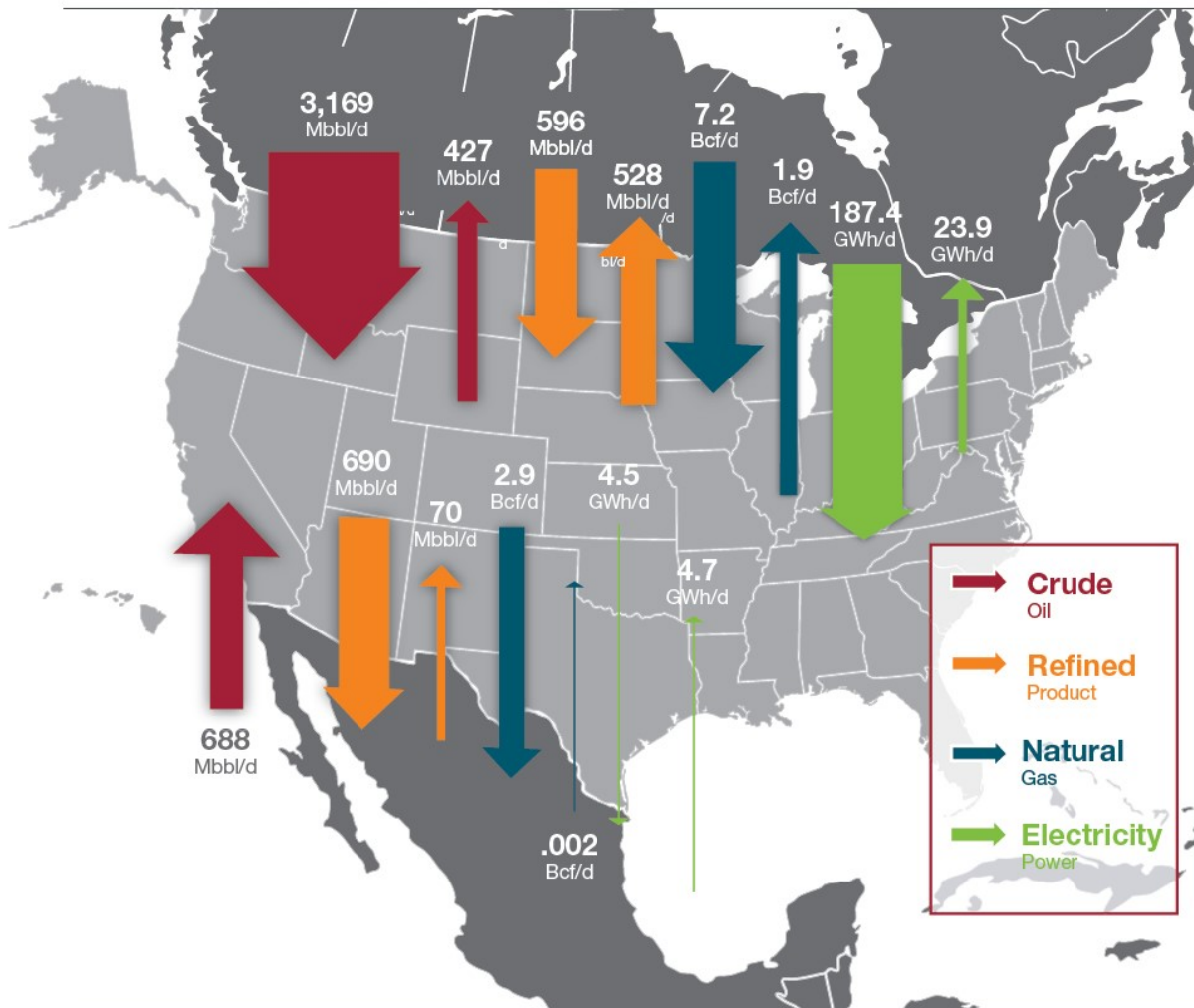




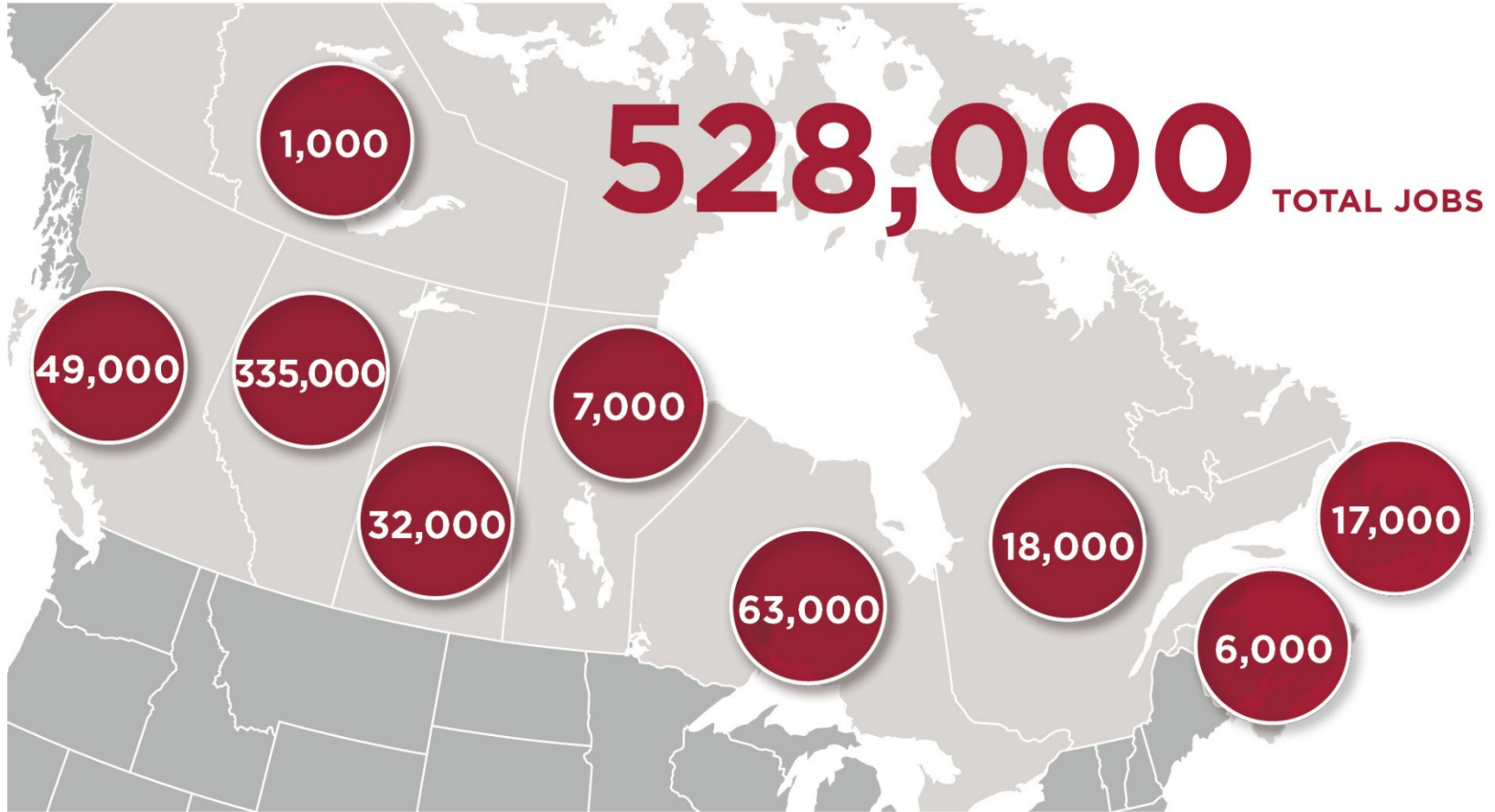
Energy Infrastructure Projects

North American Energy Trade

