ENERGY INFRASTRUCTURE IS ESSENTIAL TO CANADA

IAGT SYMPOSIUM 2017

Chris Bloomer, President & CEO, CEPA

October 25, 2017
Who is CEPA?

The **Canadian Energy Pipeline Association** (CEPA) represents Canada’s transmission pipeline companies, which operate about 135,000 kilometres of pipeline in Canada and the United States.

VISION
- Safe, socially and environmentally-sustainable industry

MISSION
- Enhance operating excellence, business environment and recognized responsibility of industry
- Leadership and credible engagement between member companies, governments, the public and stakeholders
CEPA’s role

- CREDIBLE
- LEADERSHIP
- EXPERTISE
- COLLABORATIVE
- TRANSPARENT
- STAKEHOLDER ENGAGEMENT
CEPA members

- Access Pipeline Inc.
- Alliance Pipeline Ltd.
- ATCO Pipelines
- Enbridge Pipelines Inc.
- Inter Pipeline Ltd.
- Kinder Morgan Canada Inc.
- Pembina Pipeline Corporation
- Plains Midstream Canada
- TransCanada Pipelines Limited
- TransGas Limited
- Trans-Northern Pipelines Inc.
Transmission pipeline industry vitals

- **Over 60 years in Canada**: 60
- **Highly regulated industry**:
- **Transports 97% of the natural gas and onshore crude oil produced in Canada**: 97%
- **~135,000km pipeline in Canada and the U.S.**: ~135,000 km
- **Safe and environmentally sound**
Contributing to Canada

$11.5B  Canada’s economy (2015)

$7.9B  capital projects

$1.5B  gov. tax revenues

$31.1M  community initiatives

$22.8M  innovative technology

13,646 full-time jobs

www.pr17.cepa.com
Is energy infrastructure important?

- It’s a rhetorical question
- It’s important now
- It will be important in the near-term
- It will continue to be important in the long-term
CEPA member pipeline network

Gas pipeline
Oil pipeline
Western Canadian supply

Shale:
- 3,000 trillion cubic feet of gas
- 58 billion barrels of NGLs
- 425 billion barrels of oil

Oil sands:
- 165.4 billion barrels of oil
Global demand

World energy consumption
quadrillion Btu

U.S. Energy Information Administration
World energy consumption

![Graph showing trends in world energy consumption by energy source from 1990 to 2040. The graph includes lines for petroleum and other liquids, coal, natural gas, renewables, and nuclear energy. The data is from the U.S. Energy Information Administration.](image-url)
Energy transition

GENERATION ENERGY
Moving Canada Forward

WHAT DOES CANADA’S ENERGY FUTURE LOOK LIKE TO YOU?
Industry challenges

- Regulatory reform
- Security
- Indigenous relations
- Climate change
- Spills & releases

- Broad policy shifts
- Pipeline capacity constraints
- Increased stakeholder activism
- Lack of understanding of the industry
- Investment uncertainty
Safety performance

Safe Delivery

99.999%

0 Significant liquids incidents

1 Significant natural gas incident

Number of incidents versus significant incidents
CEPA members 2012-2016

www.pr17.cepa.com
Getting to zero incidents

ACCOUNTABILITY, PERFORMANCE AND EXECUTION

Leadership and governance

CEPA Integrity First®
management systems and operating practices

Safety culture

Technology and innovation
Summary

We **MATTER**
* Economic driver
* Vast network
* Reliable

We **CONTRIBUTE**
* Billions to the economy
* Millions to communities
* Thousands of jobs

We **EVOLVE**
* Working with gov. on policies
* Investing in renewables
* Innovation

We are **SAFE**
* 99.999% record
* Goal of zero incidents
* Safest mode of transportation
Trust us to deliver Canada’s energy, safely and responsibly.