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Report on the Industry Review of Surface Compensation Database

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Executive Summary

The Surface Land Compensation Database (“the DB”) (www.wdmarriott.com) is currently undergoing a comprehensive review by the industry as represented by the largest drilling operators. The main supporters and sponsors of the DB requested a review of the objectives, principles, and operation of the DB. The purpose of the review is to determine what (if any) improvements can be made to the DB to increase its acceptance and participation or whether the ongoing operation of the DB can be justified. In addition, the review did a formal survey of operators (and will do a survey of brokers, if necessary) to determine their views on surface compensation issues, policies and practices, and whether they feel the DB and aggregate analysis will help in addressing those issues.

A preliminary meeting was held on April 13, 2010 and based on that meeting and the operator survey the following conclusions emerged:

- The objectives of DB, i.e. a competitive surface market and efficient price research are still valid for the industry,
- The principles and core values of the DB are still valid for the industry,
- The DB with personal networking is the most effective way to do price research,
- The only other alternative to the DB (having brokers be custodians of their pricing data and have them distribute it via word-of-mouth) was not seen as a viable or effective way to maximize communication efficiency,
- The current DB ‘best efforts’ method in collecting data is not good enough so improvements must be made in data coverage, completeness and accuracy,
- The single product of the field tool DB is insufficient for the major company segment of the industry and additional products must be a part of the offering,
- The single product of the field tool DB is also insufficient for the junior company segment of the industry and additional value must be provided,
- While there are many legitimate areas for improvement in the DB there are also numerous erroneous or outdated misconceptions which must be corrected.

The following are the main recommendations to improve the DB:

- Re-brand the DB as an association of members whose objective is to share surface access and compensation information,
- Restructure the governance of the DB with quarterly meetings of an Advisory Board (3 operators, 3 brokers) and quarterly user-group meetings,
- Expand the product to include aggregate analysis, benchmarking and lobbying support to appeal to the large company segment; and to report on ‘the issues of the day’ thus acting as a window and forum on surface access issues for the junior segment,
- Extend the field tool to provide a monthly index on the entire compensation ‘market’,
- Institute a rigorous data control protocol to ensure completeness and accuracy of data,
- Identify non-members explicitly so users will understand potential data gaps,
- Devise a new fee structure that will ensure that the operator/beneficiaries provide most of the funding while the broker/users pay only a token access/registration fee,
- Undertake a comprehensive marketing and sales process of the new association to the entire producer industry and broker service sector.

A second meeting was held on June 2, 2010 to review these recommendations and to ask for individual company support in the new venture. Based on the industry support a decision will be taken to either proceed with the ‘new and improved’ DB or to terminate it.

What is the problem/prize?

Surface access payments in Alberta have increased dramatically in recent years. Despite the lowest drilling levels in nearly 20 years and despite a 25% reduction in overall industry costs in 2009, surface access payments reached all-time highs in 2009. In the current lower commodity price environment, a 15-20% per acre increase in annual rental budgets is not acceptable. Increasingly, corporate management is concerned with these ever increasing costs. Part of the solution to this problem is easy access to accurate and complete pricing.

Those who are active in the Surface function are well aware of the increasing surface payments for the areas in which they work. In aggregate, Alberta first year (initial consideration) \$ per acre payments have increased 63% over the 5 year period (mid 2004 to mid 2009) while \$ per acre rentals increased 44%. All of the component parts (e.g. land value, loss of use, general disturbance, adverse effect, etc.) of the first year payment and annual rental increased, although at different rates. Further, the worst performing years were 2008 and 2009, both with increases in excess of 15%. To put some perspective on this, the following table shows a comparison of changes to other key indicators over the same period.

