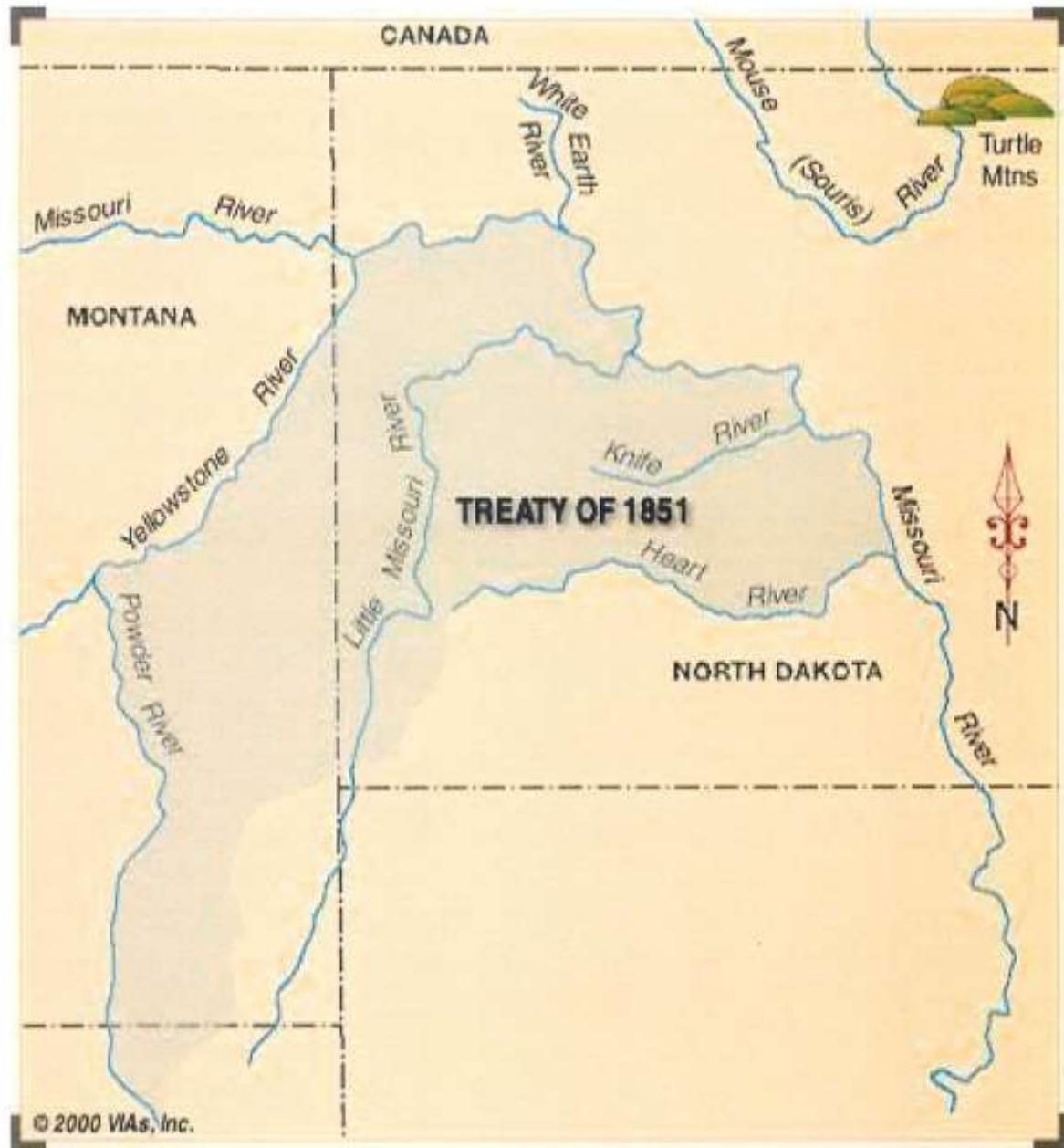
