



THE OIL SANDS  
DEVELOPERS GROUP  
Energy From Athabasca

# Lessons from the Oil Sands

Maintaining Our Social License To Operate Through Public Engagement,  
Education and Environmental Responsibility

Don Thompson

Williston Basin Petroleum Conference  
May 2, 2011

# Growth = Impact on Local Infrastructure



# The Need For Energy

## World Population

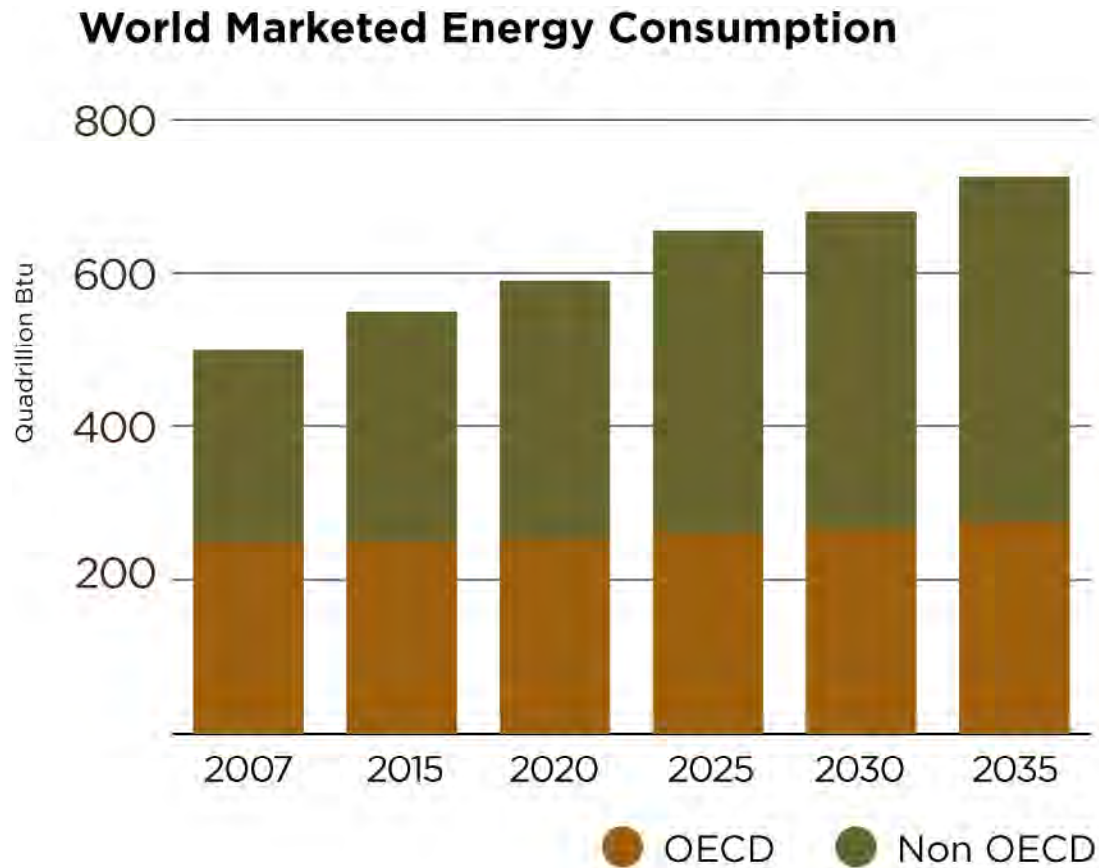


