



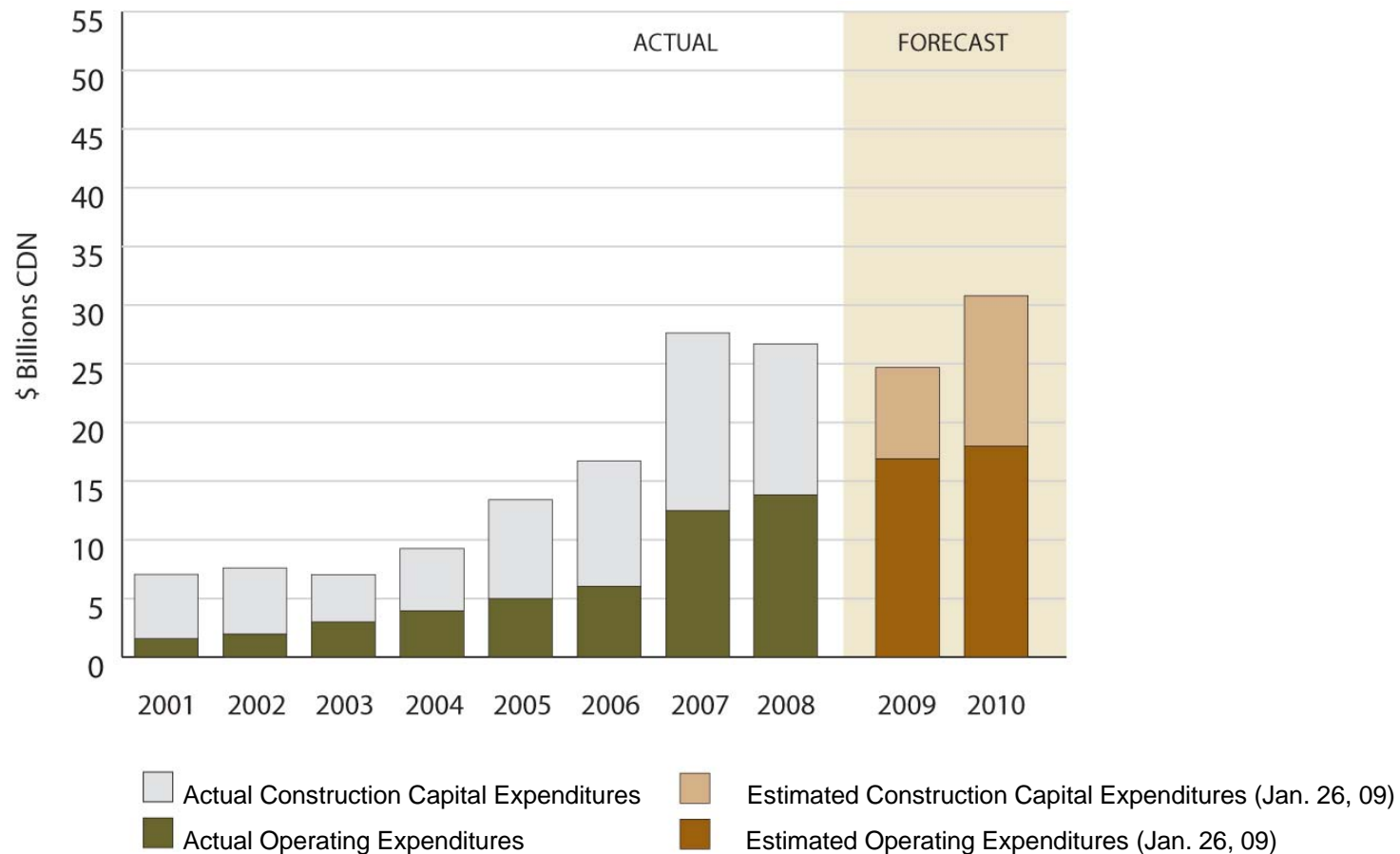
THE OIL SANDS  
DEVELOPERS GROUP  

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Energy From Athabasca

***The Oil Sands Developers Group Forecasts***  
**September, 2009**

# Combined Oil Sands