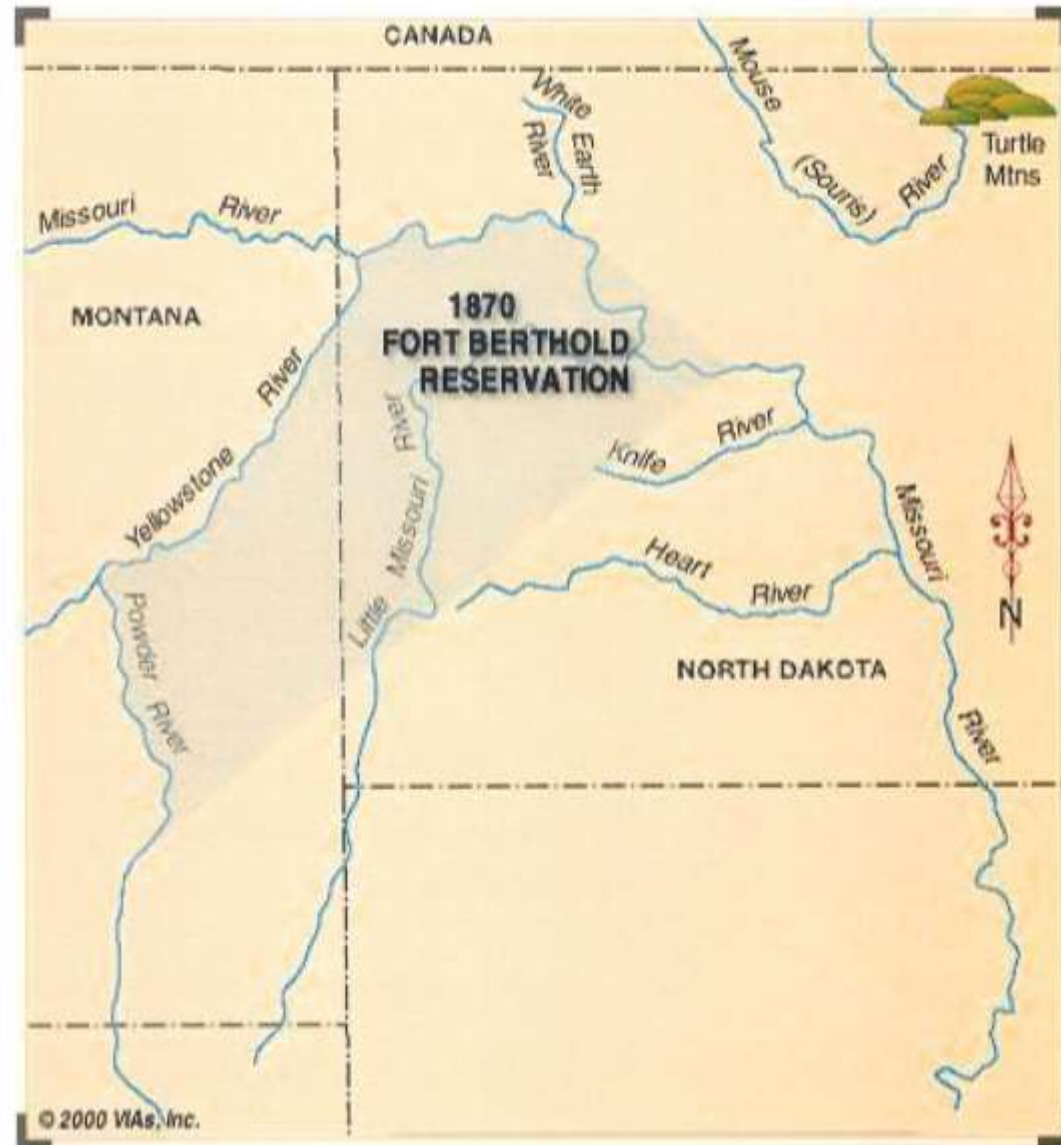
