THE INDUSTRY RAMPS UP

• 2008 USGS Study Release Bakken Findings

• Estimated total of 3.65 Billion Barrels of Recoverable Oil

• The Industry Adds Over 1,100 new wells between 2008 – 2010

• Doubles Daily Oil Production From 171,000 to 350,000 Barrels Per Day

• The Industry Adds Over 13,000 New Employees Between 2005-2009

SURVEY SAYS!
The Bakken Has Oil. 3.65 Billion Barrels Of It
FEELING THE IMPACT: IT’S ALL ABOUT LOCATION!!

- Williston is Home to Over 350 Oil Service Companies
- The Top Ten Oil Service Companies In The World Have Operations In Williston
- Williston Is The Preferred Location!!
• Williston captures over 40% of total oil and gas employment in the state.

• Oil and gas is the top employing industry in Williston with an average annual employment of 2,832 workers (27%)

• Oil and gas contributed 36.7% of total wages distributed in Williston in 2009.
Continental CEO Harold Hamm estimates the Bakken could hold as much as 24–BILLION barrels of oil.

Current takeaway capacity is set to increase from 400k to 900k by 2014.

172 rigs are currently drilling in Western ND. This could rise to 230 by the end of the year.
FEELING THE IMPACT: INFRASTRUCTURE!!

WE WILL DOUBLE THE SIZE OF OUR COMMUNITY IN THE NEXT 5 YEARS
• 106 million dollars in permit valuation was recorded in 2010. (120-Million by July 2011)

• Hotels are running at 100% (Williston hotel inventory will double by 2011)

• 1,600 temporary workforce housing units have come online in 2010 within city and county limits. (Temp Requests have reached over 4,500 in 2011)
Includes: Single and multi family, mobile home, and temporary workforce housing, Hotel Units. This does not include County Statistics.
# Residential Development

**Williston Housing Units 2011**

*Planned or Under Construction*

<table>
<thead>
<tr>
<th>Type</th>
<th>Projected Units</th>
<th>Actual As Of: 6/1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family:</td>
<td>397</td>
<td>99</td>
</tr>
<tr>
<td>Multi Family:</td>
<td>600</td>
<td>391 (3 Buildings)</td>
</tr>
<tr>
<td>Mobile Homes:</td>
<td>80</td>
<td>79 (No Space Left)</td>
</tr>
<tr>
<td>Temp Workforce Housing (City):</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(Note: County has over 4,500 Units Permitted)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel Units:</td>
<td>390</td>
<td>88 (1 Permit)</td>
</tr>
</tbody>
</table>

**Total:**

|             | 1,467 | 657   |

Total Value of Residential Permits As Of 6/1/2011: $64,661,516.00
FEELING THE IMPACT: INFRASTRUCTURE!!

- Recent study shows and infrastructure improvement need in excess of 182 Million.
- 104 Million is classified as “Immediate” need.
- City budget requests increased 18 million in 2010. (Will Likely Double in 2011)
- Wastewater treatment facility running at capacity.
- Traffic accidents were up over 40% in 2010 compared to 2009.
• There are an estimated 3,000 available job openings in the Williston service area.

• Oil and gas extraction annual wage averaged $82,502 in 2009.

• Overall average annual wage in Williston is $50,000++.

• There is a potential need for 20,000 new workers to meet the growing and replacement employment figures for the oil and gas industry.
FEELING THE IMPACT: POWER INFRASTRUCTURE!!

Mountrail Williams Electric CO-OP
2 Counties

- 30 MW 3 Years Ago
- 82 MW 2010
- 180 MW 2015
- 1.2 GW 2025

Today it’s power lines. Tomorrow it’s power plants.
FEELING THE IMPACT: WATER INFRASTRUCTURE!!

- Over 600 semis loads per new well are needed for Fresh and Waste water disposal.

- WAWS meets the need of the region.

- Industrial demand for the WAWS system will reach 10 – 18 MGD Daily

- City of Williston current growth projection predicts a demand of 7.7 MGD

Summary of Daily Hydraulic Fracturing Water Demands for Northwest North Dakota
Pipeline Infrastructure

- Crude oil
- Natural Gas
- Frac Water
- Salt Water
Refineries
FEELING THE IMPACT: HOW LONG WILL THIS LAST?

- One well per 1280 spacing 6-9 years no more leasing
- Extended laterals 15 – 20 years
- Additional 3 forks laterals 20 – 40 years
- Does not take into account there are 17 different zones that may come into play as technology increases
-
The Midwest can Build A Nation

More Homes = More Jobs

Stronger Economy/Energy Security
Increased Tax Revenue
More Domestic Oil
Western North Dakota
Hosting the largest oil play in the lower 48

Williston North Dakota is supporting a city, a state, a nation.

When it is all said and done we hope to be a better community than before we started