NORTH AMERICA ENERGY FLOWS BY COMMODITY, 2015

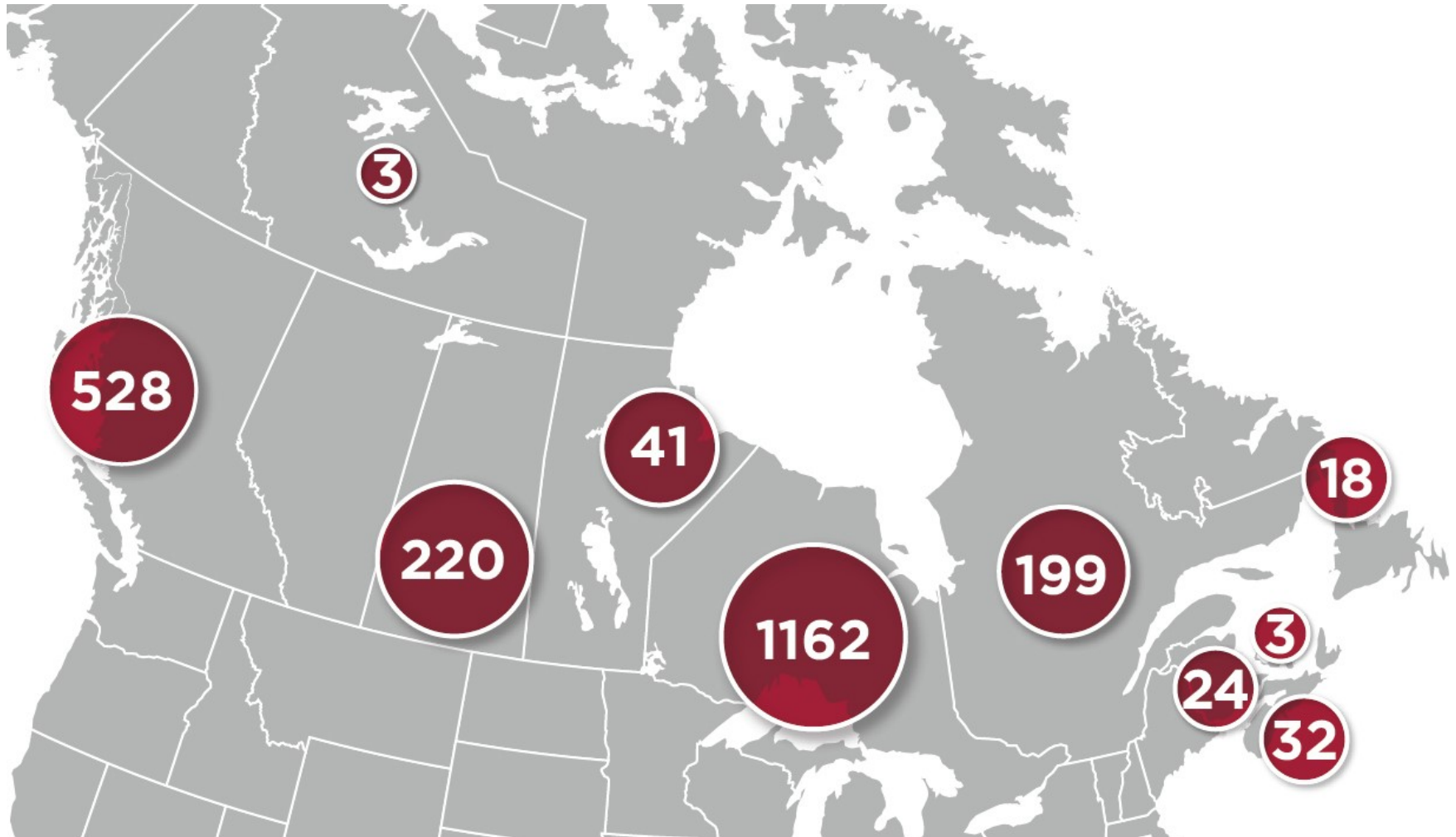


Canada's Oil and Natural Gas Industry Creates Jobs