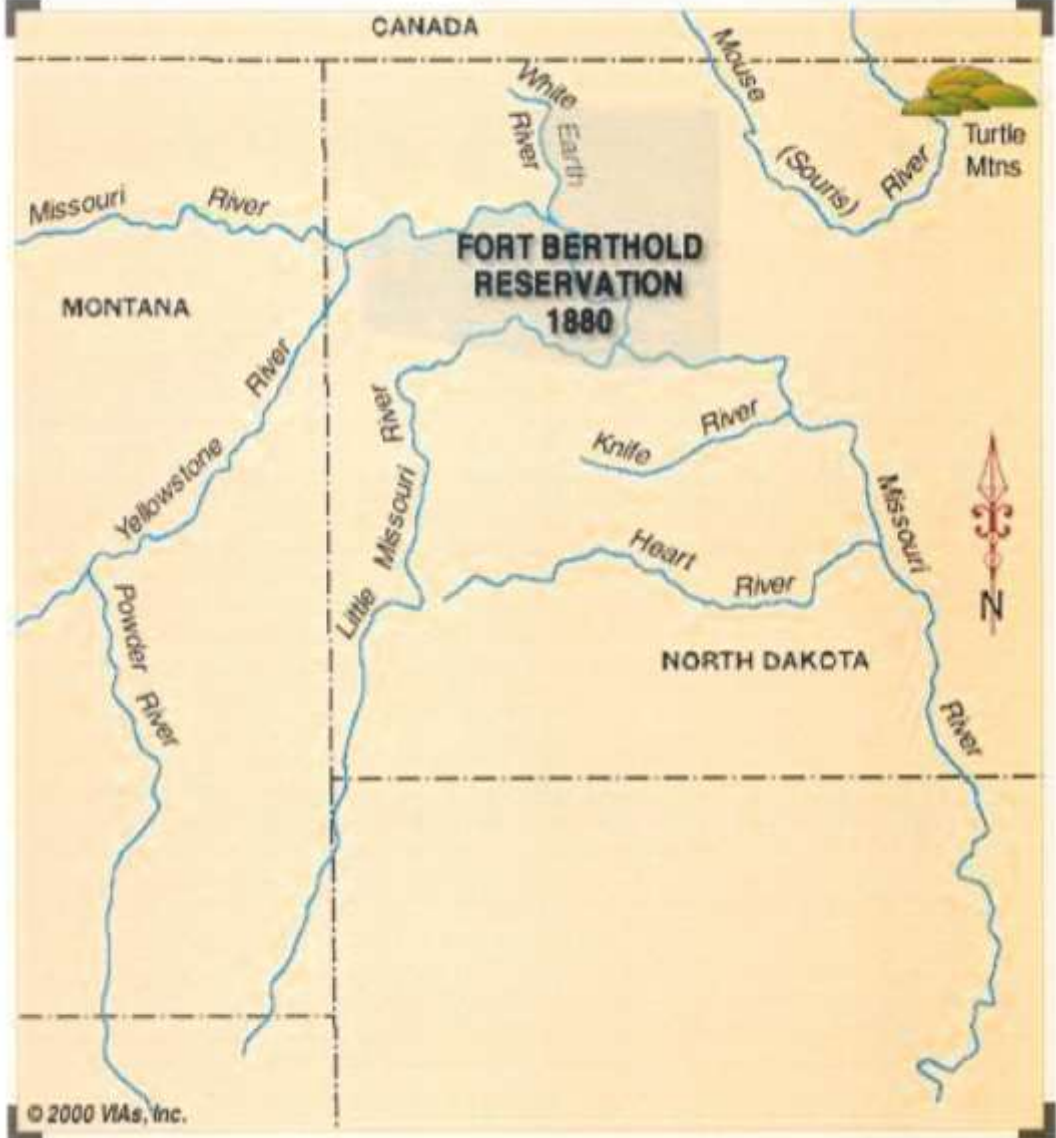