Continued population growth - a key driver for energy demand

Lifestyle expectations also continue to grow

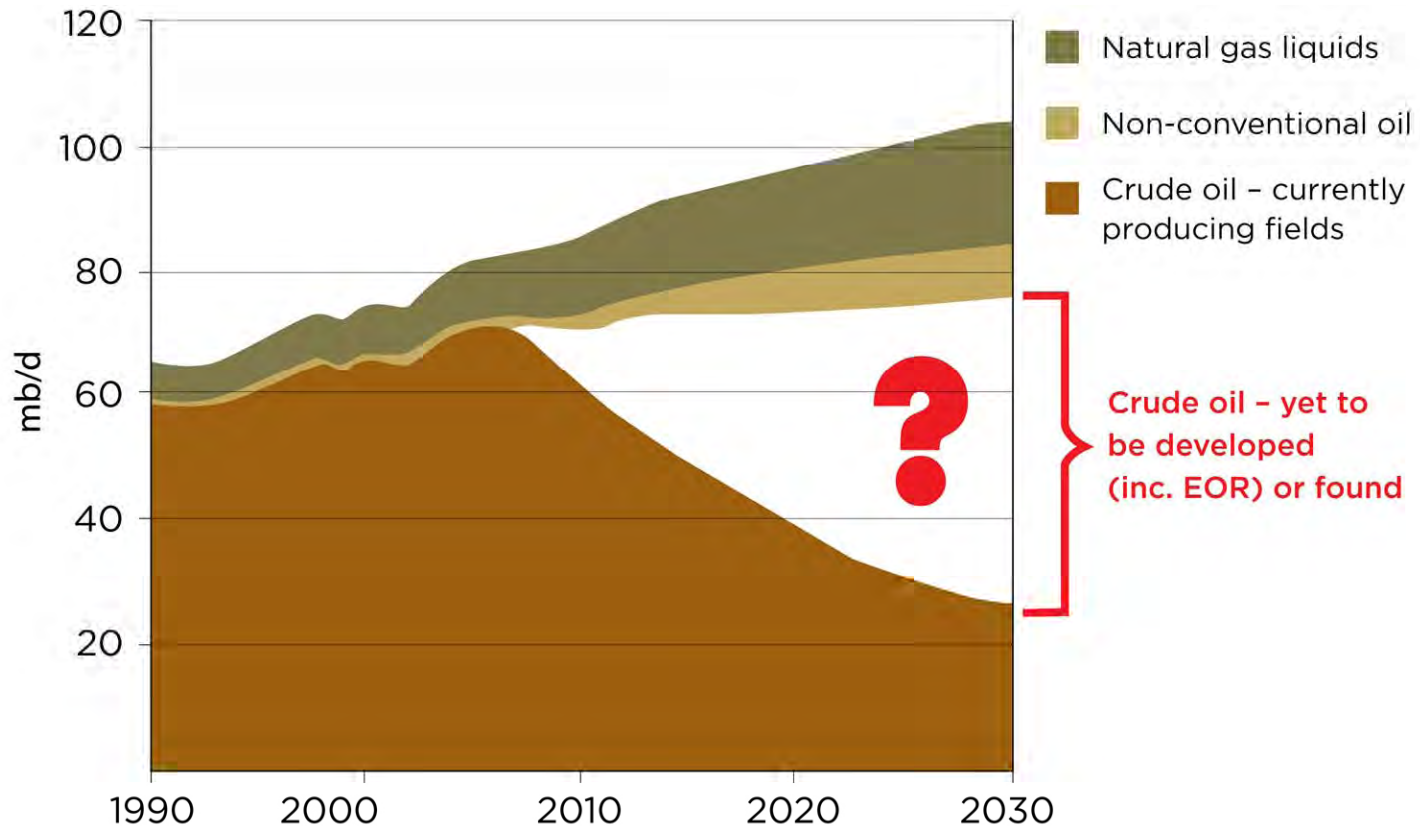
Source: Shell Energy Scenarios to 2050

# Energy Demand Continues to Grow



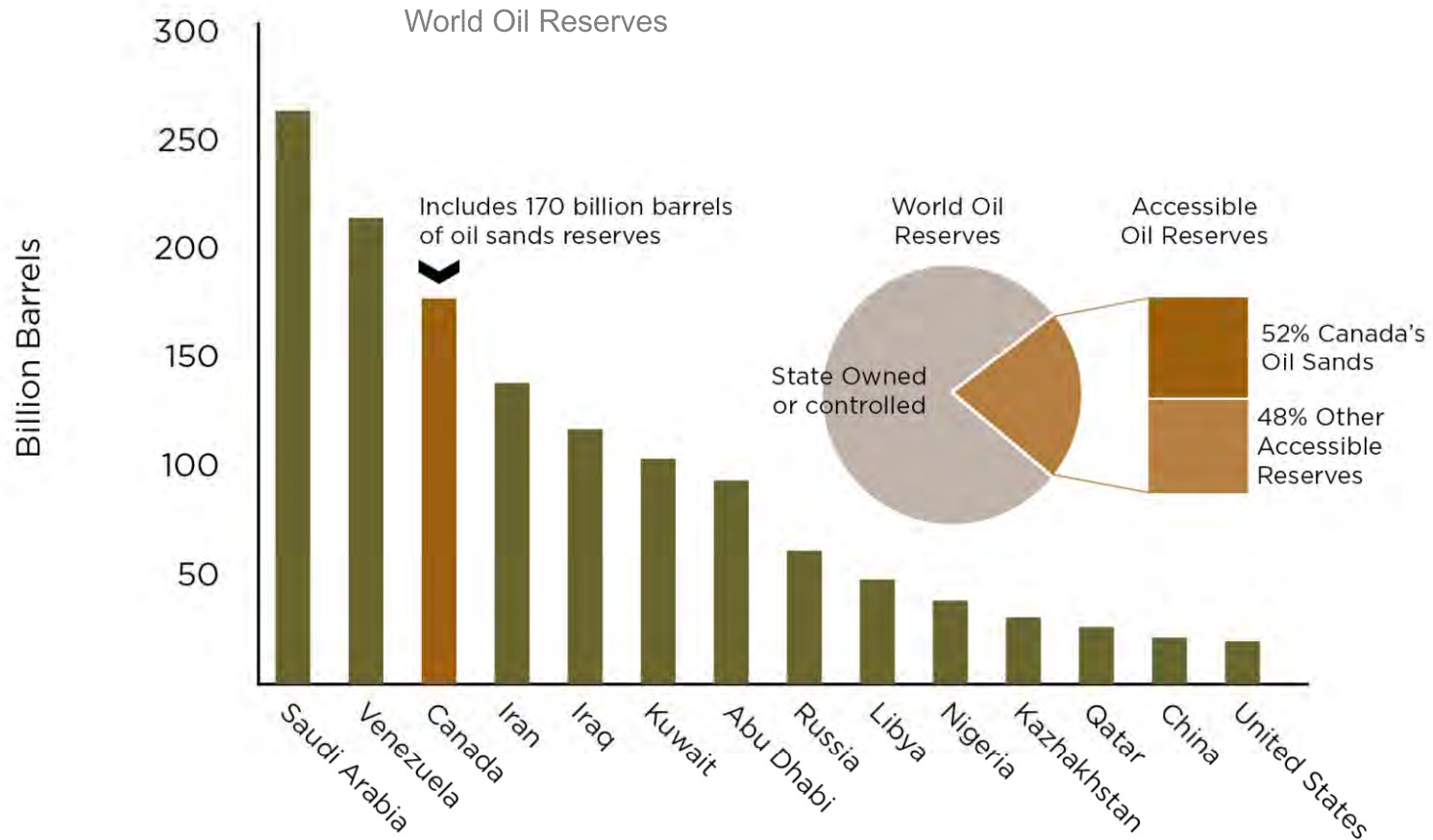
Source: <http://www.eia.doe.gov/oiaf/ieo/highlights.html>

# 64 Million Barrels Of New Capacity Required By 2030



Source: International Energy Agency World Energy Outlook 2008

# Today...Oil Sands Are A Globally Significant Resource



Source: Oil & Gas Journal Dec. 2010

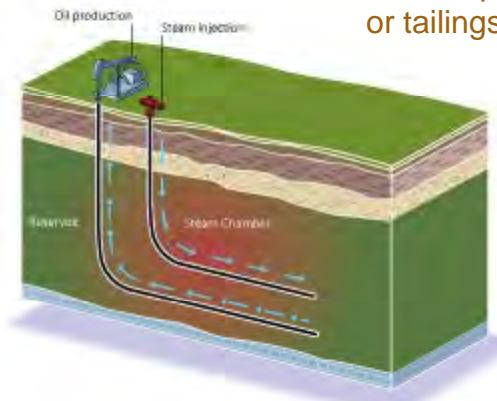


# Technology Improvements Made Industry Economically Viable

Mining – 20% of the oil sands resource is less than 200 feet deep



In-Situ – 80% of the oil sands resource is more than 200 feet deep  
Steam Assisted Gravity Drainage (SAGD)



