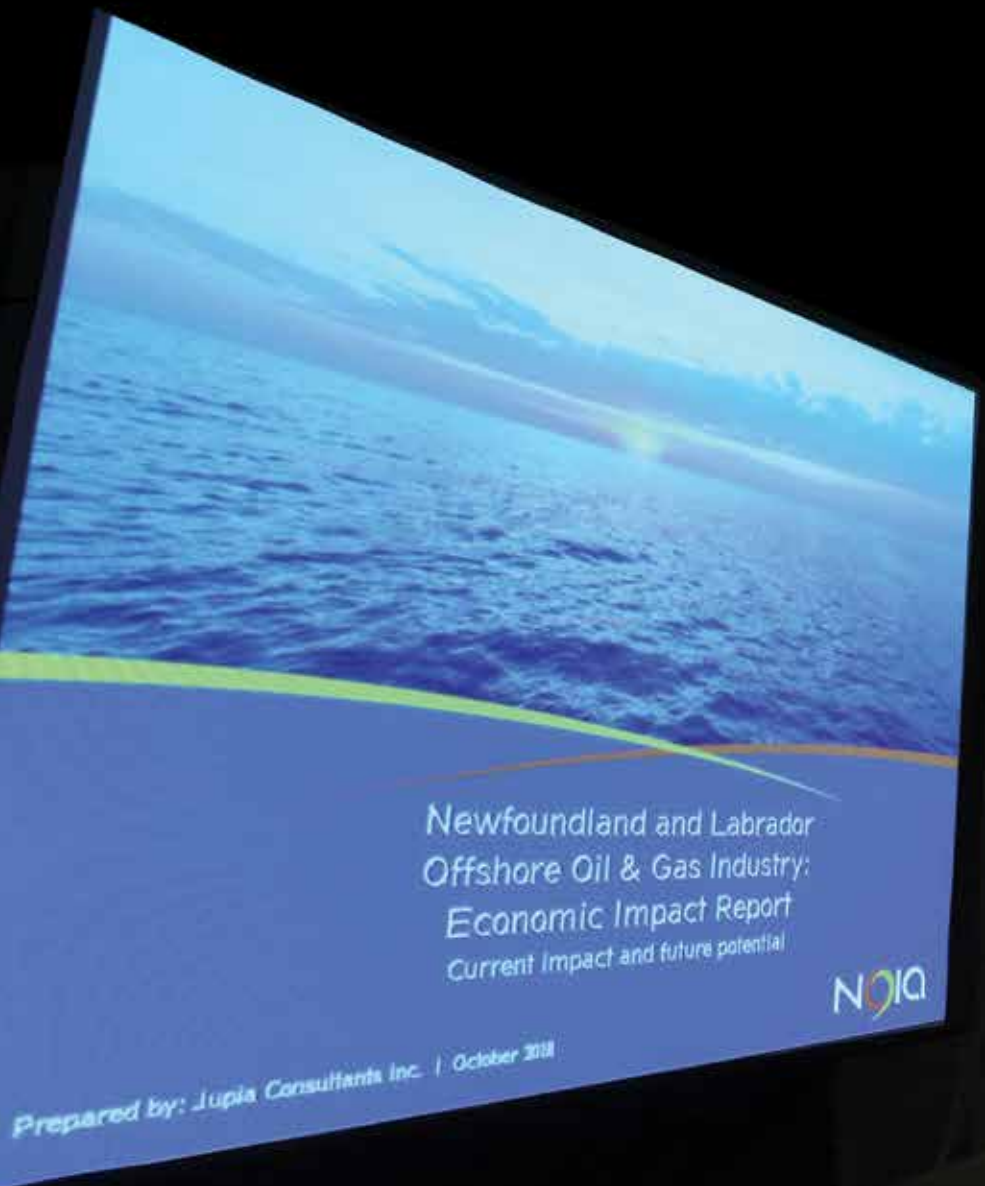


NOIA NEWS

2018
The Year in Review

Imagine the Potential:
Sharing the Story of our Offshore

Fall Seminar
Preparing for the Potential





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ON THE COVER: David Campbell of Jupia Consultants presents findings of the Newfoundland and Labrador Offshore Oil & Gas Industry Economic Impact Report on October 24.



Noia CEO Charlene Johnson

CEO Corner

Cautious optimism is present in the global oil & gas industry, largely due to the price of oil. In the Newfoundland and Labrador offshore, an ever-increasing building of confidence, excitement even, is present; a feeling that exceeds cautious optimism and recognizes what we are on the cusp of.

Our industry was able to progress through the lean years while attracting globally significant seismic investment and land sales interest. The number one reason for this is that our impressive prospectivity ensured the offshore remained a good value, even during those leaner times. A recent successful Call for Bids by the C-NLOPB is a further demonstration of the potential of our offshore. No doubt our industry was impacted by the downturn, however, I feel we are well positioned to quickly bounce back and continue our upward trajectory.

As you know, Noia recently released an economic study prepared by David Campbell of Jupia Consultants and former chief economist with the Government of New Brunswick. David's report provided a revealing and exciting assessment of what our industry can, and I truly feel, will be. We shared this story with our members and key stakeholders at an awareness event in October that received an exceptional response. The people of Newfoundland and Labrador are beginning to Imagine the Potential.

In September, Noia, Nalcor Energy – Oil and Gas and the provincial government shared our offshore story with approximately 30 senior federal government employees in Ottawa. This group included deputy ministers and assistant deputy ministers, as well as senior staff from a cross section of departments such as finance, environment, fisheries and oceans, and natural resources. The session was a tremendous success. That session would not have been possible without exceptional help from our colleagues at the Atlantic Canada Energy Office and ACOA. Noia also hosted a session of the Executive Leadership Development Program of the Public Service of Canada – a

professional learning opportunity for federal government employees – where we highlighted our potential. While further details on our efforts are included in this edition of Noia News, I wanted to share with you some highlights of the progress we have made to get the message out about how important the offshore is, not only for Newfoundland and Labrador, but for Canada.

We believe our advocacy efforts on your behalf help to ensure we have a vibrant industry, one which drives our nation forward. Over the next couple of years there are five different drilling exploration programs planned, with the possibility of more. We have never seen this level of exploration in Newfoundland and Labrador and this will create exceptional opportunities within the industry, particularly for our supply and service members. Most importantly, exploration programs are an important step to resource discovery and future offshore projects.

We operate in a global industry and as the world comes to us for our prospectivity, we are also sharing our knowledge and expertise around the globe. In October, just over 20 Noia member companies participated in a Guyana mission to build relationships and business interests in this burgeoning area of exploration and development. For many of our members, Guyana is an important next step in their growth.

There are so many reasons for optimism that we must continue to tell our story. We must push for a thriving oil & gas industry. Thank you for your continued support of Noia and I look forward to working with you, and for you, in the coming months as we Imagine the Potential and prepare for that potential.

Sincerely,

Charlene Johnson, CEO

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The Government of Newfoundland and Labrador and Equinor announced a framework agreement for a potential development project at Bay du Nord on July 26 – the first project outside the Jeanne d’Arc Basin and the first to move into deep water.

