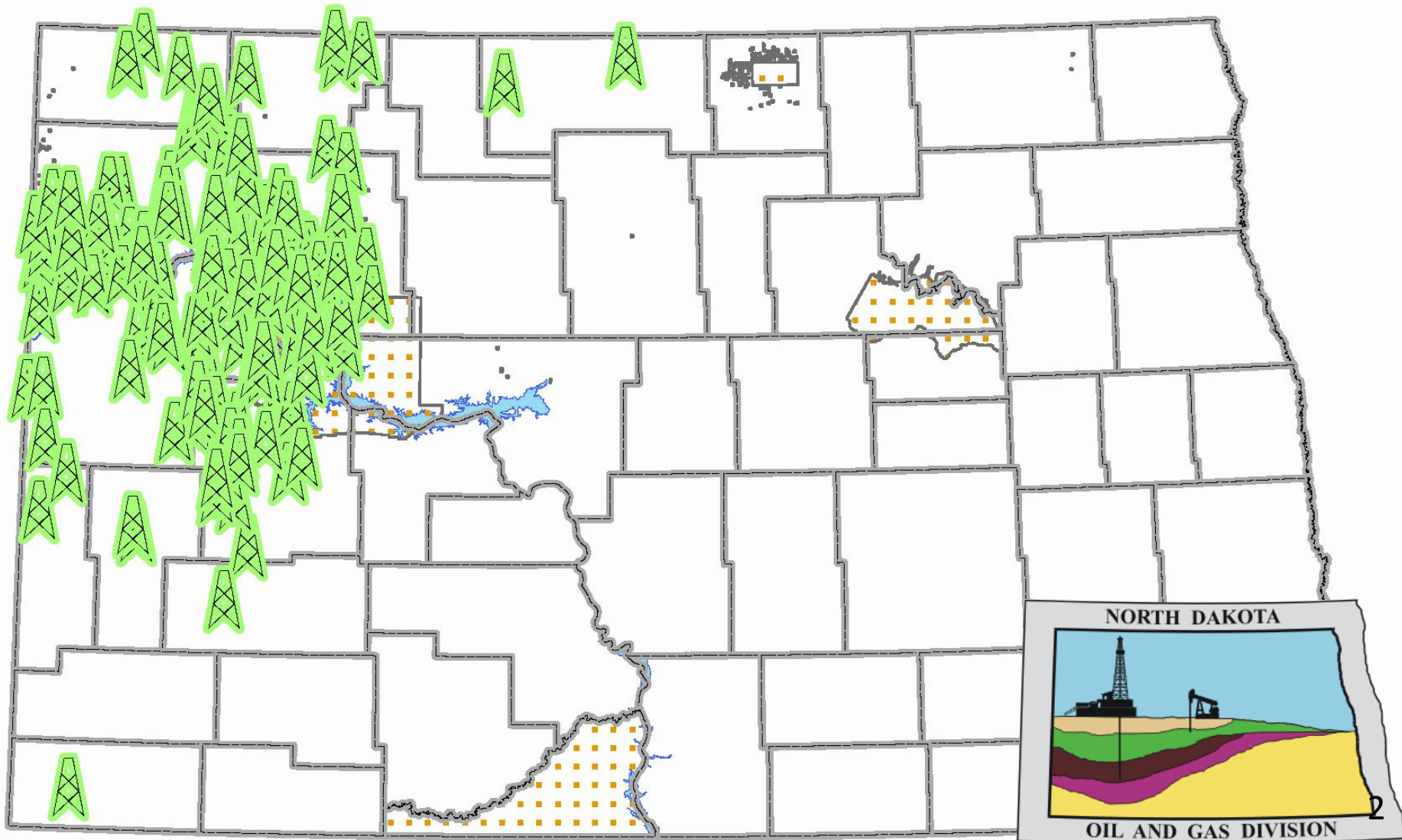
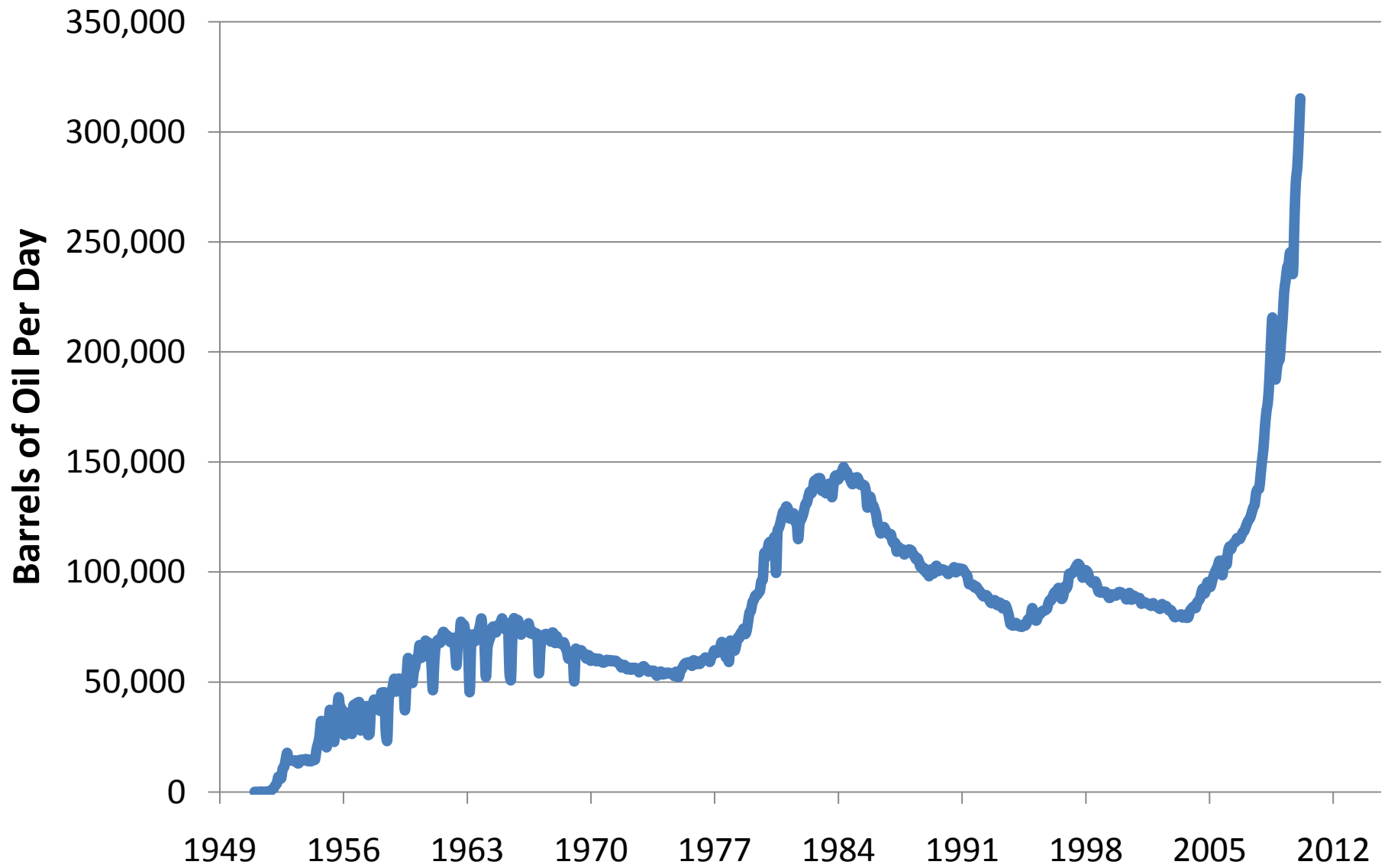


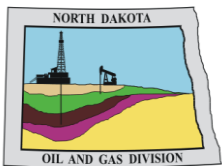
North Dakota Pipeline Authority
Energy Development and Transmission Committee
Justin J. Kringstad
August 18, 2010 – Bismarck, ND