Table 1

Five year changes - key indicators				
	Mid 2004	Mid 2009	Change	% change
Alberta Drilling *	18279	4555	-13724	-75.08
P&NG Bonuses (\$/ac.)	398.46	136.08	-262	-65.85
Natural Gas Price (\$/m3)	225.62	136.68	-89	-39.42
Alberta CPI (2002 = 100)	105.9	121.5	16	14.73
Adverse Effect per site	1668	1974	306	18.35
General Disturbance per site	1357	1685	328	24.17
Loss of Use (\$/ac.)	242	345	103	42.56
Surface Rentals (\$/ac.)	635	915	280	44.09
Agricultural Real Estate (\$/ac.)	832	1201	369	44.35
First Year (\$/ac.)	2066	3362	1296	62.73
Oil Price (\$/bbl)	38.02	69.68	32	83.27
Land Value (\$/ac.)	1061	1983	922	86.90

* full year 2005 and 2009

While the major indicators (except oil price) show an industry in decline, the cost of surface access is increasing dramatically, outstripping the Consumer Price Index (CPI) and agricultural real estate prices. In 2009, if the estimated 125,000 freehold wells and facilities in Alberta, paid the going rental rate this would amount to approximately \$400 million. In 2004, aggregate rentals were only \$280 million. The recent double digit percentage increases in rentals mean that industry rental payments are increasing \$50-60 million per year on existing leases.

Although the prize is significant, there is a difficulty in attributing any direct benefits to the influence of better pricing information through the DB. At best, the benefits are indirect and cannot be measured. Thus, when most companies are evaluating participation in the DB they are looking only at their direct benefits from their direct usage of the field tool. Since these are often perceived to be negligible it is sometimes difficult for companies to justify participation.

Recommendations

The April 13, 2010 meeting (see appendix for attendance list) and the operator survey revealed both the strengths and the weaknesses of the current DB field tool. The strengths of the DB concept are still substantive enough to justify an attempt to expand acceptance and participation. But also, the weaknesses are substantive enough that a new approach needs to be taken to the communication of compensation and other surface access information. Below are the major recommendations for industry to consider in order to reinvent the DB as a more reliable and acceptable tool. (A number of issues were raised during the review but no definitive recommendations could be made until further analysis and feedback from industry is undertaken. These issues are summarized at the end of this section for further review by the user group.)

Recommendation #1: Re-brand the DB as an association of members whose objective is to share surface access and compensation information. Under the current Marriott brand it is easy to misconstrue the DB as a commercial for-profit venture as opposed to a cooperative venture similar to an industry association eg CAPP or SEPAC or a trade association such as CAPL or AASLA. This misconception of the DB causes participants to evaluate the DB by its in-house usefulness which may be very thin if 90% of the company's surface leases are taken by brokers. In fact, the original and ongoing intent of the DB is for members to provide data so that all field agents (primarily brokers) may be adequately informed. The DB was originally created not so that the largest drillers could know what other operators were paying but rather so that their specific compensation policies could be understood by field agents who were either not employees or not consultants of the participating company. The current recommended working name for the association is the Access Information Exchange or AIX (pronounced Axe). The Association may be formally established under the Societies Act or run informally by a Board of Advisors. Membership in the new association and access to the DB and other information is conditional upon supplying data in conformance with an explicit data control protocol.

Recommendation #2: Restructure the governance of the DB to have quarterly meetings of a Board of Advisors (3 operators, 3 brokers) and quarterly user group meetings. The recommended governance structure would provide for a both high level accountability and direction through a Board, and also provide a mechanism for addressing lower level operational and performance issues through the user group. The intention is not to create cumbersome reporting and governance structures but rather to provide adequate responsiveness and communication on the success of the stated objectives of the association. If issues arise then they can be dealt with at the appropriate level. The meetings of the user group can also be used to discuss the 'surface issues of the day' as well as to present aggregate data analysis on various topics. At the time of writing, CAPL has been approached to take over the governance and administration of the DB, and while they approve in principle, any further progress will depend upon extending coverage and being assured that they can cover costs.