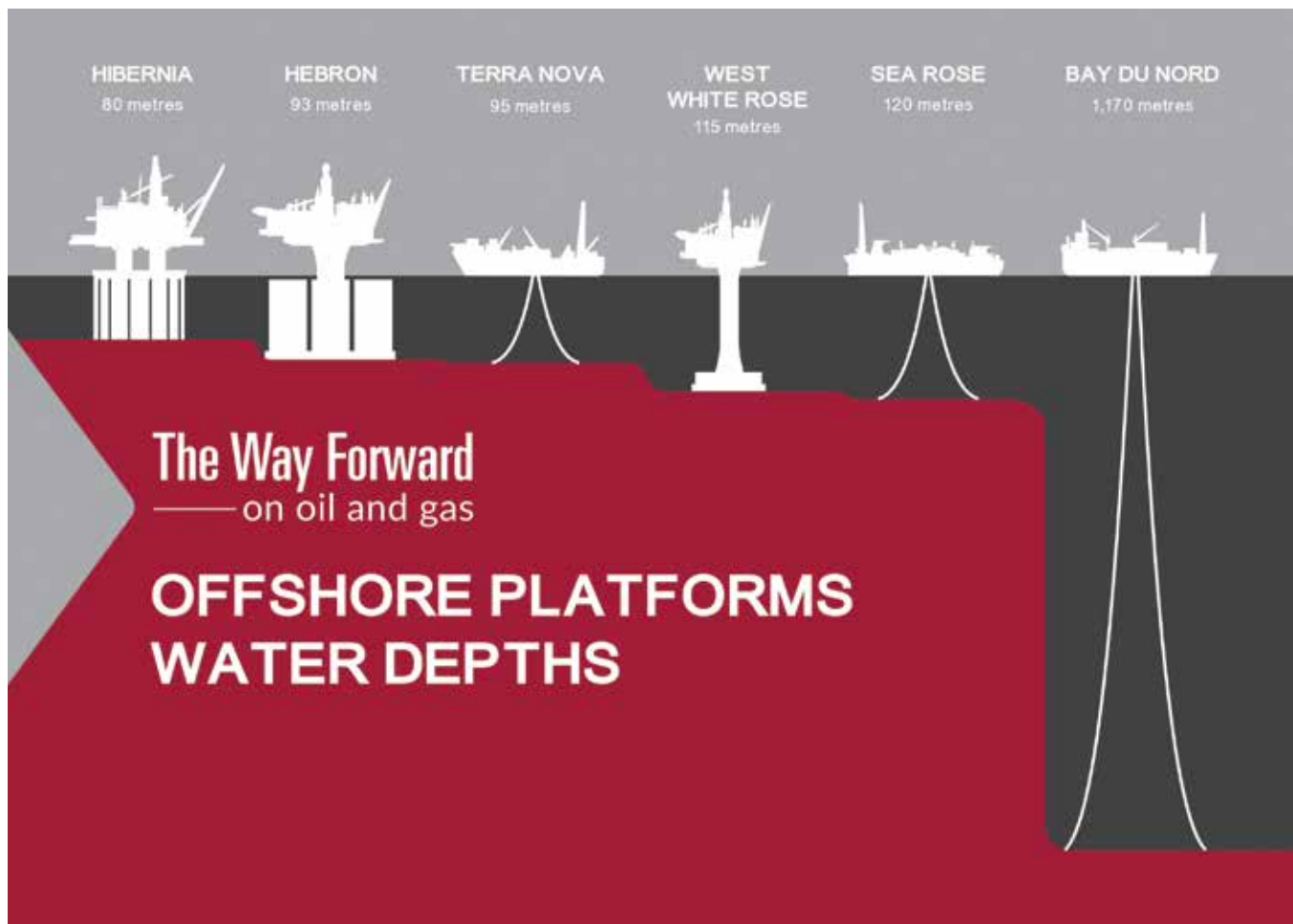
2018:

The year in review

Bay du Nord

In July, Equinor (formerly Statoil) and the Government of Newfoundland and Labrador (NL) announced a framework agreement for a potential development project at the Bay du Nord discovery in the Flemish Pass – the first project outside the Jeanne d’Arc Basin and the first to move into deep water.

Bay du Nord is located about 500 kilometres east of St. John’s, in almost 1,200 metres of water, and contains an estimated 300 million barrels of recoverable oil. It will likely be produced with FPSO technology. It is the first development project frame agreement to be announced under the province’s new Generic Oil Royalty Regulations, with an estimated \$3.5 billion in direct revenues to the NL government. In the pre-development phase, expenditures are estimated at \$6.8 billion, with \$3.4 billion to be spent in this province. Operations phase expenditures are estimated at \$4.1 billion, with the vast majority to be spent in NL.



Graphic credit: Newfoundland and Labrador Department of Natural Resources "Offshore Platforms Water Depths Comparison" published online at www.gov.nl.ca/nr

The project is owned by Equinor (65 per cent) and Husky Energy (35 per cent), and the province has acquired a 10 per cent equity stake through Nalcor Energy – Oil and Gas.

Next steps include finalization of the Acquisition and Benefits Agreement with the province, Canada-Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) Development Plan application and approval and Canadian Environmental Assessment Agency (CEAA) submission and approval. The project is expected to be sanctioned as early as 2020 with potential first oil around 2025.

Husky Energy

During 2018, work on West White Rose progressed on multiple fronts. At the Argentia graving dock site, infrastructure installation was completed in the first half of the year and by mid-September the concrete base slab for the platform had been completed. The slab contains more than 12,000 cubic metres of concrete –

enough to fill nearly five Olympic-size swimming pools. Slipforming of the main pedestal began in October. In other locations, work continued on the topsides structure – which is about 10 per cent complete – in Texas and living quarters construction in Marystown is about 45 per cent complete.

The *SeaRose* turnaround was completed on schedule in the second quarter of the year.

Husky completed an infill well at North Amethyst early in the year and, during the summer, well workovers were carried out at two older wells in the central drill centre. In the fall, two infill wells were completed at the main White Rose field. Another exploration well was planned to the south of the main White Rose field to begin before year's end.

In May, Husky announced a new discovery at the White Rose A-24 well, located approximately 10 kilometres north of the *SeaRose* FPSO. The well encountered more than 85-metres of oil-bearing sandstone and continues

to be evaluated. It could tie back to the SeaRose FPSO directly or via the West White Rose Platform. Husky has a 68.875 per cent ownership in the well, along with Suncor Energy (26.125 per cent) and Nalcor Energy (5 per cent).

In June, Husky and ExxonMobil agreed to an exchange of lands in the Jeanne d'Arc Basin. The agreement included the Fortune significant discovery area (SDLs 1011 and 1012) and lands adjacent to the Hebron field (SDLs 1042 and 1046). Husky also picked up additional working interest in SDL 1011 and 1012 and transferred working interest in SDL 1042 and 1046 to ExxonMobil. Husky says these changes consolidate its position in the Fortune discovery and align with its broader portfolio management strategy for the region.

Hebron

The Hebron platform is seeing excellent early operational and drilling performance. As of September 30, more than 16 million barrels of oil had been produced since achieving first oil in November 2017. By the end of Q3 Hebron had spudded its seventh well.

During 2018, Hebron-related contracts were awarded to:

- LGL Limited for supply of a seabird distribution monitoring study;
- Hyflodraulic for maintenance, repair, hydraulics and fabrication services;
- Spartan Industrial Marine and Nord Marine Services for immersion suit maintenance and repair services;
- Frontier Subsea for subsea engineering services;

- Stantec Architecture for architectural support services; and
- The Call Centre Inc. for emergency callout services.

Hibernia

Hibernia remains the top producer in the Newfoundland and Labrador offshore, averaging 130,000 barrels per day in 2018 up to the end of August, according to statistics released by the C-NLOPB. The facility enjoyed strong drilling and operational reliability in 2018. Hibernia temporarily shut down operations for 34 days in the fall for planned maintenance. This maintenance is routine and important for the integrity and reliability of equipment and is standard safety practice in the oil & gas industry. There is also a regulatory requirement for offshore operators to test equipment and this can only be done when production is shut in.

Terra Nova

Terra Nova's drilling program, using the Transocean Barents, continued through 2018 and will extend into 2019. The work scope includes maintenance of existing wells and drilling new wells in the Terra Nova field.

Suncor continues to pursue the Terra Nova Asset Life Extension (ALE) project and anticipates finalizing its project scope and making a go/no go decision by early 2019.

A turnaround for planned maintenance on the Terra Nova FPSO was completed safely in the third quarter.



The advertisement features a background image of an offshore oil platform and a ship at sea. The text 'Complete asset life cycle solutions' is prominently displayed in white. Below this, a list of services is provided, each preceded by a right-pointing chevron. The Wood PLC logo is in the bottom right corner, and the website 'woodplc.com' is in the bottom left corner.

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Construction of the West White Rose concrete gravity structure continues at Husky Energy's Argentia graving dock site.

On October 18, Suncor's east coast business area received the gold award in the oil & gas category of the 2018 Canada's Safest Employer Awards.

Western Newfoundland

In May, Nu-Oil & Gas PLC received approval from the provincial Department of Natural Resources to carry out a production test at its Garden Hill site on the Port au Port Peninsula. Garden Hill is operated by Enegi Oil, a wholly owned subsidiary of Nu-Oil. The test was expected to last between 30 and 90 days and would start when PVF Energy Services, an oil & gas consulting company based in St. John's, completed required maintenance at the site.

Nu-Oil & Gas has reached a five-year production sharing agreement with PVF to establish commercial production operations on the production licence (PL) 2002-01(A). A farm-in deal to drill additional wells was also reached in May.

Meanwhile, Corridor Resources announced in June that it was suspending work on the Old Harry prospect, an undrilled structure located in the Gulf of St. Lawrence and straddling the border of Newfoundland and Quebec. The company said its analysis of Old Harry shows a structure that is more complex than previously understood, may be more

gas prone than oil prone and overall reserves could be less than originally estimated.

Corridor says it intends to make a formal request to the governments of both straddling provinces – as well as the federal government – to grant a new license to extend Corridor's land tenure on the Newfoundland side and take the legislative and regulatory steps necessary to clarify the status of Corridor's exploration licenses in Quebec.