August 17, 2010: 138 Active Drilling Rigs

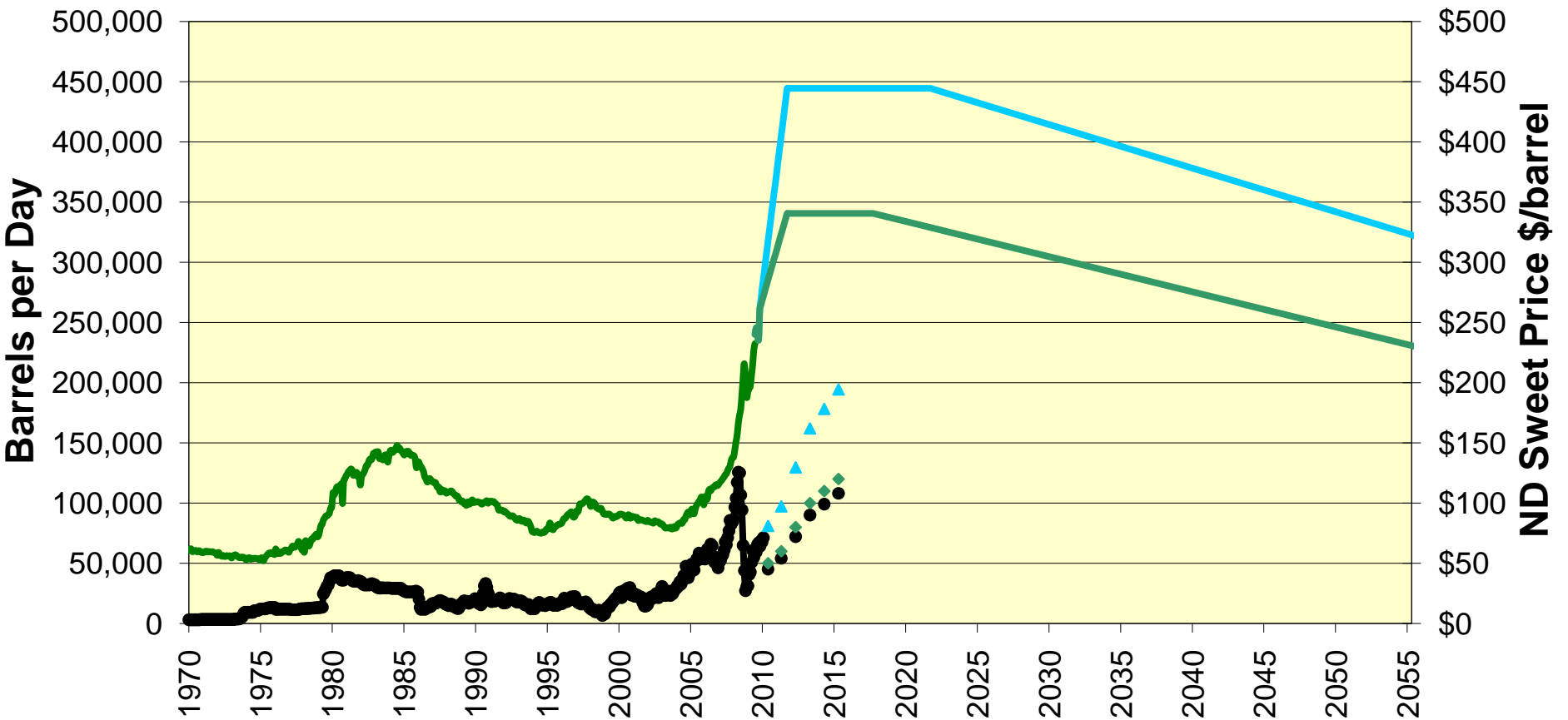


North Dakota Crude Oil



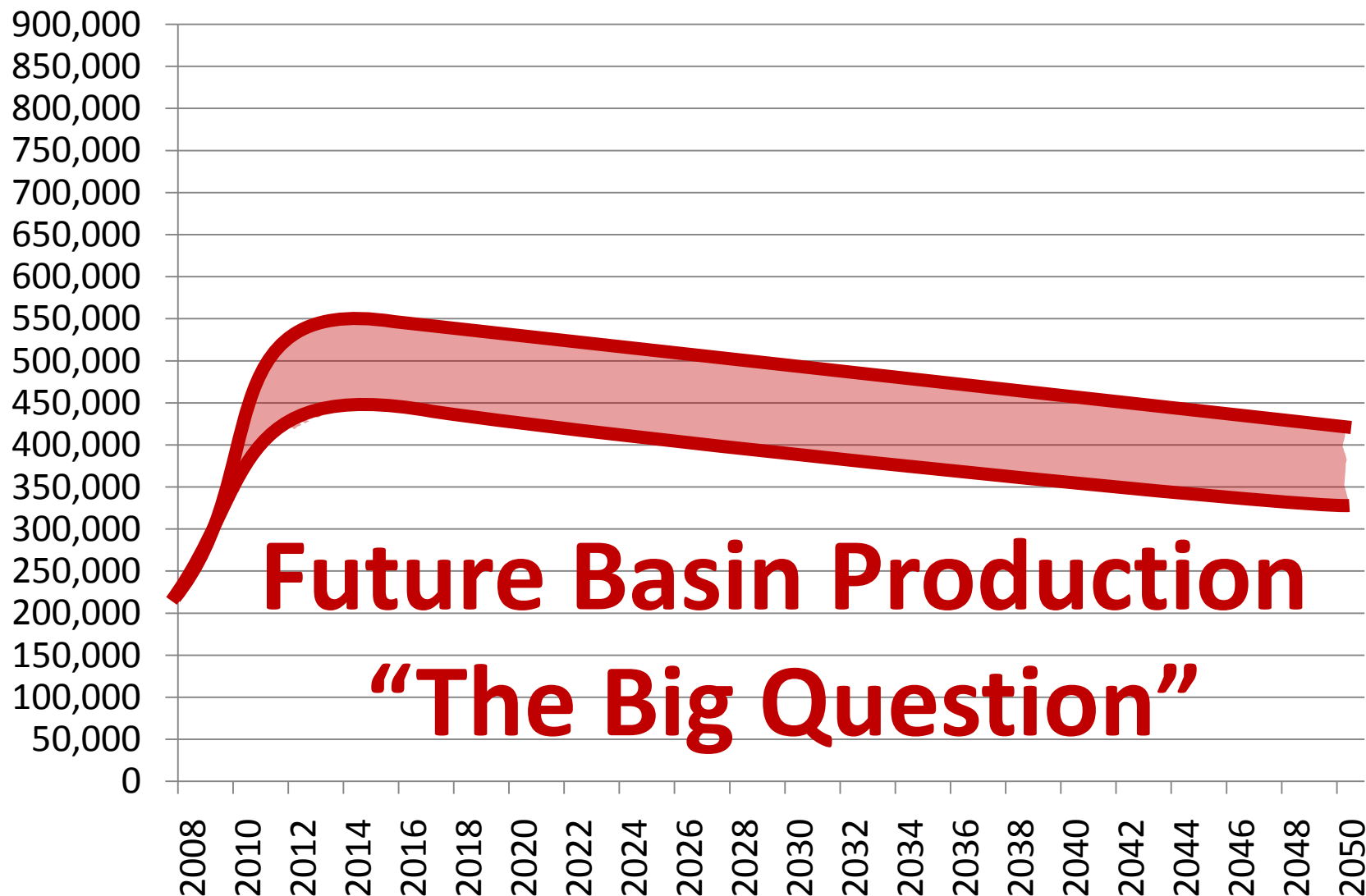


North Dakota Oil Production and Price



ProdPriceTable!\$S\$451 Bakken - Three Forks Maximum Bakken - Three Forks Minimum
\$/Barrel History & DOE-EIA Projected \$/Barrel Most Likely \$/Barrel Maximum

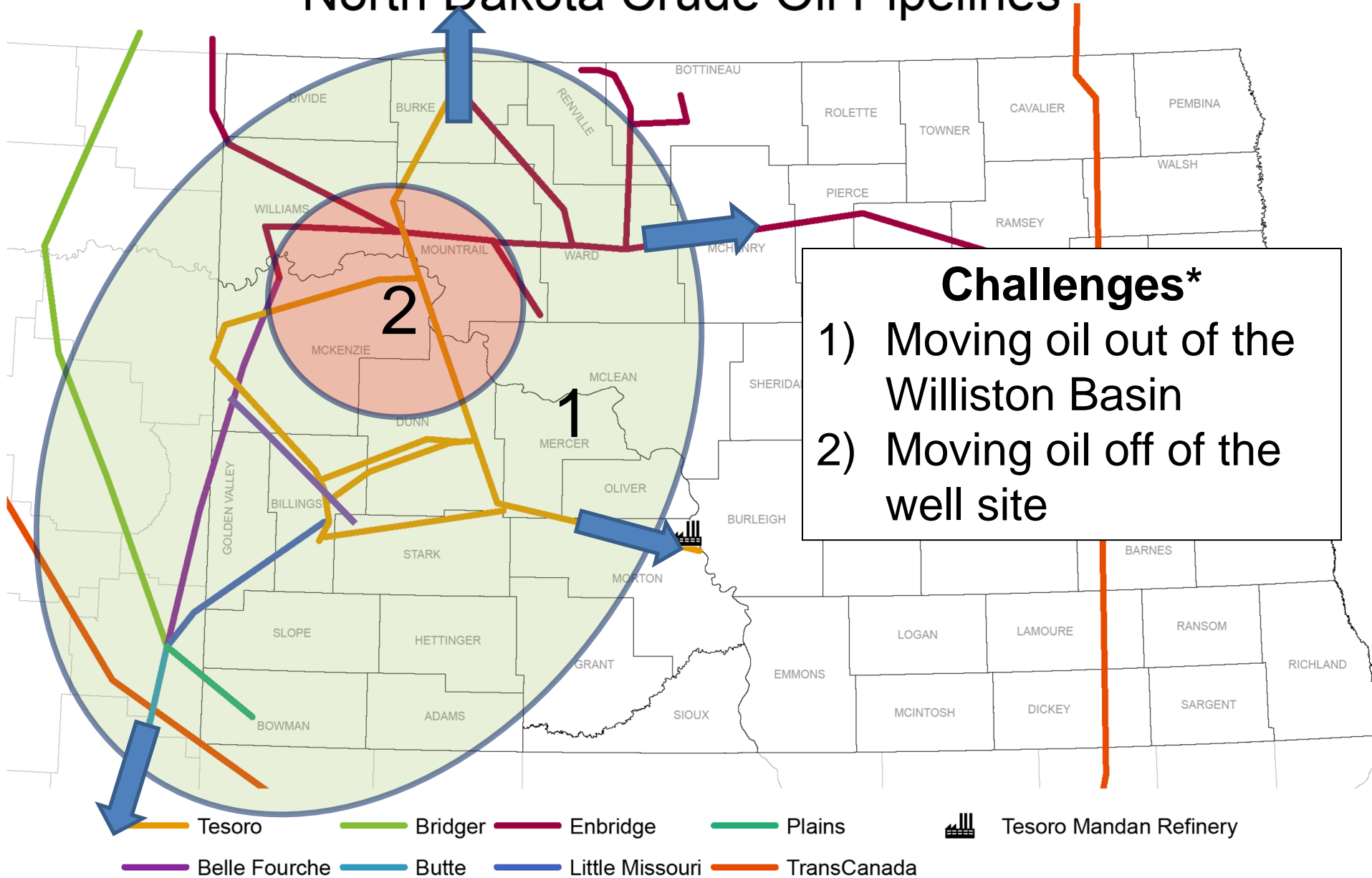
Williston Basin Oil Production* & Export Capacity, BOPD



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

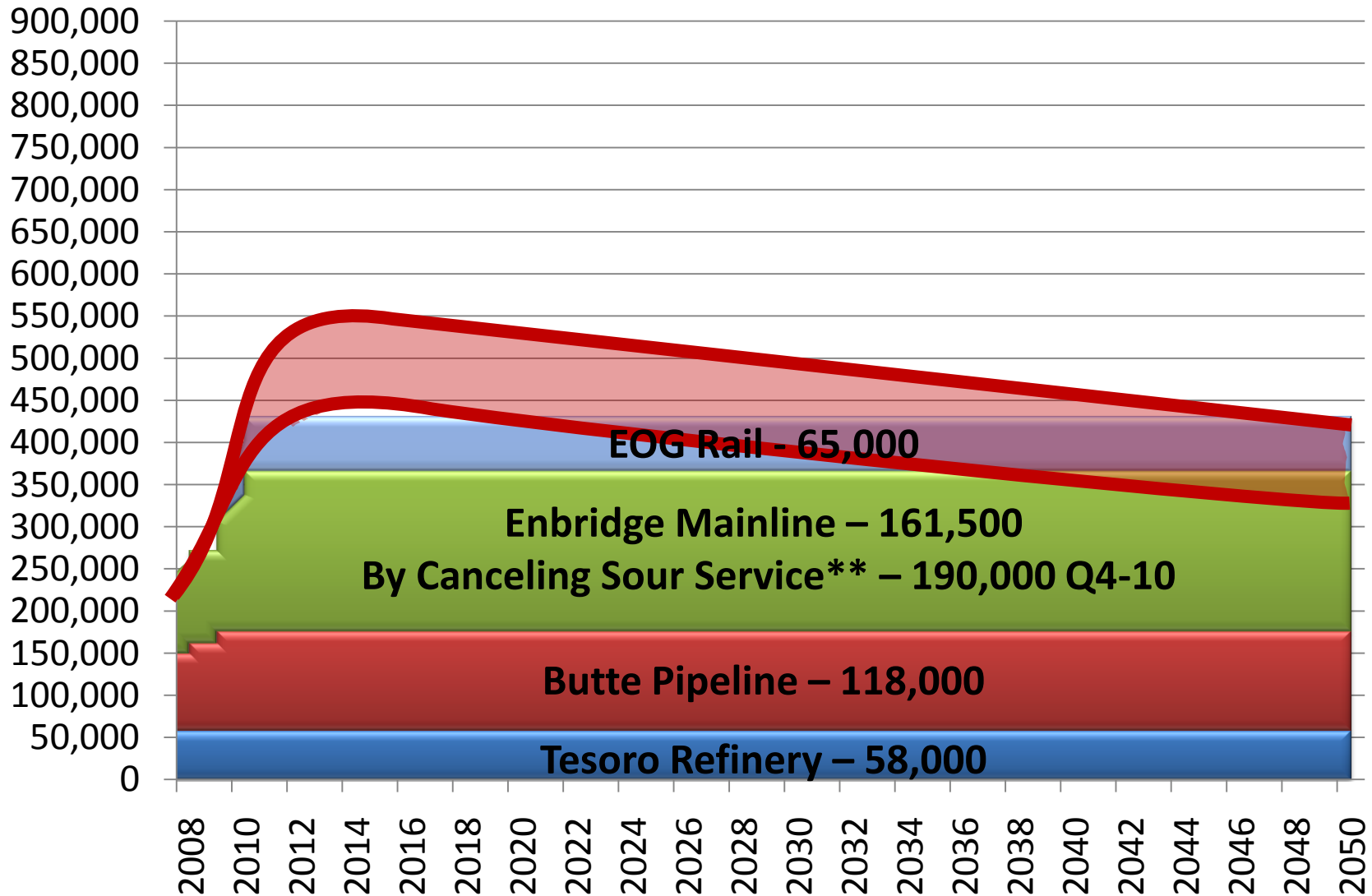
**Projects still in the proposed or internal review process