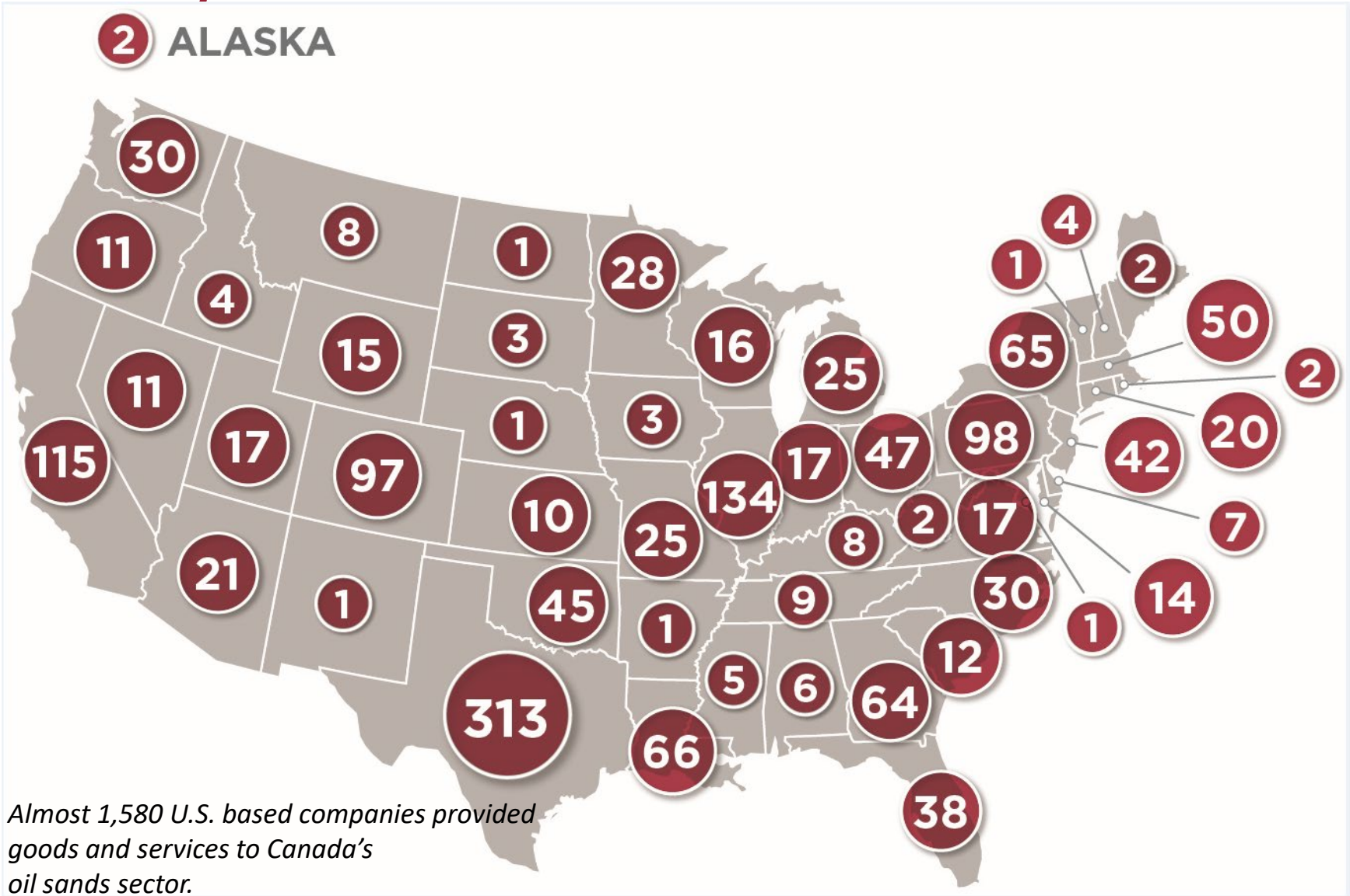
Source: CAPP, 2018

Number of Suppliers to Canada's Oil Sands by Province in 2016-2017