Recommendation #3: Expand the product to include aggregate analysis, benchmarking and lobbying support to appeal to the large company segment; and have the website report on 'the surface issues of the day' thus acting as a window and forum on surface access issues for the junior segment. The current DB field tool does not provide enough direct corporate benefit to make a subscription attractive to either the very large corporations or the very small companies. To address this deficiency the product needs to be extended to provide additional 'management' information as an included part of the membership fee. Thus, the yearly aggregate analysis will be automatically included with membership. Benchmarking (which will

require additional fine tuning of the approach) will be included for the top ten operators. Also, any bona fide requests for analysis from the industry associations to support lobbying efforts would be provided free of charge. For the smaller companies, the new association website would provide both a window on surface access issues in general and surface compensation issues in particular. Thus issues will be raised, explained, and discussed on the new website and also discussed in the user group meetings. While this feature is primarily intended to make the association attractive to smaller companies, clearly all surface agents who are interested in current issues can benefit from this new clearing house for information.

Recommendation #4: Extend the field tool to provide a monthly index on the entire compensation 'market'. One specific improvement to the field tool would be to use all the data to show the current overall state of the surface compensation market. This would help agents determine appropriate compensation when data sources are incomplete or dated. The index would be similar to a stock market index or average real estate prices. The purpose would be to provide both the direction of the overall market and how much it is changing over time.

Recommendation #5: Institute a rigorous data control protocol to ensure completeness and accuracy of data. The most common concern expressed by companies big and small was about adequate data coverage, the completeness of the data, and its accuracy. Where data is received directly from operator's computer systems there is very little concern. However, where data is being submitted either from brokers or in-house agents there is concern that some data may be lost or intentionally not submitted. Further, the accuracy of the submitted data needs to be assured. To address these concerns the operating companies together with the database administrator will need to establish a common and rigorous monthly data control protocol that will ensure that data is submitted from all sources and can be verified as accurate.

Recommendation #6: Identify non-members explicitly so users will understand potential data gaps. Because data coverage and accuracy is such an important determinant of the usefulness of the DB, users will need to know whose data is not contained in the DB. Thus, operators choosing not to submit data to the DB will be explicitly listed so field agents will know that additional contact/research will be necessary to understand the rates in the areas in which those companies operate. Similarly, operators will wish to know which brokers have access to the DB and are actively supplying data. Thus brokers not using the DB and not supplying data will also need to be explicitly listed so operators will be prepared to accept their additional research costs.

Recommendation #7: Undertake a comprehensive marketing and sales process of the new association to the entire producer industry and broker sector. If approved, the 'new and improved' service will be reviewed at a meeting of brokers on June 16. After that a roll out to the entire producing industry will be effected by direct marketing to all producers.

Recommendation #8: Maintain a direct liaison with all the producer associations (ie CAPP and SEPAC) and land agent associations (CAPL, IRWA, AASLA) to eliminate misunderstanding and misconceptions concerning the new association. While the DB has a number of legitimate concerns, there are also a substantial number of misconceptions which undermine acceptance within industry. In order to ensure that misconceptions are not passed along it is recommended that the DB administrator become an active participant on the various committees addressing surface issues. This will also provide an opportunity for the administrator to stay current on the 'issues of the day'.

Recommendation #9: Refer the following to the user group for further analysis and review:

- i) **Alternative delivery options eg Accumap or Geologic,**
- ii) **More detailed Surface Rights Board decision summaries,**
- iii) **Feasibility of SRB – Dispute Resolution information reports,**
- iv) **Additional data to be collected for field tool,**
 - a. **Outlier identification**
 - b. **Compensation drivers eg mineral expiry**
- v) **Opportunities to collect data from land software systems eg CS Explorer, Landrite etc,**
- vi) **Extend data coverage to include BC.**

These and many other suggestions were raised in discussion but will require further analysis and feedback from industry before definitive recommendations can be made.

Recommendation #10: Devise a new fee structure that will ensure that the operators (ie the beneficiaries) provide most of the funding while the broker/users pay only a token access/registration fee. The primary beneficiaries of an effective DB will be the operators because of a more competitive surface market and also because of reduced costs for field price research. Thus, they should be the ones providing most of the funding. Since the broker costs are ultimately paid by the operators they should be charged only a nominal access fee. The proposed yearly association fee structure for operators is as follows based on the aggregate freehold drilling in BC plus Alberta plus Saskatchewan. The broker schedule is based on number of employees.