North Dakota Crude Oil Pipelines



*Modified from Bridger and Belle Fourche Pipelines

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

Several Exciting Developments For Post 2010 Crude Oil Transport

Enbridge BPEP

Quintana BakkenLink

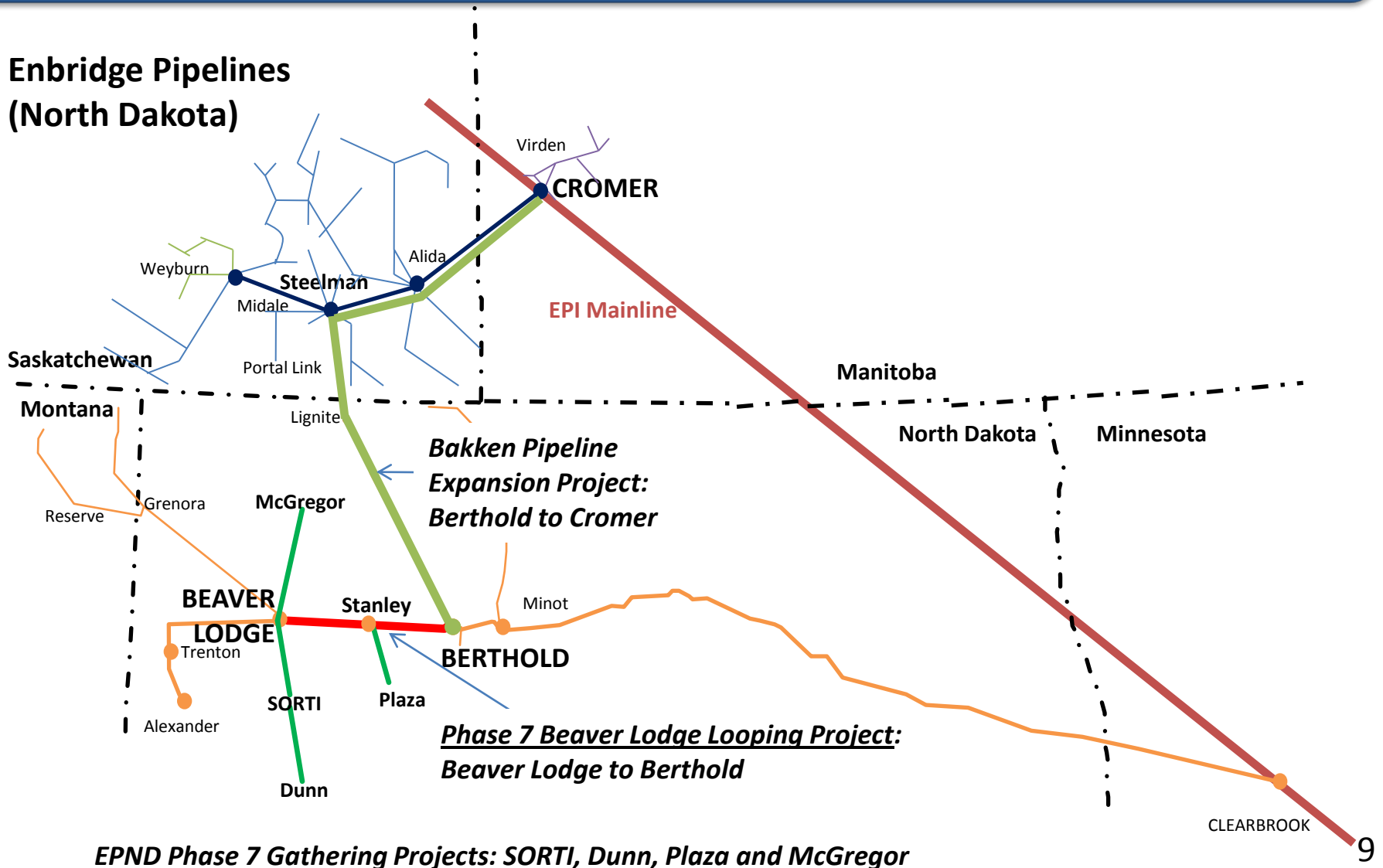
True Co.'s Baker 300

Unit Train Development

Others Still Looking at Opportunities

Potential Bakken Pipeline Expansion

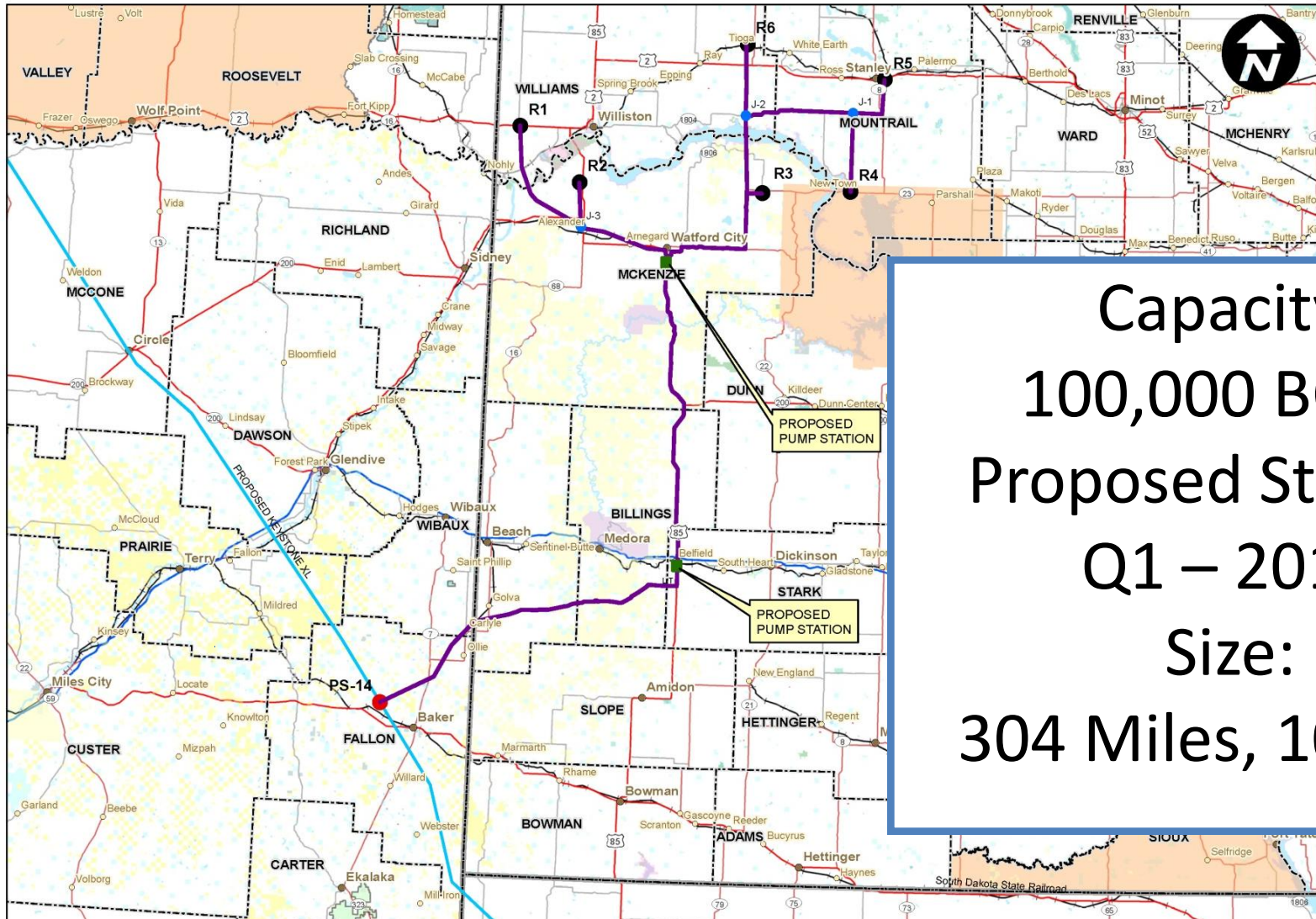
Enbridge Pipelines (North Dakota)



Enbridge BPEP Details

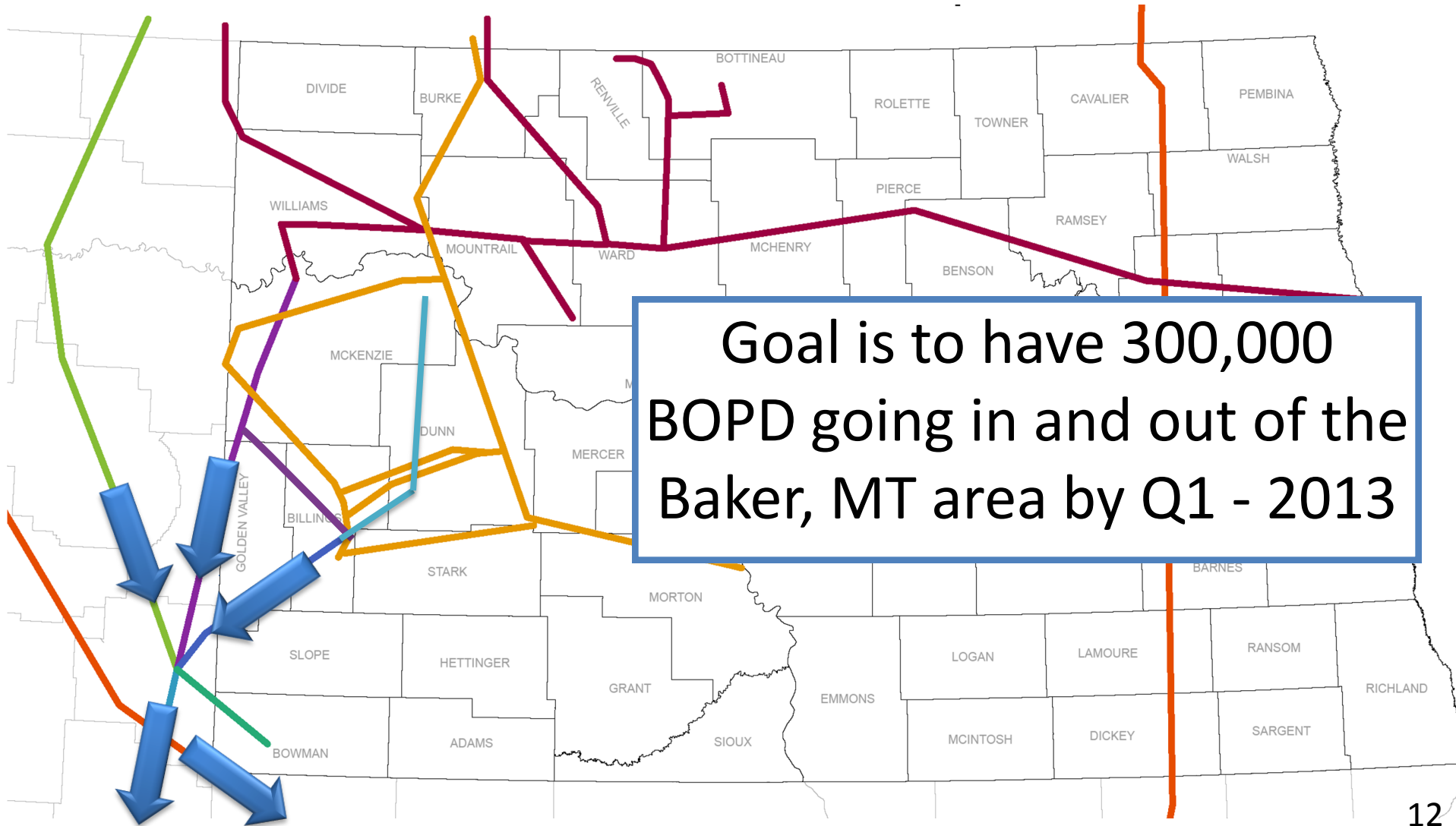
- In March, non-binding indications of interest were received from potential shippers
- Gathering pipelines could be in-service Q2 2012
- 25,000 BOPD Portal Reversal – Q1 2011
- Beaver Lodge looping/Portal Reversal could provide up to 140,000+ BOPD into Cromer, MB by Q4 2012

Proposed Quintana BakkenLink

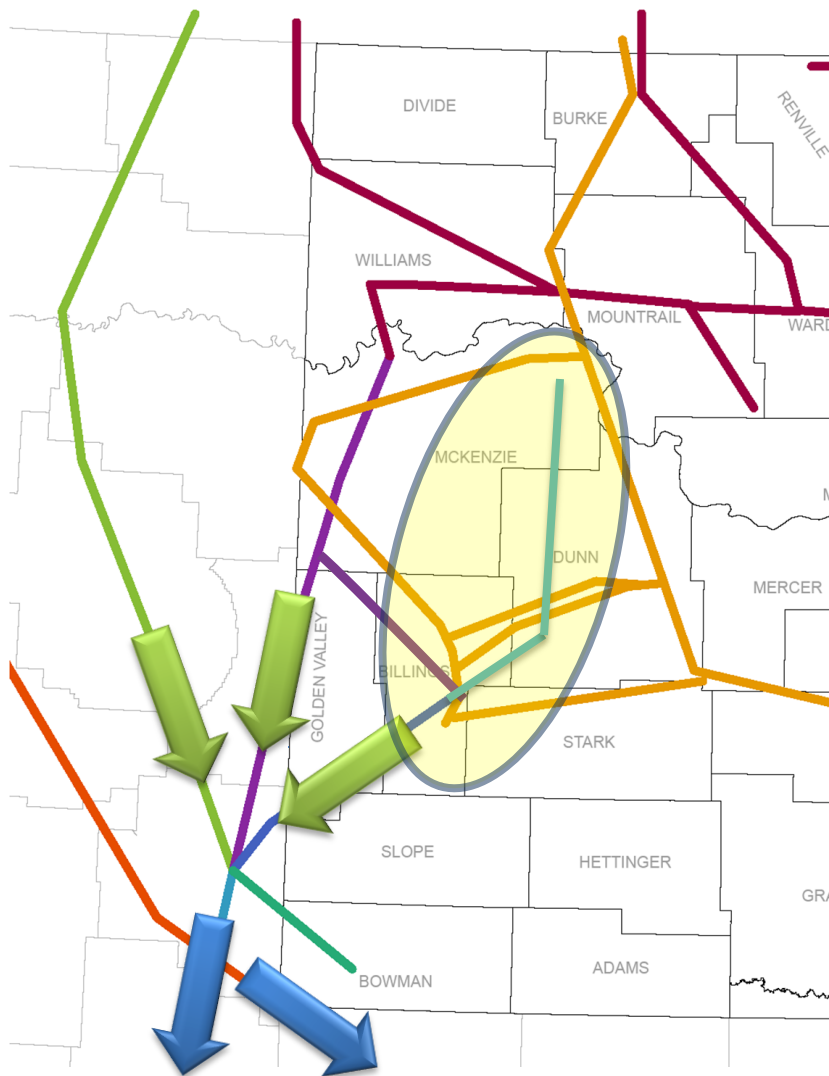


Capacity:
100,000 BOPD
Proposed Startup:
Q1 – 2013
Size:
304 Miles, 10"-16"

True Co.'s Proposed "Baker 300"