Nalcor Energy – Oil and Gas

Nalcor Energy – Oil and Gas remained focused during 2018 on the collection of seismic data as well as seabed cores in the areas identified for future license rounds. By the end of 2017, over 170,000 line kilometres of new 2D multi-client data and over 15,000 square kilometres of 3D data was acquired off Labrador and down the southeast coast over the Orphan Basin, Flemish Pass, Flemish Cap and South Coast.

On September 7, Nalcor released the 2018 Oil & Gas Independent Resource Assessment, which identified an additional 11.7 billion barrels of oil and 60.2 trillion cubic feet of gas potential offshore. This latest data relates to parcels on offer in the 2018 Eastern Newfoundland Call for Bids. It brings the combined potential in less than seven

percent of Newfoundland and Labrador's offshore area to 49.2 billion barrels of oil and 193.8 trillion cubic feet of gas.

"We're seeing the potential for multiple material scale opportunities in this upcoming license round and as a result of our 3D data investments we've also uncovered new leads and prospects in an area that was previously offered and is coming back for bidding in this license round," said Jim Keating, Nalcor's executive vice president, corporate services and offshore development.

"Our ongoing collection of data is showing significant geological diversity throughout our offshore. Currently five drilling plans have been submitted to the regulator. These exploration programs, coupled with the province's continued data acquisition, will further build our knowledge surrounding the full resource potential offshore and the role these resources will play in building a strong future for our province."

Orphan Basin

BP Canada is proposing to conduct an exploration drilling project within offshore exploration licenses

in the Orphan Basin, located approximately 350 kilometres east of St. John's. As proposed, the Newfoundland Orphan Basin Exploration Drilling Project would allow the proponent, over a nine-year period, to determine the presence, nature and quantities of the potential hydrocarbon resource in exploration licenses 1145, 1146, 1148 and 1149.

In September, the CEAA announced it is reviewing the Environmental Impact Statement (EIS) submitted by BP Canada to determine whether it contains the necessary information, as outlined in the EIS Guidelines, to proceed to the detailed technical review and to commence a public comment period. In October, the CEAA initiated that consultation, inviting public and indigenous groups to comment on the potential environmental effects of the project and proposed mitigation measures outlined in the proponent's EIS. Deadline for written submissions was November 29.

Land Tenure

In April 2018, the C-NLOPB announced Calls for Bids in the Eastern Newfoundland and Jeanne d'Arc

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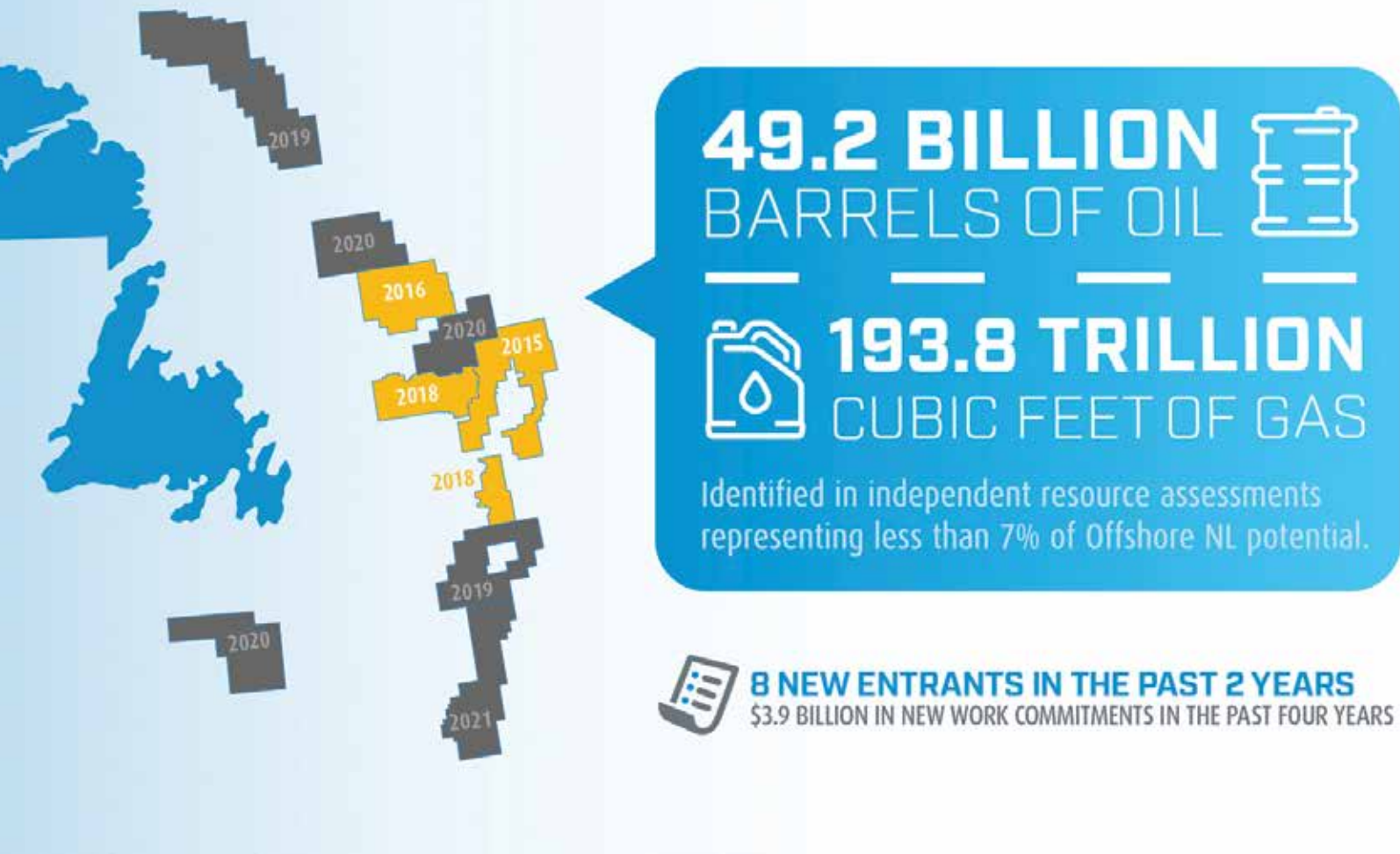
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WHAT DOES THE FUTURE HOLD?



The release of the 2018 Oil & Gas Independent Resource Assessment brings the combined potential in less than seven per cent of Newfoundland and Labrador's offshore area to 49.2 billion barrels of oil and 193.8 trillion cubic feet of gas.

Regions of the Canada-Newfoundland and Labrador Offshore Area, as well as a Call for Bids for a production license in the Jeanne d'Arc Region.

- Call for Bids NL18-CFB01 (exploration licenses, Eastern Newfoundland Region) consists of 16 parcels and a total of 3,941,046 hectares.
- Call for Bids NL18-CFB02 (exploration license, Jeanne d'Arc Region) consists of one parcel and a total of 142,448 hectares.
- Call for Bids NL18-CFB03 (production license, Jeanne d'Arc Region) consists of one parcel and a total of 1,423 hectares.

Sealed bids for these parcels were due on or before November 7. Results of the licencing round can be found on page 15 of this issue.

Following the C-NLOPB's January 2018 Call for Nominations for Areas of Interest, in July the offshore

board identified Sector NL04-EN (Eastern Newfoundland Region) for its 2019 call for nominations of parcels of land. Informed by the 2019 nominations, the Board will design parcels for its 2020 Call for Bids. Any successful bidders would be awarded licenses in early 2021.

In August, the offshore board issued two Calls for Nominations (Parcels), NL18-CFN02 in the South Eastern Newfoundland Region (Sector NL01-SEN) and NL18-CFN03 in the Jeanne d'Arc Region. These will inform the selection of parcels to be included in the 2019 Calls for Bids, which will close in November 2019. Any successful bidders will be awarded licenses in early 2020.

Maritime Oil & Gas Activity

The greatest opportunity for oil & gas development in Nova Scotia and New Brunswick is also the greatest challenge. Research conducted by the Nova Scotia

government indicates up to \$60 billion in onshore natural gas reserves, while prospects in New Brunswick are also considered to be substantial. However, there is a moratorium on hydraulic fracturing – or fracking – in place in both provinces, which effectively forestalls development of these reserves. Public opinion is still weighted against lifting the ban. During May, a poll in Nova Scotia found that only 18 per cent support fracking while 49 per cent oppose it. Support is higher in New Brunswick, where a September poll found that 61 per cent of respondents support the development of natural gas, including onshore reserves, which would involve fracking to some extent.