Operators (based on drilling)

Biggest 10 - \$6000

next 10 - \$3000

next 10 - \$1500

next 10 - \$750

all others - free if data submitted

Brokers (based on employees)

Biggest 15 - \$500

all others \$250

one-man operations - free if data submitted

Brokers will also be able to purchase advertising on the website.

Results of the Survey Questionnaire

The survey ([Operator Survey Results](#)) clearly showed ongoing support by the industry to control surface access costs and to provide adequate pricing information for field agents. However, it fell short in terms of indicating widespread support for a centralized compensation DB as a means to achieve those ends. It seems that while everyone can agree on the 'motherhood' principles it is another story when 'push comes to shove' and companies actually have to make the motherhood work in the real world.

Fully 80% of respondents indicated that they agreed with the DB objectives of market efficiency and research efficiency. 95% agreed with the underlying DB principles and 85% indicated that the most effective method for price research is the DB augmented with word-of-mouth networking. There was virtually universal agreement with the 2005 IRWA position on field pricing and research. 95% of companies recommend a specific approach to compensation that would be most effectively achieved by reference to a comprehensive DB.

And yet... Only 65% felt that the existing problems with the DB could be solved, although another 10% were unsure whether they could be solved or not. When asked if based solely on the discussion at the April 13 meeting, their companies would supply data to the DB, only 45%

said yes (and some of those with conditions) while 25% said no, and 25% said they would have to have to take the question back for a corporate review.

A majority (65-70%) of respondents felt that a DB subscription would be enhanced by additional services or a change in governance with users more directly in control. Other findings include over 70% of drilling occurs on freehold lands and over 70% of all takings are done by brokers.

'New and Improved' DB Service/Product

While the DB is almost universally known as a field tool to research detailed and particular compensation, it also has other important functions. These arise out of the ability to analyse large amounts of data.

One important function is an administration function to support the calculation of rent review values. In the rent review function, the data is not used to determine competitive 'market values' at a specific location at a specific time, but rather to analyse a broader geographic area to see how aggregate values have changed over time. Then a rent policy is set to ensure equitable treatment of landowners for that geographic area. Depending on the rent policy of the company, this administration function can be complicated or simple but requires specific custom analysis of large amounts of data.

Yet another important function is the aggregate analysis of the industry as a whole. This includes industry trend analysis and company benchmarking. Overall pricing and individual heads of compensation components are changing over time and the data allows for an aggregate analysis of how much change is taking place, both in aggregate and in the individual components. Further, price movements are not uniform across the provinces so the unique characteristics of different areas can also be analysed. For the most recent trend report see "Trend Analysis 1999 – 2008" at the WDM site ([Trends 1999 - 2008](#)). A recent study concluded that rates in Alberta are rising very quickly but that the rapid increases are not due to the corresponding increases in the fundamentals of real estate values or agricultural receipts. See "Alberta Surface Compensation – Fair and Equitable?" at the WDM site ([Fair and Equitable?](#)).

In order to make the DB participation more attractive to a larger proportion of the industry some additional services or products need to be provided to appeal to those who may have a limited use for the field tool. These additional products services are summarized in Recommendation #3 and #4 above.

In addition, the new website will act as a window on Surface issues for the industry. The following is a partial set of the issues which will be documented:

1. Ever increasing surface access costs in Alberta,
2. Migration of Alberta rates to Saskatchewan,
3. Review of the Surface Rights Acts (AB within the Land Use Framework review),
4. Representations by agricultural lobby eg. AAMDC claims payments decreasing,
5. Increasing effectiveness of advocates and surface rights groups,
6. Implications of the SRB Dispute Resolution process,
7. Formation of BC Farmers' Advocate Office (FAO),
8. Ongoing debate around Adverse Effect and rents on pipelines,
9. AB FAO to form its own compensation DB,
10. Representation on surface issues in current Alberta competitiveness review,
11. Increasingly contentious rent review process.