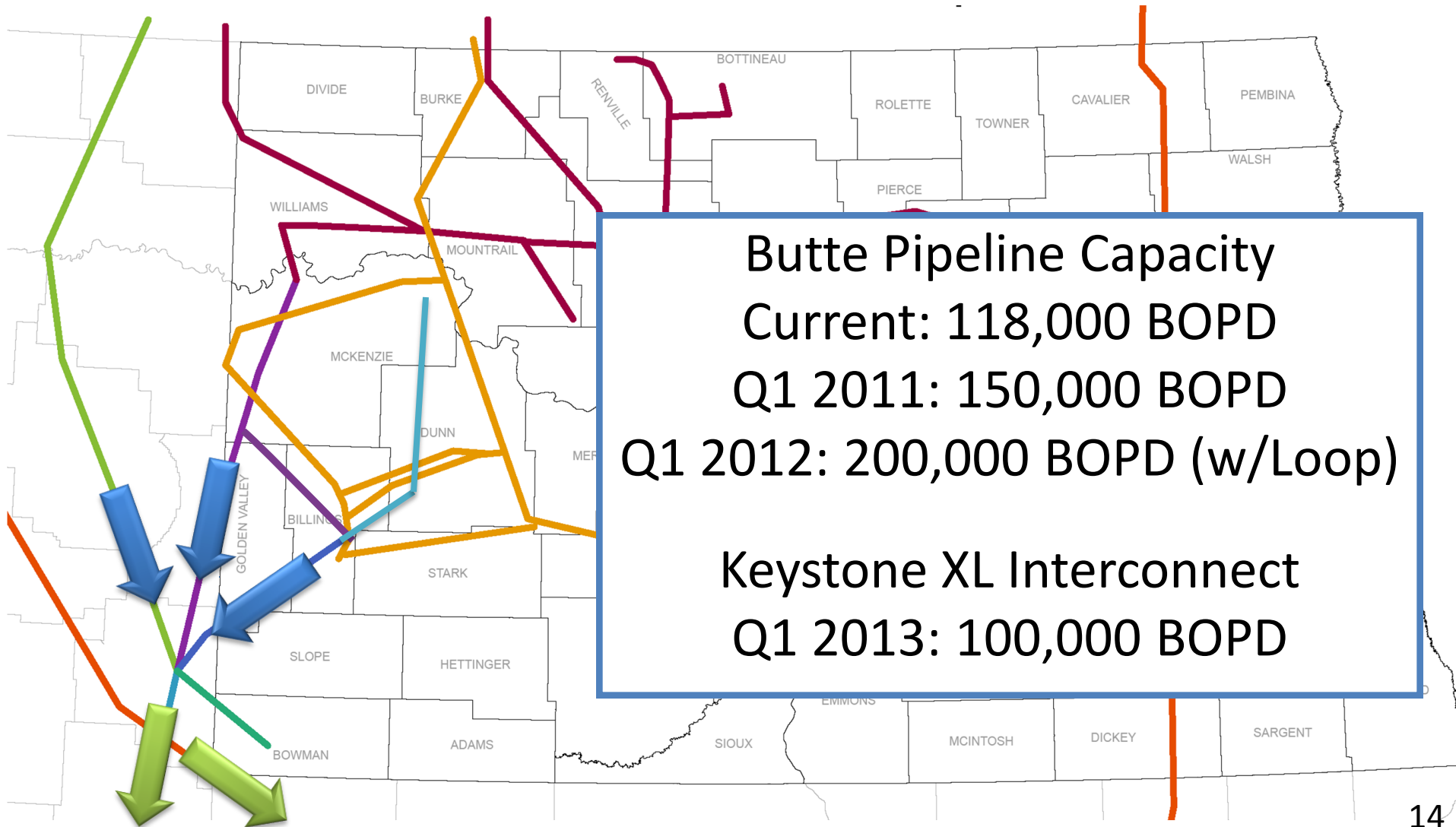
True Co.'s Proposed "Baker 300"



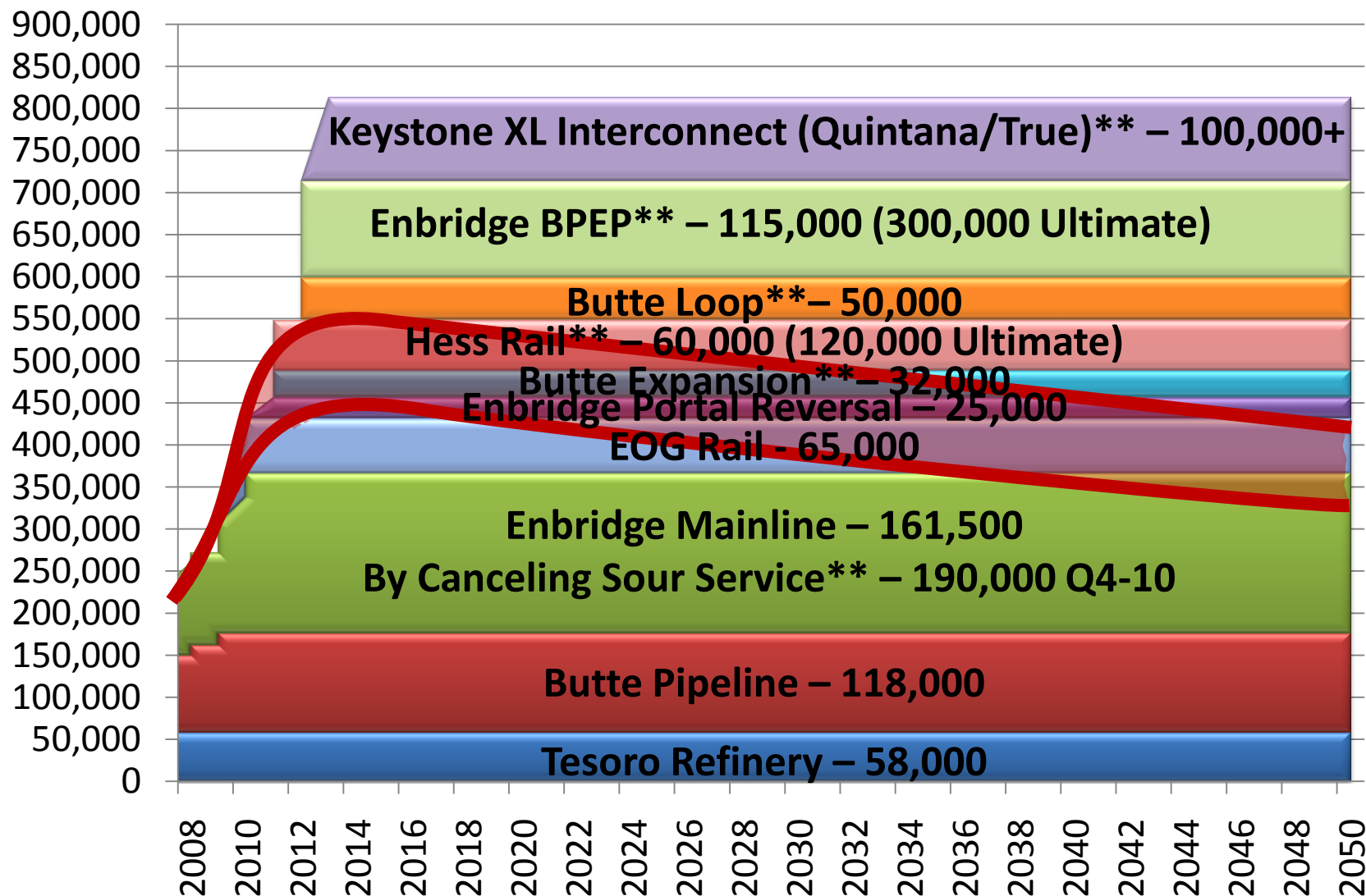
Four Bears Pipeline
Anticipated Q1 2011
12 inch – 80 Miles
Initial - 60,000 BOPD

Little Missouri:
28,000 → 60,000 BOPD
Belle Fourche Reversal:
60,000 BOPD
Poplar (Bridger) Expansion:
28,000 → 60,000 BOPD
DRA to reach 300,000 BOPD Goal

True Co.'s Proposed "Baker 300"



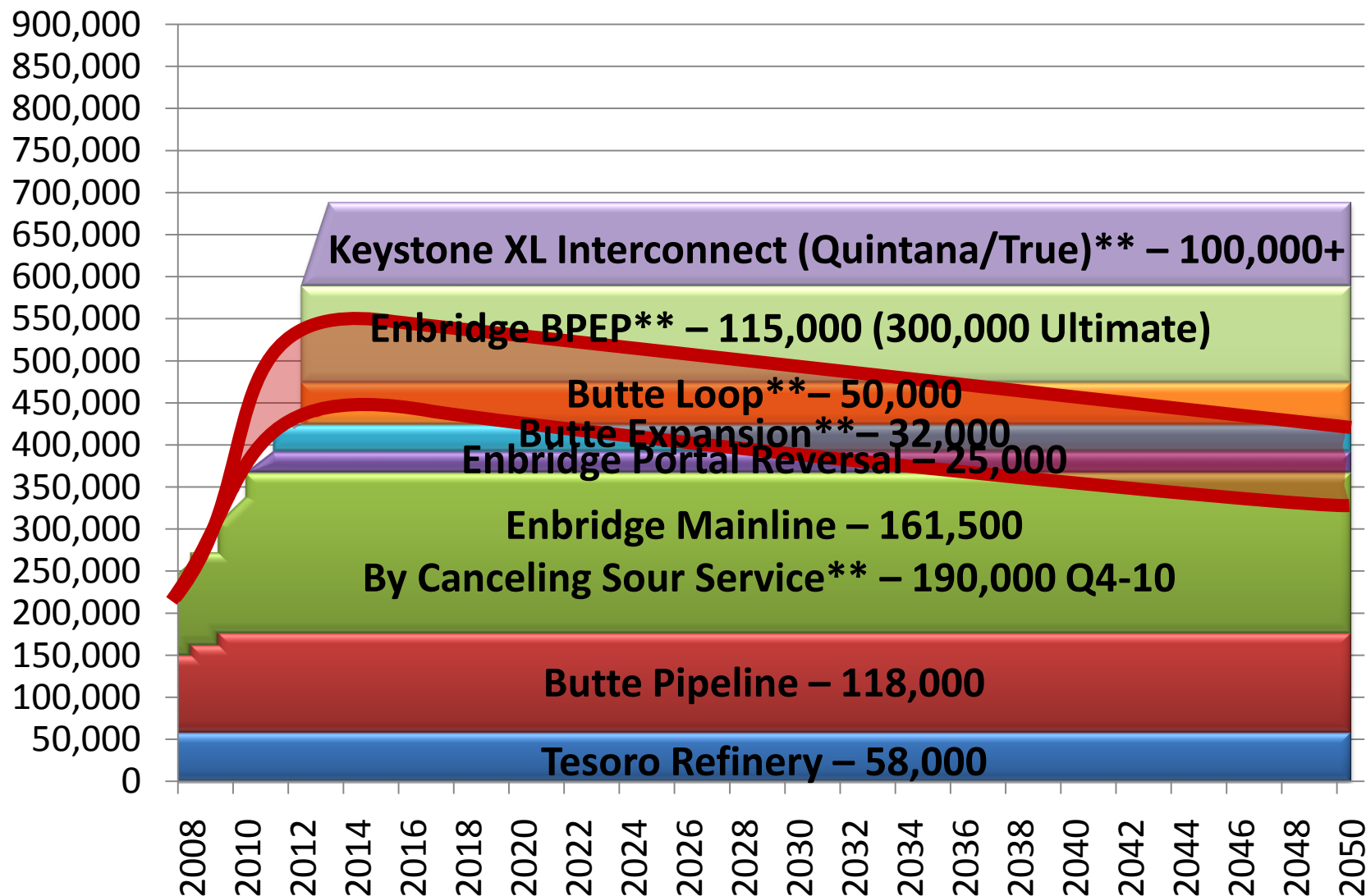
Williston Basin Oil Production* & Export Capacity, BOPD



