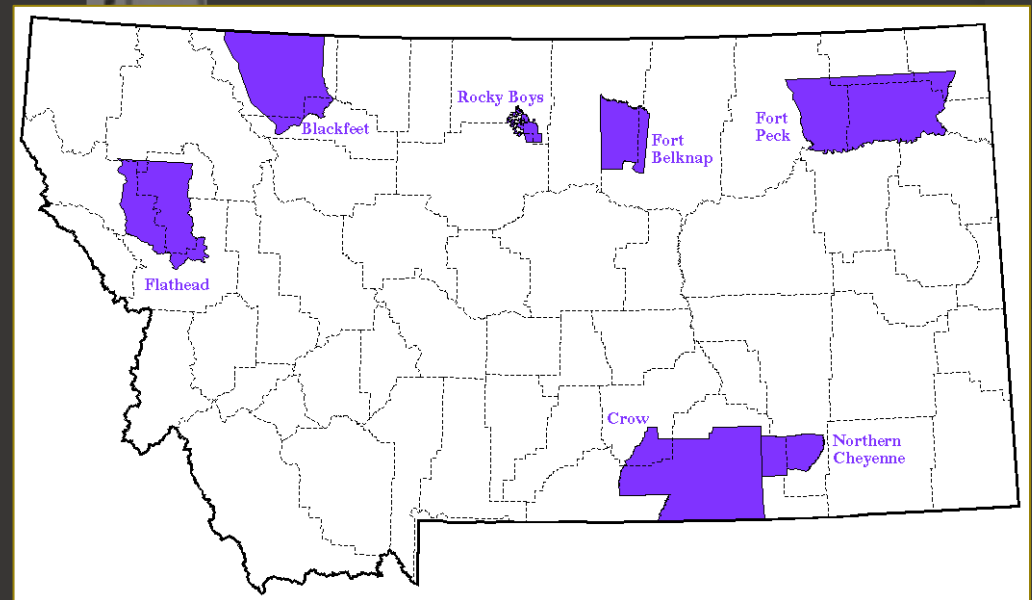


Energy Opportunities on Montana's Tribal Lands

Development Opportunities

- Tribal Lands in Montana hold strong energy resources
- Previous developments have occurred on or near reservations in:
 - Oil, Gas, Wind, Transmission, Hydro and Coal
- Current developments are primarily petroleum related

Resource	Strength
Wind	Strong
Solar	Moderate
Hydro	Strong
Geothermal	Moderate
Oil	Strong
Gas	Strong
Coal	Strong



Current Market Conditions

Markets have cooled

- Electricity generation demand has flat lined
- MT RPS requirement has predominantly been met by utilities
- Electrical supply is sufficient
- Price of Renewable Energy Credits (RECs) has dropped significantly

Therefore...

- Development of electrical generation and transmission lines on a utility scale is unlikely in the near future.

Petroleum Markets

- Steady growth in eastern MT (not the boom of 5 years ago)
- Infill drilling and some exploratory drilling occurring

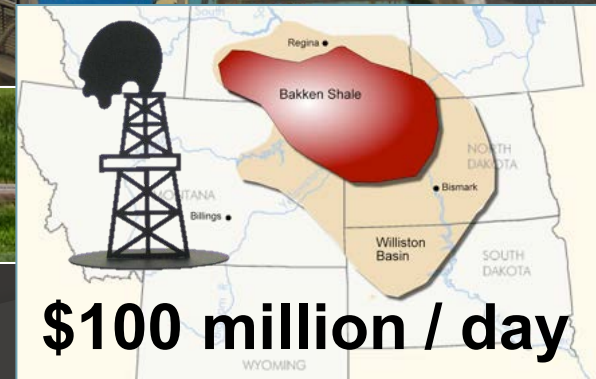
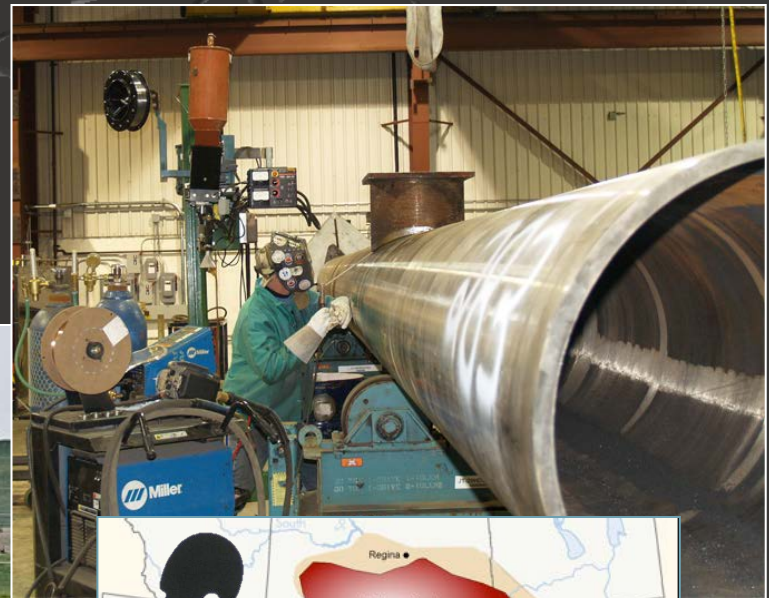
Coal

- Best resources in the country. Future demand is uncertain.

