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BY E-MAIL AND WEB POSTING

November 17, 2014

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

RE: 2014 Natural Gas Market Review – Stakeholder Conference Planning

In a letter dated September 19, 2014 (“the [September 19 letter](#)”) the Board announced its 2014 Natural Gas Market Review consultation, which includes a Stakeholder Conference to be held at the Board’s offices commencing December 3, 2014.

The purpose of the Stakeholder Conference is to provide a forum for discussing the issues raised in two reports prepared by consultants engaged by Board staff on how the underlying drivers of QRAM were affected by market conditions and prices over the winter 2013/14 period; and on the key factors affecting North American and Ontario natural gas markets to 2020, including any implications for the further development of Board policy.

The purpose of this letter is to provide registered participants and other interested parties with additional information on the Stakeholder Conference.

Stakeholder Input on the Scope of the Review

In the September 19 letter, the Board invited stakeholders to advise the Board on any additional issues they believe should be discussed at the Stakeholder Conference to address the purpose and objectives of the consultation. Input received was used to help guide the preparation of the preliminary Stakeholder Conference agenda, which is attached as Appendix A.

Stakeholder suggestions can be grouped into five main categories:

- Impact of market developments since the 2010 Natural Gas Market Review;

- Issues raised by winter 2013/14 natural gas market events;
- Concerns about the inter-relationships between electricity and gas markets;
- The evolution of gas markets over the foreseeable future; and
- How these changes might impact natural gas regulation in Ontario.

In light of the level of interest and the breadth of issues raised, the Board will hold the conference over two days, beginning at 10 a.m. on December 3, 2014 and continuing on December 4, 2014. This will allow the issues to be addressed in five sessions. The 1st session will be devoted to a retrospective review of recent sector developments, while the 2nd session will focus on the 2013/14 winter and its impacts on natural gas pricing.

Stakeholders also have identified various topics associated with the interrelationships between the electrical and natural gas markets, and follow on impacts on customers. These issues will be discussed in the 3rd session on the Natural Gas/Electricity Markets Interface.

A wide variety of topics suggested by stakeholders involved expectations for market evolution over the next few years. With this in mind, the 4th session will address emerging influences on the natural gas market.

Stakeholders also expressed interest in examining a number of regulatory matters related to recent and anticipated developments in the natural gas market, which will be the subject of the 5th and concluding session.

Detailed Agenda

A detailed conference agenda will be prepared following the November 19 due date for stakeholders to register for the Conference, indicating whether they intend to give a presentation (see below). The detailed agenda will include information on the order and time of each presentation.

Stakeholder Conference Format

Ontario Energy Board Chair and CEO Rosemarie T. Leclair will open the conference and introduce Board members in attendance. Sessions will consist of a formal presentation(s) followed by open forum discussion. The Stakeholder Conference will be transcribed.

Stakeholder Conference Registration & Presentations

Interested participants wishing to attend the Stakeholder Conference are reminded that they should register by email to NGMR@ontarioenergyboard.ca by **4:30 p.m.**

Wednesday, November 19, 2014. Please indicate “2014 NGMR Conference” in the subject line and provide the following information in the body of the e-mail:

- participant/organization name;
- name(s) of attendees to be registered;
- whether the participant intends to make a presentation, and if so, the presentation topic(s);
- whether the participant intends to attend in person or remotely; and
- a contact name, telephone number and e-mail address.

Due to seating capacity restrictions, in-person attendance should be limited to two persons. Additional attendees will be accommodated subject to seating availability. Remote participation will be available through the Board’s website. Detailed instructions on how to participate remotely will be sent to all registered participants on or before the conference date.

For attendees planning a presentation, for scheduling purposes the topic of the presentation must be clearly indicated in the email and should be identifiable as directly related to one of the topics listed on the preliminary agenda. In order to ensure all presentations can be accommodated and to maximize time for discussion, presentations should be no longer than 10 minutes.

An electronic copy of any presentation materials must be submitted to the Board Secretary by **Monday, November 24, 2014**, in accordance with the filing instructions set out in the September 19 letter. Presentation materials will be posted on the consultation webpage.

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

Yours truly,

Original signed by

Kirsten Walli
Board Secretary

Attachment: Appendix A – Stakeholder Conference Preliminary Agenda

Appendix A

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

STAKEHOLDER CONFERENCE

Preliminary Agenda

Session 1

Overview of Recent North American Natural Gas Market Developments

- Factors affecting supply sources
- Factors affecting Ontario demand
- Factors affecting pipeline & storage
- Regulatory changes

Session 2

Winter 2013/14 Natural Gas Price Review

- What happened and why
- Considerations for QRAM drivers / gas supply planning cost/risk trade-offs

Session 3

Natural Gas/Electricity Markets Interface

- Winter 2013/14 Electricity Market Review
- Gas/Electric Market Co-ordination

Session 4

North American and Ontario Natural Gas Markets to 2020

- Factors affecting natural gas supply, demand, transportation, storage and prices
- Consideration of Ontario future price scenarios

Session 5

Market and Regulatory Implications of Key Natural Gas Market Trends

- Roundtable discussion