The Nova Scotia government announced in May that it would delay calls for bids for offshore oil & gas parcels, stating that the timing would not be practical for industry. No call for bids had been issued up to press time.

In June, the Nova Scotia government announced a four-year, \$11.8 million geoscience program to provide a clearer picture of the province's offshore potential. The program will include the collection of core samples, high-resolution mapping of the


ocean floor, seismic images, drilling results and more. Interestingly, the province will work on compiling this research with the country of Morocco, to which Nova Scotia was adjoined 200 million years ago, before the supercontinent of Pangaea began drifting apart. After securing approval early in 2018 from the federal and provincial governments to proceed, BP Canada began drilling an exploration well in the Scotian Basin, approximately 330 kilometres southeast of Halifax. The drilling program could include up to seven exploration wells before it concludes in 2022.

The first well was spudded late in April by Seadrill's West Aquarius rig in 2,777 metres of water, but drilling was shut down 65 days later when 136 cubic meters of drilling mud were leaked into the ocean. After an investigation and repair work, drilling resumed in late July and the well was side-tracked in August.

ExxonMobil continued to move toward decommissioning its Sable Offshore Energy Project (SOEP), while Encana's Deep Panuke field stopped producing altogether. Both operators have applied to the Canada-Nova Scotia Offshore Petroleum Board




A large red tugboat, the Atlantic Towing ship, is docked at night in front of a city skyline. The ship has "ATLANTIC TOWING" and "RESCUE ZONE" markings. The city lights are visible in the background.



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(C-NSOPB) for permission to leave most of its offshore pipelines in place on the ocean floor, after the lines have been cleaned and flushed with seawater. There are almost 200 kilometres of pipeline involved in the SOEP application and 175 kilometres with Deep Panuke.

The C-NSOPB will decide on the applications early in 2019. In October, ExxonMobil awarded Able UK the contract for dismantling, recycling and disposal of SOEP structures at its Seaton Port facility in the UK.

As offshore production of SOEP dwindles, Nova Scotia and New Brunswick are challenged with maintaining supplies of natural gas for their customers. In that regard, the Bear Head LNG project in the Strait of Canso and Pieridae Energy in Goldboro made quiet advances during 2018, though both are at different stages of development.

Bear Head has all regulatory approvals in place and is designed to export eight million tonnes of LNG annually. But first, it must secure a reliable source of gas, which may prove challenging under current circumstances.

The Pieridae project is much further along its development cycle and appears close to getting a green light. In October, the Nova Scotia Utility and Review Board issued the proponent a permit to construct the LNG facility. A research paper published in August by a team of National Bank of Canada energy analysts noted that much was in place, including customers, debt guarantees, most required permits and a labour agreement with the local workforce. The plant intends to import natural gas from the United States via the Maritimes and Northeast Pipeline. As well, it has acquired Ikuma Resources in a stock swap, giving Pieridae ownership of 30 per cent of their required gas

supply, and the company is working on similar deals with other companies that own gas reserves in western Canada.

The Alton natural gas storage project near Stewiacke, Nova Scotia has seen another delay. The project seeks to hollow out deep underground salt caverns to store natural gas, which would be purchased at low summer prices and resold in winter when prices have risen. The latest delay is to allow for the brining process, which could take two to three years. The proponents are now planning for a 2021 start date.

Ocean Supercluster

In February, the federal minister of innovation, science and economic development announced that the Ocean Supercluster – a consortium of industry, research and development (R&D) and academic institutions across Atlantic Canada, spearheaded by Petroleum Research Newfoundland and Labrador (PRNL) – would be awarded millions of dollars in federal funding to boost innovation in ocean and digital technologies.

On November 16, the federal government announced the signing of an agreement to invest nearly \$153 million, matched dollar for dollar by the private sector. The funding agreement means the supercluster can move forward with activities to harness emerging technologies to strengthen Canada's ocean industries such as marine renewable energy, fisheries, aquaculture, oil & gas, defence, shipbuilding and transportation. It is projected that the ocean supercluster will create more than 3,000 jobs and add more than \$14 billion to Canada's economy over 10 years. ■



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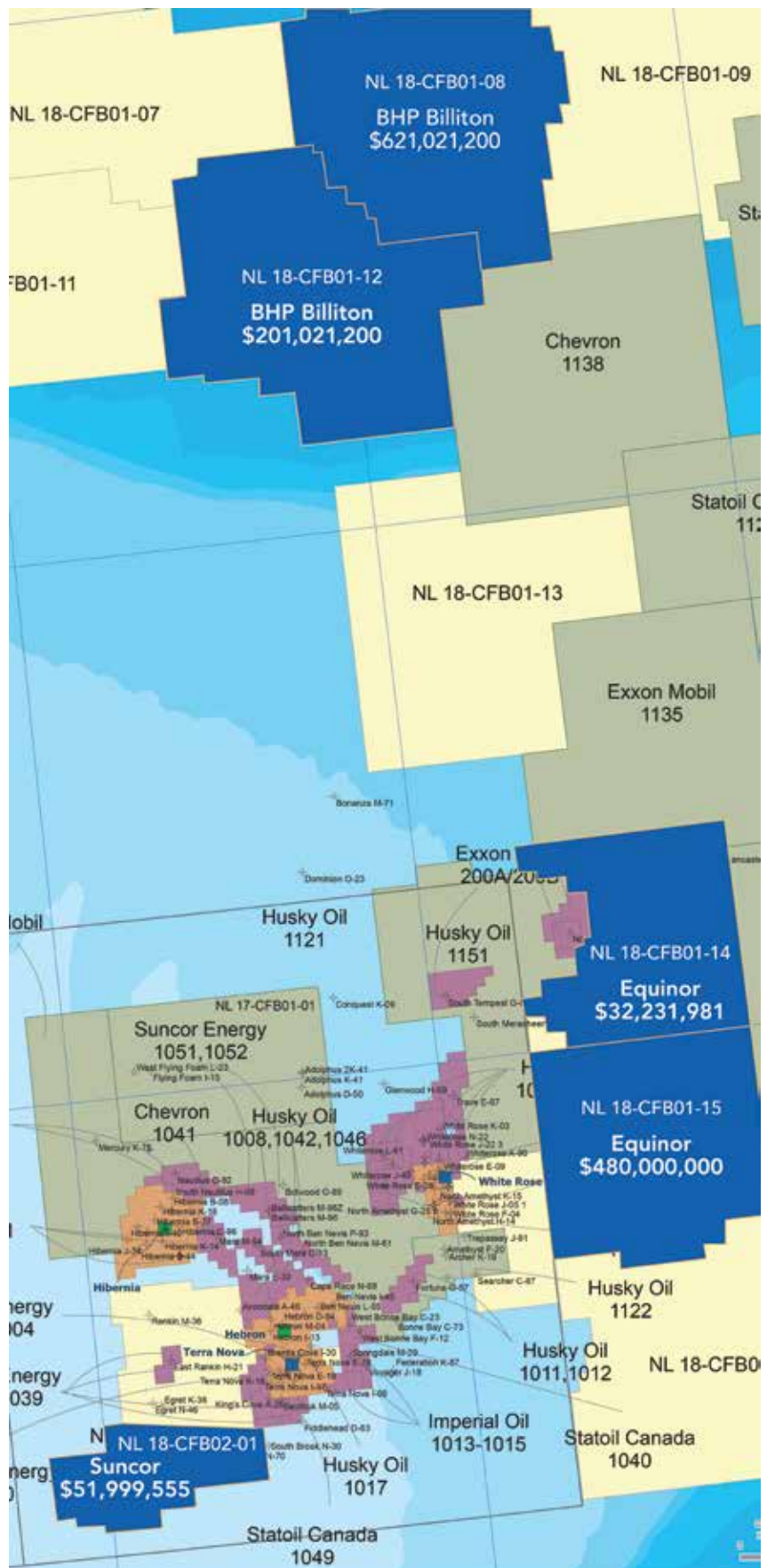
The Canada-Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) announced the results of its 2018 land sale November 7. This year, the overall sale totalled \$1,386,273,936 and included a record single successful bid of \$621,021,200.

For exploration licences on parcels offered in the Eastern Newfoundland and Jeanne d'Arc regions, the sole criterion for selecting a winning bid was the total amount the bidder committed to spend on exploration of the parcel during Period I (the first period of a nine-year licence). The minimum acceptable bid for each parcel was \$10,000,000 in work commitments.

