



ENBRIDGE
NORTHERN
GATEWAY PIPELINES

Enbridge Northern Gateway Project

FALL 2009

Who we are: Enbridge



— Liquids Systems
— Gas Systems
— Gas Distribution

- 2 World's longest liquids pipelines system: 13,500 km
- 2 2 million barrels of oil and liquids/day
- 2 Natural gas transmission and distribution, renewable and alternative energy, international energy projects
- 2 Owns and operates Canada's largest natural gas distribution company which provides gas to 1.9 million customers in Ontario, Quebec and New York State.
- 2 Headquarters: Calgary, AB
- 2 Over 60 years of experience
- 2 Listed on the Toronto and New York stock exchanges
- 2 Employees: 6,000+ in Canada, U.S. and South America

What we're planning

- 2 \$4.5 billion pipeline project (*2009 estimate*)
- 2 Twin pipelines 1,170 km in length
- 2 Export petroleum (approx. 525,000 barrels/day to new marine terminal in Kitimat)
- 2 Import condensate (approx. 193,000 barrels/day)
- 2 Create approx. 4,000 construction jobs



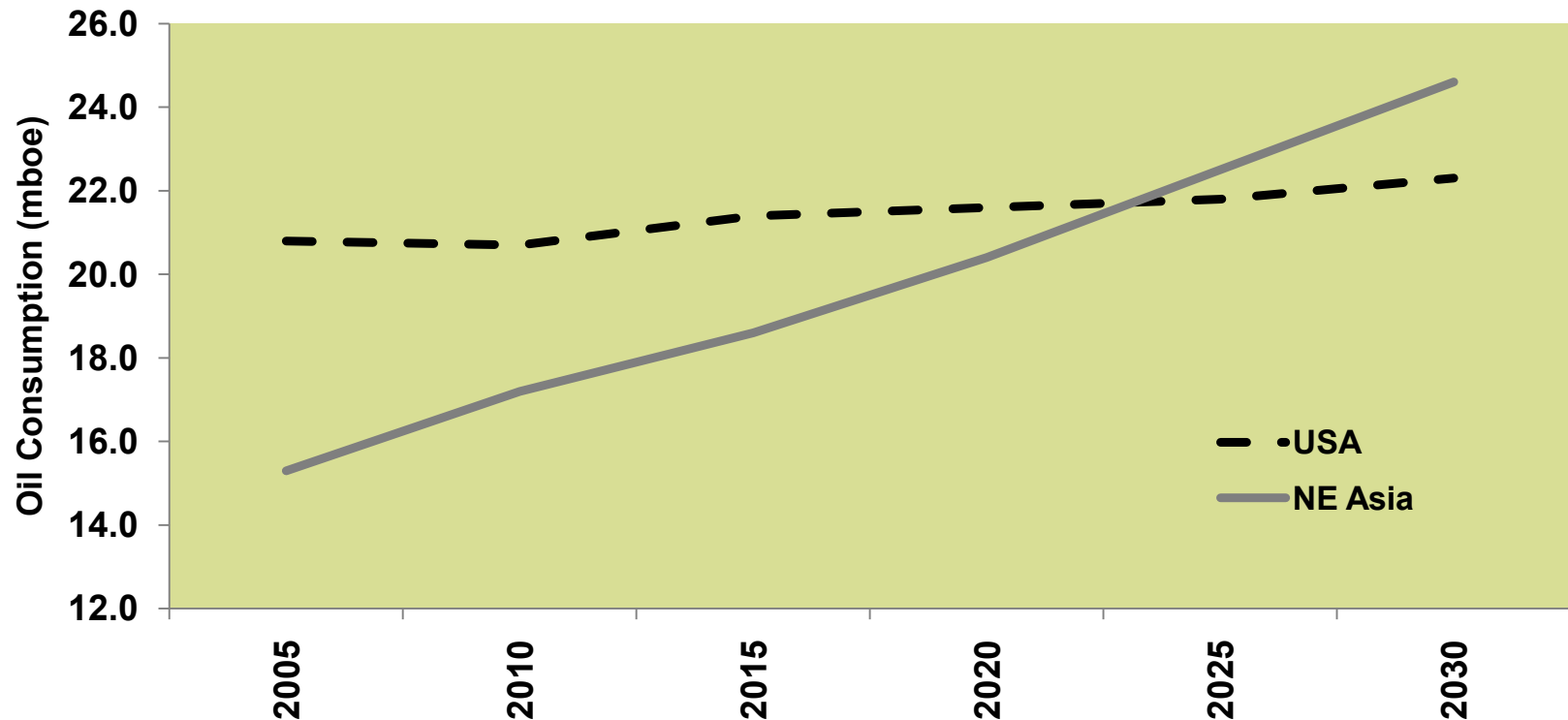
Kitimat marine terminal model

Where it's planned



Why a new pipeline?

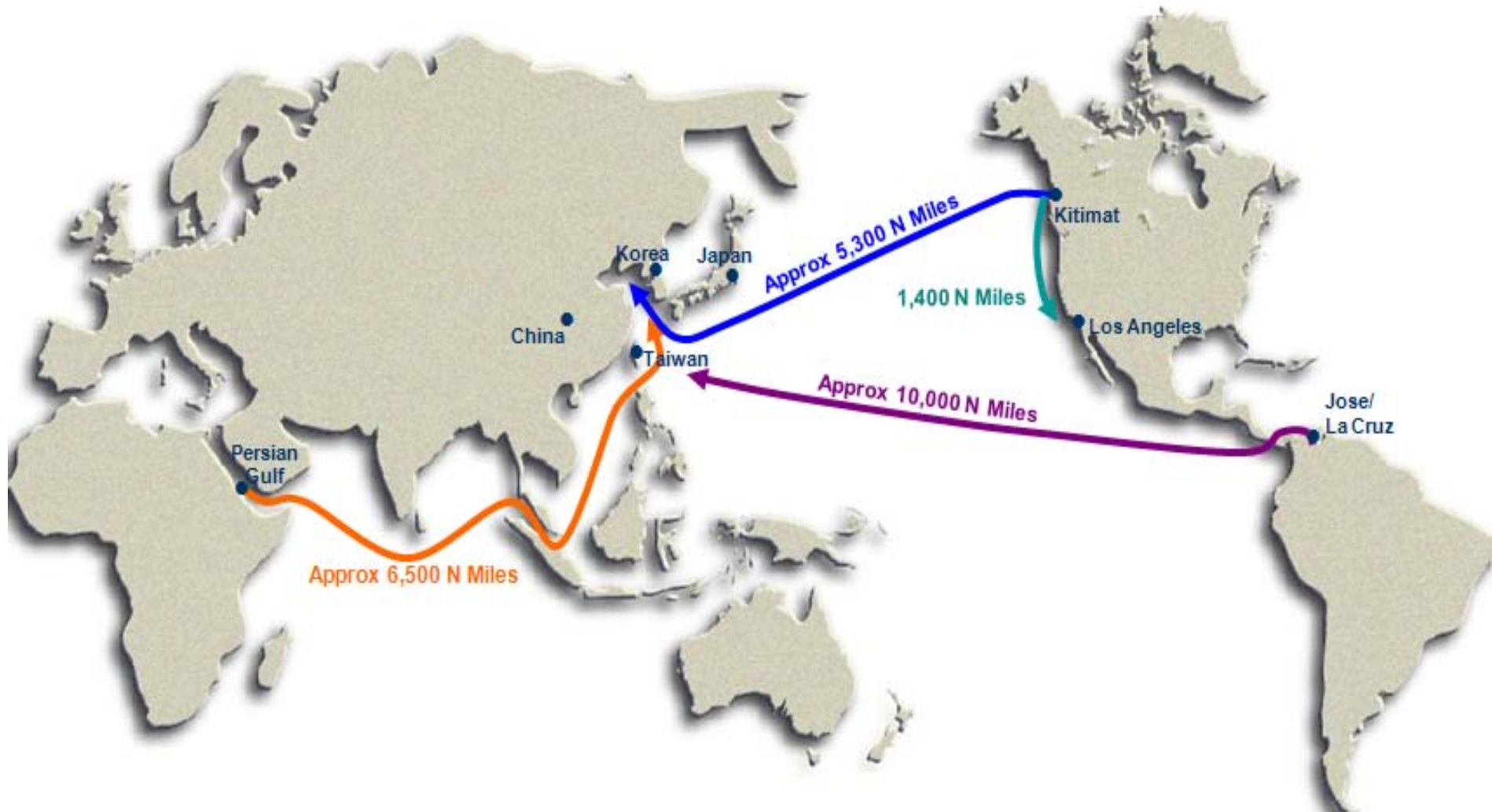
Demand: Led by China, oil consumption in NE Asia will surpass the U.S. by 2025*