Expenditure Outlook

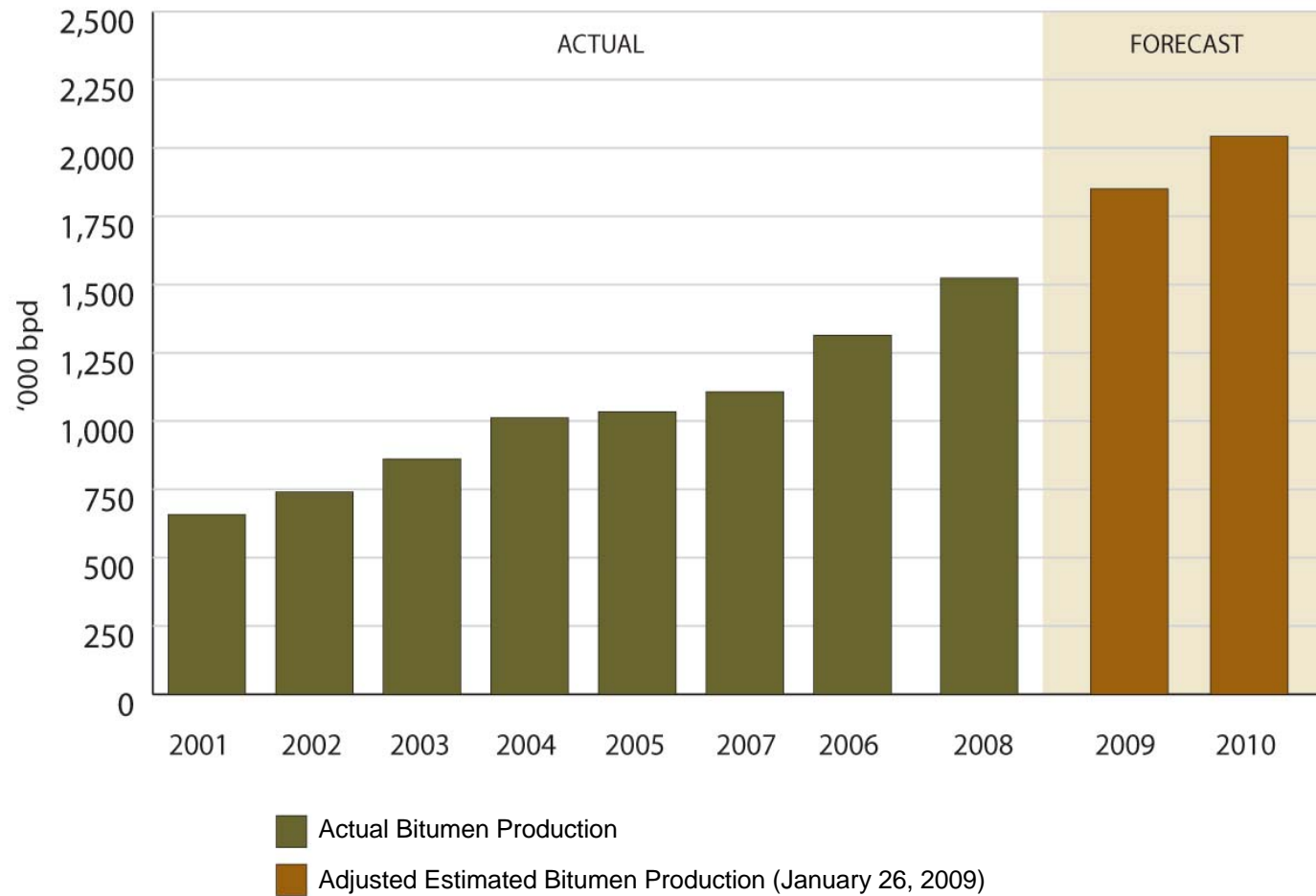


Construction capital expenditure estimates are for all Alberta oil sands projects, including all related pipeline, upgrader and co-generation projects that have been publicly announced

