

# CERI 2017 Oil & Gas Symposium

## Where Do We Go from Here?

March 6-7, 2017 • Calgary TELUS Convention Centre • Calgary, AB

*Oil and gas markets are changing in the face of low commodity prices, dampening demand, transportation issues and environmental regulations. These changes have created significant challenges for new developments across the country. In addition, Canadian industry is impacted by increased production of oil and gas by what was once Canada's major customer, and now major competitor, the US.*

*How does the industry manage through the change in the market?*

*If that wasn't challenging enough, consumers and other stakeholders are expressing concerns over the impact of new oil and gas production and pipelines on the environment, and the rights of Indigenous Peoples. We know these heightened issues create uncertainty in project planning and how the country meets its international carbon management commitments.*

*Can we balance the needs for economic development in the oil and gas sector with environmental protection and improved relationships with Indigenous Peoples? The economic benefits are clear. Do those benefits offset the costs of development? Is there an approach that provides a winning solution for all stakeholders or are we going to continue a difficult, argumentative and ultimately ineffective debate? **Where do we go from here?***

### Monday, March 6, 2017

**7:00 am**

Registration Opens

**Overall Conference Sponsor:**

**7:00 – 8:00 am**

Continental Breakfast

**Sponsored by**

**8:00 am**

Introductory Remarks by Conference Co-chair

Allan Fogwill; President and Chief Executive Officer • Canadian Energy Research Institute

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**8:10 – 8:40 am**

**Opening Keynote Address**

**Geopolitical Round-up and a View to the Future of Oil and LNG Around the Globe**

Bill Whitelaw; President and Chief Operating Officer • JWN Energy

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**Session 1 (8:45 – 10:15 am)**

**Supply Outlooks, Forecasts and Perspectives**

*The Western Canadian Sedimentary Basin is home to some of the world's largest reserves of oil and natural gas in conventional, tight and shale plays. The history of the development of these resources has been to feed the North American energy market, Canada and the United States, and up until 2010 access to that market has been virtually unobstructed. For a variety of reasons, access to parts of that market are no longer possible. In response to this situation the Canadian oil and gas industry has turned its attention towards accessing the global market. To quote Prime Minister Trudeau, "this is 2015" and the rules have changed. So as the oil and gas industry continues to wait for tidewater pipelines and LNG facilities to be constructed, the global oil and gas markets are moving forward. The industry must pay attention to global events in case the window of opportunity starts to close.*

Moderator: Todd Hirsch; Chief Economist, Economics and Research • ATB Financial Corporation

**Oil and Oil Sands Developments: How Do We Access Global Markets?**

**Natural Gas and LNG Developments: What Do the Global Markets Look Like?**

Geoffrey Cann; Partner, Oil and Gas • Deloitte Canada

**Natural Gas Liquids: What Do the Global Markets Look Like?**

Bill Rawlusyk; Senior Director, Midstream Oil and NGL • IHS Markit

10:15 – 10:45 am

Networking Break

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Session 2 (10:45 am – 12:15 pm)

### **Demand Outlooks, Pricing and Perspectives**

*Efforts have been made to build new pipelines and LNG terminals to reach new markets where demand for oil and gas is still growing, but for how long? Many pro-renewable and less-carbon-energy-supply stakeholders claim the world needs to move away from fossil fuels much faster than it is doing today. Many others at the same time are stressing that the world needs more oil and gas. Which is it?*

Moderator: Mark Salkeld; President and CEO • Petroleum Services Association of Canada (PSAC)

### **Global Oil and Gas Demand Outlook**

Antoine Half; Senior Fellow and Director, Global Oil Markets, Center on Global Energy Policy • Columbia University

### **Crude Pricing in the Americas: Will Canada Be Left Behind?**

### **Transportation Sector Demand**

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12:15 – 1:30 pm

### **Luncheon Presentation**

#### **Oil Sands Now, Soon, and Future**

Ian Gates; Professor, Department Head, Chemical and Petroleum Engineering, Schulich School of Engineering • University of Calgary

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Session 3 (1:30 – 3:00 pm)

### **Examining Full Cycle Costs and Emissions Profile for Energy Projects**

*Provincial and federal policies to retire coal plants, implement a carbon tax and regulate emissions intensity of many large industrial projects are causing a re-assessment of energy projects. From a climate change perspective, this is a “no-brainer”. But from an economic point of view, how do the various options line up?*