Sixteen parcels of land were offered in the Eastern Newfoundland Region (NL18-CFB01) and four awards were made. BHP Billiton Petroleum purchased Parcel 8 for \$621,021,200 and Parcel 12 for \$201,021,200, while Equinor Canada purchased Parcel 14 (in partnership with Husky Energy) for \$32,231,981 and Parcel 15 (in partnership with Suncor Energy) for \$480,000,000.

Call for Bids NL18-CFB02 offered one parcel of land in the mature Jeanne d'Arc Basin. This was purchased by Suncor Energy for \$51,999,555, in partnership with Husky Energy and Equinor Canada.

Subject to bidders satisfying the requirements specified in the calls for bids and subject to ministerial approvals, the C-NLOPB will issue the new exploration licences in January 2019. ■



Blocks purchased in the 2018 land sale are highlighted in dark blue and note the purchaser and price paid.



Steve Hogan

Meet Suncor Energy's Steve Hogan

When Steve Hogan entered Memorial University of Newfoundland in 1992, he had not imagined a career in the energy industry. Two years into preparing to apply to physiotherapy school, he found an interest in mechanical engineering. Then, a chance sighting of a poster in the engineering building set him on a new path.

The poster, featuring a schematic of the Hibernia platform, piqued his interest in the oil & gas industry that was just beginning to take shape in the province, one that Hogan knew little about. This curiosity led to a work term at Hibernia Management and Development Company in St. John's, launching an energy career that brought him back to the city in February 2017, at that time as Vice President, East Coast Canada for Suncor Energy.

"I've never looked back," Hogan mused. "I always felt that I would end up in business. I didn't anticipate the energy space, but I'm super glad I ended up here."

Since graduating from Memorial University with a Bachelor of Engineering degree in 1999, Hogan has held a variety of technical and leadership positions with Suncor throughout western Canada and on the east coast for the Terra Nova project. Hogan said his love of problem solving, passion for business and extroverted

nature helped launch him on a leadership path. He credits mentors early in his career with realizing his leadership potential.

"I really enjoy working with and being around people. I get energy from that," Hogan explained.

Some of his most enjoyable days at work are when he's working with teams.

"When I'm with people, either solving tough challenges or celebrating our successes, those are the good days. I go home pretty charged."

One of Hogan's biggest challenges is trying to find balance. With two young sons and a very supportive wife, he said it is always top of mind.

"It's difficult. I think everyone struggles with that no matter what position you're in."

From a professional perspective, Hogan said leadership comes with accountability.

"The biggest accountability I have on the east coast is getting everybody home safely at the end of their shift," he stated. "There's a lot of people working on behalf

INDUSTRY PROFILE | Meet Suncor Energy's Steve Hogan

of industry and a big part of my role is making sure that we've got the right culture, the right leadership presence, strong procedures, and that people are trained and competent so they can get home."

He highlighted that Suncor's east coast office just won a gold award for the second time in three years from a national safety program recognizing Canada's safest employers.

Hogan has learned a lot from the many mentors in his life, beginning with his parents.

Referring to himself as "a listening leader," he said it's important to always listen and learn. He carries three key nuggets with him: listen to your people, trust your instincts and receive bad news well.

"I've also come to realize that the collective knowledge of any team or organization is so much more powerful than the sum of all the individuals. As a leader, trying to get that team to behave like one and drive results is part of the fascination I have with leadership."

Outside of work, Hogan said he makes it a priority to be active every day.

"I need to go to the gym, go for a run or play with my kids. That provides me that daily balance."

His other passion is family travel.

"We love travelling together. The time's going quick with the kids and so these are memories, they're priceless."

Despite the many places he's been, Hogan said his favourite place isn't a destination on a map.

"What I've come to realize is that I'm the most content as long as we're together as a family. Wherever we are is where I'm the happiest. It's about the company, not the place."

It should come as no surprise, then, that Hogan considers his proudest moment in life so far, "The birth of my two boys. Full stop."

Being back in his home province again has meant a lot to him.

"I feel proud to be able to work in my home province in this industry which is important to the province. The industry is growing, and having a role here, especially in my position, makes me feel quite fortunate."

Hogan said it is powerful to see government, operators and the service sector working together to move the industry forward. He said the province's goals are aspirational, but achievable.

"We understand what the challenges are, we know what good looks like and we've got a lot of leadership momentum behind addressing these hurdles." ■



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Premier Dwight Ball with Natural Resources Minister Siobhan Coady (center) and Statoil's Vice President for Offshore Newfoundland Unni Fjaer (right) at the July 2018 announcement of a framework agreement for the development of the Bay du Nord project

Department of Natural Resources marks 30 years as a Noia member

Noia is pleased to recognize Newfoundland and Labrador's Department of Natural Resources for 30 years of membership. As the department responsible for the stewardship and development of the province's natural resources it has a close relationship with Noia.

The department is responsible for all matters relating to promotion, exploration and development of mineral and energy resources (oil, gas, hydro, wind and biofuels) and related industry developments in the province. Key operational areas include electricity and renewables, oil and gas developments, benefits and royalties, and mining and minerals. The department's minister is also responsible for oversight of Nalcor Energy and joint management of the offshore through the Canada-Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB).

The department collaborates with other stakeholders to maximize growth and development opportunities. This

includes the establishment of the Oil & Gas Industry Development Council to develop and implement Advance 2030 – a plan for growth in the oil & gas industry. Chaired by the natural resources minister, with permanent membership by Noia and CAPP, the council is focused on working with the department and other stakeholders to develop a sustainable and competitive industry. The vision is for Newfoundland and Labrador to be an internationally preferred location for oil & gas exploration and development, driven by an innovative, sustainable, local industry that is globally competitive, environmentally responsible and maximizes benefits to the people of the province. An immediate priority of Advance 2030 is increasing exploration offshore, which builds on our tremendous resource prospectivity.

Other areas of focus include innovation and supply chain development, and focusing on digital, subsea and ocean-related technologies. The recently launched Business Innovation and Development Fund will invest \$6 million a year over 10 years to encourage innovation, build local supply capabilities and pursue export opportunities, particularly among SMEs.

The department continues to market offshore exploration and development opportunities, education, R&D and supply and service expertise internationally, including having a significant presence at events such as the Offshore Technology Conference in Houston, Offshore Northern Seas in Stavanger and Offshore Europe in Aberdeen. Recently, the Government of Newfoundland and Labrador signed a MOU with Guyana to work on opportunities for growth through collaboration.

As part of the strategic approach to drive exploration, the department is moving forward to position Nalcor Energy – Oil and Gas Inc. as a directly held crown corporation. This will ensure alignment with the actions identified in Advance 2030 for the benefit of all Newfoundlanders and Labradorians.

As the Newfoundland and Labrador oil & gas industry continues to grow, the Department of Natural Resources will continue to play a strong role, as has been demonstrated through its 30 years as a member of Noia. ■



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Imagine the Potential: Sharing the story of our offshore

Imagine the Potential was launched by CEO Charlene Johnson at the Noia Oil & Gas Conference in June 2018 to a great reception by Noia members and conference attendees. The purpose of the campaign is to ensure members, the public and decision makers are aware of the vast potential of the Newfoundland and Labrador offshore resource and ensure the oil & gas industry has the opportunity to flourish and continue to be an economic driver for the province and Canada. A key component of the campaign was the commissioning of an economic impact study about the offshore.

The conference launch provided an overview of preliminary research and a final report has since been publicly released. David Campbell of Jupia Consultants prepared the report which reviewed past and current benefits and forecasted the potential future value of the resource off the shores of Newfoundland and Labrador.

Noia asked Campbell – former chief economist for the Government of New Brunswick – to undertake the study to help quantify the impact of a thriving industry. He has extensive experience in studying energy projects and was engaged to provide an objective analysis. Noia felt an economic study conducted by someone with such experience was required to help tell the story of Newfoundland and Labrador's offshore and the potential of the resource.

The study, which is an easy read – even for an economic analysis – is available at www.ImagineThePotential.ca. Using the Government of Newfoundland and Labrador Advance 2030 objectives for the industry, such as 650,000 barrels of oil production per day by 2030, along with the Brent crude oil price and demand forecasts of the United States Energy Information Administration and the International Energy Agency, the study paints a story of tremendous opportunity, one that the province and the country cannot afford to miss.

Report highlights

The report provided some significant historical data about the contribution of the oil & gas industry to Newfoundland and Labrador and Canada. The impact on individuals is one

There are billions of reasons to support Newfoundland and Labrador's oil & gas industry

www.ImagineThePotential.ca



of the greatest contributions, as demonstrated by the average weekly wage in Newfoundland and Labrador in 2017 being six per cent higher than the Canadian average. In 1998, the province was 13 per cent below the average. Also, in 2017, the oil & gas industry generated 23,500 full-time equivalent jobs in the province (including direct, indirect and induced jobs). There was approximately \$2 billion in wages generated (15 per cent of the provincial total) and \$1.5 billion in consumer spending. The industry also generated \$2.5 billion in capital expenditure and over \$1.42 billion in total tax and royalty revenue for provincial and local governments in 2017.