*NE Asia = China, Japan, South Korea & Taiwan
Source: 2008 EIA International Energy Outlook

Supply

Close proximity to growing markets



When it's planned

- 2 **2008 - 2011:** Public & government review process
- 2 **2009:** File regulatory application
- 2 **2012 - 2015:** Construction (*subject to regulatory approval*)
- 2 **2015:** Commissioning & start-up



The regulatory process

- 2 Public review led by:
 - Canada's National Energy Board (NEB)
 - Canadian Environmental Assessment Agency (CEAA)

- 2 Additional agencies, including:
 - Transport Canada
 - Department of Fisheries and Oceans

- 2 NEB and CEAA will lead a Joint Review Panel to conduct public hearings along the route



Keys to success

- 2 Environmental stewardship
 - Pipelines
 - Marine

- 2 Aboriginal engagement
 - Alignment of interests
 - Sustainable benefits

- 2 Northern communities
 - Collaborative processes
 - Sustainable development



Marine safety



- 2 Vetting of ships and crew
- 2 Double hulled ships
- 2 Ship steering and navigational systems
- 2 Tug escort operations (tethered towing)
- 2 Compulsory pilotage
- 2 Pilot-carried electronic navigation systems
- 2 Improved navigational aids
- 2 Weather monitoring for ship transit limits
- 2 Ship and terminal safety plans
- 2 Emergency response planning

World class emergency response

- 2 Reduced response time
- 2 Improved response capability
- 2 Integrated response organization
- 2 International pooling of resources