Issue Resolution

An important purpose of the industry review of the DB was to fully enumerate and describe in detail all the problems with the DB field tool that were preventing acceptance and participation. Once a problem was fully understood, it was then determined if the concern is a valid one or not. For those valid concerns one of the recommendations above is suggested to solve the problem. For those concerns that are unfounded a communication program will be undertaken to provide more information. All the known concerns listed below are sorted by how serious they are to undermining acceptance and participation.

Valid and Serious Issues

1. DB is 'not accurate' or 'not reliable'
2. DB has inadequate industry coverage
3. DB excludes 'extra' payments
4. DB excludes 'bad' deals
5. Brokers fail to supply data
6. DB lacks rigorous data control function
7. No use to operator who exclusively uses brokers
8. We set the prices in our areas
9. Smaller operators will not commit to supply data
10. Participating companies do not supply all data

Solution/Recommendation

- #5 data control
- #8 marketing, #6 identify gaps
- #5 data control
- #5 data control
- #4 index, #7 reduced fees
- #5 data control
- #3 new products
- #1 re-brand as association
- #3 new products
- #2 governance, #5 data control

Valid but Not-so-Serious Issues

11. Administrator doesn't do enough sales and marketing
12. DB report not accepted as evidence at SRB hearing
13. DB violates a sacred trust confidentiality
14. We have our own DB and that is all we need
15. Develop as credible tool for SRB Dispute Resolution
16. SRB hearing decisions need more detail in DB
17. Additional data – compensation drivers
18. Additional data – outlier identification with contact

- #8 marketing
- better evidence is lease doc
- lease doc disclosure clauses
- #1 re-brand
- #10 refer to user group
- #10 refer to user group
- #10 refer to user group
- #10 refer to user group

Unfounded Issues

19. DB data is fraudulent or fake
20. DB will make agents lazy or stupid
21. Discourages agent networking
22. Costs too much
23. Competing price research methods are better
24. DB is too much like communism
25. DB is not updated in 'real' time
26. DB is in violation of the Competition Act

- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations
- unfounded, #9 join associations

History

The DB originated as an initiative of producers in the CAPP Surface Land Committee in 1995. At that time, committee members felt that a different approach was necessary to ensure that agents were adequately informed about field compensation. The principle of cooperative information sharing was long established but the 'word-of-mouth' methods of exchanging that

information often failed to provide enough detail or proved to be 'too little, too late' to adequately meet the needs of the agent.

The committee proposed a feasibility study of a centralized, independent, external DB to track and distribute detailed compensation information. The committee was unanimous in its support of this new method and 15 of the largest operators signed up for a pilot project. Two years later the original 15 were joined by 7 more large subscribers and commitments to supply data were made by 60 of the top 80 drillers accounting for 75% of all drilling. This overwhelming majority support 'in principle' by operators has not wavered in the intervening years. The DB is essentially an association of producers who wish to share detailed surface compensation data in order to maximize knowledge of their field activities.

The feasibility study made a thorough review of all the issues surrounding the establishment of the DB including the legal issues. CAPP's Legal Committee and CAPP General Counsel reviewed the DB to ensure that the industry and CAPP would not be in violation of any statutes by sponsoring the formation of the DB. The legal review focused on competition and privacy issues. The committee concluded that the collection and publication of compensation data is not, in itself, a violation of the Competition Act. The privacy issues of 1995 were eclipsed in 2004 by the Alberta Personal Information Protection Act (PIPA) and other provincial privacy Acts. The increased liability faced by operators as a result of this legislation, and the possible inability to produce evidence for Surface Rights Board hearings, has caused virtually all lease agreements to now contain clauses which give consent to the disclosure of the lease 'personal information' by both the landowner and the operator.

CAPP was very clear in 1995 that it did not want to be involved in the administration of the DB. Further, the proponents insisted on low costs and a user-pay subscription service. Since Marriott had undertaken the feasibility study and run the pilot project, the company was a natural to operate the database on behalf of the proponents. A number of land brokers had bid to be the DB administrators but it was decided that this would create a conflict of interest. Rather, Marriott became the administrator since they had no interest in the surface land business.

