



**CGAI ENERGY ANALYST SUMMIT PROGRAM**

**Is Canadian Energy  
Competitive Internationally?**  
March 2026



**8:00:** Registration and Networking Breakfast

**8:45:** Welcoming remarks

- David Perry, CEO, CGAI

**9:00:** Keynote speech

- Hon. Tim Hodgson, Minister of Energy and Natural Resources for the Government of Canada

**9:15:** Keynote Speech

- Johanne Senecal, Vice President, Sustainability, External Relations & Indigenous Affairs, Canadian Association of Petroleum Producers

**9:30:** Presentation

- Susan Bell, Senior Vice President, Downstream, Rystad Energy

**10:00:** Coffee Break

**10:15:** Presentation

- Charles St-Arnaud, Chief Economist, Servus Credit Union

**10:45:** Presentation

- Rory Johnston, CGAI Fellow and Founder, Commodity Context

**11:15:** Networking lunch

**12:00:** Fireside Chat

- Terry Hubbard, President, Impact Assessment Agency of Canada
- Moderator: Joe Calnan, VP Energy and Calgary Operations, CGAI

**12:30:** Panel - How Energy Investment Decisions are Made

- Jack Mintz, President's Fellow, UofC School of Public Policy
- Kellen Foreman, Director, Government and Indigenous Relations, Ovintiv
- Kendall Dilling, President, Oil Sands Alliance
- Jennifer Pierce, Chief Administrative Officer, Trans Mountain Pipeline
- Moderator: Monica Gattinger, Chair of Positive Energy, UofO

**13:30:** Panel - Energy and Environment Policy takeaways

- Jay Khosla, Executive Director, Economic and Energy Policy, Public Policy Forum
- Mark Cauchi, Director General, Energy and Transportation, ECCC
- RJ Johnston, Director of Energy and Natural Resources Policy, UofC SPP
- Dale Friesen, Senior VP, Corporate Affairs & Chief Government Affairs Officer, ATCO Group
- Moderator: Catherine Lansley, Director, Energy, Environment & Resources, Global Public Affairs

**14:30:** Closing remarks

- Joe Calnan, VP Energy and Calgary Operations, CGAI

## WELCOMING REMARKS

**Dr. David Perry** is the President and CEO of the Canadian Global Affairs Institute, host of the institute's Defence Deconstructed Podcast, and a co-director of the Triple Helix MINDs Collaborative Network. He is the author of multiple publications related to defence budgeting, transformation and procurement and a columnist for the Canadian Naval Review. He is an adjunct professor at the Centre for Military, Security and Strategic Studies at the University of Calgary and a research fellow of the Centre for the Study of Security and Development at Dalhousie University. He was previously the Senior Security and Defence Analyst of the Conference of Defence Associations Institute and Deputy Director of Dalhousie University's Centre for Foreign Policy Studies. Embassy Magazine and *The Hill Times* has named him one of the "Top 100 Influencing Canadian Foreign Policy."

## KEYNOTE SPEECH MINISTER TIM HODGSON

**The Honourable Tim Hodgson** is Minister of Energy and Natural Resources for the Government of Canada, and Member of Parliament for the riding of Markham—Thornhill. Born in Winnipeg and raised in a Canadian Armed Forces family, Minister Hodgson grew up moving from coast to coast, gaining a deep appreciation for the country's diversity and the values that connect Canadians. Today, he lives with his wife in the Greater Toronto Area (GTA) where they raised their two daughters. Minister Hodgson's early years were shaped by a strong sense of service. He served as a reserve officer in the Canadian Armed Forces while earning his Bachelor of Commerce degree at the University of Manitoba. That experience inspired a lifelong commitment to supporting military families, including through his involvement with the True Patriot Love Foundation. After completing his MBA at Western University's Ivey Business School, Minister Hodgson went on to a successful global career in finance. He spent two decades with Goldman Sachs in senior leadership roles across New York, London, Silicon Valley, and Toronto, eventually serving as CEO of Goldman Sachs Canada. He later served as a special adviser at the Bank of Canada, working alongside then-Governor Mark Carney to help navigate global economic uncertainty. provinces.

