Plant

Natural Gas Challenge II



Williston Basin Interstate Pipeline



Charbonneau Expansion

32 MMCFD
Added in 2008

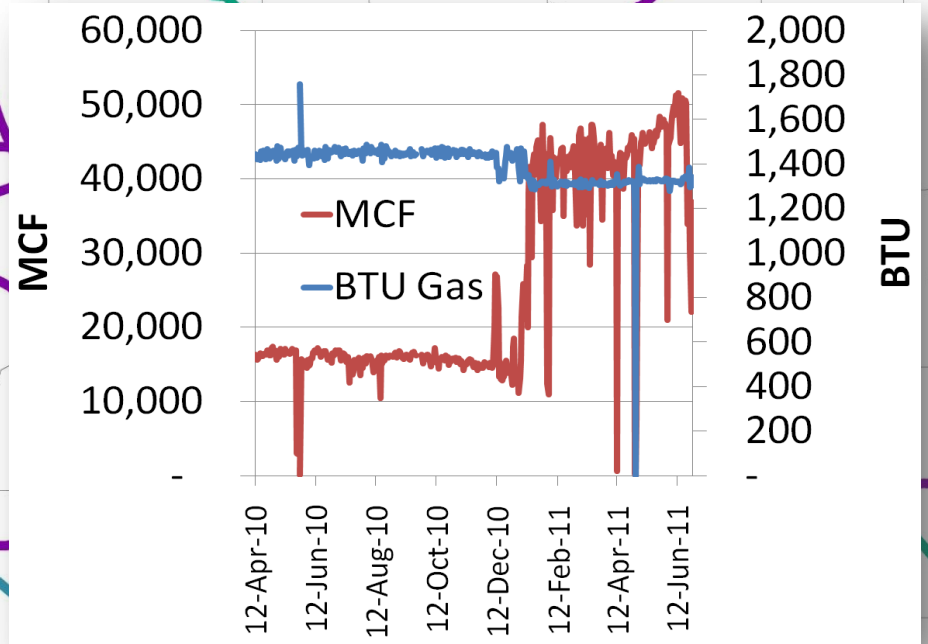
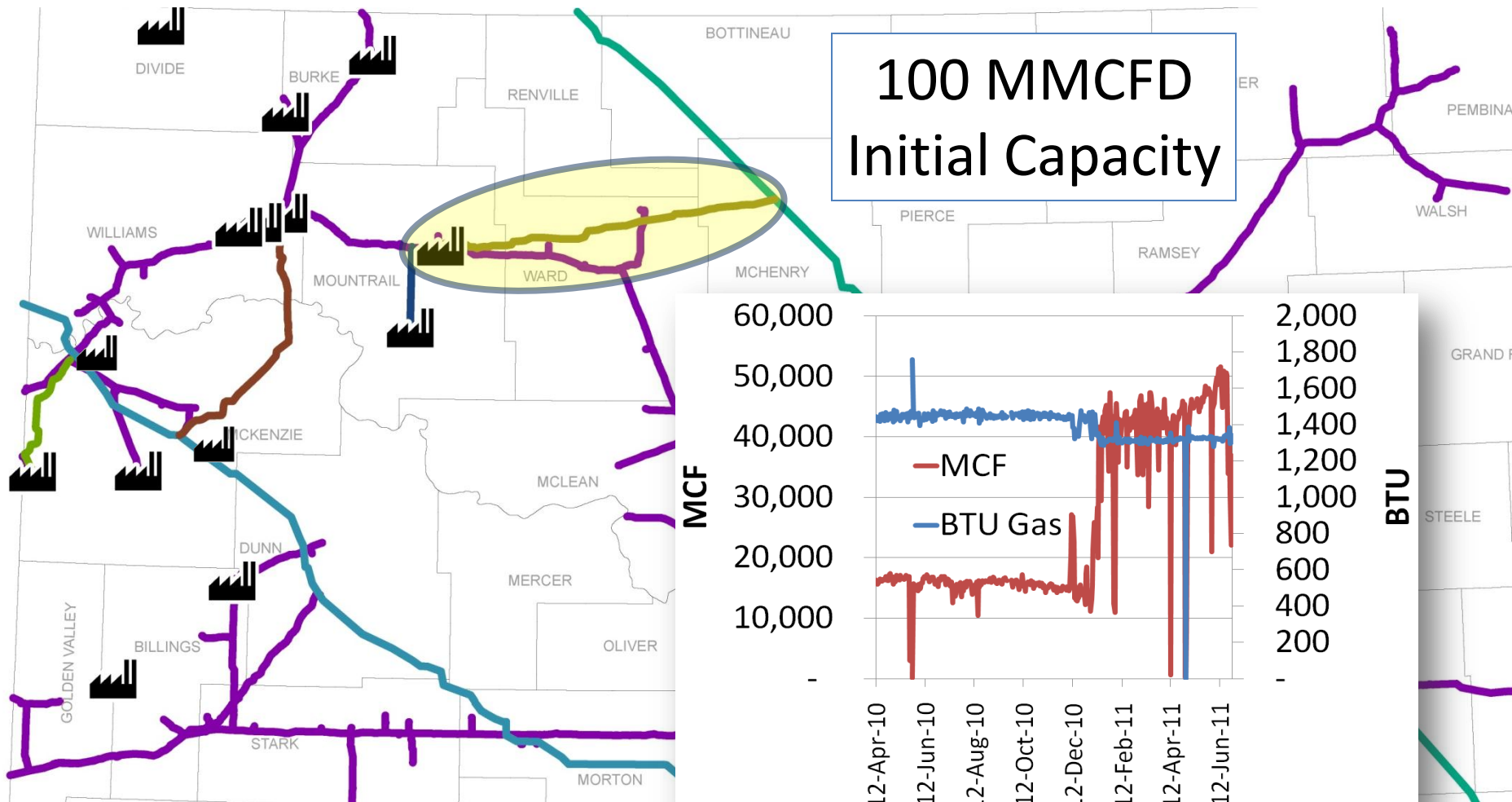
27 MMCFD
To Added Sep 2011