In-situ operations do not have mines or tailings ponds



# The Oil Sands Developers Group

Formed in 1997 to facilitate stakeholder communications

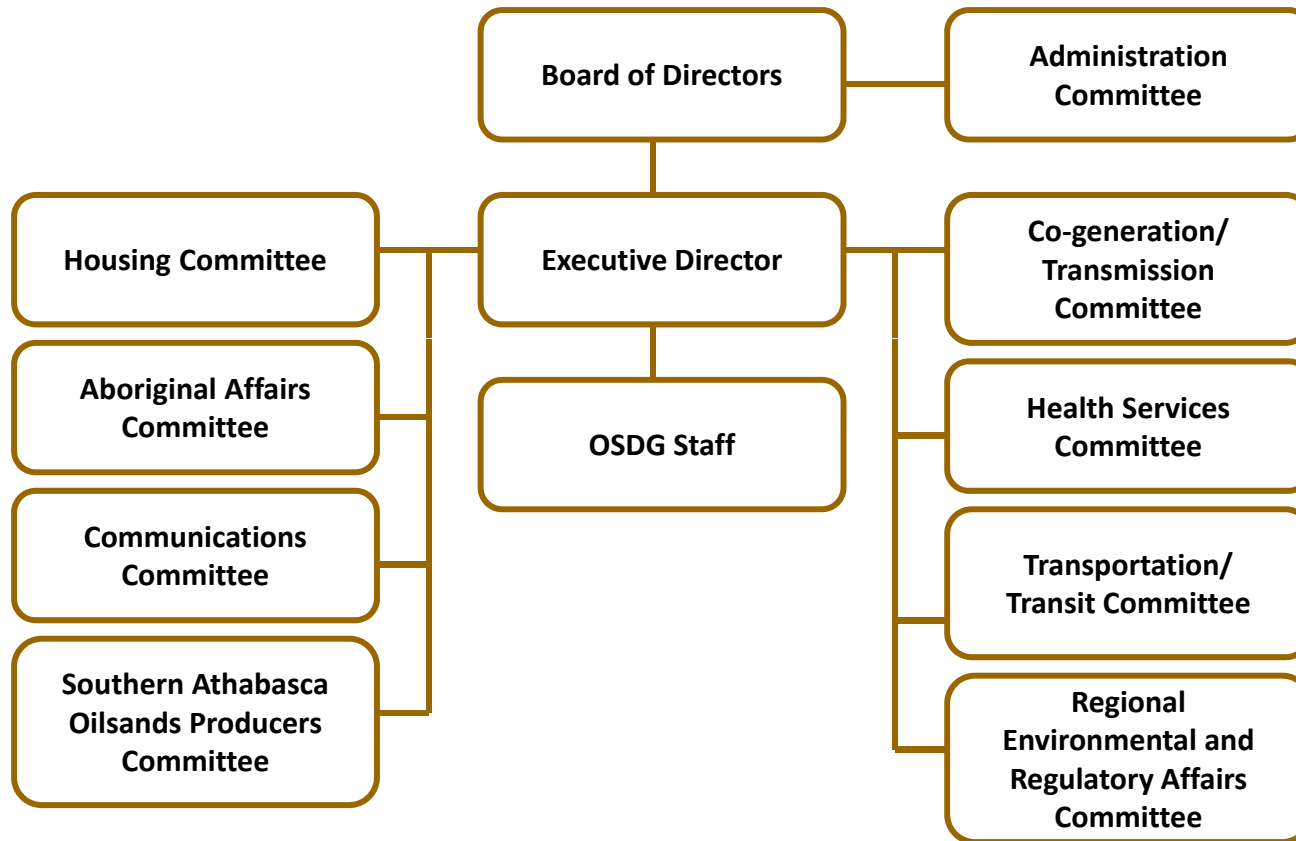
Work collaboratively to resolve regional issues

Previously called the Athabasca Regional Issues Working Group (RIWG)