Source: Construction Capital: Canadian Association of Petroleum Producers data and Nichols Applied Management's revision of 2008 OSDG data, Operating Expenditures: Nichols Applied Management's revision of 2008 OSDG data



# Oil Sands Production Outlook

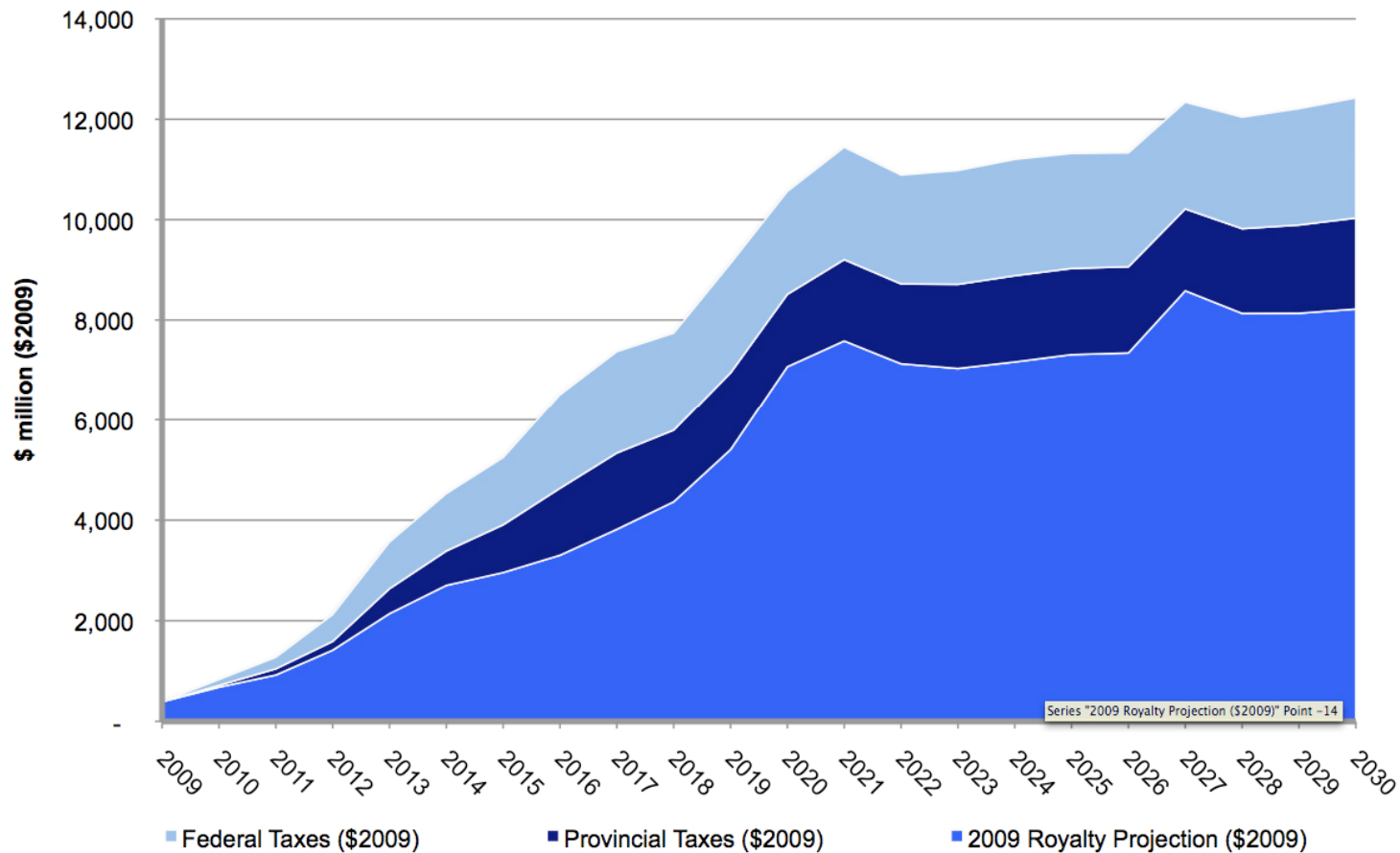


Source: Canadian Association of Petroleum Producers and Nichols Applied Management's revision of 2008 OSDG data. Results include all oil sands projects within the province of Alberta.