Baker Storage Expansion

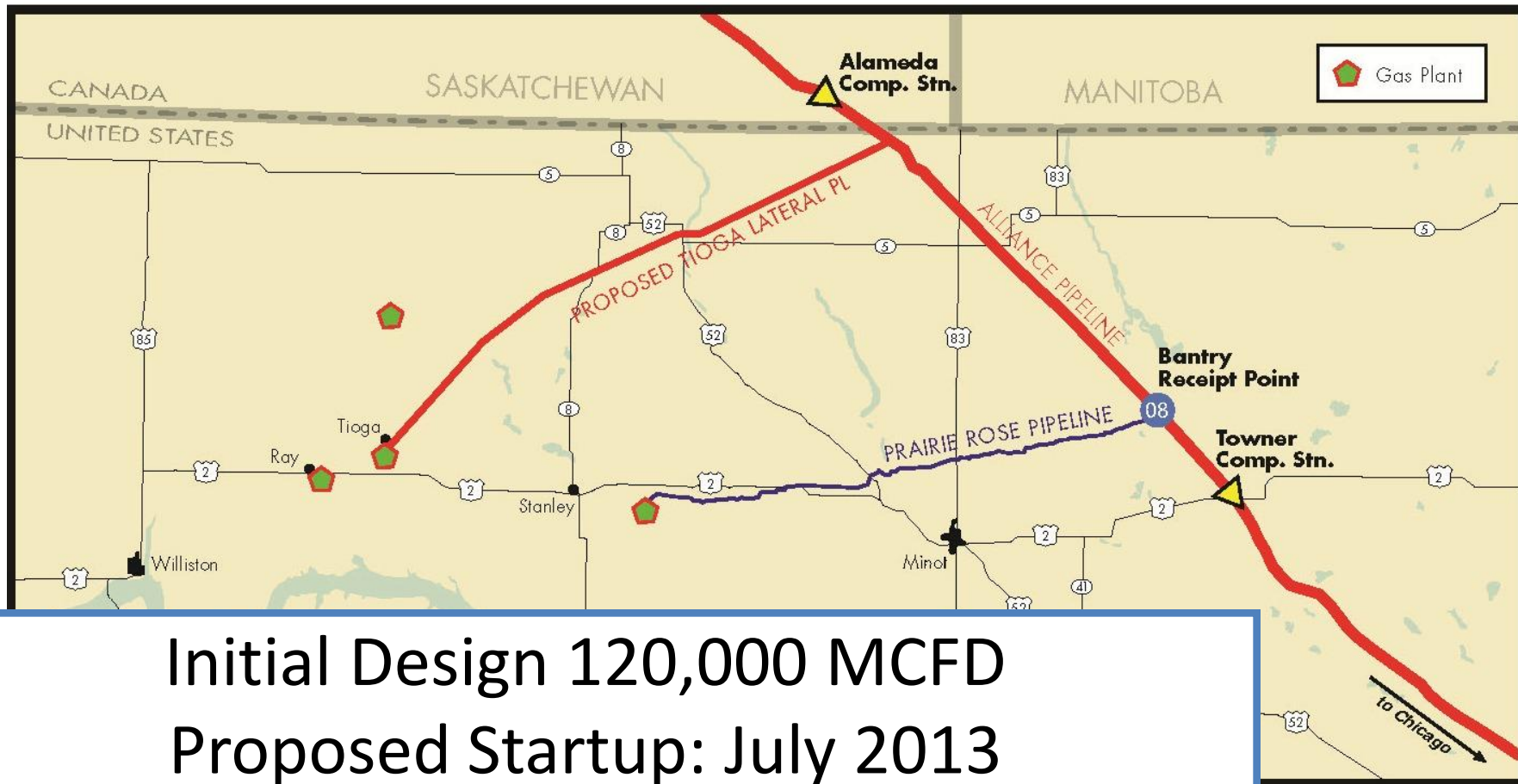
April 2012

Potential Portal Delivery

Pecan's Prairie Rose Pipeline



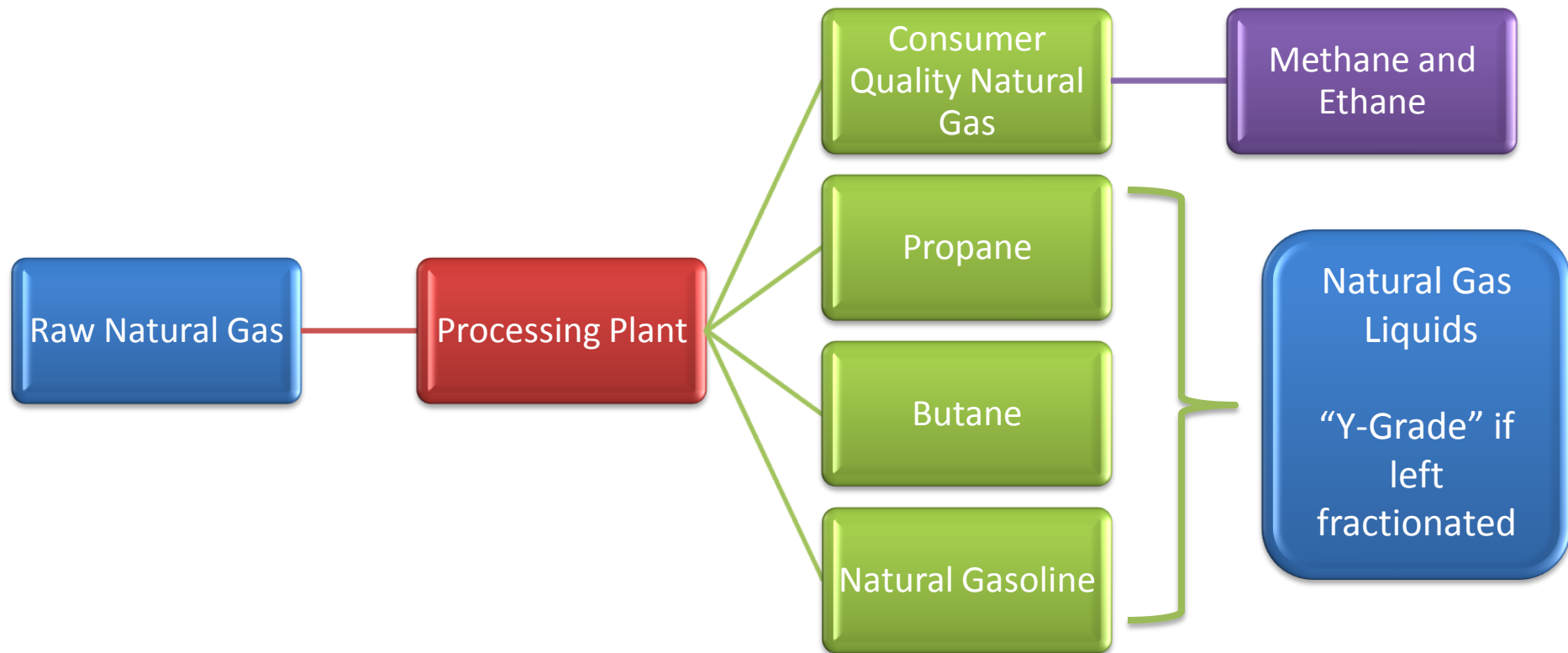