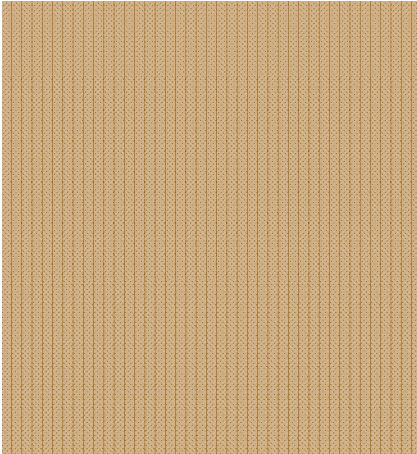
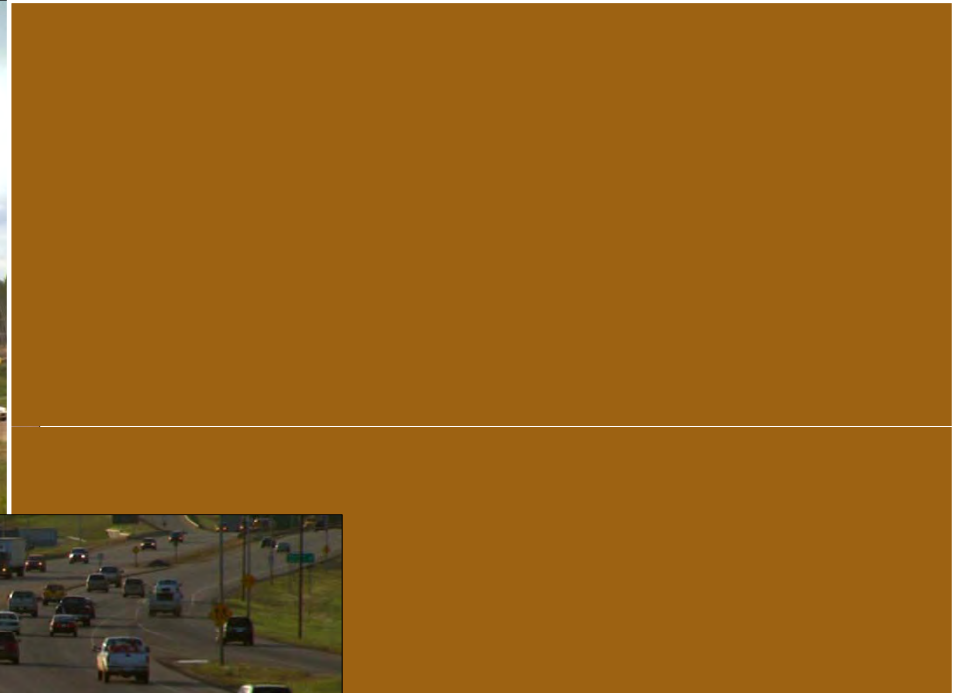