*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

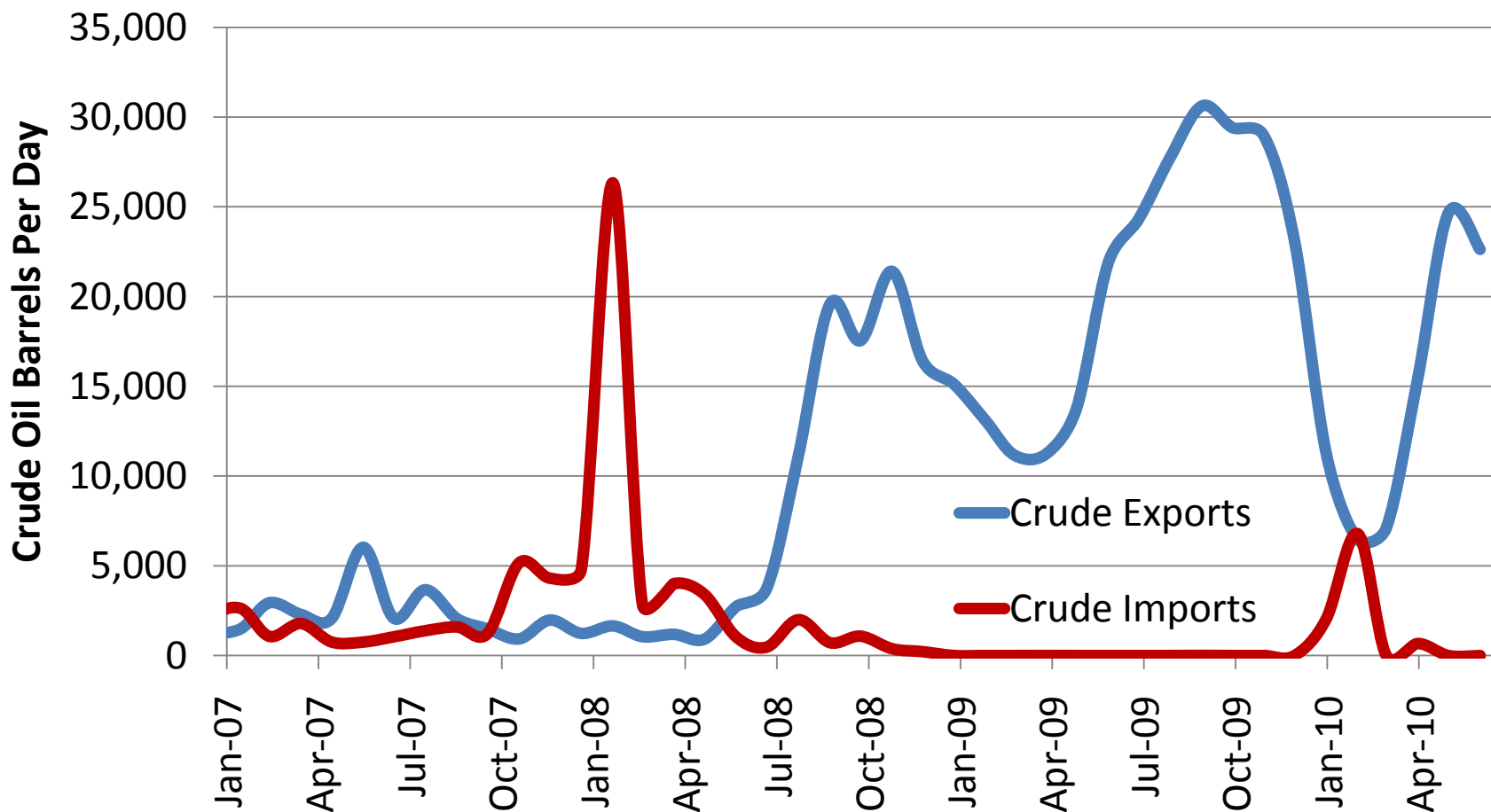
Williston Basin Oil Production* & Export Capacity, BOPD



*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

North Dakota Truck Imports/Exports

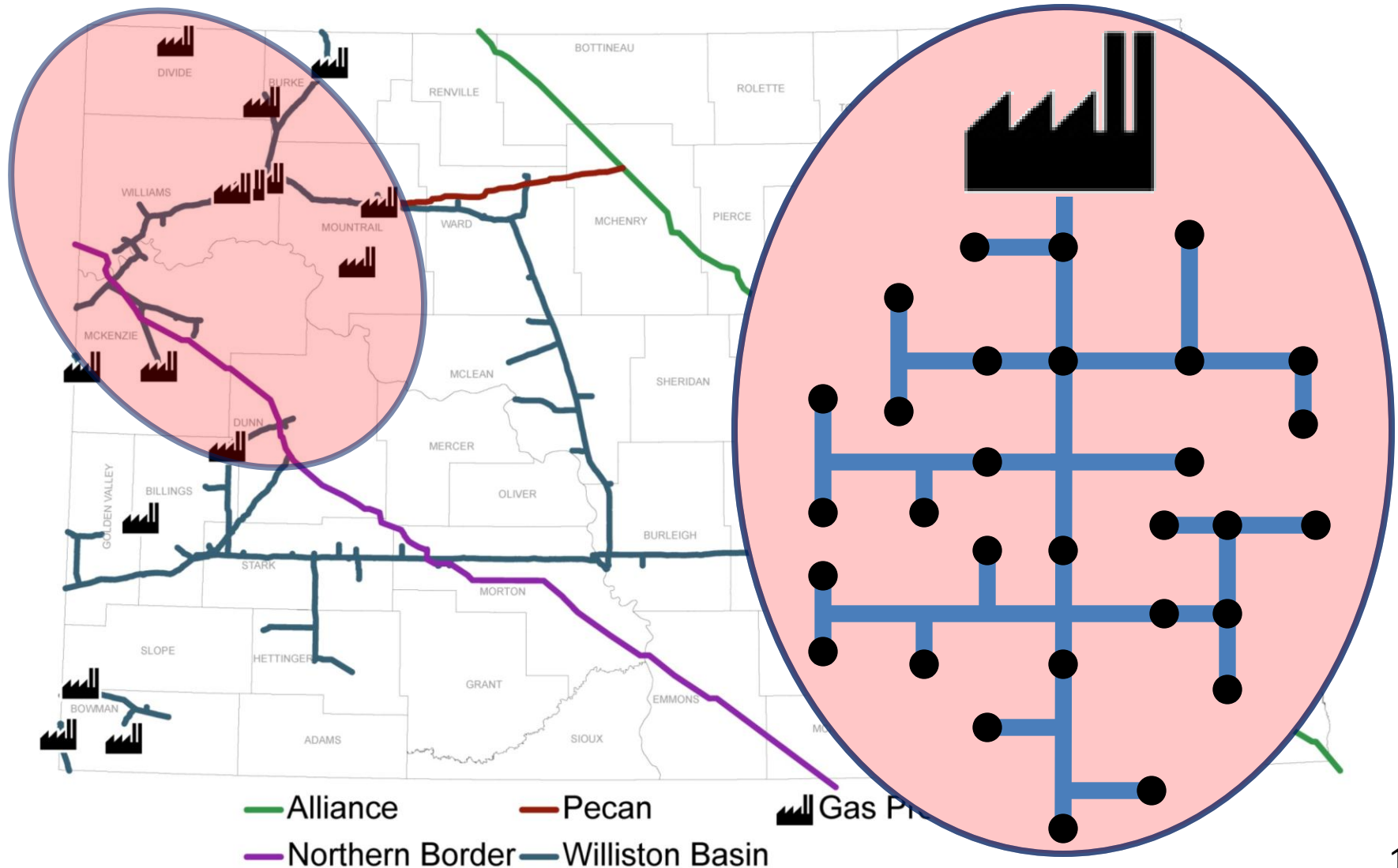


Information collected through the United States International Trade Commission's *Interactive Tariff and Trade DataWeb*