Alliance Tioga Lateral Pipeline



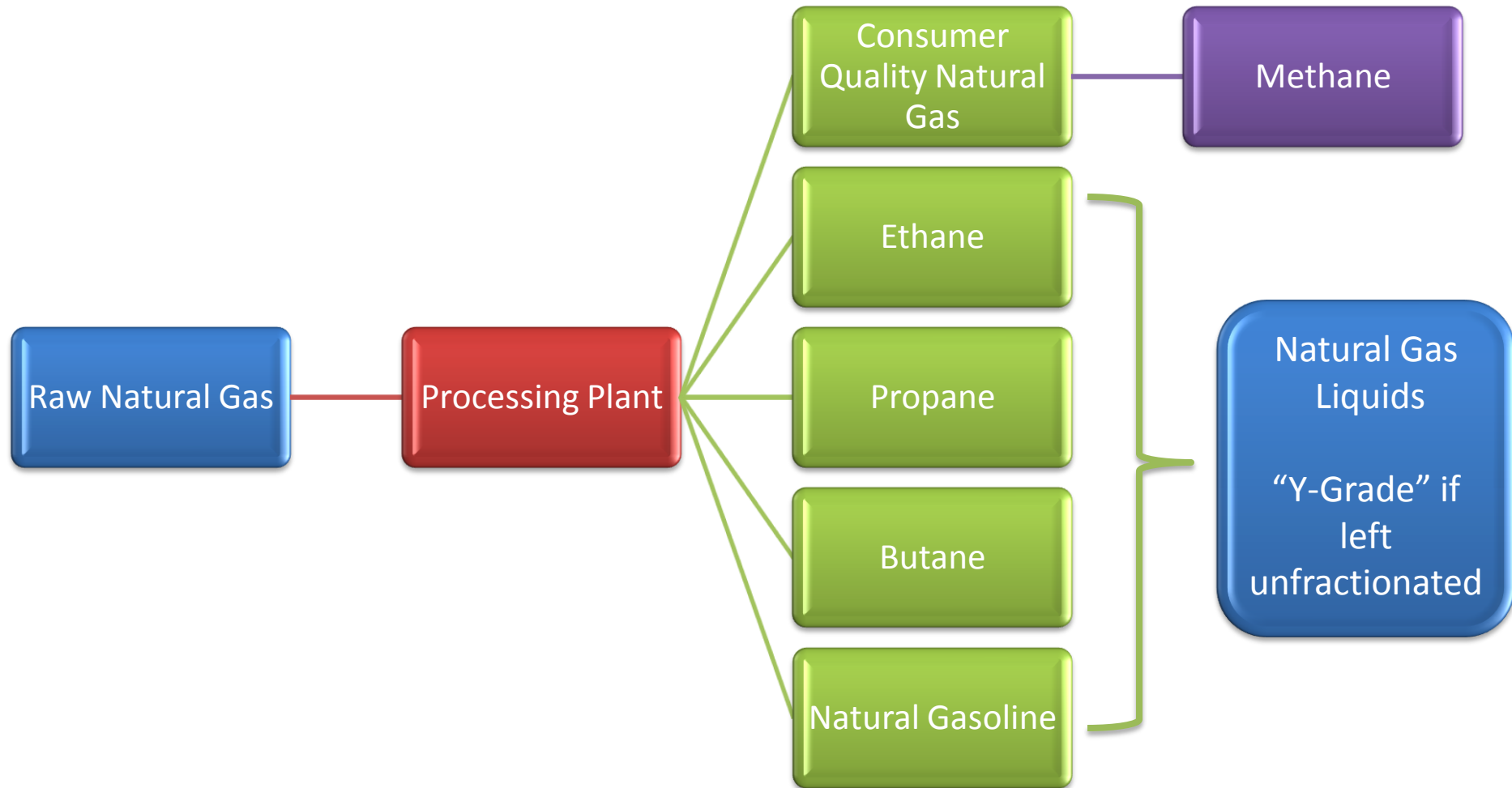
Initial Design 120,000 MCFD
Proposed Startup: July 2013
Size: 80 Miles, 12"-16"