# OSDG Committees And Operating Structure

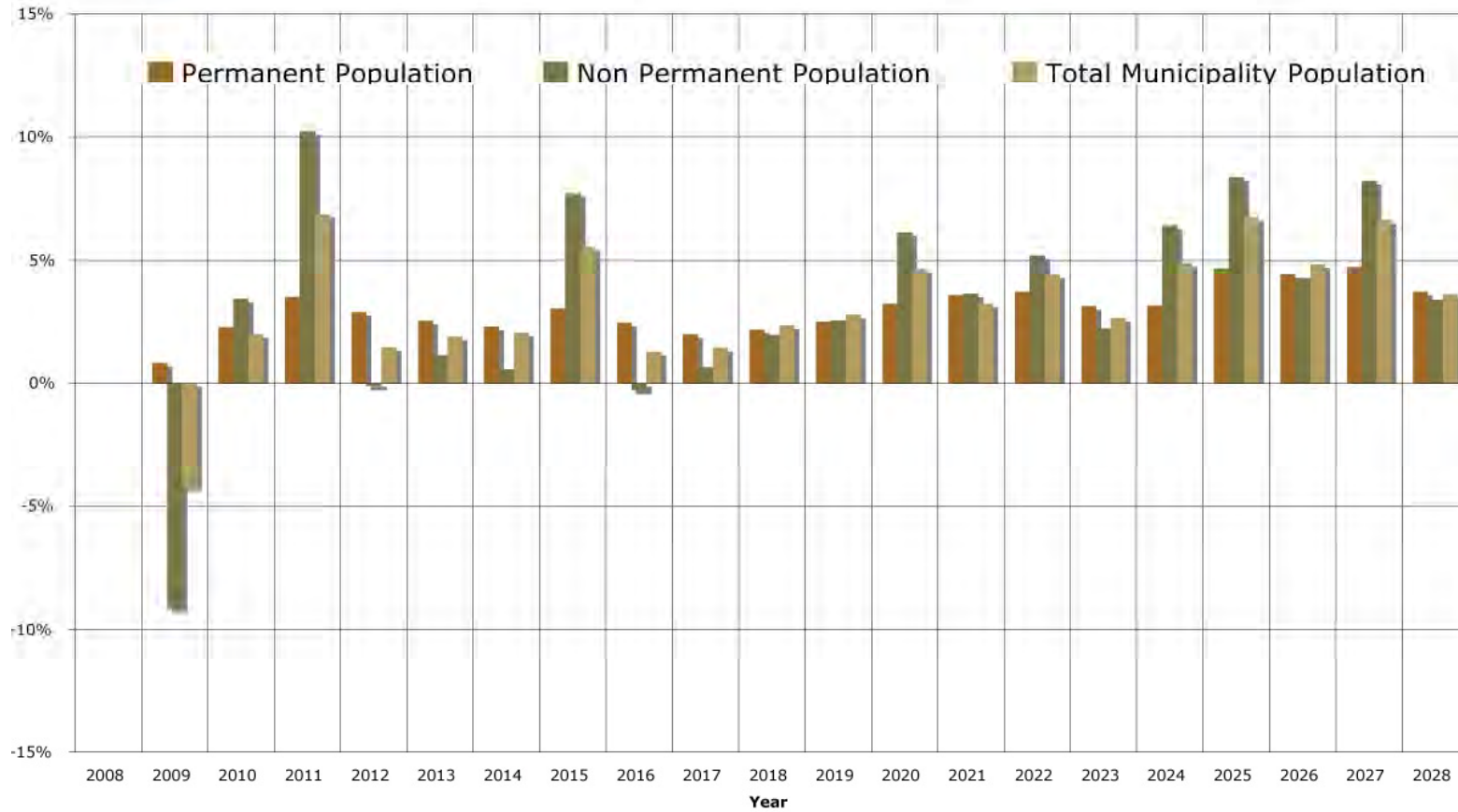


# Transportation

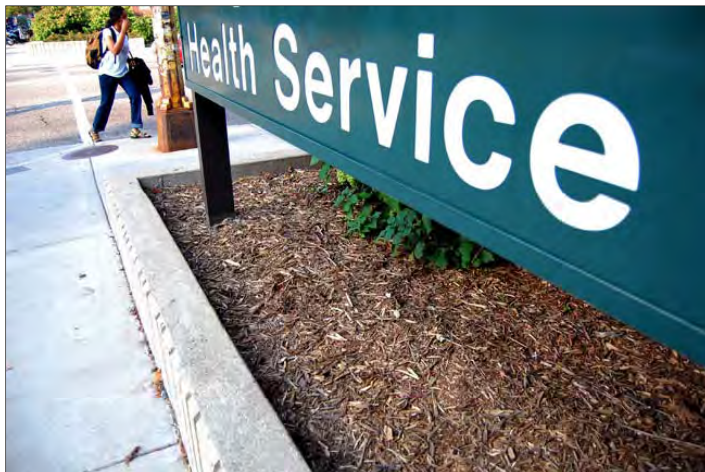
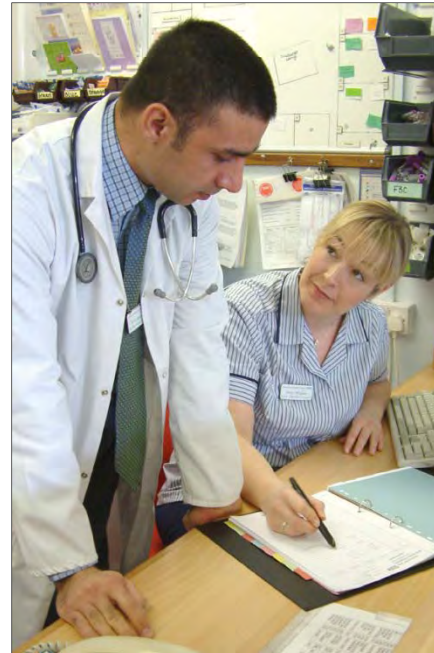


# Housing

## Population Growth Rates



# Healthcare



# Aboriginal Participation In Oil Sands Development

Aboriginal Companies – value of contracts in 2009 – **\$711 M**

Aboriginal Companies – value of contracts 1998 – 2009 – **\$3.7 B**

Aboriginal employees in permanent jobs in 2009 – **1,600+**

Contributions to Aboriginal communities in 2009 – **\$10.6 M**

Industry Relations Corporations and Métis/non status group funding 2009 – **\$13 M**



# Environment

Provide a member forum to discuss issues related to potential regulatory processes/issues with potential impact on oil sands development

Communicate between industry members with respect to regional groups/stakeholder/regulators

Regional regulatory initiatives by Government of Alberta ministries

Industry response to in-stream flow needs (Athabasca River)

Emissions guidelines

Government process for fulfilling consultation obligations and setting regional environmental work priorities

# Integrated Regional Environmental Studies And Monitoring



[www.CEMAONLINE.ca](http://www.CEMAONLINE.ca)



[www.ramp-alberta.org](http://www.ramp-alberta.org)



[www.wbea.org](http://www.wbea.org)



# OSDG's Surveys

Accurate and credible information

Analysis and forecasts obtained through our annual surveys

Managing an inclusive committee process focused on analyzing issues, facilitating solutions and achieving results





# We Live Where We Work



# The Oil Sands Developers Group...

**...industry, government and communities working together**

[www.oilsandsdevelopers.ca](http://www.oilsandsdevelopers.ca)