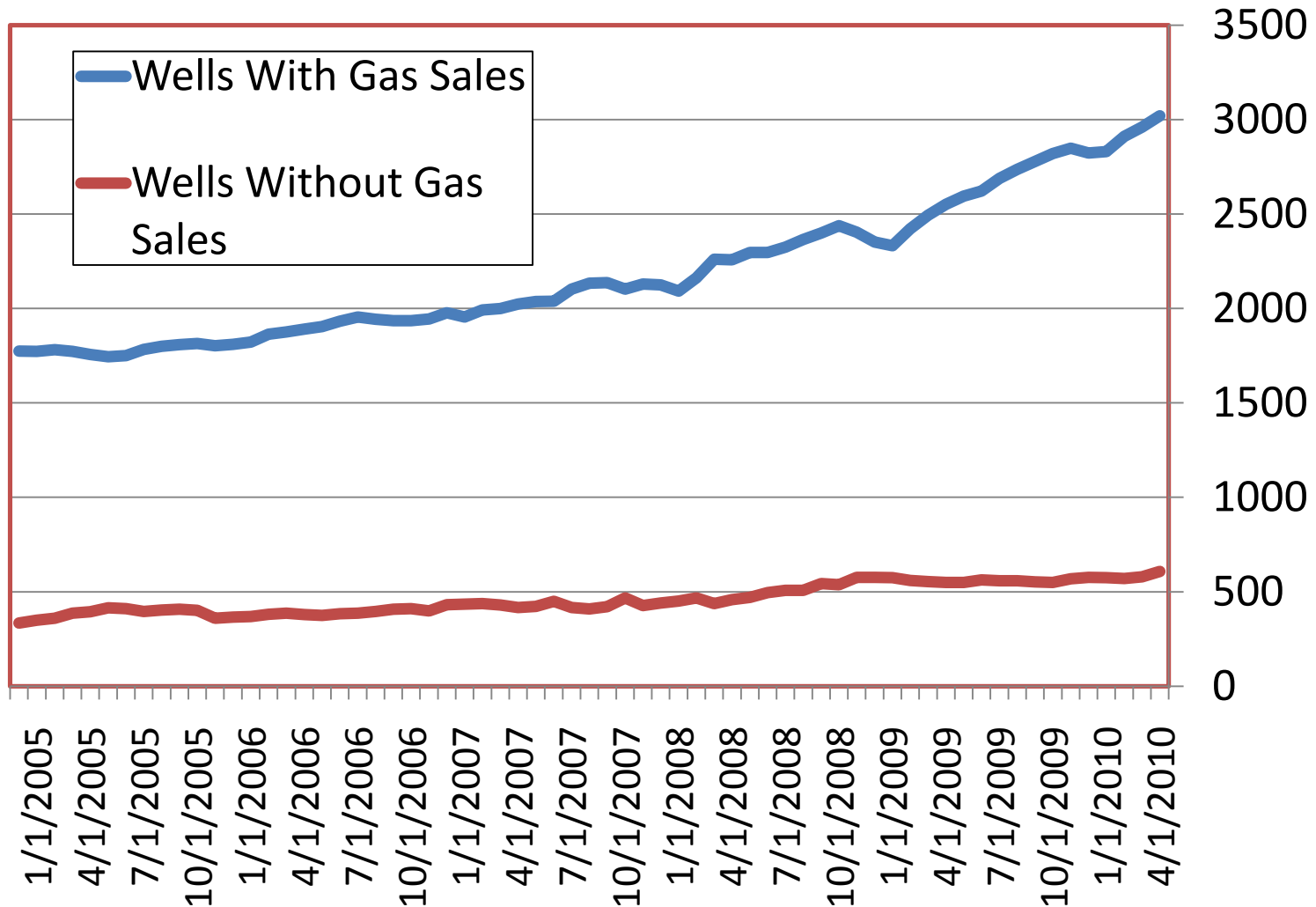
Natural Gas Projects



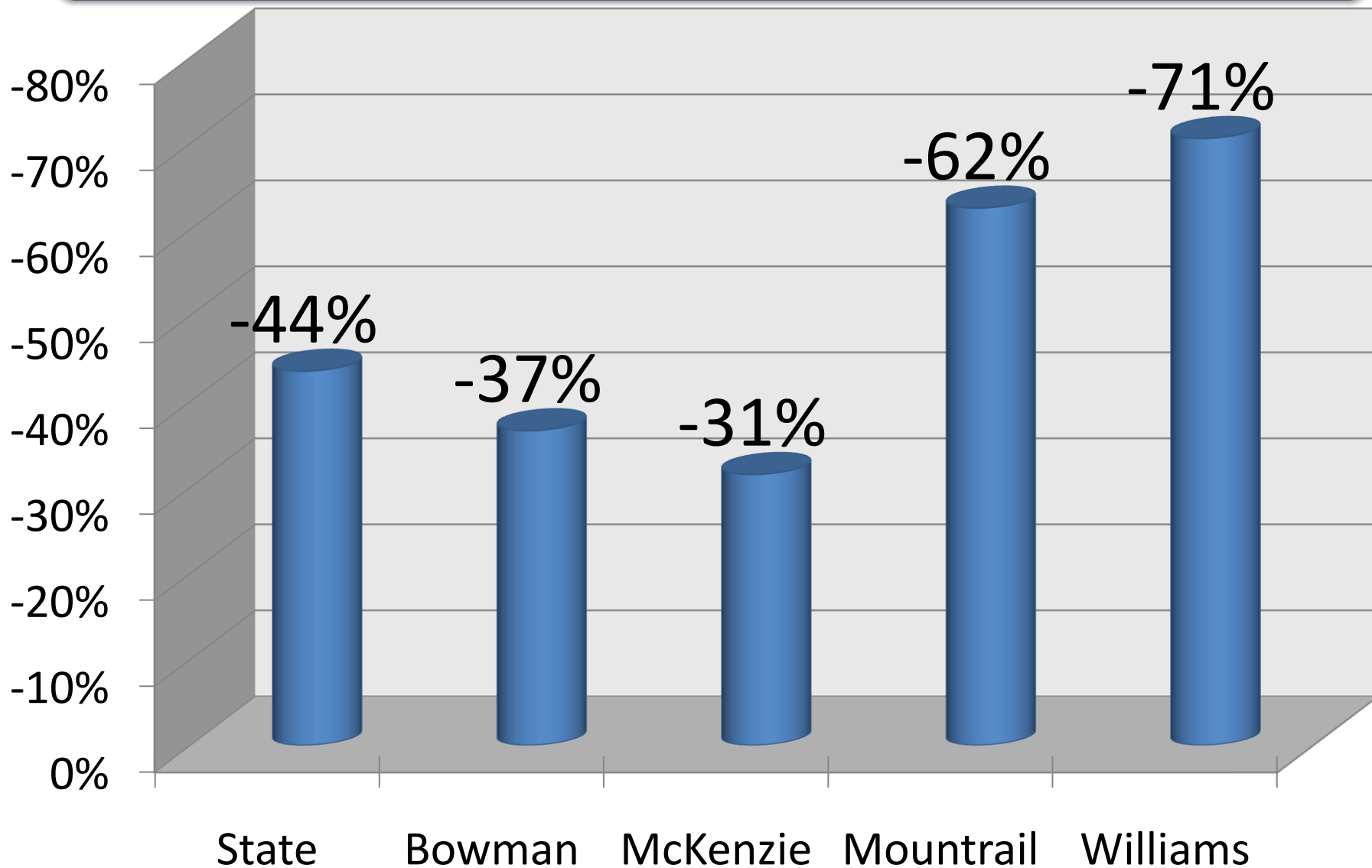
Natural Gas Challenges

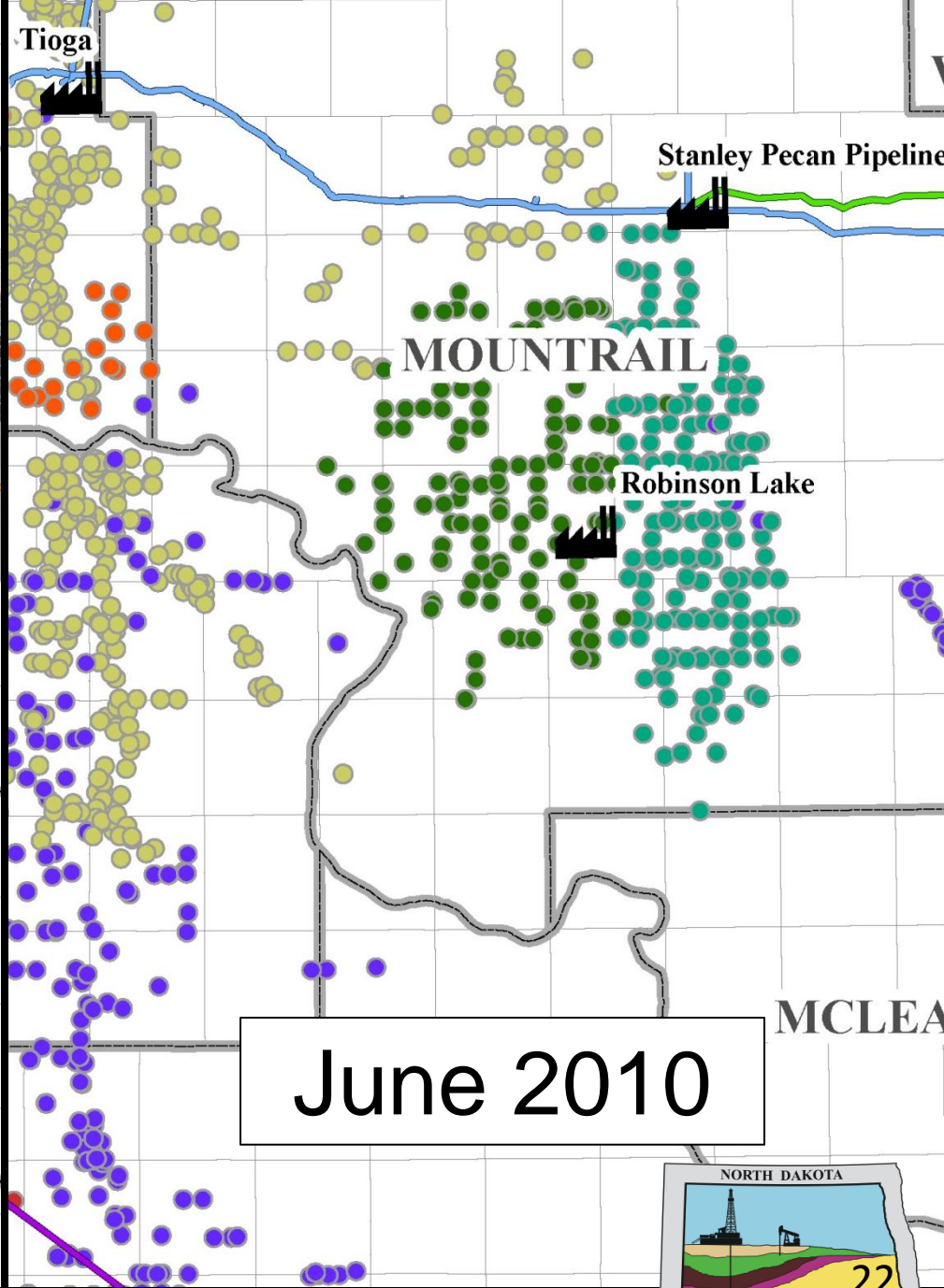
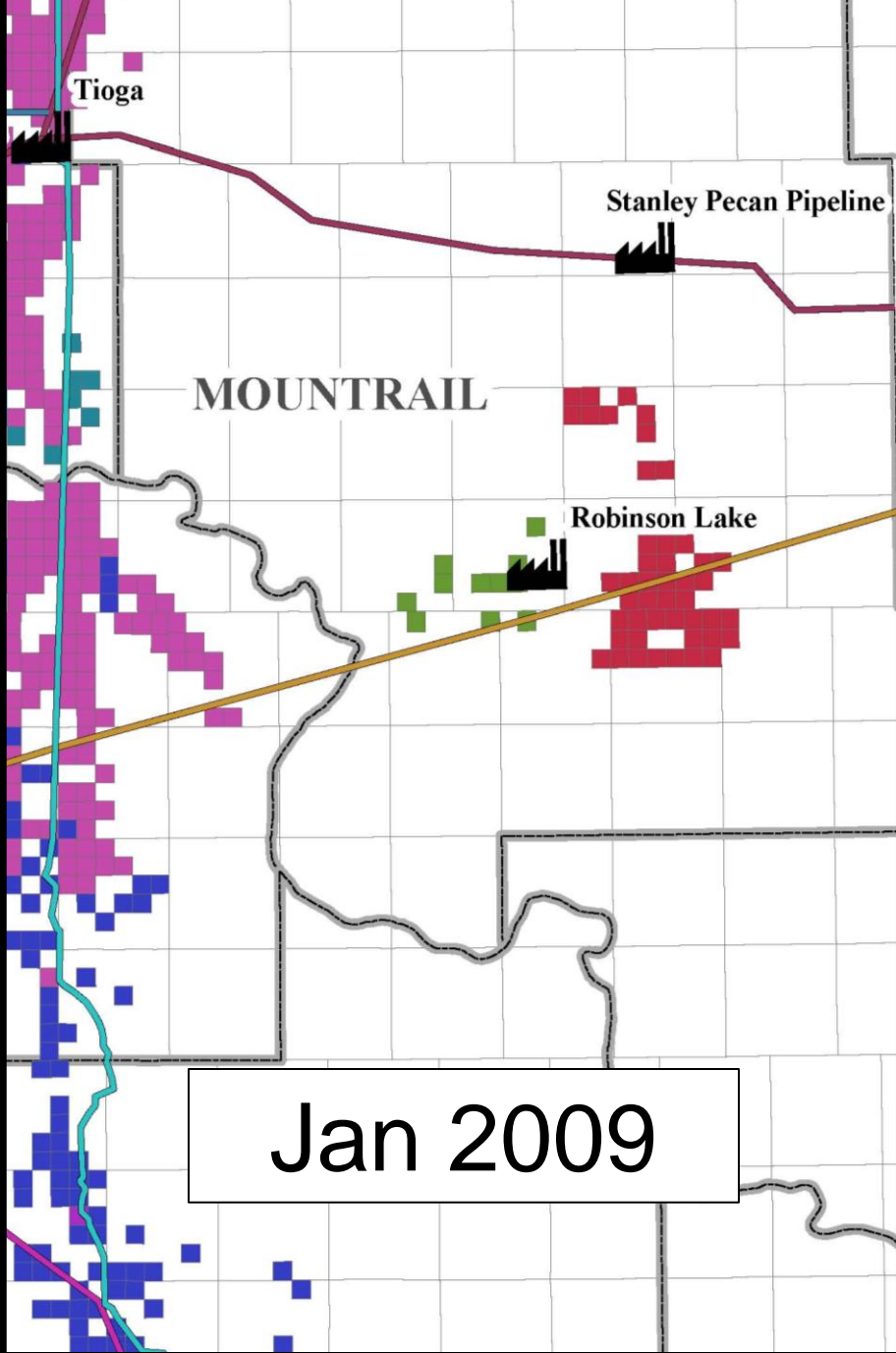