Originally, all data was submitted using the fax machine and paper reports (hence the Marriott Report) were distributed to the subscribers. Eventually, area reports and sophisticated DB queries were available over the Internet, and finally data was captured at the website as well.

Along the way, the basic field tool function of the DB led to broader administration applications and aggregate analysis looking at the industry as a whole, including corporate benchmarking. CAPP also utilized the DB for analysis in support of lobbying efforts on surface rights issues. Individual clients and groups of clients sponsored trend analysis studies and benchmarking. Even more extensive analysis is possible because now there is a raw data source available. For example, providing a Surface Rights Board 'score card' on whether decisions accurately reflect what is paid in an area, is possible using the DB.

To date the DB has achieved significant data volumes averaging over 3000 records per year coming in. However, this still leaves data gaps that cause the users concern.

Data Sources

The collection of data has been done on a 'best efforts' basis rather than through a rigorous data control protocol. The following is a table showing the data received over the past few years.

Year	Data Sets	Per Week
2003	3468	67
2004	2569	49
2005	3673	71
2006	3830	74
2007	2857	55
2008	3741	72
2009	2112	41
2010 est.	2777	53

Data sources in the past have been primarily the brokers who submitted data on behalf of their clients. Recently data has been received directly from the computer systems of the operators, greatly adding to the accuracy of the data received. It is estimated that the DB currently covers around 35-40% of all the surface leases.

All Surface Rights Board decisions are reviewed by the DB administrator and when there is an award made under the 'heads' the decision is entered into the DB. In recent years, the success of the SRB Dispute Resolution process has greatly reduced the number of compensation hearings so SRB data has become a much small proportion of the total. Recently, many operators have decided to provide data as an in-house function rather than delegating it to brokers. The following table shows the sources of data over the past few years.

Sources %	2006 & prior	2007	2008	2009	2010 est.
Brokers	98	85	57	45	53
In House	0	0	0	15	25
Systems	0	13	41	39	22
SRB	2	2	2	<1	0

The largest fifteen companies supplying data are summarized in the next table. Also when data is submitted it is possible to not identify the operator to which the data applies. So this data is summarized under the company call 'other'. While the distribution of data over the 15 companies was fairly robust in 2005, it has diminished somewhat since that time. In 2009, there were only 10 of the largest 15 companies actually submitting data indicating serious gaps in the coverage of the DB.

Company	2005	2006	2007	2008	2009
p1	728	732	607	757	438
other	624	533	418	655	261
p2	517	727	775	890	116
p3	416	255	2	2	0
p4	360	163	149	39	5
p5	246	60	44	153	27
p6	232	209	82	147	7
p7	229	98	164	137	73
p8	116	427	235	666	371
p9	48	1	0	0	0
p10	43	35	0	0	0
p11	40	156	60	25	0
p12	30	38	0	0	0
p13	27	35	45	4	18
p14	20	165	147	102	48
p15	<u>13</u>	<u>63</u>	<u>48</u>	<u>85</u>	<u>55</u>
	3689	3697	2776	3662	1419