Natural Gas Processing

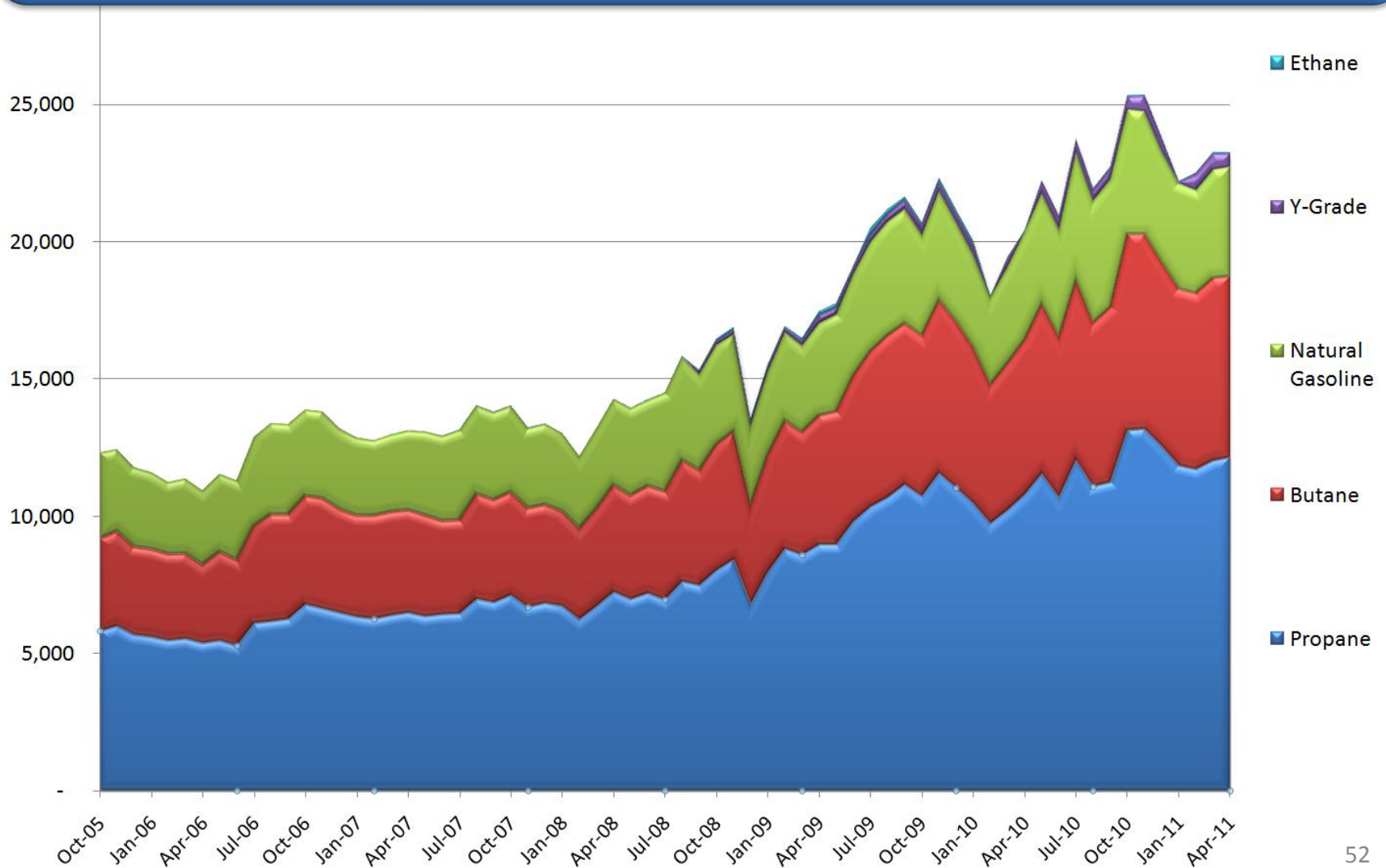
Current Status



Natural Gas Processing With Ethane Extraction

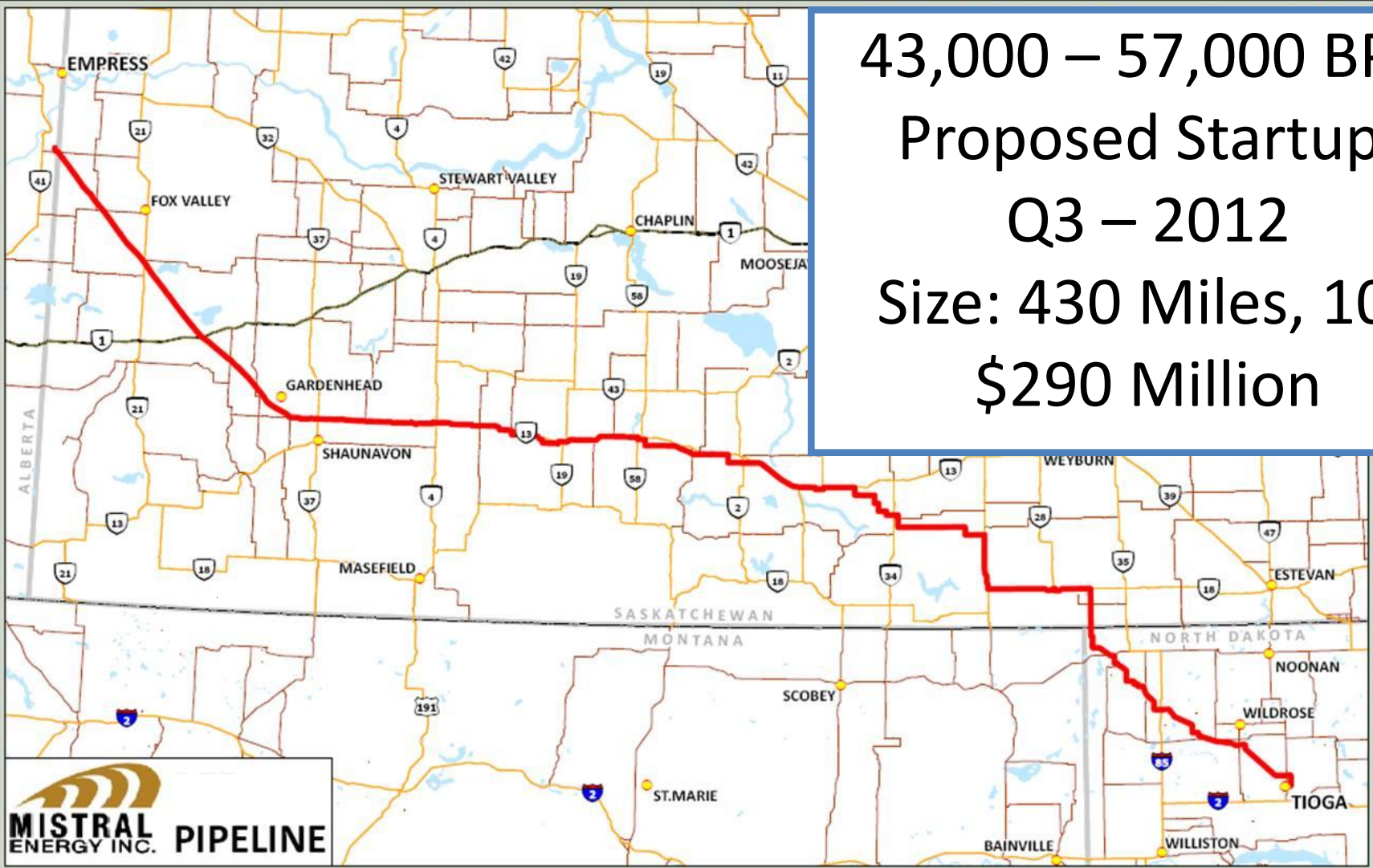


North Dakota Natural Gas Liquids



Vantage Pipeline: Ethane

43,000 – 57,000 BPD
Proposed Startup:
Q3 – 2012
Size: 430 Miles, 10"
\$290 Million