Best Development Opportunities

Capitalize on previous and ongoing developments

- Bakken and Alberta oil sands
 - Metal fabrication and assembly
 - Oil field servicing
 - Transport (rail and truck)
 - Construction



Development Examples

Assembly / Metal Fabrication

- Lauren Engineers and Construction
 - Metal fabrication and assembly of equipment for the Alberta oil sands industry
 - Employee skillsets: welding, assembly, tooling, equipment operation
- True North Steel
 - Meeting the demands for water and fuel/oil containment systems (tanks and accessories) in the Bakken
 - Employee skillsets: welding, assembly, tooling, equipment operation

Trucking

- Bakken Energy Co. – Montana Transport Company
 - 5 trucks, 5 drivers, no HAZMAT
 - Huge need for more companies of this nature
- Diesel Mechanics for heavy duty, tractor trailers and heavy equipment are in high demand

Development Examples

Oilfield Services

- MT Rig Mat
 - MT Rigmat specializes in the manufacturing of Oilfield Rig mats and Oilfield Camp Mats and can also provide Custom Fabricated Rig mats for any application.

General Contracting

- Bakken Drywall
 - Provides drywall services to the abundance of new construction in the area.
- CMG Oil & Gas (concrete)
 - Specializes in Oil Pad construction, Water Hauling, Gravel and Scoria Crushing and Hauling, Rail Siding Construction, and other civil opportunities located in Western North Dakota and Eastern Montana.
- Kramer Enterprises Incorporated
 - Builder of commercial and heavy industrial projects, as well as large residential or multi-use projects.

Development Possibility

Railcar Servicing

US and Canadian government are proposing the phase out of the DOT 111 tank car for use in the transports of flammable liquids like crude oil and ethanol.

- DOT 111 account for 228,000 of the 335,000 active tank car fleet
- 92,000 of them move flammable liquids
- The new rules would require the retrofit or phase-out of those cars within two years for shipment of Bakken crude oil and within five years for all flammable materials.
- Detailed information can be found at www.phmsa.dot.gov



Development Possibility

Waste Disposal

The Bakken suffers greatly from the lack of disposal facilities.

Montana allows 7 times the levels of radioactivity in petroleum production waste.

- Oaks Disposal
 - NNW of Glendive
 - No liquids



Attracting Developers / Investors

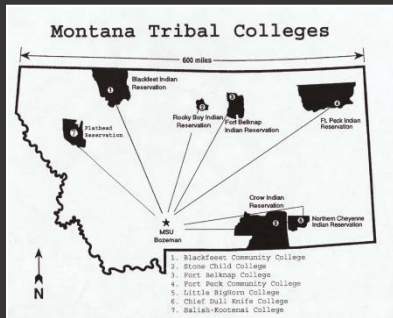
Marketing

- Energy Resources
 - Tribal government publications outlining the resources found on tribal lands
- Site Location
 - Tribal government publications outlining the advantages to locating business facilities and projects on tribal lands and identifying industrial sites
 - If the reservation does not harbor any industrial development sites tribal leadership should look at these developments
- Work Force
 - Tribal government publications outlining the availability of trained and qualified tribal members
- Tribal EDOs target industry businesses best suited to their workforce
- Partner with other local / regional EDOs

Attracting Developers / Investors

Get to Work Today

- Movement = Investment
 - Colleges and Training Centers
 - Develop these programs and get them up and running
 - E.g. Welding, Commercial transport, hazardous materials handling, HVAC, concrete, framing, bookkeeping, etc.
 - E.g.
 - Salish Kootenai College – Highway Const. Certificate
 - Blackfeet Community College – Commercial Truck Driving and Building Trades Certificates and Construction Tech AAS
 - Fort Peck Community College – Certificates in Welding, Trucking, Electrical, Automotive Tech., Accounting
 - Stone Child College – Certificates in Accounting and Construction Technology and AA in Water Quality



Attracting Developers / Investors

Get to Work Today

- Movement = Investment
 - Get qualified workforce employed
 - Many members may already possess the skills needed for employment
 - Utilize tribal resources (Blackfeet Community College Career Center)
 - Build a relationship with staffing / employment agencies in areas of development
 - DakotaOilJobs.com
 - BakkenShaleHelpWanted.com
 - Jobs.BakkenShale.com
 - Bakken employment agencies
 - Member by member build upon tribal experience



Conclusion

Capitalize on the Developments of Today

- **Educate » Train » Employ**

Prepare for the Developments of Tomorrow

- **Educate » Market » Develop**





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