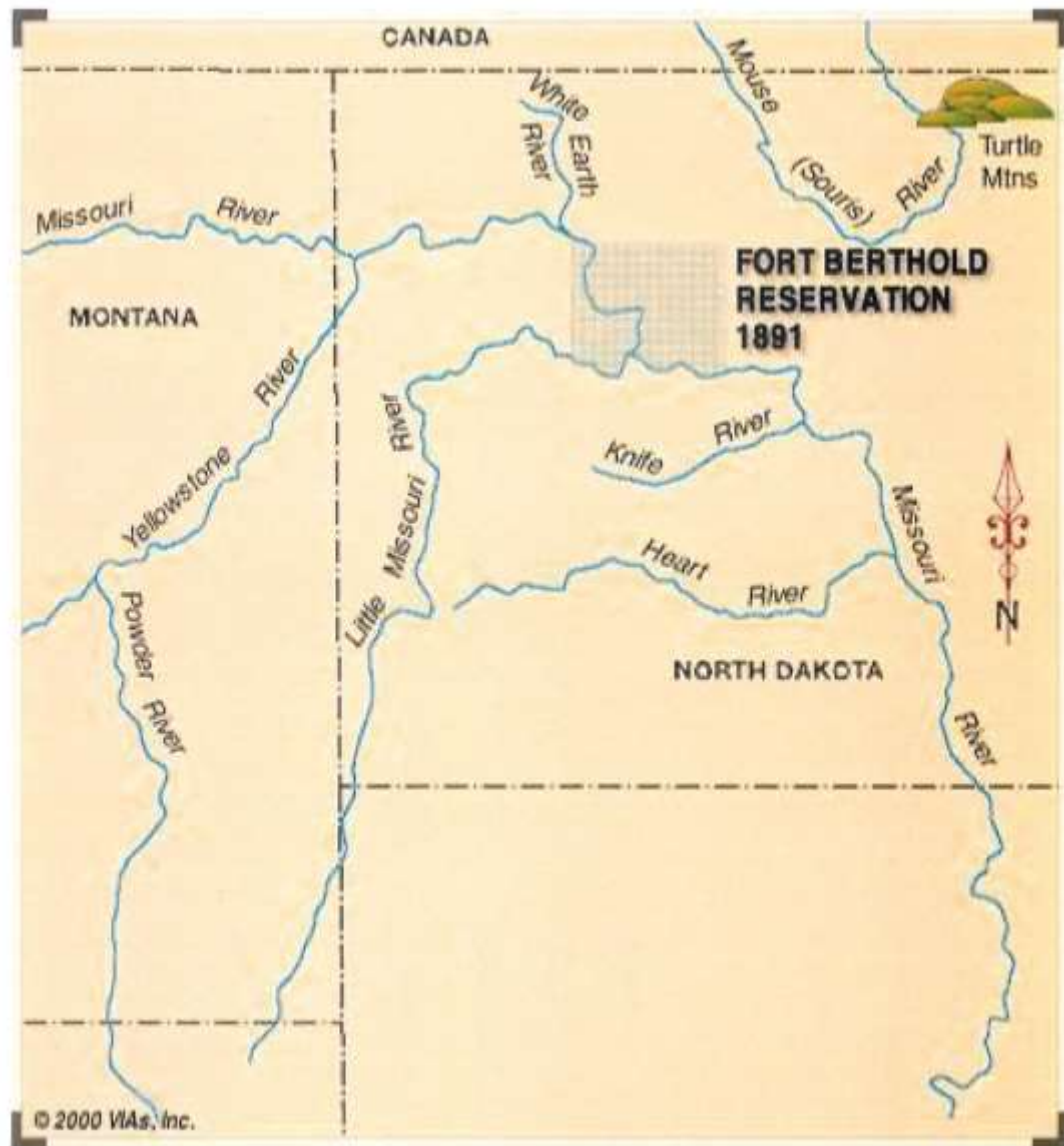
Mandan, Hidatsa and Arickara Nation Demographics