ONEOK Bakken Pipeline: Y-Grade

Proposed Bakken Pipeline

 Bakken Pipeline

 Overland Pass Pipeline

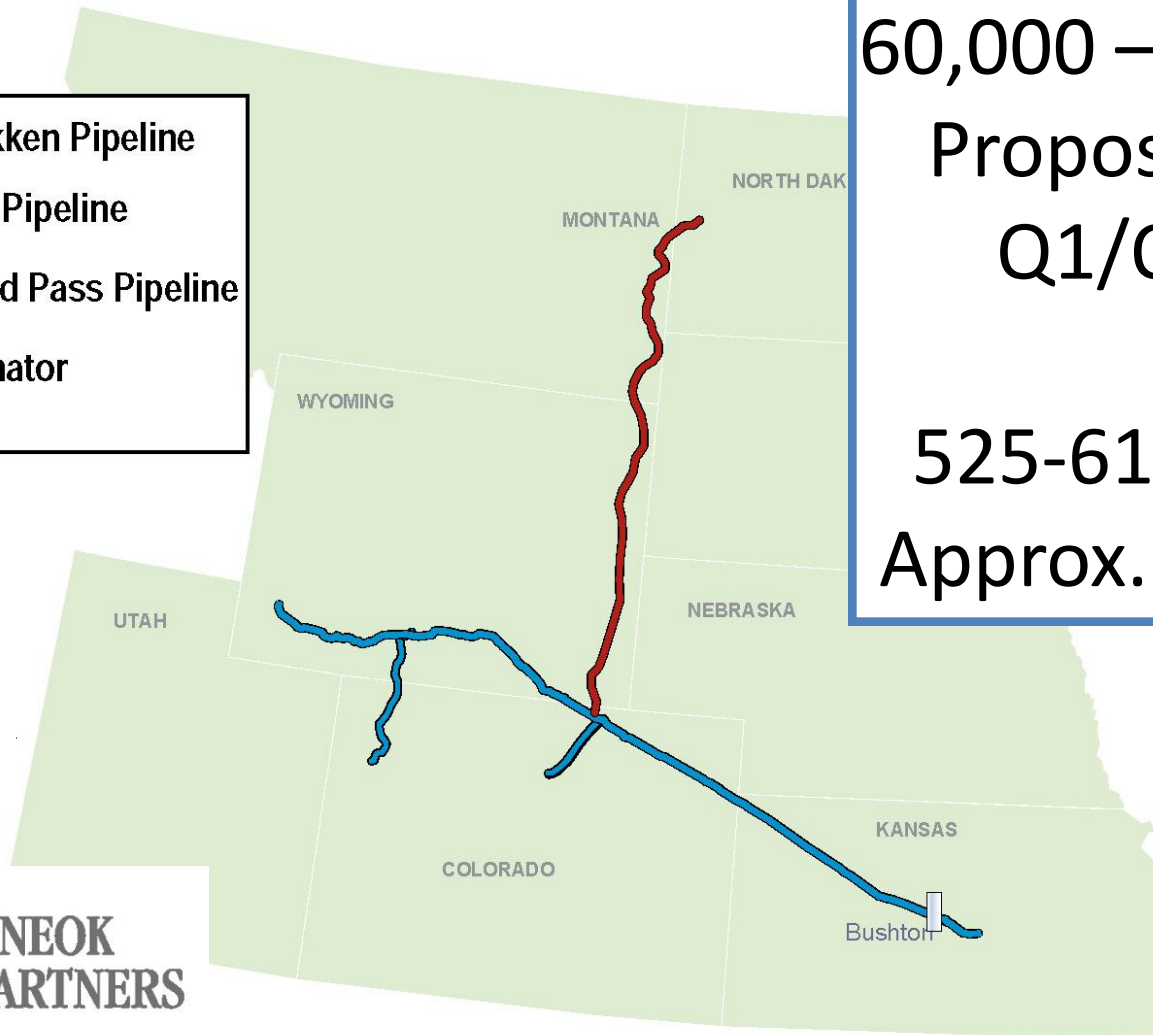
 Fractionator

60,000 – 110,000 BPD

Proposed Startup:
Q1/Q2 – 2013

Size:

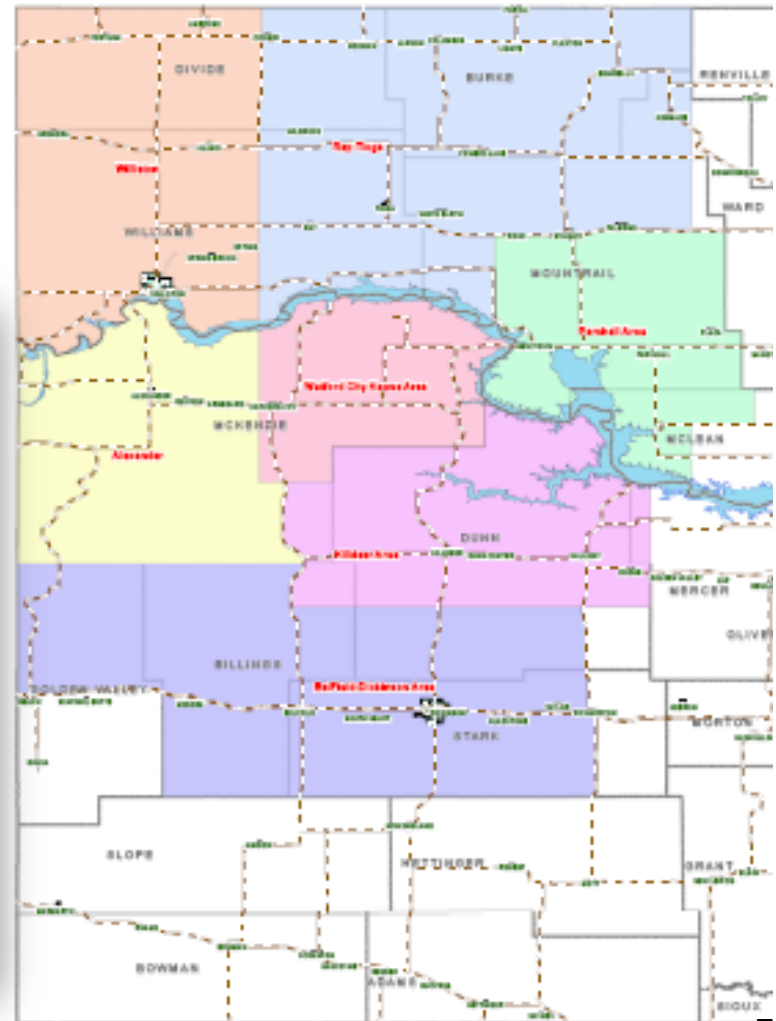
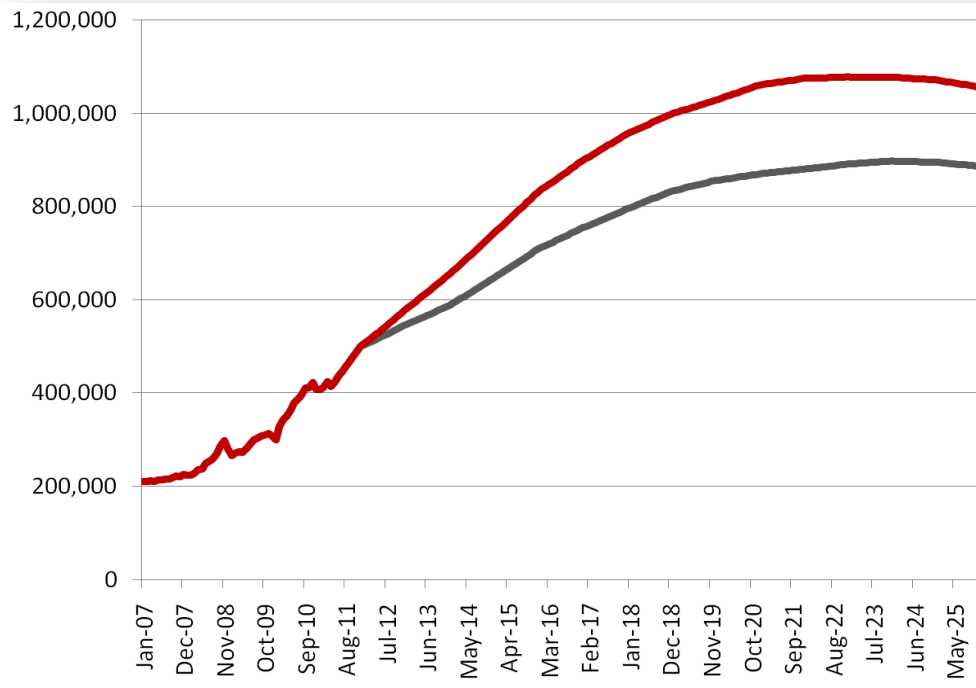
525-615 Miles, 12"
Approx. \$700 Million



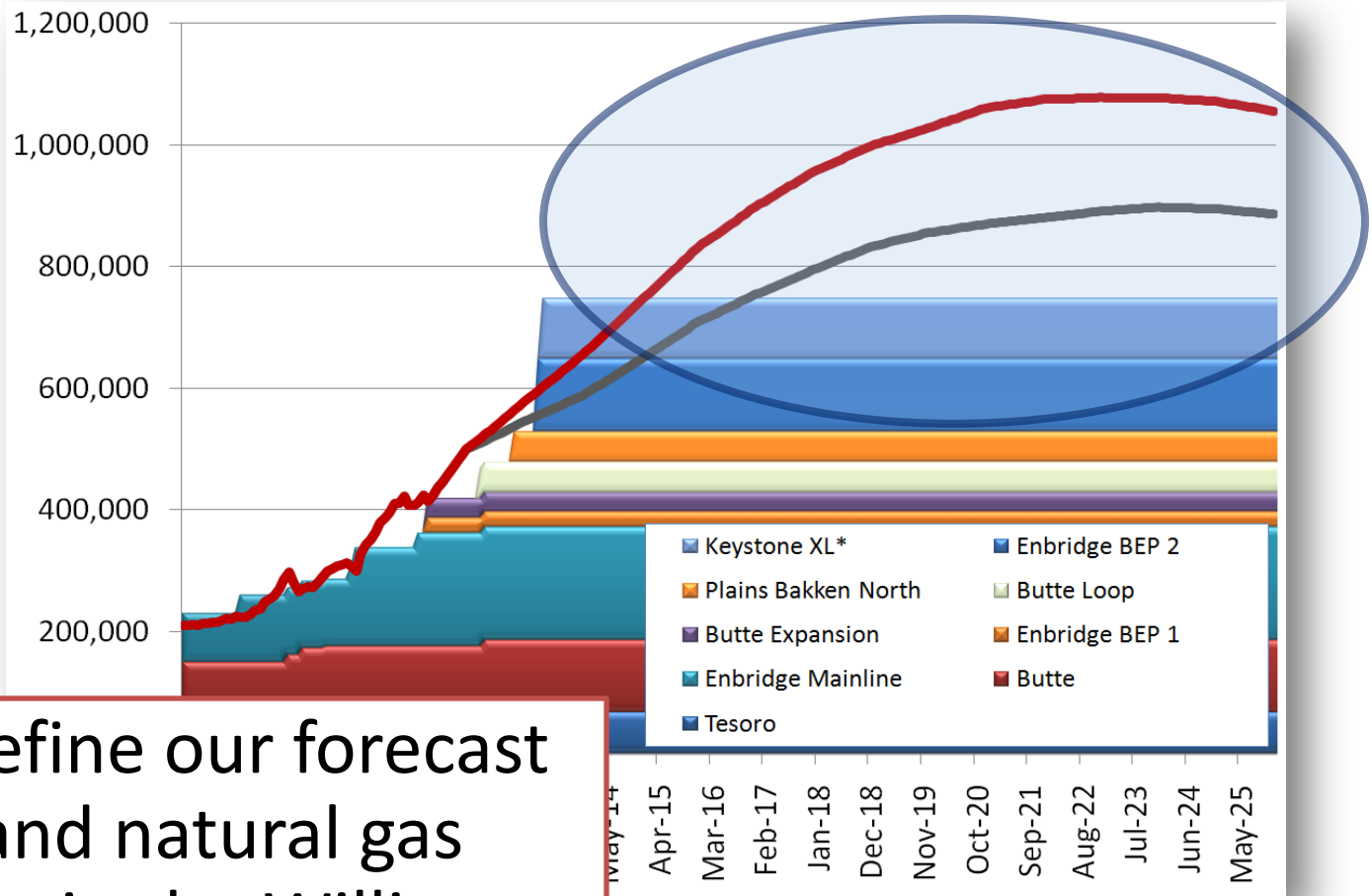
ONEOK
PARTNERS

What's Next for the NDPA...