# Oil Sands Royalties and Corporate Taxes Projection 2009\*

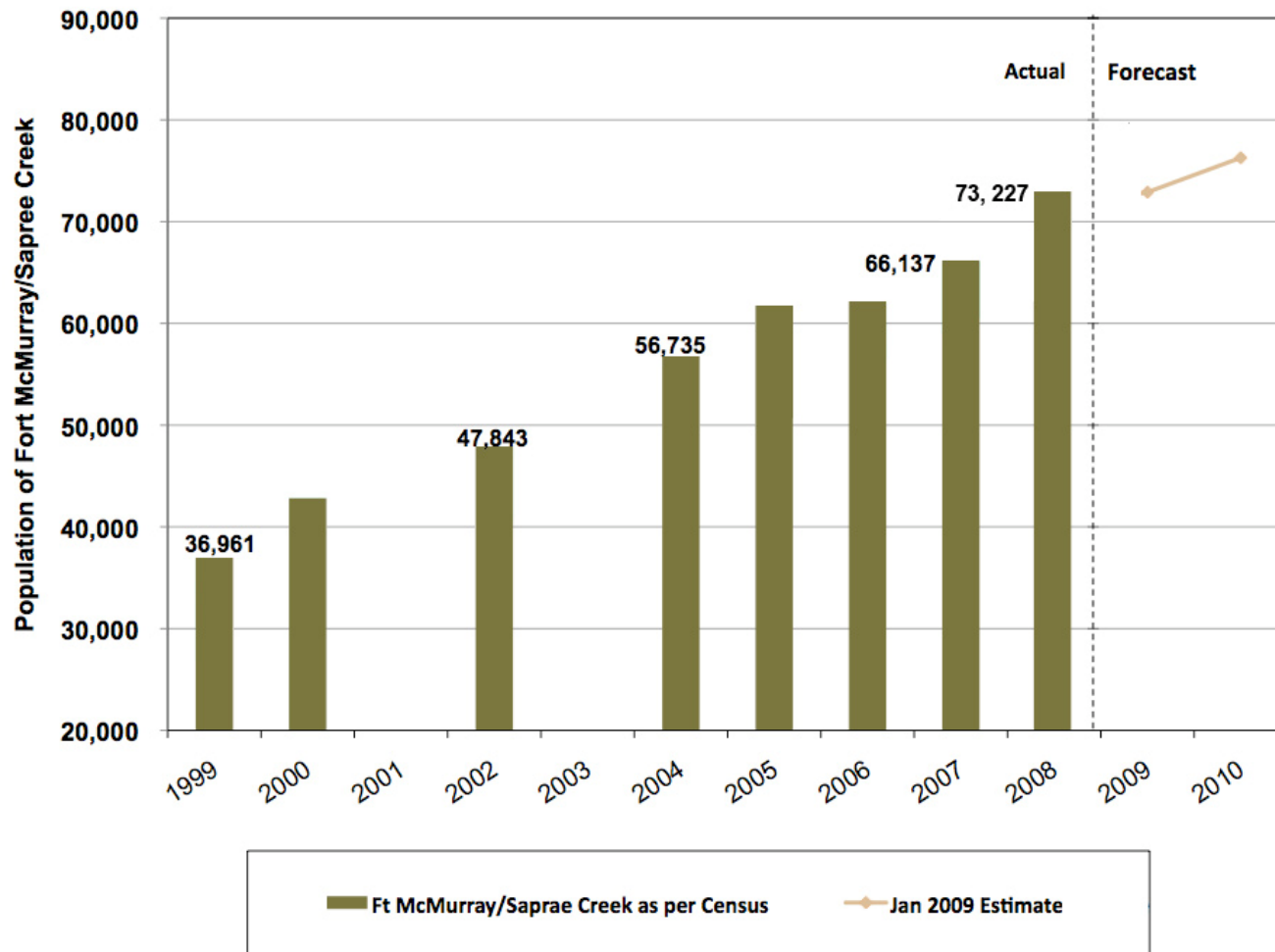
## Royalties and Taxes



\*A long-term (i.e., 2013+) oil price of WTI US\$ 75/Bbl has been assumed in this analysis with an assumed WTI price of US\$54/bbl in 2009 and US\$62/bbl in 2010 then rising to the long-term price in 2013. Results include all oil sands projects within the province of Alberta.