ND Gas Gathering Statistics



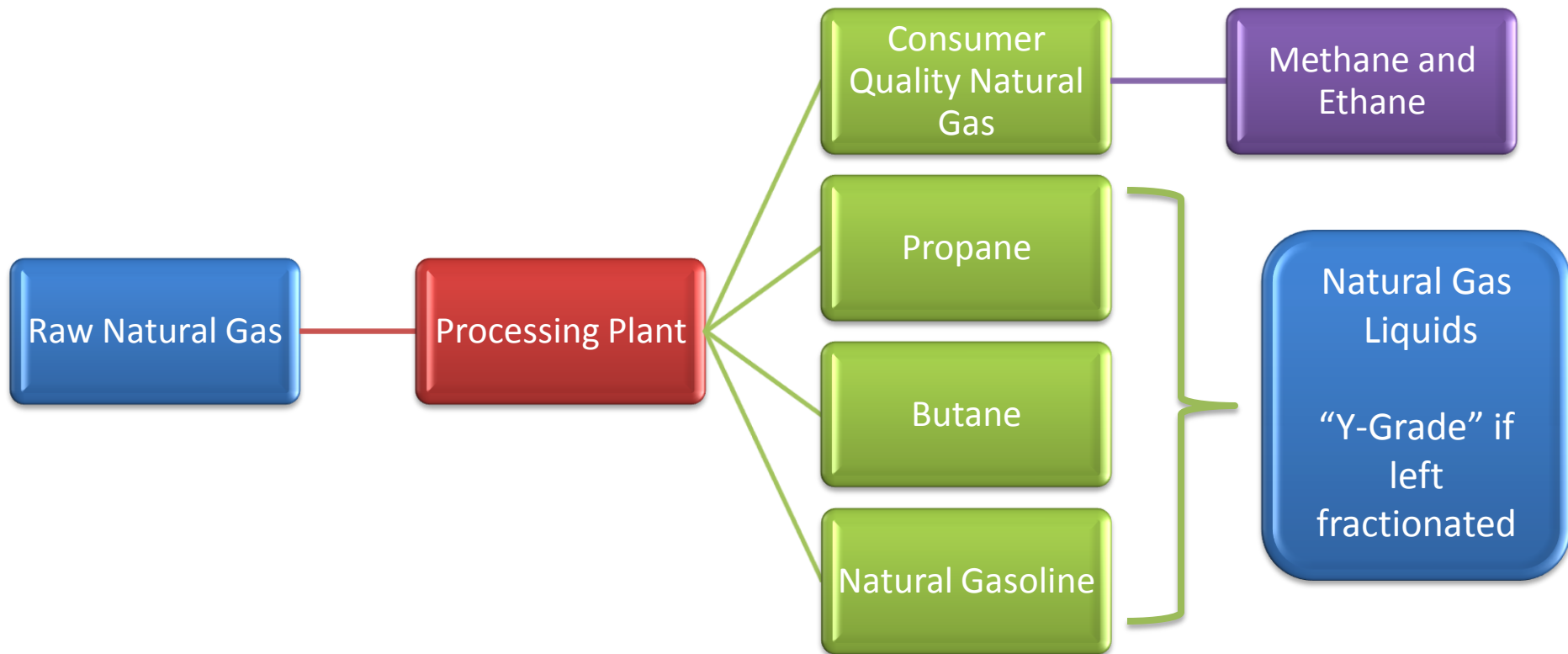
Flaring Reduction Dec. 08- Dec. 09



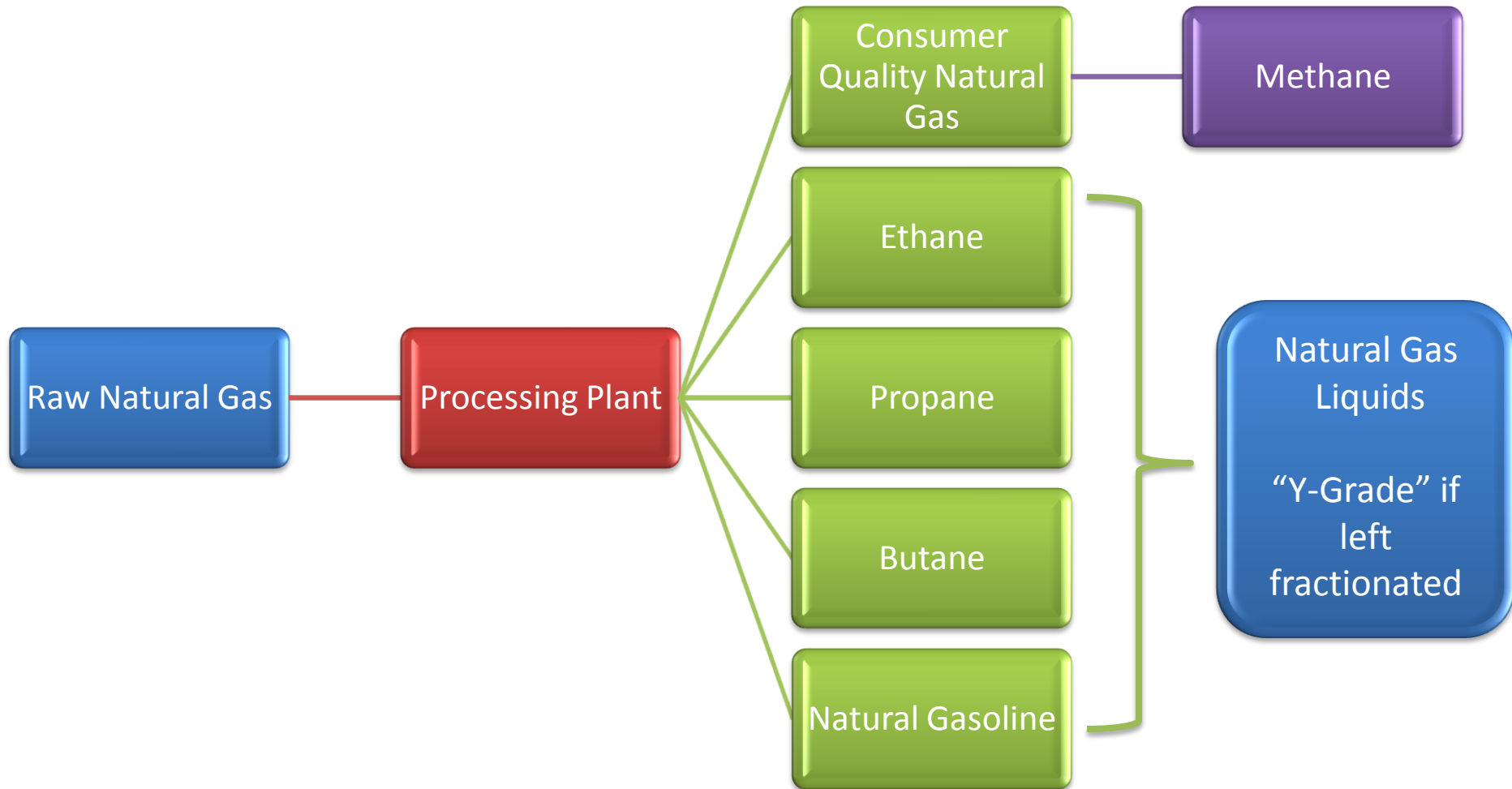


Natural Gas Processing

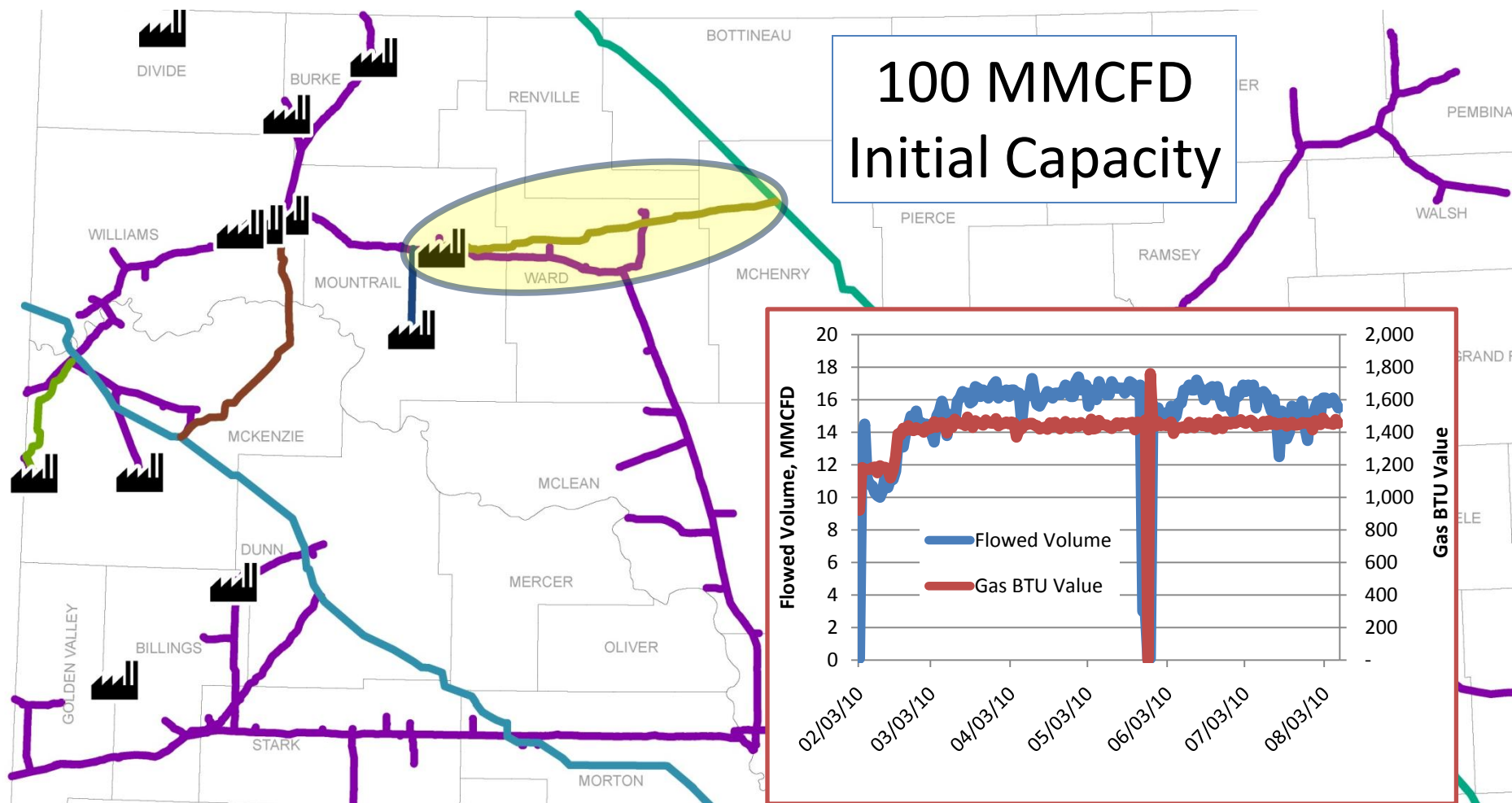
Current Status



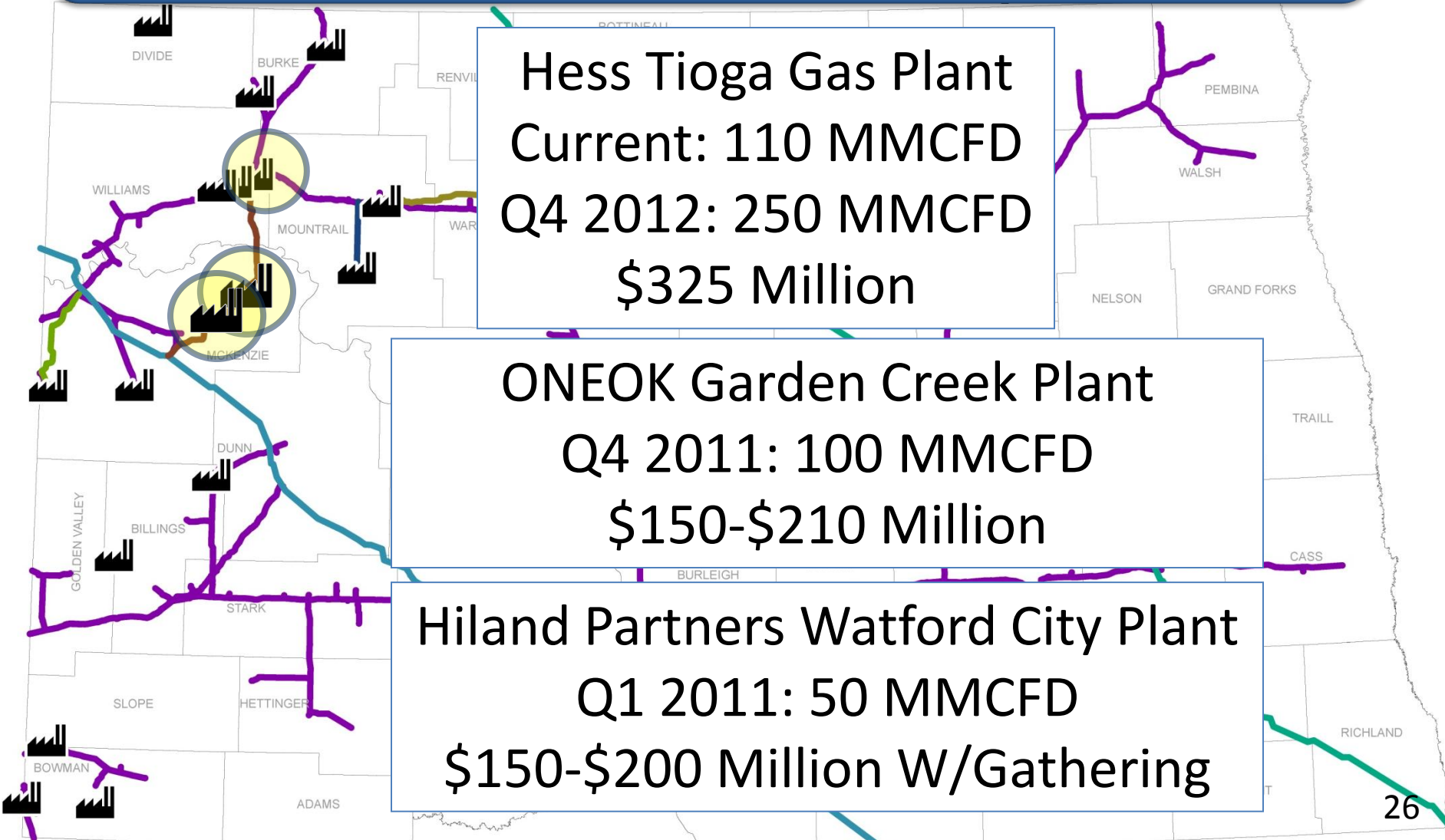
Natural Gas Processing With Ethane Extraction