Enhanced Regional Forecasting



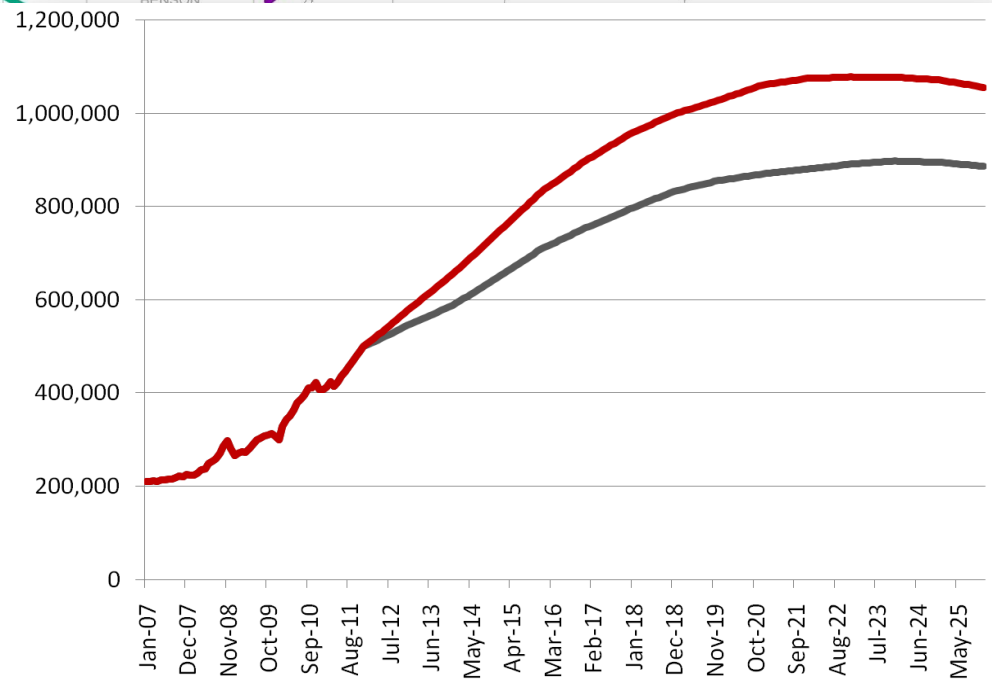
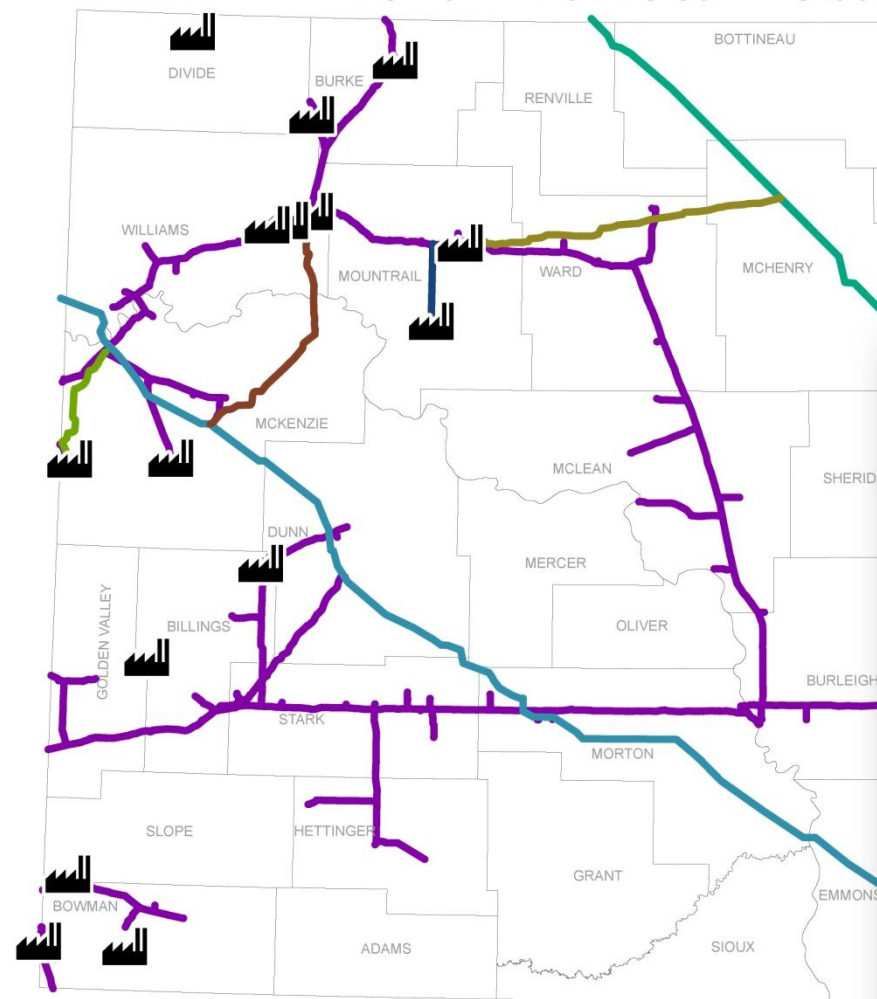
What's Next for the NDPA...



Work to refine our forecast
for oil and natural gas
production in the Williston
Basin post 2013

What's Next for the NDPA...

Reassess Natural Gas Transmission Infrastructure



Public Presence



2nd Annual Bakken Rocks

COOKFEST



JULY 27

5:00 - 8:00 p.m. CDT

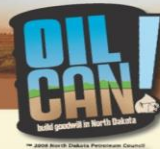
Tioga, ND
City Park

JULY 29

5:00 - 8:00 p.m. CDT

New Town, ND
4 Bears Casino
Little Shell Amphitheater

Bakken Basics Education Sessions will be held at both locations at WWW.NDOIL.ORG.



