

**Ontario Energy  
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**Commission de l'énergie  
de l'Ontario**  
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## **BY E-MAIL AND WEB POSTING**

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**

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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](mailto: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

**Ontario Energy Board**  
**2014 Natural Gas Market Review**  
EB-2014-0289  
**STAKEHOLDER CONFERENCE**

**DRAFT AGENDA**

**Wednesday, December 3, 2014**

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- 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

**The Ontario Energy Board | 2300 Yonge Street, 25<sup>th</sup> Floor | Toronto, Ontario M4P 1E4**  
**West Hearing Room / ADR Room**

**Ontario Energy Board**  
**2014 Natural Gas Market Review**  
EB-2014-0289

**STAKEHOLDER CONFERENCE**

**DRAFT AGENDA**

**Thursday, December 4, 2014**

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**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**

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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.