Pecan's Prairie Rose Pipeline



New or Expanding Gas Plants



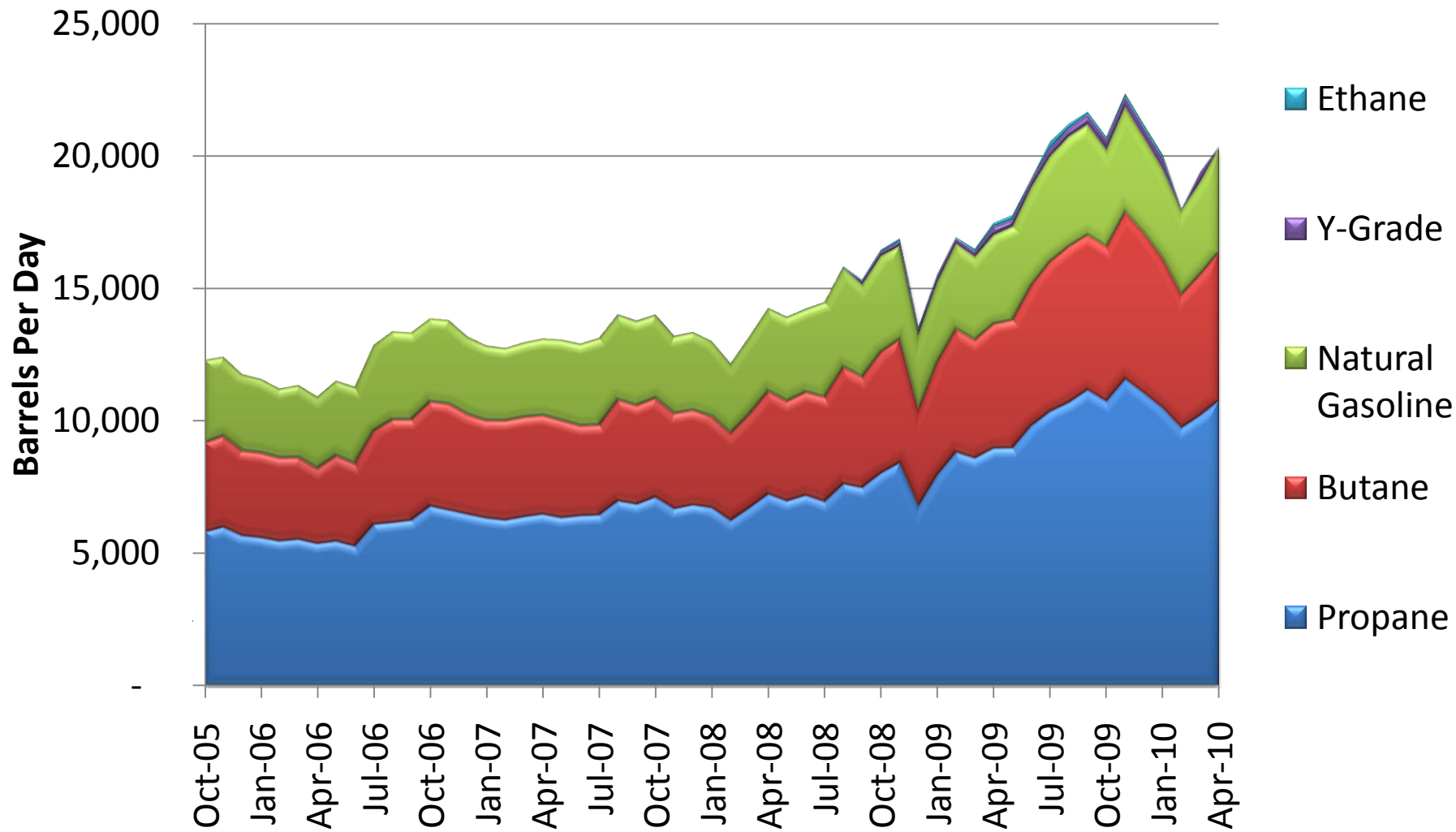
The map displays the state of North Dakota with county boundaries labeled: DIVIDE, BURKE, RENVILLE, MOUNTAINTOP, WILLIAMS, MOUNTAINTOP, WARREN, PEMBERVILLE, WALSH, NELSON, GRAND FORKS, TRAIL, CASS, BURLEIGH, SLOPE, HETTINGER, ADAMS, and BOWMAN. Gas pipelines are shown in purple and blue. Three gas plants are highlighted with yellow circles: Hess Tioga Gas Plant (near MOUNTAINTOP), ONEOK Garden Creek Plant (near MOUNTAINTOP), and Hiland Partners Watford City Plant (near MOUNTAINTOP). Other gas plants are indicated by black icons with smokestacks.

Hess Tioga Gas Plant
Current: 110 MMCFD
Q4 2012: 250 MMCFD
\$325 Million

ONEOK Garden Creek Plant
Q4 2011: 100 MMCFD
\$150-\$210 Million

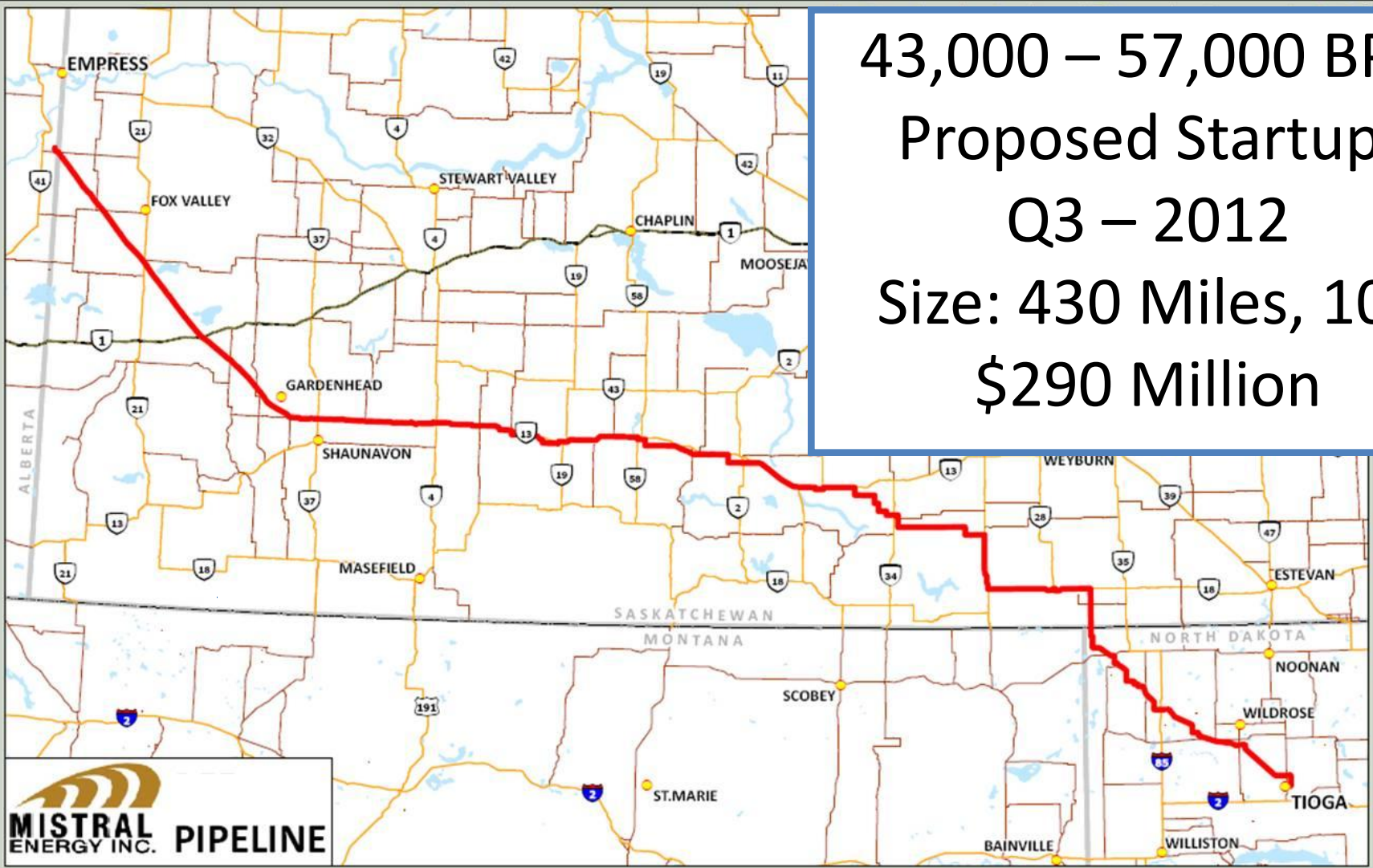
Hiland Partners Watford City Plant
Q1 2011: 50 MMCFD
\$150-\$200 Million W/Gathering

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

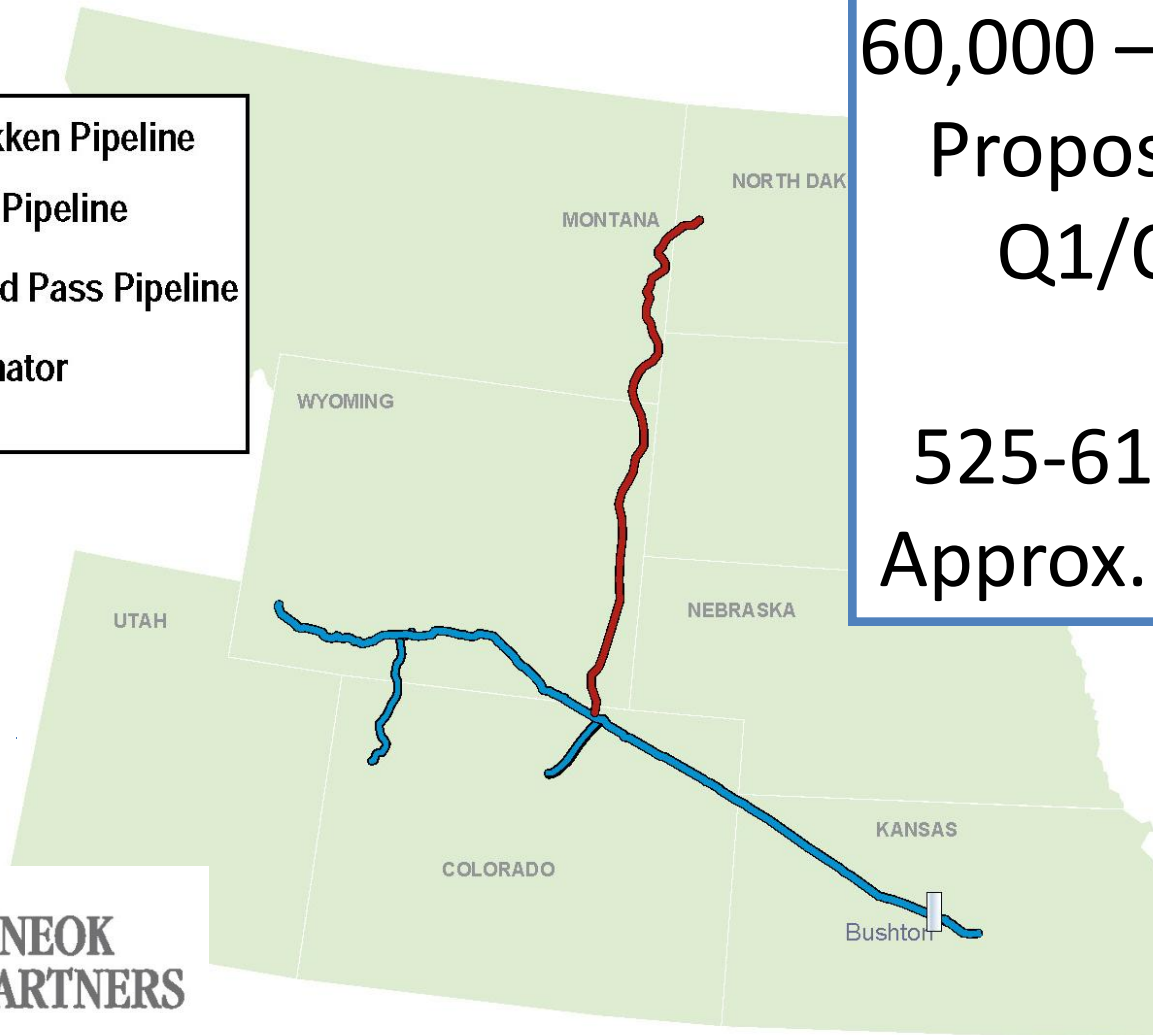
 Fractionator

60,000 – 110,000 BPD

Proposed Startup:
Q1/Q2 – 2013

Size:

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



ONEOK
PARTNERS

Williston Basin NGL Production and Transportation Webinar

September 2nd 2–4pm Central Time

Keynote: Dan Lippe, Petral Worldwide

Alliance Pipeline

Aux Sable Liquid Products

ONEOK Partners (tentative)

Vantage Pipeline





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

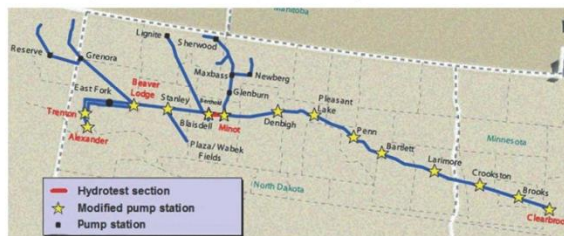
Greetings

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
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INDUSTRIAL COMMISSION OF NORTH DAKOTA NORTH DAKOTA PIPELINE AUTHORITY

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» ABOUT PIPELINES

"Pipelines are really the energy lifelines of almost every daily activity. Pipelines play a role in everyone's lives and are essential to the nation's industries. Yet few people are aware of the work done by the country's 200,000-mile petroleum pipeline network that delivers the products that are integral parts of America's economy. It is a network that delivers the nation's crude oil and petroleum products (such as gasoline, jet fuel, home heating oil) reliably, safely, efficiently, and economically." ~ Pipeline 101

To learn more about pipeline operations, safety, construction, and more, please visit:



Supply Line Video



• Video provided by AOPL » www.aopl.org

AOPL
Association of Oil Pipe Lines

Thank You!

North Dakota Pipeline Authority

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