December 1, 2014

TO: All Rate Regulated Natural Gas Distributors
All Registered Participants in Board File No. EB-2014-0289
All Interested Parties

RE: 2014 Natural Gas Market Review – Stakeholder Conference Agenda

In a letter dated November 17, 2014, the Board indicated that a detailed Stakeholder Conference agenda would be prepared following the November 19 due date for stakeholders to register for the Conference and indicate whether they intend to give a presentation. A number of stakeholders indicated their intention to give a presentation.

The conference agenda has been designed to encourage discussion by all participants of the key issues raised by the presentations. To ensure sufficient time for discussion, presenters are asked to limit their presentation to no longer than 15 minutes. All participants are encouraged to have reviewed the presentation materials in advance of the conference. All presentation materials and the two consultants’ reports have been posted to the 2014 Natural Gas Market Review webpage.

By highlighting the main information elements and key conclusions of their presentation, presenters will help focus discussion on the main issues of interest to attendees and will better inform the Board’s further consideration.

Questions about this consultation process should be directed to Stephen Cain at stephen.cain@ontarioenergyboard.ca or 416-440-8144. The Board’s toll-free number is 1-888-632-6273.

Yours truly,

Original signed by

Kirsten Walli
Board Secretary

Attachment: Stakeholder Conference Draft Agenda
Wednesday, December 3, 2014

10:00 Welcome & Introductions ............................................................. Rosemarie T. Leclair, Chair & CEO
10:10 Conference Overview ......................................................... Peter Fraser, V.P. Industry Operations & Performance

10:15 Session 1: Overview of Recent North American Natural Gas Market Developments
- Factors affecting supply sources, Ontario demand, pipelines & storage
- Recent changes in the regulatory context

Recent Influences on North American and Ontario Gas Market ..................... Navigant Team

10:30 Discussion

11:00 Morning Break

11:15 Session 2/Panel 1: Winter 2013/14 Natural Gas Prices
- What happened and why

Winter 2013/14 Natural Gas Price Review ........................................... Navigant Team
An Exceptional Winter / Review of Ontario Natural Gas Markets During the 2013-2014 Winter ................................................................. Chris Shorts, Kevin Petak | Union Gas

11:45 Discussion

12:30 MID-DAY BREAK (lunch not provided)

1:30 Session 2/Panel 2: Winter 2013/14 Natural Gas Prices
- Considerations for QRAM drivers
- Gas supply planning cost/risk trade-offs

Cost/Risk Trade Offs of Different Gas Supply Planning Parameters ...................... Jamie LeBlanc, Andrew Welburn | Enbridge
Gas Supply by Storage Target ........................................................................ Dwayne R. Quinn | FRPO

2:00 Discussion

2:30 Afternoon Break

2:45 Session 3: Natural Gas | Electricity Market Interface
- Winter 2013/14 electricity market behaviour
- Future electricity sector demand for natural gas and implications

Market Surveillance Panel’s Winter 2014 Period Review ................................. Steve Dorey | MSP
Meeting Future Power Market Natural Gas Requirements ...... David Butters, John Wolnik | APPrO
IESO Gas/Electric Coordination ......................................................... Len Johnson, David Barrett | IESO

3:30 Discussion

4:15 Day 1 Recap ......................................................................................... Peter Fraser
Ontario Energy Board
2014 Natural Gas Market Review
EB-2014-0289

STAKEHOLDER CONFERENCE
DRAFT AGENDA

Thursday, December 4, 2014

9:00  Welcome & Overview.............................................................................................................., Peter Fraser
9:05  Session 4/Panel 1: North American and Ontario Natural Gas Markets to 2020
    •  Factors affecting natural gas supply, transportation, storage and prices
    •  Consideration of Ontario future price scenarios

Emerging Trends and Market Outlook..............................................................Navigant Team
Gas Markets to 2020................................................................. Jamie LeBlanc, Andrew Welburn | Enbridge
Future Trends: Assessing Ontario Natural Gas Market Requirements Through 2020 /
Ontario Infrastructure Development to 2020.................................Michael Sloan, Jim Redford | Union Gas
North American and Ontario Gas Markets to 2020.................................Dave Schultz | TransCanada

10:00  Discussion
11:00  Morning Break
11:15  Session 4/Panel 2: North American and Ontario Natural Gas Markets to 2020
    •  Factors affecting natural gas demand, transportation and prices
    •  Consideration of Ontario future price scenarios

Adjusting to Natural Gas Market Changes.....................................................Shahrzad Rahbar | IGUA
An Assessment of Dawn-Parkway Transportation Service
Turn Back Risk.............................................................................................John A. Rosenkranz | OGVG/CME/FRPO
Considerations of the Role of Natural Gas-Fired Generation
in Ontario’s Evolving Electricity Supply Mix .........................George Pessione, Andrew Pietrewicz | OPA

12:00  Discussion

1:00  MID-DAY BREAK
1:45  Session 5: Market and Regulatory Implications of Key Natural Gas Market Trends
Key Issues Discussion ..................................................................................ALL

3:30  Conference Recap and Closing Remarks.......................................................Peter Fraser

ADJOURN

Presentation materials are available for printing on the 2014 Natural Gas Market Review webpage. Please print and bring with you any paper copies you need for the meeting.