Trend: oil trade up, spills down



ENBRIDGE
NORTHERN
GATEWAY PIPELINES

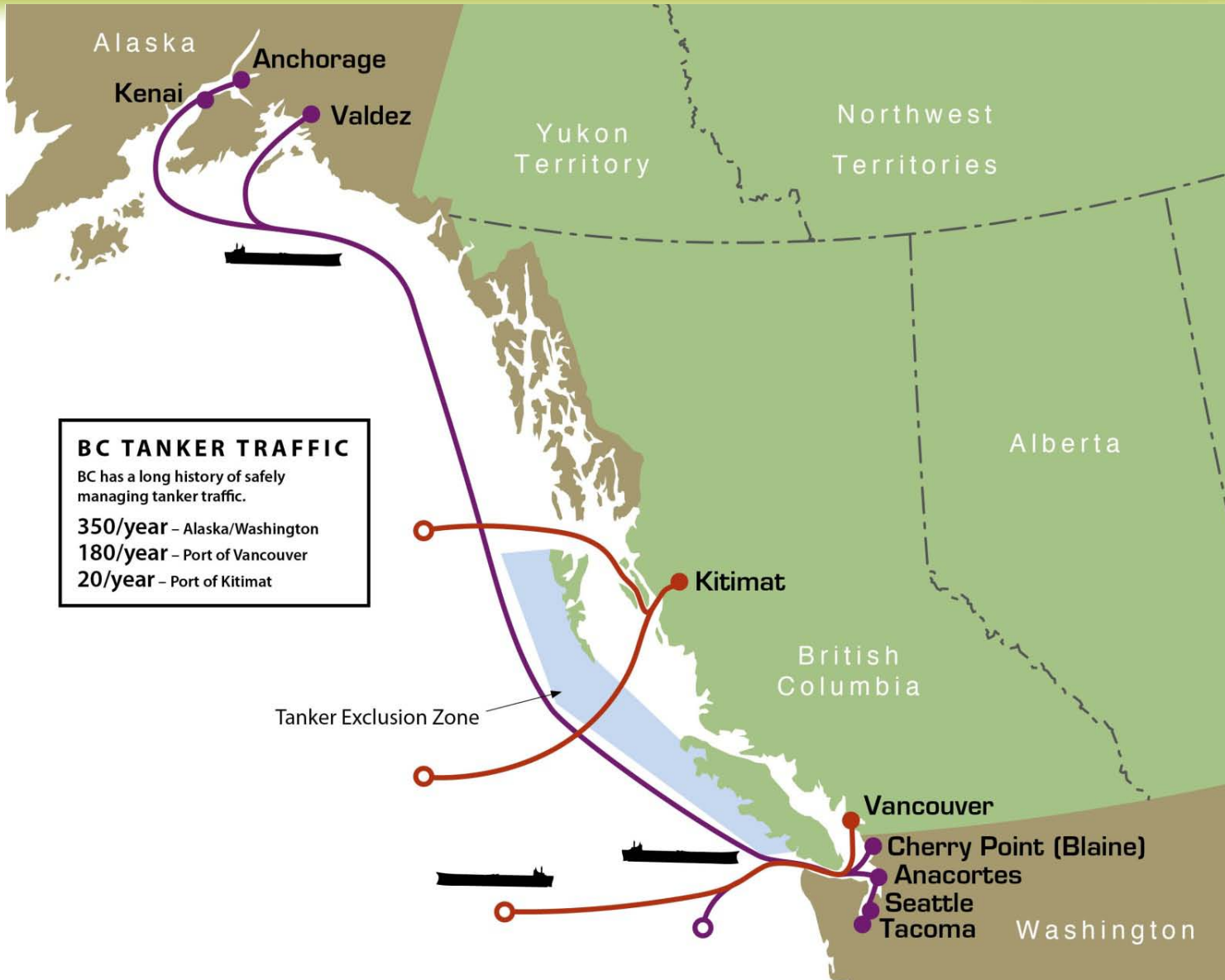
Billion Tonne-Miles

No. of spills > 7 tonnes



— Seaborne Oil Trade (Billion Tonne-Miles) [Source: Fearnresearch, 2007] — No. of spills > 7 tonnes

BC tanker experience



Pipeline safety



Control centre

- 2 24/7 monitoring from sophisticated control centre
- 2 In-line inspection tools (“pigging”)
- 2 Proven technology and strict operational standards
- 2 Safety control valves and leak detection systems
- 2 Enhanced rapid and effective emergency response

First Nations

2 Essential to the project:

- Sole sourcing
- Business opportunities
- Equity ownership
- Capacity
- Employment
- Training
- Community investments
- Environmental stewardship

2 Working to build new partnerships:

- 30 + resource agreements
- 25 + traditional use studies
- 25 + open houses
- 30 + technical workshops
- 10 + skills development workshops



Northern communities

- 2 Community Open Houses
- 2 Presentations: local governments, chambers of commerce, service clubs
- 2 Greening Initiative
- 2 Northern Gateway Trust
- 2 Community Advisory Boards
- 2 Regional offices in Kitimat, Terrace, Vancouver and Calgary
- 2 www.northerngateway.ca
- 2 Facebook, MySpace, Twitter, YouTube, Flickr
- 2 Toll free: 1-888-434-0533



Terrace office

Economic benefits

- 2 \$2.4 billion in wages earned in northern BC and Alberta
- 2 Support for local businesses; sole sourcing
- 2 More than 4,000 jobs created during three years of construction
- 2 More than 200 permanent jobs
- 2 Infrastructure improvements, population increases, economic spin-offs
- 2 Support the development of transferable skills



Local opportunities

2 Local hiring: union and non-union labour

2 Contracting

- Skilled construction work
- Electrical and mechanical contracting
- Transportation (air, trucking)
- Clearing, logging and salvage
- Site restoration
- Industrial rentals, repairs
- Environmental monitoring
- Field technicians
- Food services and accommodation
- Supplies (concrete, gravel, building materials)



2 Joint ventures

2 Business development

2 Education and training

Summary

- 2 We have the experience, people and technology to ensure this project is safe and reliable
- 2 There is real demand for our products by people all over the world
- 2 Our goal is to balance the environmental, social and economic benefits of the project
- 2 We understand the challenges ahead and look forward to continuing the discussion with all communities



Questions?

www.northerngateway.ca



flickr™



twitter