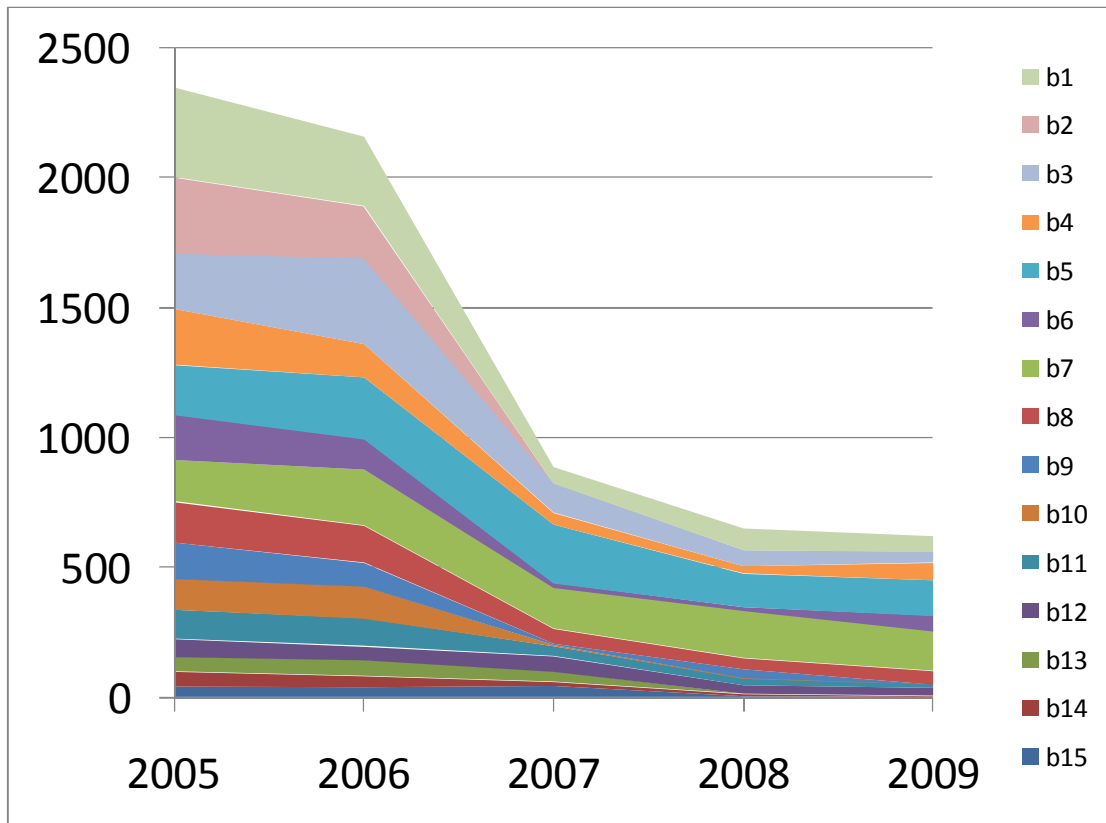
Data Usage

The usage of the DB can be seen through the log-ins to do individual searches. The following table shows the log-ins and the source of the searches by producers versus brokers.

Year	Log-ins	Per Day	% Broker
2003	1901	7	92
2004	2824	11	91
2005	2808	11	92
2006	2105	8	82
2007	1121	5	92
2008	1085	4	90
2009	1125	5	75
2010 est.	1475	6	63

The search numbers are picking up in 2009 and 2010 primarily due to increased usage by producers who are looking for information for use in rent reviews.

The graphic on the next page shows the usage per year by the largest 15 broker users. Some brokers eg b2 and b15 were large users but then let their subscriptions lapse. Other brokers eg b5 and b7 have been fairly constant users over time. All the other brokers have had their usage decrease substantially as activity levels have decreased.