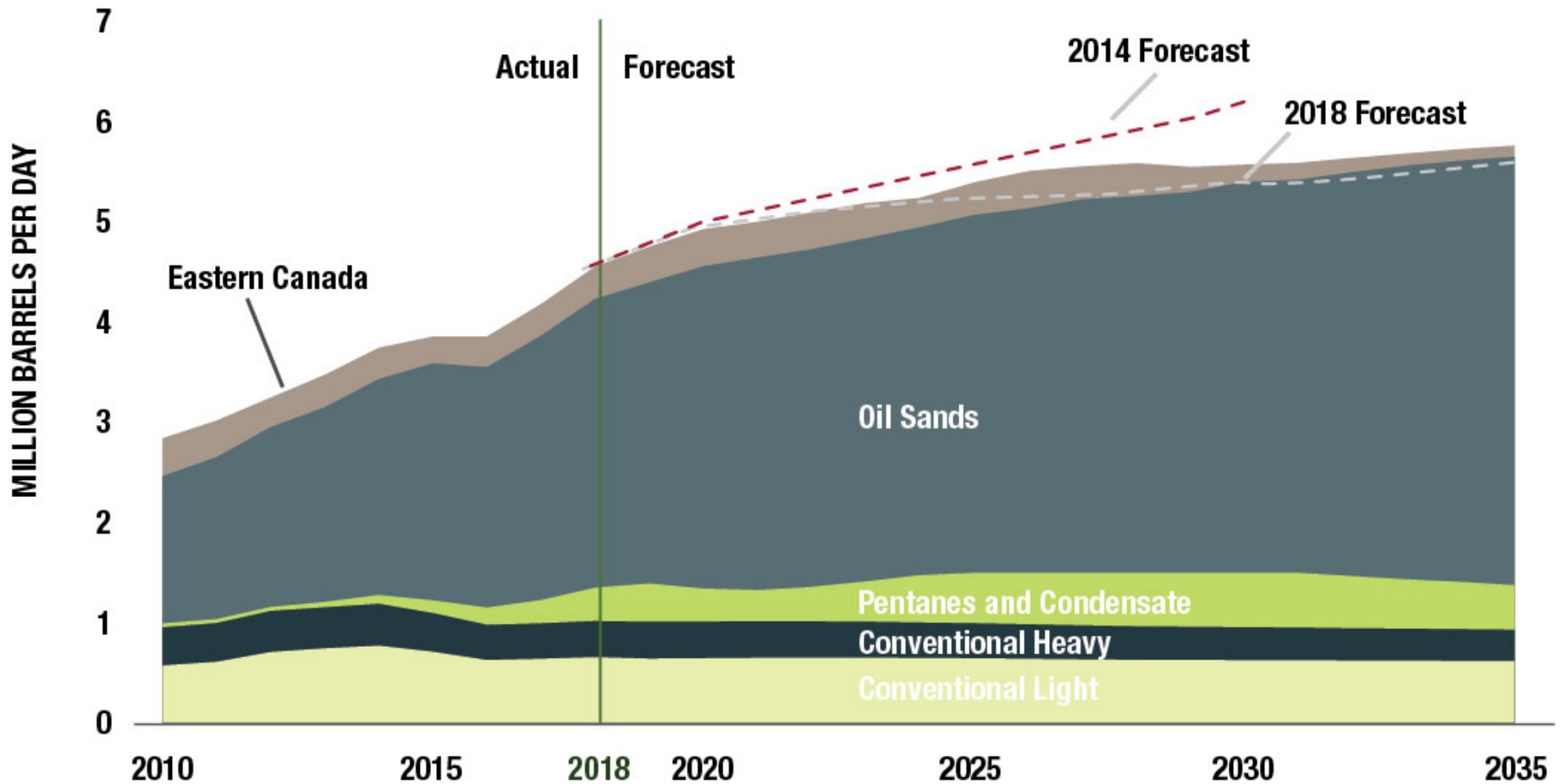


Source: CAPP member data aggregated by CAPP, 2019

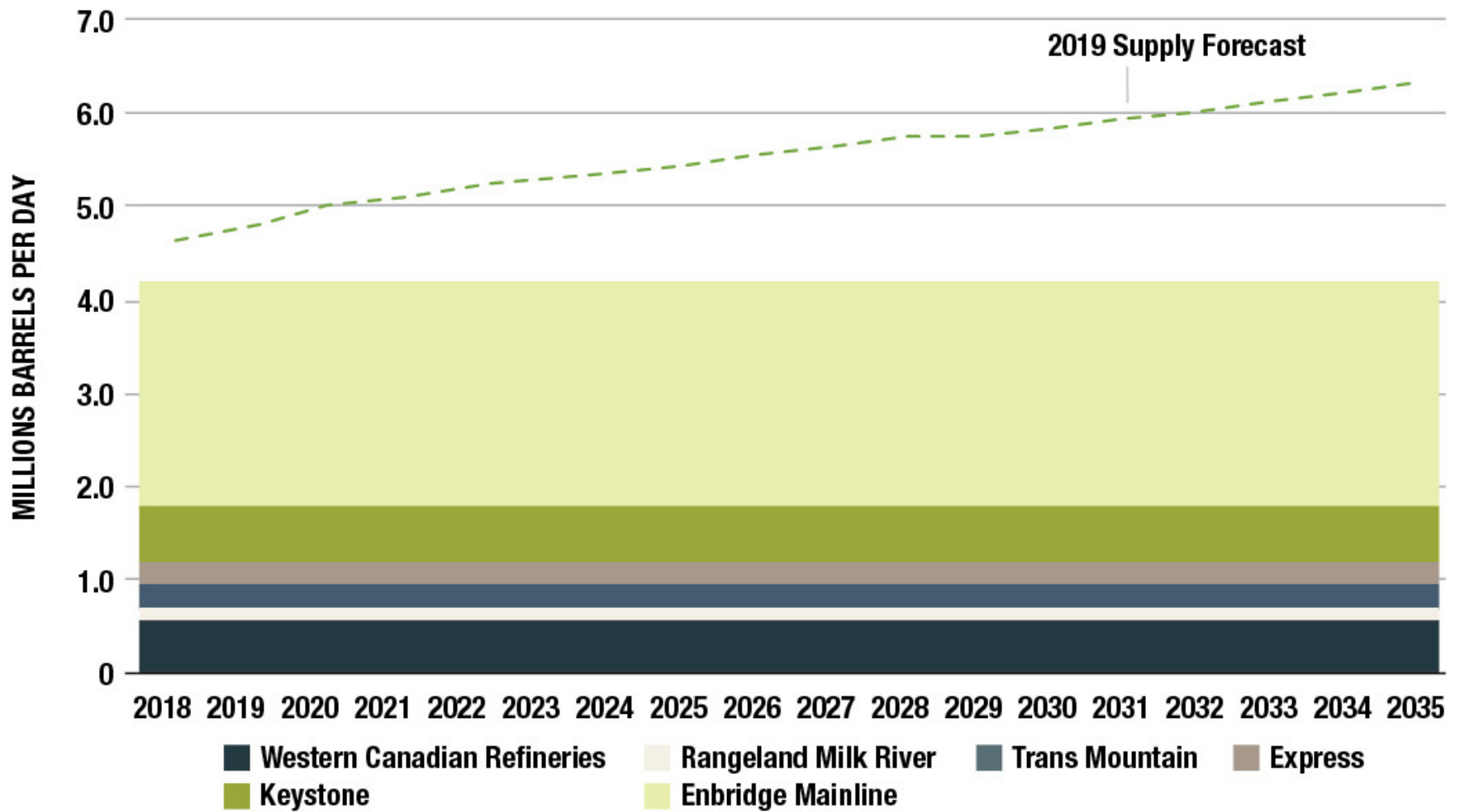