BAKKEN BASICS TOWN HALL MEETINGS

Learn about the oil and gas production activities taking place in your area from industry professionals.

Light food and beverages provided

Vicky Steiner, ND Association of Oil & Gas Producing Counties

Ron Ness, ND Petroleum Council

Kathy Neset, Neset Consulting

Steve Pine, Great Northern Energy

Justin Kringstad, ND Pipeline Authority

Lynn Helms, ND Department of Mineral Resources



TUESDAY, OCTOBER 5

Westhope - High School
8:00 - 9:45 a.m. CDT

Bowbells - City Hall
12:15 - 2:00 p.m. CDT

Crosby - Movie Theater
5:30 - 7:15 p.m. CDT

WEDNESDAY, OCTOBER 6

Williston - International Inn
7:30 - 9:15 a.m. CDT

Watford City - High School
11:30 - 1:15 p.m. CDT

Dickinson - Grand Dakota Lodge
3:30 - 5:15 p.m. MDT

VISIT NDOIL.ORG FOR MORE INFORMATION

at WWW.NDOIL.ORG.
at WWW.NDOIL.ORG.
RSVP by visiting
WWW.NDOIL.ORG



NDPA Monthly Webinars

- Past Slides and Video Available Online

- Industry Experts



- New Topics Each Month

- Audience Interaction



INDUSTRIAL COMMISSION OF NORTH DAKOTA
NORTH DAKOTA PIPELINE AUTHORITY
Governor **John Hoeven**
Attorney General **Wayne Stenehjem**
Agriculture Commissioner **Doug Goehring**
Director **Justin J. Kringstad**

The Pipeline Publication

Keeping North Dakota Connected

Volume II Issue IV - December 2009

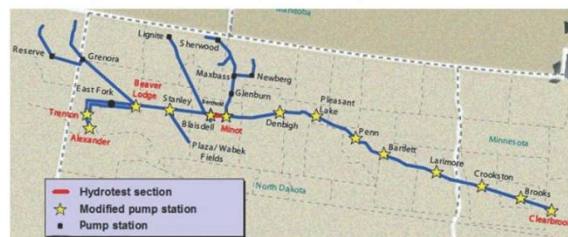
Greetings

Season's Greetings from the North Dakota Pipeline Authority! While the temperature in North Dakota is dropping fast, the activity in North Dakota's oilfields is heating up. With more rigs moving into the basin, improved well completion techniques, and quicker spud to spud times, North Dakota petroleum production is expected to grow for many years to come. Along with the growing crude oil production, several exciting transportation expansion projects are very near completion, with many more in the works. For additional project information, past newsletters, maps, reports, and more please visit the Pipeline Authority website, www.pipeline.nd.gov.

Enbridge Phase VI Expansion Update

The much anticipated Enbridge Phase VI Expansion is nearly complete. Scheduled to be in service on January 1, 2010, the expansion will increase Enbridge's mainline capacity to Clearbrook, MN from 110,000 barrels per day (BOPD) to 161,600 BOPD. Once complete, Enbridge North Dakota will have more than doubled its 2007 system capacity of 80,000 BOPD.

More good news is that Enbridge has no intentions of stopping at 161,600 BOPD and is actively working to gain support from interested shippers for the proposed Portal Reversal Expansion Project or PREP. As proposed, PREP would allow Enbridge to transport an additional 30,000 BOPD by 2011 and up to an additional 115,000 BOPD by 2013.



Details of Enbridge's Phase VI Expansion.
Source: Enbridge Pipelines LLC - www.enbridge-expansion.com

North Dakota Statistics

	Aug-09	Sept-09	Oct-09
Average Daily Oil Production, BOPD	232,355	238,265	239,067
Average Daily Gas Production, MMCFD	266.66	259.76	253.04
Wells Producing	4,545	4,579	4,606
Average Rig Count	45	51	56

As of December 16, 2009, there are 77 active rigs in North Dakota.

www.pipeline.nd.gov

Prairie Rose Pipeline Nears Completion

An unexpected construction specification change has delayed the startup of the Pecan Prairie Rose Pipeline until Mid-January, 2010. The new 75 mile, 12 inch pipeline is designed to transport up to 80 million cubic feet of unprocessed natural gas per day from Mountrail County to an interconnect with the Alliance Pipeline near Towner, ND.

Proposed Baker Storage Enhancement

Williston Basin Interstate Pipeline Company is developing a project to increase firm deliverability from its Baker gas storage field in eastern Montana. With current firm storage withdrawal rates of 115 million cubic feet per day (MMCFD), Williston Basin sees an opportunity to add an additional 125 MMCFD of firm withdrawal capacity, which would more than double the firm withdrawal rate from Baker. Along with the gas storage field upgrades, Williston Basin is planning a pipeline expansion to transport the increased, firm storage volumes to an interconnect with the Northern Border Pipeline in North Dakota. The project has a proposed in-service date of 2012 and an open season is expected in January 2010.



Source: Williston Basin Interstate Pipeline Co.

Natural Gas Storage Explained

During the mid 1900's, natural gas grew in popularity as a winter heating fuel. As a result, natural gas markets began experiencing seasonal demand swings that needed to be managed using underground storage operations. Depleted natural gas fields are most often targeted for storage due to existing infrastructure and reservoir knowledge. During the summer months when demand is low, natural gas is injected into storage and when demand increases in the winter months, natural gas is withdrawn for consumer use.



ND Pipeline Authority

State Capitol 14th Floor • 600 E. Boulevard Ave. Dept. 405 • Bismarck, ND 58505-0840

Phone: (701) 220-6227 • Fax: (701) 328-2820

E-mail: jjkringstad@gmail.com • www.pipeline.nd.gov

North Dakota Pipeline Authority
State Capitol, 14th Floor
600 E. Boulevard Ave. Dept. 405
Bismarck, ND 58505-0840



Contact Information

North Dakota Pipeline Authority

600 E. Boulevard Ave. Dept. 405
Bismarck, ND 58505-0840

Phone: (701)220-6227

Fax: (701)328-2820

E-mail: jjkringstad@ndpipelines.com

Website:

www.pipeline.nd.gov



Know what's below.
Call before you dig.