Noia CEO, Charlene Johnson, feels the economic impact study has proven that the Newfoundland and Labrador offshore is a nation building industry.

"There were \$755 million in wages and \$550 million in consumer spending, along with \$680 million in tax revenue, generated in the rest of Canada in 2017," she pointed out. "And, for every direct job in Newfoundland and Labrador in the oil & gas industry, 1.8 jobs were created in the rest of Canada."

While the industry's past and current economic value has been significant, its potential is tremendous.

The study forecasts that, by 2045, royalty and tax revenue to Newfoundland and Labrador will exceed \$100 billion and, by 2033, the industry will generate 56,000 jobs, with wages and consumer spending expected to more than double to \$4.6 billion and \$3.5 billion respectively. Impressively, the model shows that the oil & gas sector has the potential to generate more revenue for the provincial government in 2033 than the entire economy currently does.

These future benefits extend across the country. By 2033, every direct job in Newfoundland and Labrador is expected to create 2.3 jobs elsewhere in Canada. Other forecasted impacts include \$1.6 billion in wages, \$1.2 billion in consumer spending and \$3.3 billion in tax revenue in the rest of Canada in a single year.

All of this is for an industry which is considered by most observers to be in the early stages of development. With only seven per cent of the Newfoundland and Labrador offshore having undergone independent resource



The advertisement features a scenic view of a rugged coastline with a lighthouse and a red offshore supply vessel. The Irving logo is prominently displayed in the center. Below the logo, the text reads: "We're here to help fuel growth in Newfoundland". At the bottom, a red banner contains the contact information: "Call us at 1.866.865.8800 to learn how we can keep you moving quickly". Below the banner, the text "Marine Gas Oil • Lubricants • DEF" is displayed.

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Charlene Johnson speaks with participants during Noia's October 24 session presenting Jupia Consultants' economic impact report of the province's oil & gas industry.

assessment, there are 49.2 billion barrels of unrisks oil estimated offshore. The past three years has seen \$2.55 billion in new work commitments through the C-NLOPB land tenure process and seven new exploration and production companies have entered the Newfoundland and Labrador offshore. Our prospectivity is world class with over 650 leads and prospects. Optimism within the industry is fuelled by West White Rose expecting first oil in 2022 and a recent framework agreement for an FPSO to develop the Bay du Nord field in the Flemish Pass – a new basin for the industry – with first oil projected in 2025.

Advocacy

In mid-September, Noia Board of Directors Chair Liam O'Shea and CEO Charlene Johnson travelled to Ottawa to meet with senior level federal government employees during a Newfoundland and Labrador offshore seminar. The departments represented were varied and included finance, natural resources, fisheries and oceans, and environment, just to name a few.

Joining Noia were representatives of Nalcor Energy – Oil & Gas, including Jim Keating, executive vice president, and Richard Wright, manager of exploration, as well as Gordon MacIntosh, deputy minister for the Newfoundland and Labrador Department of Natural Resources. Noia, Nalcor and Natural Resources presented during the seminar, highlighting the tremendous prospectivity of our offshore, the goals of Advance 2030 and the economic potential that remains ahead.

Aided by federal government employees, including Andrew Noseworthy of the Atlantic Canada Energy Office, Robin Kieley of ACOA and Melissa Preston of

Natural Resources Canada, the seminar was a half-day event and included informative discussion by everyone involved.

Attendees were extremely engaged as demonstrated by their attentiveness and knowledgeable questions. Of particular interest was the information that Newfoundland and Labrador's light, sweet crude is 30 per cent below the world average in greenhouse gas emissions at extraction. Considering the Government of Canada targets for carbon emissions reduction, it was well understood that Newfoundland and Labrador oil could help meet global energy demand while reducing our global carbon footprint and continuing to be an economic driver.

Another group of senior federal government employees – those enrolled in the Executive Leadership Development Program, a professional learning opportunity offered by the federal public service – came to St. John's in late October and received a briefing by Noia and Nalcor on the importance of the offshore industry. Once again, this was a successful event that ensured leaders in the public service of the Government of Canada are fully aware of the value of the industry and the impact it has made, and will continue to make, upon all Canadians.

Sharing the story

Noia has spent a great deal of time in the last number of months sharing the story of our offshore with members, industry leaders, governments and residents of Newfoundland and Labrador. This has included speaking engagements by Charlene Johnson at events such as Expo Labrador, Offshore Northern Seas in Norway, the



David Campbell of Jupia Consultants presents the Noia-commissioned economic impact report which reviews past and current benefits and forecasts the potential future value of our province's offshore resources.

Placentia Bay Industry Showcase, a Lewisporte and Area Chamber of Commerce luncheon, a Canadian Home Builders Association of Newfoundland and Labrador luncheon and a panel discussion hosted by Women in Science and Engineering Newfoundland & Labrador (WISE NL). Sharing the story at events which allow Noia to broaden the message is extremely important.

Recognizing the importance of having its members aware of the economic study – as they are exceptional ambassadors for the offshore – Noia hosted a member event on Wednesday, October 24. During the session, the association outlined why the economic impact study was commissioned and Jupia Consultant's David Campbell presented the study results. Also during the event, the Department of Natural Resources provided details of its Business Development and Innovation Fund and Nalcor Energy – Oil and Gas provided an update on the prospectivity of our offshore.

Noia members were pleased that such a detailed economic analysis had been undertaken to show the current and future value of the industry. Excitement filled the room as members discussed the potential for the province and the country, as well as the role their business or organization could play in reaching that potential. Overwhelmingly, Noia members in attendance agreed that the story of our offshore must be told at every opportunity and the industry must be provided the opportunity to reach its full potential.

Following the member breakfast session, Noia hosted a session for key industry associations and organizations in Newfoundland and Labrador. Attendees included representatives of the construction, aerospace, real estate and skilled trades sectors, as well as academia and media.

David Campbell presented the economic impact study and Nalcor Energy's Jim Keating provided an overview of our prospectivity.

All of those who attended were similarly struck by the magnitude of the industry and the potential to transform the economy for the betterment of all industries. It was acknowledged by numerous attendees that the oil & gas industry is an economic driver that will help every other sector grow.

Building on the strength of the October 24 awareness events, Noia will continue to share the story of the Newfoundland and Labrador offshore. Noia's Board of Directors and CEO will continue to promote the industry at events throughout the province, and all members are encouraged to share the information with their employees and those they do business with every day. Industry associations who rely on the benefit derived from the industry are also encouraged to share the story and do their part to ensure the industry thrives. Every time the story of our offshore is told and its potential is imagined, additional people join the movement to support our offshore industry.

Noia members, industry associations and the public are encouraged to visit www.ImagineThePotential.ca to learn more and follow Noia's social media channels to share the story with their family, friends and colleagues.

Working together, the potential of the Newfoundland and Labrador offshore oil & gas industry can be achieved for the success of everyone. ■



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In his Fall Seminar presentation, Steven Taylor outlined the most popular technology topics named in the Digital Transformation Working Group's survey of Noia and NATI members.

Fall Seminar 2018

Preparing for the Potential

The annual Noia Fall Seminar provides members the opportunity to delve deeper into industry issues and trends and have enhanced discussions about matters topical in the offshore. Fall Seminar 2018 continued this practice with an exceptional array of speakers, positive dialogue and important networking.

James Parmiter, Fall Seminar committee chair, explained to seminar attendees in his opening remarks that the committee formulated an agenda which focused on the positives of the Newfoundland and Labrador offshore oil & gas industry, and more specifically, the future of the industry. Drawing upon Jupia Consultants recent economic impact report and the associated awareness campaign, Imagine the Potential, the committee felt the agenda should focus on the potential of the industry and how Noia members can be ready for this potential. From there a theme, "Preparing for the Potential," along with topics and speakers, was determined.

Minister addresses industry issues

The day began with an opening keynote address by federal cabinet minister Seamus O'Regan, minister of veteran's affairs, associate minister of national defence, and member of Parliament for St. John's South-Mount Pearl.

The minister began by highlighting many of the key accomplishments of his government for our province. He then addressed a key issue for the Newfoundland and Labrador offshore oil & gas industry, the impending *Impact Assessment Act*. He stated the province is the capital of the offshore industry and the recent opening of an Impact Assessment Agency office in the province is a clear indication of that.