United States Suppliers to Canada's Oil Sands in 2014/15



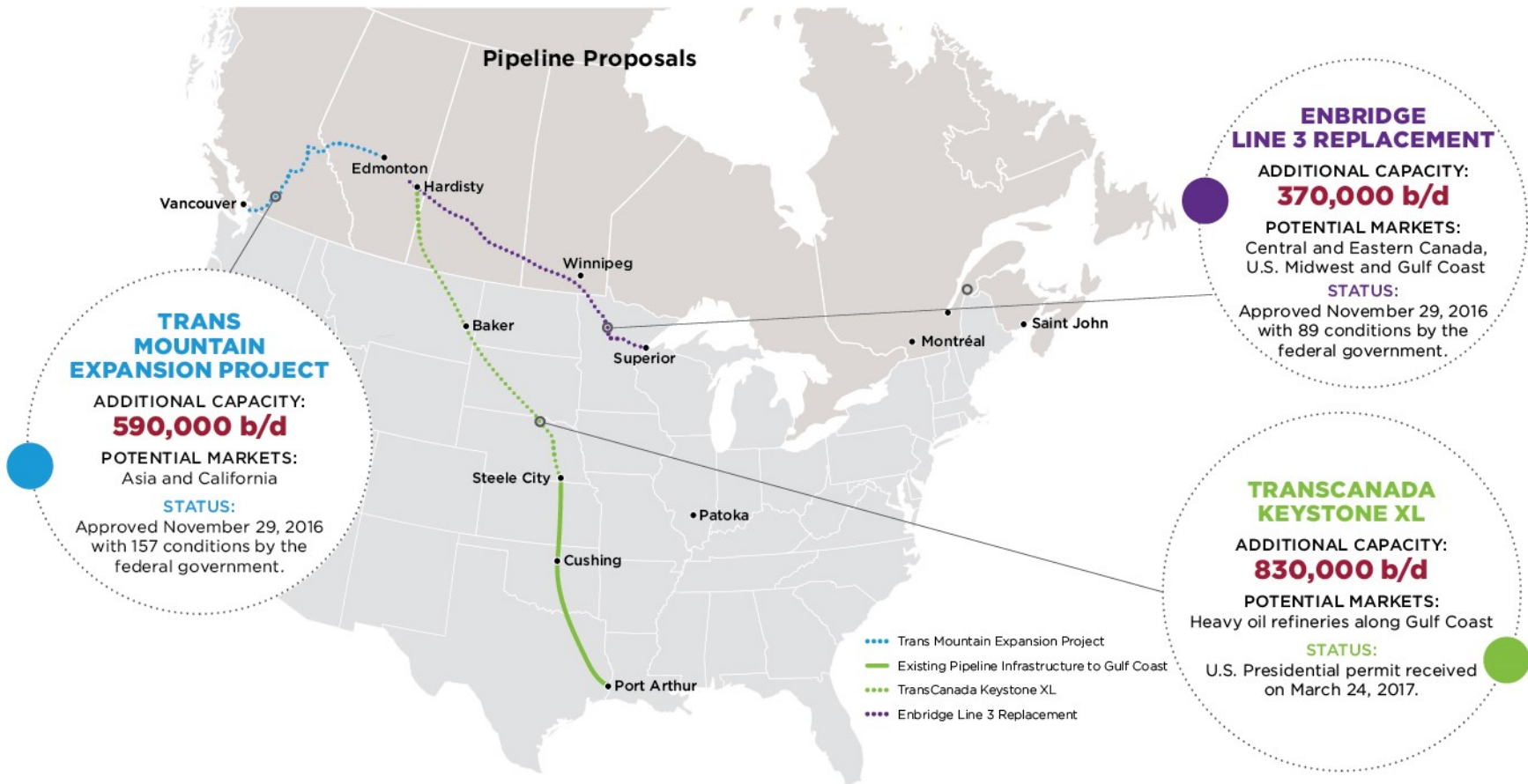
Canadian Oil Sands and Conventional Production