- ❖ **Fort Laramie Treaty 1851 – Recognized 13.2 million acres belonging to the Mandan, Hidatsa, and Arickara Tribes; as a result of further treaties and executive orders the land base was reduced to approximately 1 million acres.**
- ❖ **Located on the Fort Berthold Reservation in North Dakota with 6 geo political units known as segments: Parshall-Luckymound, White Shield, Twin Buttes, Mandaree, New Town-Little Shell, Four Bears with the Chairman being at-large.**
- ❖ **15,692 Enrolled Members in the Tribe**
- ❖ **Encompasses a land base of over 1 Million acres**
- ❖ **Two distinct oil formations located within the reservation boundaries: Bakken and The Three Forks**









Mandan, Hidatsa and Arickara Nation–Oil/Gas Production

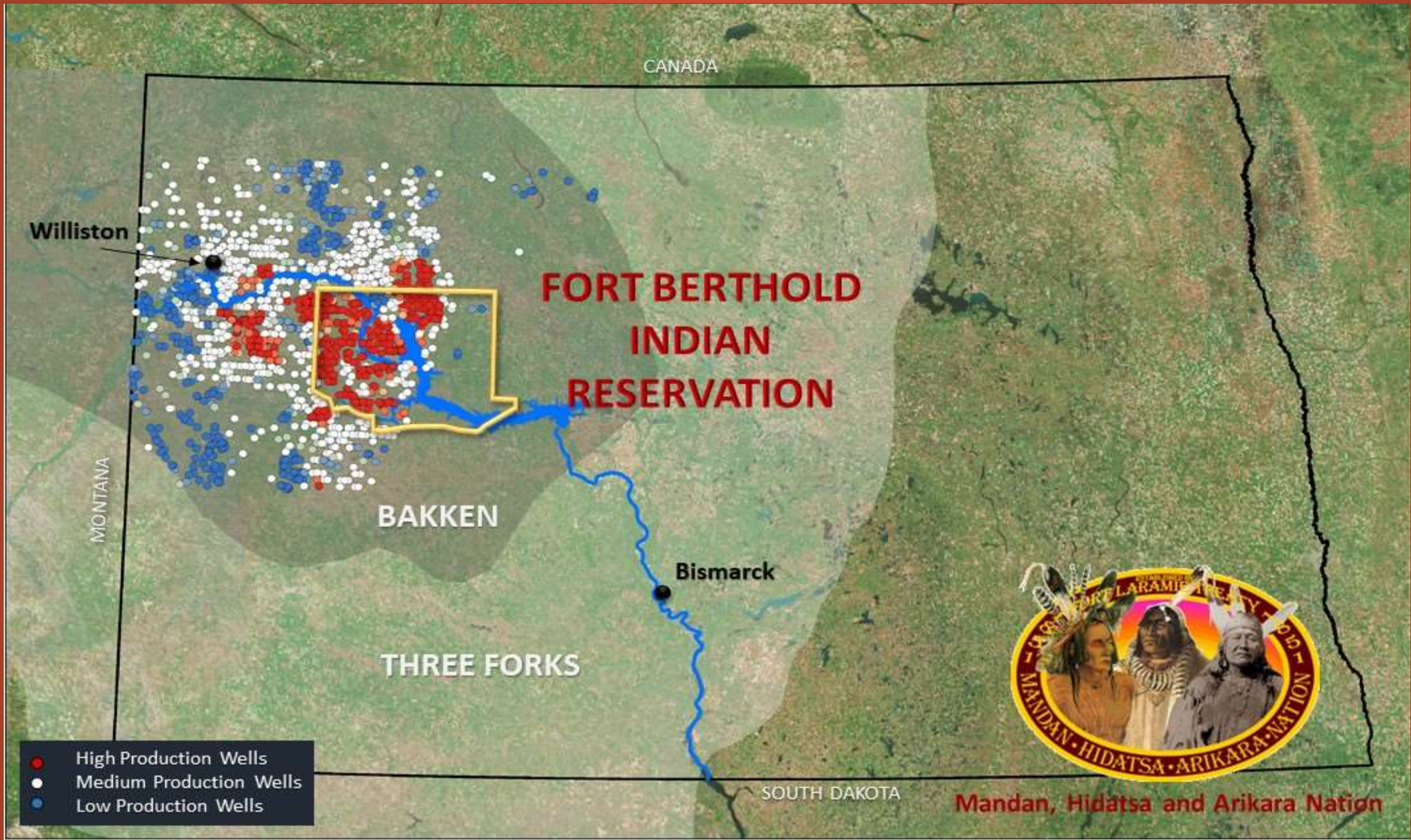
- ❖ **Approximately 30% of non-renewable energy resources in U.S. are located in Indian Country**
- ❖ **More than 2% of total U.S. oil production is located on the Fort Berthold Indian Reservation (FBIR)**