#### **SAGD Cogeneration, Coal Retirement and Grid Renewables: Benefit of a Systems Approach**

Dr. David Layzell; Director, Canadian Energy Systems Analysis Research (CESAR) Initiative • University of Calgary

#### **Oil and/or Oil Sands: Full Cycle Cost Structure and Life Cycle Assessment**

Dr. Joule Bergerson; Assistant Professor, Chemical and Petroleum Engineering Department • University of Calgary

#### **British Columbia LNG Developments: Full Cycle Cost Structure and Life Cycle Assessment**

Dr. Amit Kumar, Professor, Department of Mechanical Engineering • University of Alberta

3:00 – 3:30 pm

Networking Break

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Session 4 (3:30 – 5:00 pm)

### **Carbon Management Options**

*Greenhouse gas emissions management has become a cornerstone of many provincial and federal environmental policies and regulations. What does this mean for how the oil and gas industry is to operate in the future?*

Moderator: Bill Tubbs; Owner • B Tubbs & Associates

### **Government Perspective on Industry Carbon Management Options**

#### **Technology Roadmap for a Low Carbon Economy from Hydrocarbons**

Soheil Asgaspour; President • Petroleum Technology Alliance Canada

#### **Cost and GHG Impacts of Emerging Oil Sands Technologies**

Dr. Experience Nduagu; Intermediate Researcher • Canadian Energy Research Institute

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5:00 – 6:15 pm

Reception

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## Tuesday, March 7, 2017

7:00 am

Registration Opens

7:00 – 8:00 am

Continental Breakfast

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8:00 am

Introductory Remarks by Conference Co-chair

Dinara Millington; Vice President, Research • Canadian Energy Research Institute

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8:10 – 8:40 am

### Keynote Address

#### Global Energy Outlook

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Session 5 (8:45 – 10:15 am)

#### Stakeholder Concerns of Oil and Gas Development

*Energy development in Canada affects a wide range of stakeholders. Much debate revolves around where benefits accrue and costs truly lie, and what is in the best “public interest” in terms of environmental protection, energy security and economic growth. Can we balance the needs for economic development in the oil and gas sector with environmental protection and improved relationships with Indigenous Peoples? Do benefits offset the costs of development? Is there an approach that provides a winning solution for all stakeholders?*

Moderator: George Eynon; President & Principal Consultant • geos-eynon & associates consulting inc.

#### Indigenous People Relations

Dr. Stella Swanson • Swanson Environmental Strategies

#### Environmental Groups

#### The Role of Federal or Provincial Governments

10:15 – 10:45 am

Networking Break

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Session 6 (10:45 am – 12:15 pm)

#### LNG Markets

*The Asia/Asia-Pacific market is considered the prize for North American LNG suppliers. However, as China demand flattens and Russia advances pipeline developments, what will the market look like over the next decade and will Canadian LNG be left behind?*

#### How Competitive is Canadian LNG versus the US?

#### LNG Future Demand: Who are the Major Consumers?

Cecilia Tam; Special Advisor • Asia Pacific Energy Research Centre (APERC)

#### Impact of Carbon Emissions Management on LNG Development in Canada

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12:15 – 1:30 pm

#### Luncheon Presentation

#### BC Perspective on Upstream Natural Gas Development

Ines Piccinino; Assistant Deputy Minister, Upstream Gas Development • BC Ministry of Natural Gas Development

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**Session 7 (1:30 – 3:00 pm)**

**Executive Panel Discussion**

**Energy Futures: What Could the Canadian Energy Landscape Look Like in 10 Years?**

*How will industry manage the challenges of consumer and other stakeholder concerns? What should be done to address environmental concerns and the rights of Indigenous Peoples? What does the typical company or investor need to consider when new developments are proposed and built? Is the risk too great?*

Moderator: Kendall Dilling; Vice President, Environment and Regulatory • Cenovus Energy Inc.

Chris Bloomer: President & CEO • Canadian Energy Pipeline Association

Dan McFadyen; Program Director, Extractive Resource Governance Program, School of Public Policy • University of Calgary

Dr. Shahrazad Rahbar; President • Industrial Gas Users Association (IGUA)

**3:00 pm**

Closing Remarks & Conference Adjournment