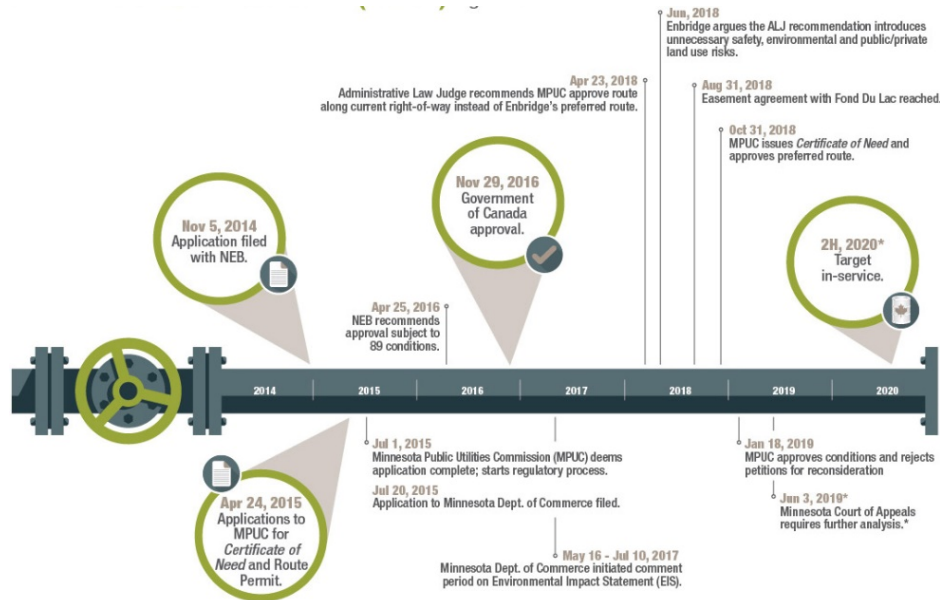
Existing Takeaway Capacity from Western Canada vs. Supply