Appendix - attendance at April 13 meeting

Ranked by total 2009 drilling - Alberta + Sask. + BC					
Company	Contact	Phone	Email		Attend 13 th
EnCana Corporation	Grant McLennan	645-3160	grant.mclennan@encana.com		yes
	Chris Bakker	645-2132	chris.bakker@encana.com		yes
Cenovus	Grant Phillips	766-6576	Grant.Phillips@cenovus.com		no
	Susan Johnston	766-4010	Susan.Johnston@cenovus.com		yes
Canadian Natural Resources	Scott Reed	517-6700	scott.reed@cnrl.com		yes
Husky Energy Inc.	Susan Gramlich	750-1389	susan.gramlich@huskyenergy.com		yes
Devon Canada Corporation	Kevin Stark	232-7100	kevin.stark@devoncanada.com		no - keep in 'loop'
Suncor Energy	Bob Maxwell	296-3039	bmaxwell@suncor.com		yes - alternate
ConocoPhillips Canada Limited	Jamie Fleck	260-8210	Jamie.m.Fleck@conocophillips.com		yes - alternate
Enerplus Resources Fund	Don Ratcliff	298-2213	DRatcliff@enerplus.com		yes
	Blair Scarratt	298-2699	BScarratt@enerplus.com		yes
Apache Canada Ltd.	Mark Bahan	303-5968	mark.bahan@apachecorp.com		yes
Paramount Resources Ltd.	Chuck Faulkner	290-3602	chuck.faulkner@paramountres.com		yes - alternate
Penn West Energy Trust	Alan Gagne	693-2993	allan.gagne@pennwest.com		no
PetroBakken Energy Ltd.	Buck Rainbird	265-1116	BuckR@standardland.com		yes - alternate
Taqa North Ltd.	Laurier Laprise	724-5297	Laurier.Laprise@Taqa.ca		yes
Crescent Point Energy	Ameeta Cordell	718-1791	acordell@crescentpointenergy.com		yes - alternate
ARC Energy Trust	Rob Pettifer	503-8640	rpettifer@arcresources.com		yes
Imperial Oil Resources Limited	Vince Eggleston	237-3880	vince.b.eggleston@esso.ca		yes - alternate
	Brad Misener		bradley.l.misener@esso.ca		yes - alternate
Centrica/Direct	Bob Wyonzek	290-6857	robert.wyonzek@directenergy.com		yes
Royal Dutch Shell plc	Michelle Smith	691-2687	Michelle.A.Smith@shell.com		
EOG Resources Canada Inc.	Steven Harrison	663-8453	steven_harrison@eogresources.com		yes
Galleon Energy Inc.	Mike Anderson	716-3220	michaelja@galleonenergy.com		yes
Baytex Energy Trust	Mike Longeway	750-1242	mike.longeway@baytex.ab.ca		no - will do survey
ISH Energy Ltd.	Judy McLellan	262-2244	judym@ishenergy.ca		
Quicksilver Resources Canada	Jason Gouw	538-5545	jgouw@qrinc.ca		no - mostly BC Crown
Anderson Energy Ltd.	Rick Kaminski	206-6003	rkaminski@andersonenergy.ca		yes
Harvest Energy	Colin Page	261-8249	colin.page@harvestenergy.ca		yes
Nexen Inc.	Ray MacEachern	699-5657	ray_maceachern@nexeninc.com		no
Pengrowth Corporation	Eric Nelson	508-8915	Eric.Nelson@Pengrowth.com		yes - alternate
Murphy Oil Company	Ross MacKenzie	294-8904	ross_mackenzie@murphyoilcorp.com		no - will do survey
Fairborne Energy Ltd.	David Pyke	290-7711	dpyke@fairborneenergy.com		
NAL Resources	Pary Weiler	294-3600	pweiler@nal.ca		
Bonavista Energy Trust	Ted Anderson	514-7213	ted.anderson@bonavistaenergy.com		no
Talisman Energy Inc.	Kerry Shields	237-1234	KShields@talisman-energy.com		no
NuVista Energy Ltd.	Mark Buchanan	538-8559	mark.buchanan@nuvistaenergy.com		no - will do survey
Progress Energy Trust	Melanie Howard	539-1812	mhoward@progressenergy.com		yes - alternate
Rife Resources Ltd.	Lee McDougall	221-0841	lmcdougall@rife.com		no - will do survey
Celtic Exploration Ltd.	Carrie Petrie	215-5329	cpetrie@celticex.com		no - will do survey
Trident Resources Corp.	Murray Phillips	770-1770	mphillips@tridentexploration.ca		
Advantage Oil & Gas Ltd.	Monte Hurt	718-8035	mhurt@advantageog.com		maybe - will do survey
Trilogy Energy Trust	Landon Whitlock	718-2337	landon.whitlock@trilogyenergy.com		no
Compton Petroleum Corp	Miguel Rodriguez	237-9400	mrodriguez@comptonpetroleum.com		
Black Pearl Resources	Margaret Ariss	539-1107	Margaret.Ariss@pxx.ca		yes