O'Regan outlined his perspective that the Act would be an improvement for the industry over previous legislation by providing a shorter, clearer and transparent process. He highlighted the duty to consult for major energy projects and that a failure to do so would result in court challenges and the inability to complete projects. Importantly for the industry, the minister committed that he would not have red tape be a hinderance to investment in the province. He committed to work with the industry to grow markets for our natural resources and to enhance expertise in the offshore.

Feedback by Noia and its members has been important to the development of *Impact Assessment Act* legislation, said O'Regan, and a framework for a regional assessment of the offshore recently drafted with the Government of Newfoundland and Labrador would be a positive for the industry.

Industry potential

Richard Wright, manager of exploration for Nalcor Energy – Oil & Gas, opened the seminar with information about the prospectivity of the province's offshore. With almost 50 billion barrels of oil in an offshore where just seven per cent of the area has undergone a resource assessment, the possibilities are astounding.

Wright outlined the 2D and 3D seismic work Nalcor has undertaken offshore and how it has materially reduced the risk of exploration. The program has created significant interest in the offshore, including the most recent call for bids which resulted in the highest offshore bid licence round in Canadian history. Proceeds from the 2018 land sale resulted in enough investment to pay for Nalcor's seismic program to date.

Wright compared the Newfoundland and Labrador offshore to other offshore areas such as the North Sea. He indicated that, with 650 leads and prospects, our offshore has the potential to be prolific and have a material impact on the province and country.

Achieving international success

PanGeo Subsea is a local company that has taken knowledge acquired in the Newfoundland and Labrador offshore and exported it around the world. CEO Moya Cahill told the story of how her company developed global success while remaining anchored in Newfoundland and Labrador.

After working throughout the world in places such as the United States, the United Kingdom and the Middle East, Cahill returned to her native province and built a company focused on offshore 3D acoustic technology.

PanGeo Subsea's experience demonstrates that although local supply and services companies should rely on their expertise, they must also monitor global trends and adapt to changing industry needs to prepare for the future. It also shows the benefit of companies expanding their footprint globally to accumulate further knowledge and experience. The growing global energy market is available to



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local companies, but investment and innovation are required to continue this growth.

Preparing for digitalization

Digitalization is a buzzword in the global oil & gas industry and the Newfoundland and Labrador offshore sector is no exception. Around the world, companies are exploring how digitalization can make their operations more effective, more efficient and safer. While trying to determine how digitalization fits into the local industry, Noia members also need to prepare to align their operations and offer services in a manner which matches the digital objectives of major players in the industry.

Noia and NATI have established a working group to understand what digitalization means to Newfoundland and Labrador companies and how companies are preparing for its implementation. NATI board member Steven Taylor outlined how a survey of members of both associations was undertaken to get their perspective on this somewhat elusive topic. The working group intends to use the results to determine what actions may be undertaken to help companies benefit from digitalization.

The member survey showed that companies in the province are aware of digitalization but are looking for guidance on next steps. Over 75 per cent of respondents expect digitalization to be important for them in the next two years which will require further work and collaboration across sectors. Industry requirements will be a significant factor in how they proceed.

Digitalization also figured prominently in the presentation made by ExxonMobil Canada's Stephen Edwards. As safety, security, health, environment and external affairs manager for the company, he outlined how digitalization played a key role – and made a significant impact – on the operations of Hebron, including in worker safety. Describing digitalization as a game changer for the industry, Edwards outlined how a subsea fibre optic cable has enhanced communication between onshore and offshore, replacing VSAT communications. Video and an onshore control centre have streamlined operations, providing added value to the project.

Bay du Nord generating excitement

The recent signing of the Bay du Nord framework agreement has generated excitement in the industry. All eyes are on this next offshore project, which contains substantial reserves estimated at 300 million barrels of recoverable oil and will open a new basin – the Flemish Pass – for the province.

With sanction expected in 2020 and first oil forecasted for 2025, supply and service companies are preparing for the potential. Stephanie Curran, Equinor Canada's safety and sustainability manager, provided attendees with an update on the project and also provided information on the company's corporate strategy to be always safe, low carbon and high value.

The Bay du Nord project, which will likely use FPSO technology due to its deeper water location and distance from shore, is seen by many as a gateway into



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the next phase of offshore development for the province. Curran talked of Equinor Canada's plans to become an operator in the offshore, anchored by Bay du Nord, and its commitment to local participation in the project. She indicated Equinor will have timely communication with local suppliers and ensure bid packages do not unfairly prevent them from participating in bid processes. As it is a difficult project, given its location and environment, she said a coordinated effort will be required by all industry participants.

The C-NLOPB and the future of the offshore

Scott Tessier, chair and CEO of the C-NLOPB, concluded the day with the seminar's luncheon keynote address. In his presentation "What's Next for the C-NLOPB," he provided an in-depth look at the current and future activities of the offshore board, with a specific focus on its role as a regulator.

Bookending the information provided by Nalcor Energy – Oil and Gas at the start of the day, Tessier outlined the success of the province's land tenure system and recent Call for Bids, and outlined the board's next steps. He discussed modernization of the province's regulatory framework and implementation of performance-based guidelines, and indicated consultation will continue on these matters.

Tessier also spoke of the framework, drafted by the federal and provincial governments, to conduct a regional assessment of the Newfoundland and Labrador offshore. The C-NLOPB will have an important role to play in that process, which will improve efficiency while ensuring environmental protection, and will be the first such assessment undertaken in Canada. He anticipated a final

agreement would be available in the coming weeks and looked forward to further feedback on the process.

With respect to the impending Impact Assessment Act, Tessier indicated the board supports the environmental objectives of the legislation and a great deal of work is occurring to prepare for implementation. The C-NLOPB and its Nova Scotia equivalent, the Canada-Nova Scotia Offshore Petroleum Board, are examining integrated reviews to avoid potential duplication. The C-NLOPB will be ready, he said, for implementation with a well-designed process.

In keeping with one of the main themes of the day, Tessier also discussed digitalization; how it will impact the C-NLOPB as the regulator and the industry as a whole. The board believes there will be some challenges, including for it as the regulator, but the industry must work collaboratively to be a party to this change. The C-NLOPB itself is looking at ways to offer digital applications and solutions for its operations.

Tessier also spoke of the need to advance local benefits for the industry. He encouraged offshore operators to communicate any potential gaps they see in competency, training and skills so the issues can be evaluated and proactively addressed. He also acknowledged that while contract bundling often does not benefit local companies, businesses must be competitive and cannot rely solely on the C-NLOPB or the Atlantic Accord to ensure their viability. While the industry has a strong social licence, work must continue, and Tessier believes the C-NLOPB will be ready for the many changes coming in our industry. ■



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Noia members make inroads in Guyana

On the heels of a second successful trade mission to Guyana this fall, many participating Noia members are reporting success in their efforts to become involved in the emerging oil & gas play. Situated on the north Atlantic coast of South America, several significant offshore discoveries since 2015 promise to transform Guyana's economy.

More than 20 organizations took part in the mission, held October 15-19, to explore opportunities in the region. The mission included an information seminar with ExxonMobil and Tier 1 contractors, business-to-business matchmaking meetings with potential Guyanese partners, site visits and networking events.

The growing relationship between east coast Canada and Guyana was further solidified during this mission with the signing of a Memorandum of Understanding (MOU) by the governments of Newfoundland and Labrador and Guyana.

"Both Newfoundland and Labrador and Guyana offer outstanding prospectivity and opportunity," said Siobhan Coady, Newfoundland and Labrador's natural resources minister. "Establishing a government-to-government relationship will allow us to share experiences and knowledge of the oil & gas industry and lead to a relationship that will benefit the economies of both regions."

Caron Hawco, president of Caron Hawco Group, said the missions have opened doors for her company to enable conversations about how companies want to build their communications and marketing to engage in the oil & gas industry.

She has developed a strategic alliance with Guyanese marketing company, Sagacity Media, and has had discussions with other companies

about possible opportunities related to training and industry partnering.

"During this mission we were able to solidify some of our messaging and develop a webpage for the company, as well as having strategic meetings at both the operator and the tier one level."

Hawco also works with Newfoundland and Labrador companies to help them access, learn about and maximize opportunities in Guyana.

"The goal is to do what I was able to do at the beginning of the oil & gas industry here: building the tools of communications at the operator level, as well as at the supply chain level, helping people make connections and facilitating conversations and communications."

Bruce Rogers, CEO, Rogers Enterprises Ltd., (REL) also attended both trade missions. He said the first mission helped him better understand the Guyanese market. Since then, he has signed a MOU with a Guyanese partner, Global Technologies Inc., an established information technology, satellite/mobile telecommunication and training company.

Rogers said the company is looking to expand its services in Guyana to include health and safety consulting and training.