Pipeline Proposal Projects



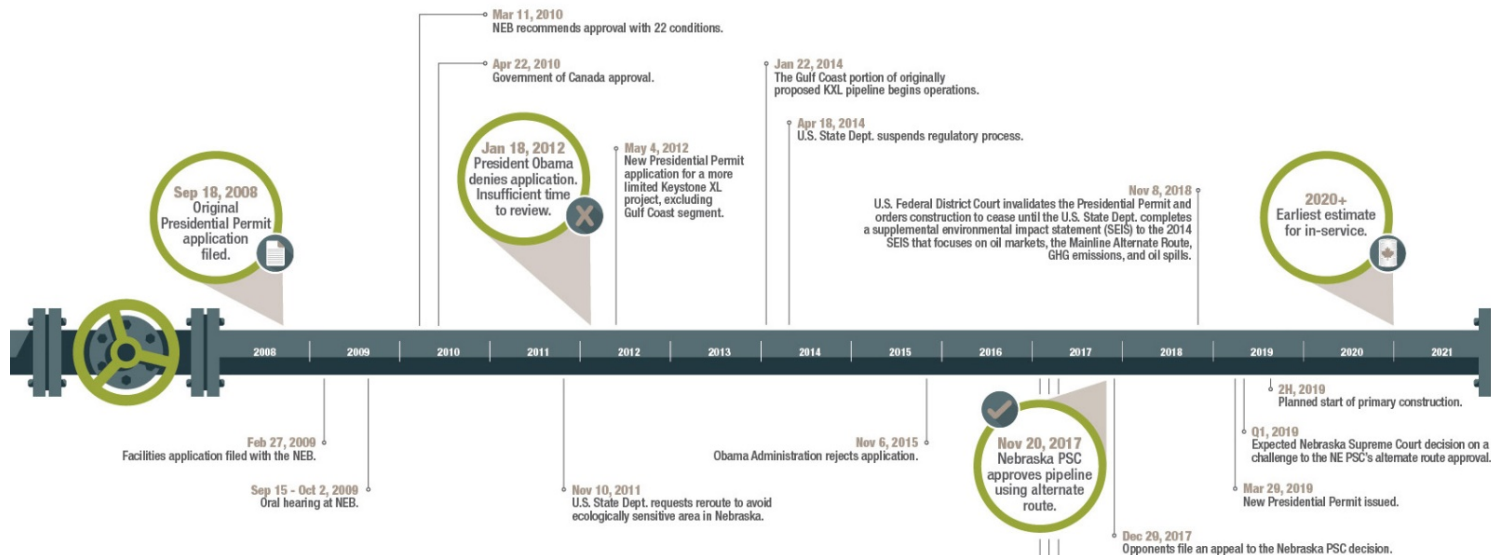
Enbridge Line 3 Timeline



Successful completion of L3RP will put an additional
370,000
 b/d of Canadian oil on the global market.



TC Energy Keystone XL Timeline



Successful completion of KXL will put an additional

830,000

b/d of Canadian oil on the global market.

TC ENERGY KEystone XL

COST: C\$10.85 billion (2014 estimate)

CAPACITY: 890,000 b/d
(700,000 b/d initial + 830,000 b/d additional)

LENGTH: 526 kilometres
(987 new + 193 reactivated + 2 x 3.6 km)

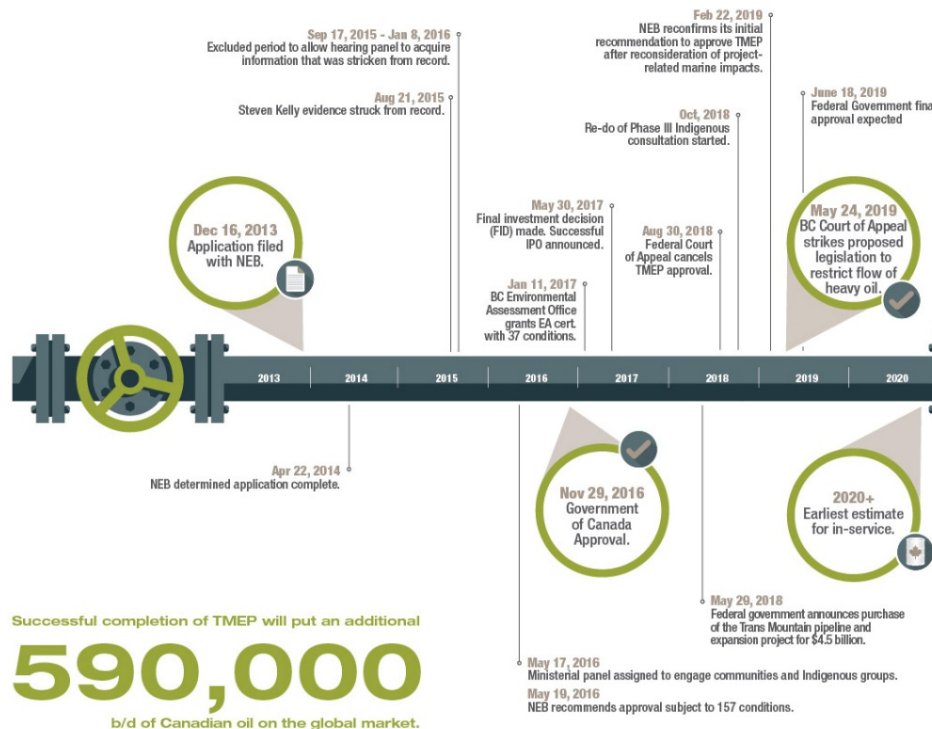
DIAMETER: 36 inches

CONTRACTS: 500,000 b/d*

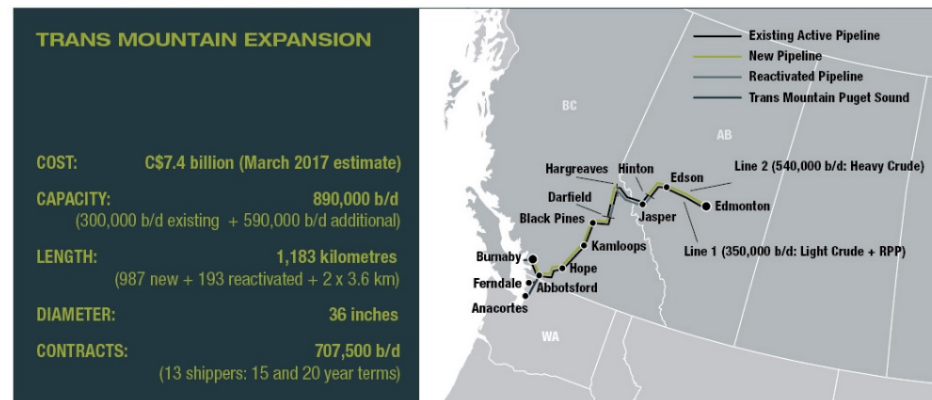
* TC Energy announced in January 2018 that 500,000 b/d of firm 20-year commitments have been secured, including 50,000 b/d from the Govt. of Alberta. TC will continue to secure long-term contracts.