Oil and Gas Reserves

- ❖ **\$26 Billion: Oil and Gas sales on FBIR since 2008**
- ❖ **\$218 Billion: Future estimated FBIR Oil and Gas sales (Est. 3.3 Billion bbls)**

Oil Industry – Activity

- ❖ **FBIR produces more than 6.1 Million bbls per month**
- ❖ **1,600+ producing wells on FBIR; more than 4,000 wells remain to be drilled**
- ❖ **\$1 Billion in gas revenue since 2008 on FBIR, est. \$9 Billion future revenue**



Future Opportunities

According to USGS/Energy Resource Program (ERP), which is responsible for conducting assessments on undiscovered, technically recoverable resources:

- ❖ **April 2008 Bakken Assessment:**
 - ❖ **3.7 Billion barrels of oil**
 - ❖ **1.9 Trillion cubic feet of gas**
 - ❖ **.15 Billion barrels of NGL's (Natural gas liquids)**

- ❖ **April 2013 Bakken/Three Forks Formation**
 - ❖ **7.4 Billion barrel of oil (+102%)**
 - ❖ **6.7 Trillion cubic feet of gas (+262%)**
 - ❖ **.53 Billion barrels of NGL's (+258%)**

- ❖ **These early estimates continue to be based on a recovery rate of less than 8%**

Federal Burdens on Tribal Energy Development

EPA Permitting of Refinery and Trans-load facility - 7 years

- ❖ **Lost revenue: \$365M from refinery and \$28M for crude storage**
- ❖ **Restrictive regulations impeded us from competing in the market**
- ❖ **Need streamlined process that prioritizes tribal regulation**

BLM Methane and Flaring Rule

- ❖ **Loss of \$160M due to failure to prevent flaring on FBIR**
- ❖ **Historically, ineffective venting and flaring rules have disadvantaged the Tribes**
- ❖ **BLM should defer to tribal rulemaking authority**
 - ❖ **Tribes consult with industry partners**
 - ❖ **Meet minimum federal standards**
 - ❖ **Implement rules that address particular Tribal needs**

Federal Burdens on Tribal Energy Development

Impact of NEPA on Indian Energy Development

- ❖ **NEPA rules require an Environmental Assessment for each well pad**
- ❖ **Tribal trust lands wrongfully treated as federal public lands**
- ❖ **Time consuming and costly to obtain federal NEPA approvals**
- ❖ **Federal agencies should recognize tribal environmental regulations and standards**

Negative Impacts Due to Dual Taxation

- ❖ **Loss of tax revenue of over \$1 Billion dollars**
- ❖ **Economic growth lost opportunities**