The companies plan to use Global's facilities in Georgetown, while REL will provide personnel with the expertise to train local Guyanese instructors to deliver health and safety consulting services.

Rogers said this mission allowed him to gather additional details about issues such as government regulations, tax laws and legal requirements, while spending time with his new potential partner.

"We're in negotiations now for a commercial agreement between the two parties to formalize that," Rogers explained. "This is a good time to get prepared and be ready for that market."

Rogers said the goal is to facilitate the type of knowledge transfer to Guyana that Newfoundland and Labrador received some 30 years ago.

"We're going into this relationship with the understanding that the goal is to bring our expertise

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Provincial Aerospace representatives Omar Khan (left) and Stephen Green (middle) at Guyana's Centre for Local Business Development.

to Guyana and transfer knowledge to Guyana so that eventually they can be where Newfoundland is now."

PAL Aerospace also attended the 2017 and 2018 missions. Omar Khan, their director of ice/environmental services and medevac, said they were pleased to sign a MOU in June of this year with Roraima Airways, a company they met during the 2017 trade mission.

"We view Roraima as a great partner for the aerospace services we offer, and also helping to bring the aerospace services and environmental services together," Khan explained. "PAL Aerospace in Newfoundland and Labrador has, for over 30 years, been providing environmental services to the Grand Banks operators, and we look forward to doing so in Guyana as the country looks to shape its future with its newly discovered resources."

NSB Energy has also been busy forging business relationships in Guyana. President Mike Critch attended last year's trade mission to gather information and was later referred to a potential business partner. The new partnership, NSB Omega Guyana, was incorporated in Guyana in September, with Guyanese partner, Davitri Doerga, as majority (51 per cent) owner. The company will provide comprehensive workforce solutions and technical staffing to Guyana's oil & gas industry.

"We share our software, processes, procedures (which are ISO compliant) with our partner," Critch said. "They'll use our system, we'll train them and we'll provide them with the guidance that they need."

The Guyanese partners have visited St John's for training, while Critch has been back and forth on several occasions since the first trade mission. They currently have three support staff on the ground in Guyana as they pursue their first contract.

"There's still some work to do but we're currently in discussions with a major oil & gas company for a contract," Critch noted.

Crosbie Group is another Newfoundland and Labrador company with an established partnership in Guyana. Company representatives first visited the country five or six years ago to look at potential investment opportunities in Guyana's mining sector, before learning about its emerging oil industry.

"When we realized how significant the discoveries were, and how quickly the pace of the Liza project was picking up, we started taking a closer look," said Mark Collett, Crosbie Group's chief operating officer. "Perhaps most striking to us are the parallels between Newfoundland and Labrador's experience during the early days of its



Bruce Rogers, CEO of Rogers Enterprises (right), has attended both trade missions to Guyana. His company signed a MOU with a Guyanese partner in information technology, satellite/mobile telecommunication and training, and is looking to expand its services in Guyana to include health and safety consulting and training.

offshore oil industry journey, and Guyana's journey today."

Collett added that joint venture partnerships paved the way for Crosbie Group's development as a leader in the provincial energy sector, including the formation of Crosbie Salamis Limited as a premier offshore asset maintenance and deck services solutions company in eastern Canada.

"Our experience in the industry has been based on a strategy of identifying partnering opportunities and pursuing technology and skills transfer to build capacity in the province. We believe that strategy can work in Guyana as well."

The company did a lot of groundwork to identify its partner, Farfan & Mendes, a long-standing

family business in Guyana. Crosbie Group has spent considerable time in Guyana, meeting with industry representatives and building out its plan to operationalize the business, while its partner has also come to Canada on several occasions.

"You can't do business in Guyana, and have a reasonable expectation of success, if you haven't secured an established partner; we've made significant inroads in this regard and we are well down the road of building our JV company, Panthera Solutions Inc."

Noia News will cover further developments as Noia members progress efforts to export their knowledge and expertise to this emerging market. ■



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Lobsterfest

Lobsterfest is an annual event taking place during Noia's conference week each June. The event, which is sold out months in advance of the conference and attended by hundreds of conference-goers, donates its proceeds to assist with Noia's operating expenses. This year, \$7,700 was presented to Noia CEO Charlene Johnson (second from right) by event organizers Phil Whelan (L), Alexia Giles (second from left) and Matt Shinkle (R).



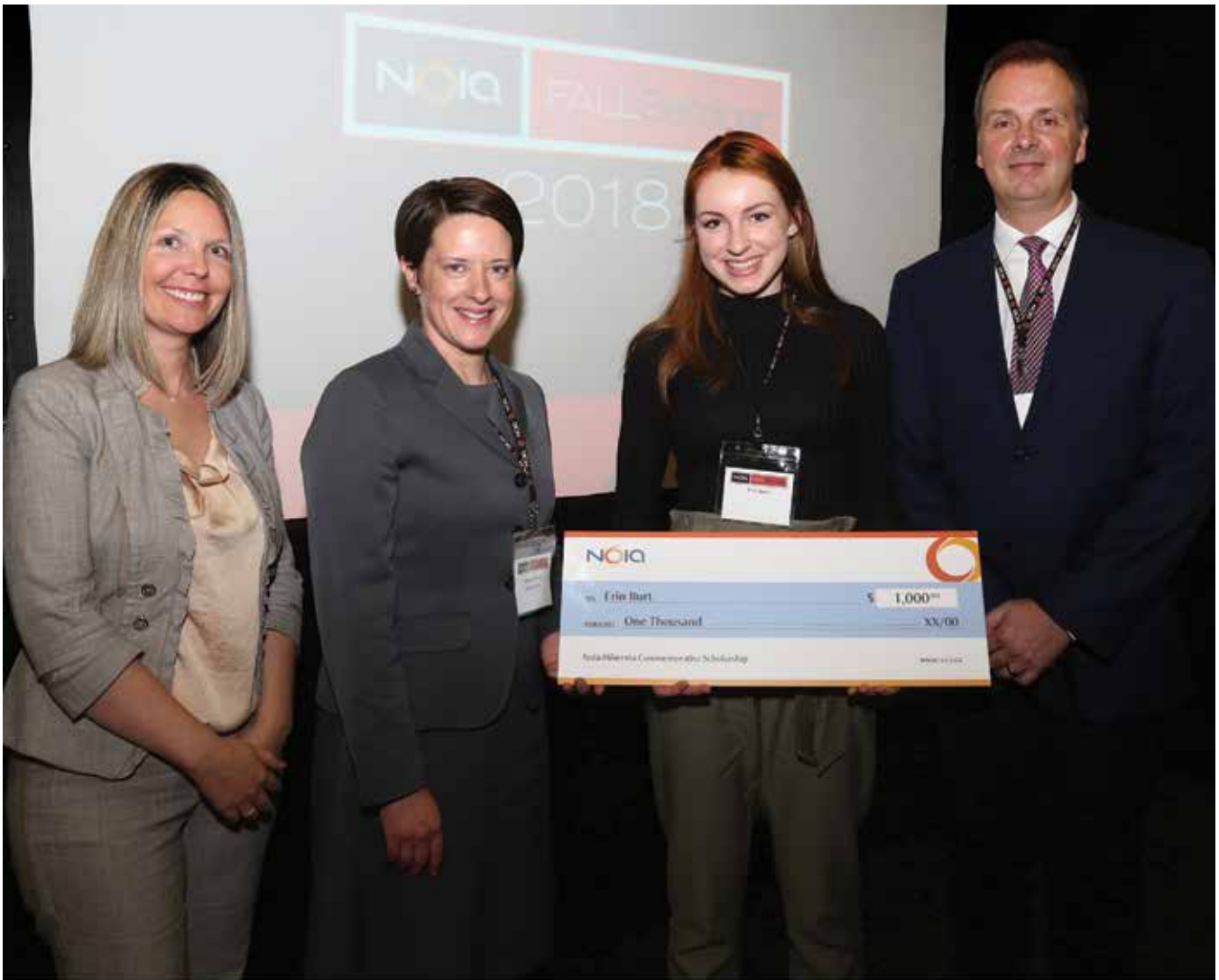

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Noia-Hibernia Commemorative Scholarship

Erin Burt, a graduate of Holy Spirit High School in Conception Bay South, was presented with the 2018 Noia-Hibernia Commemorative Scholarship during Noia's Fall Seminar. Erin is studying engineering at Memorial University with a goal of working in the oil & gas industry upon graduation. Presenting Erin (second from right) with her \$1000 scholarship are (L-R) Noia CEO Charlene Johnson, and Karen Winsor and Jason Fudge, both members of Noia's Board of Directors.



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