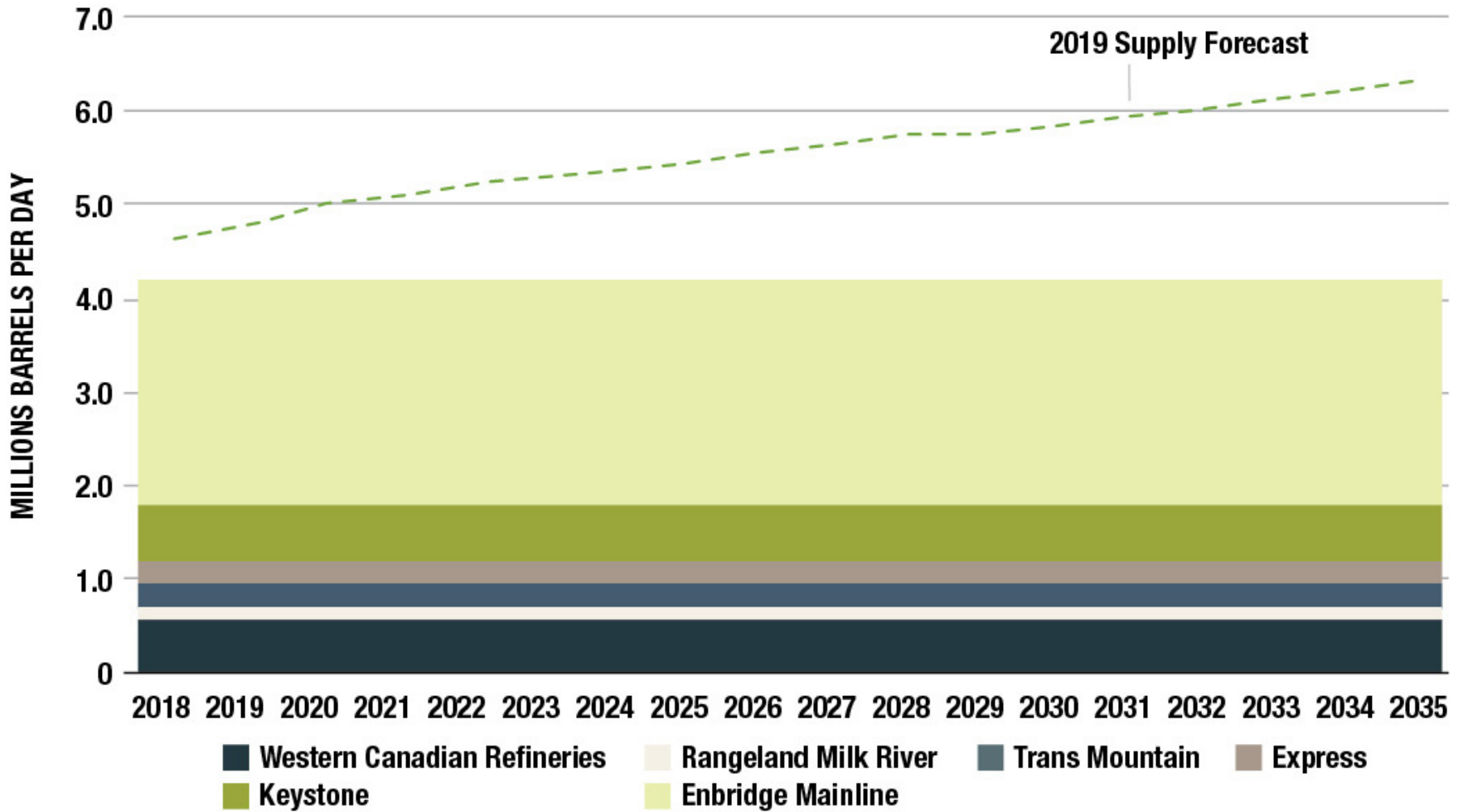
Trans Mountain Timeline



Successful completion of TMEP will put an additional
590,000
 b/d of Canadian oil on the global market.



Existing Takeaway Capacity from Western Canada vs. Supply



Indigenous Opportunity

Industry Growth Drives Opportunity



JOBS
2016

11,900 6% of individuals working in Canada's oil and natural gas industry identified as Indigenous.



PAYMENTS TO INDIGENOUS GOVERNMENTS
Jun. 1-Dec. 31, 2017

\$55 million in payments (from conventional oil and natural gas activity) made to Indigenous governments in Canada



PROCUREMENT
2015-2016

\$3.3 billion spent by oil sands companies on procurement from Indigenous-owned companies.



COMMUNITY INVESTMENT
2015-2016

\$48.6 million in Indigenous community investment provided by oil sands producers.



APPRENTICES
2015

6% of apprentices in Canada were Indigenous people working in industry-related trades.