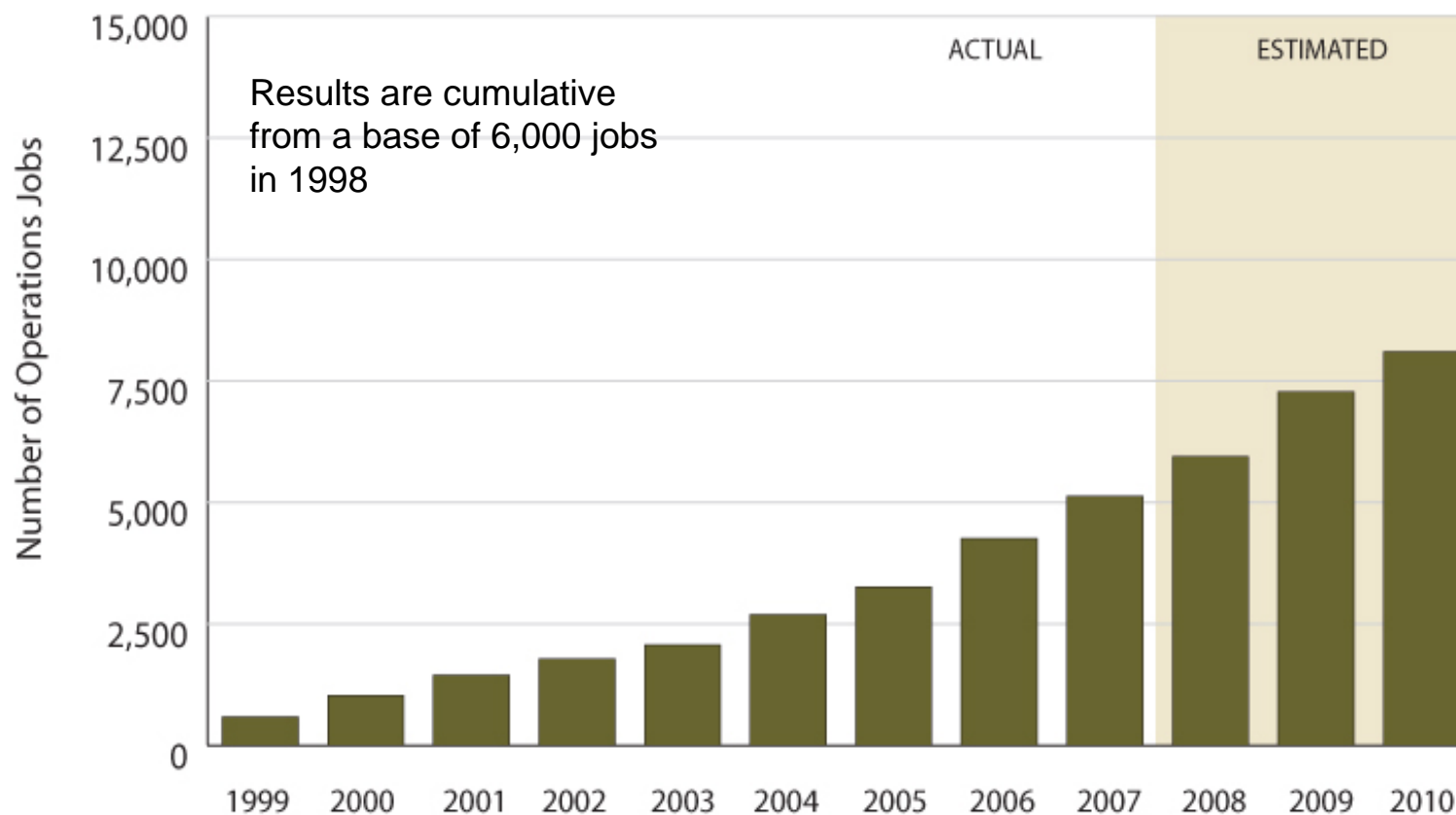


# Projected Population Growth – Fort McMurray Urban Service Area



Source: Nichols Applied Management, based on a revision of 2008 survey data

# Oil Sands Permanent Operations Jobs – Wood Buffalo Region



Source: Nichols Applied Management, based on a revision of 2008 survey data. Estimates do not include construction jobs or contractors and include only jobs in the Wood Buffalo region of Alberta.

# OSDG Members' Community Investment

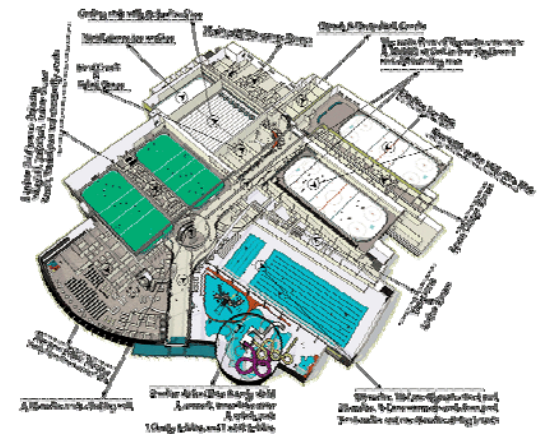
Corporate donations of \$10 million were made by OSDG members in 2008 to groups and organizations within the Regional Municipality of Wood Buffalo, including:

- \$3M for the Suncor Community Leisure Centre at MacDonald Island
- \$2.5M for the performing arts theatre at Holy Trinity High Catholic School

OSDG members value ongoing support for key community service organizations including:

- United Way (Fort McMurray is *per capita* leader in Canada)
- Keyano College
- Northern Lights Regional Health Centre
- YMCA of Wood Buffalo Day Care
- The Hub Family Resource Centre

More than \$62 million has been donated over the past 11 years.



Source: OSDG 2008 Member Survey

# Aboriginal Participation in Oil Sands Development

- Value of contracts in 2008 with local Aboriginal companies – **\$575 M**
- Value of contracts from 1998 to 2008 with local Aboriginal companies – **\$3 B**
- Aboriginal employees in permanent jobs in 2008 – **1,500+**
- Contributions to Aboriginal communities in 2008 – **\$2.4 M**
- Industry Relations Corporations funding for consultation & project-specific reviews in 2008 – **\$7 M**



Source: OSDG 2008 Member Survey

# Disclaimer

This presentation contains forward-looking information. Actual results could differ materially due to market conditions, changes in law or government policy, changes in operating conditions and costs, changes in project schedules, operating performance, demand for oil and gas, commercial negotiations or other technical and economic factors.

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