## SPEECH JOHANNE SENÉCAL

**Johanne Senécal** is Vice President of Sustainability, External Relations and Indigenous Affairs at the Canadian Association of Petroleum Producers. Johanne is a seasoned government and regulatory affairs expert with over 30 years of experience as a senior executive working in the areas of public policy development, government relations, regulatory affairs, indigenous affairs and strategic communications, both in the public and private sectors. She has worked in the mining and telecommunications sectors and has an extensive political background having worked for the Prime Minister of Canada, various Ministers and serving as Chief of Staff to the Leader of the Official Opposition. Johanne has also held several directorships and was the inaugural Co-Chair of the Board of Directors of the Canada Digital Technology Supercluster as well as a member of the Mining Industry Human Resources Council Board of Directors.

**PRESENTATION**  
**SUSAN BELL - RYSTAD ENERGY**

**Susan Bell** is Senior Vice President of Downstream Research at Rystad Energy and provides leadership within the Oil Trading Solution organization. She and her team focus on ensuring clients receive timely, high-quality data and analytics on global refined product supply and demand, trade flows and refinery margins. Susan joined Rystad Energy in September 2023 with more than 25 years of experience in the industry. She holds a bachelor's degree in chemical engineering from the University of Alberta in Canada and has held numerous positions within the upstream and downstream petroleum industry. Her experience includes refinery operations and optimization, strategic planning and oil market analysis for crude oil and refined products.

**PRESENTATION**  
**CHARLES ST-ARNAUD - SERVUS CREDIT UNION**

**Charles St-Arnaud** is Chief Economist at Servus Credit Union. He was formerly Chief Economist at Alberta Central, the central banking facility and trade association for Alberta's credit unions. His work focus on monetary policy, the oil industry, productivity, housing and household finance. He has worked as an Economist and Strategist for the Bank of Canada, the Department of Finance, Morgan Stanley, Lombard Odier and Nomura in New York, London and Hong Kong. He is a regular contributor to the Financial Post, Globe&Mail, BNN Bloomberg, CBC/Radio-Canada and Calgary Herald. Charles holds an Msc. in Economics from Université du Québec à Montréal.

**PRESENTATION**  
**RORY JOHNSTON - COMMODITY CONTEXT**

**Rory Johnston** is a Toronto-based oil market researcher, the founder of Commodity Context, a lecturer at the University of Toronto's Munk School of Global Affairs and Public Policy, host of the Oil Ground Up podcast, as well as a Fellow with both the Canadian Global Affairs Institute and the Payne Institute for Public Policy at the Colorado School of Mines. He is a leading voice on oil market analysis, advising institutional investors, global policy makers, and corporate decision makers. His views are regularly quoted in major international media including the Financial Times, New York Times, Wall Street Journal, Bloomberg News, Reuters, BNN Bloomberg, CBC, and Financial Post, and he frequently appears on numerous market and industry podcasts (e.g., Bloomberg's Odd Lots, Hidden Forces, etc.). Prior to founding Commodity Context, Rory led commodity economics research at Scotiabank where he set the bank's energy and metals price forecasts, advised the bank's executives and clients, and sat on the bank's senior credit committee for commodity-exposed sectors.

## FIRESIDE CHAT

### TERRY HUBBARD - IMPACT ASSESSMENT AGENCY OF CANADA

**Terence Hubbard** is the President of the Impact Assessment Agency of Canada (IAAC). He is responsible for leading all reviews of major projects under the Impact Assessment Act, in cooperation with other Government of Canada regulatory agencies, as well as provinces and territories and Indigenous groups. Prior to joining IAAC in 2018, Terence was Director General of the Petroleum Resources Branch with Natural Resources Canada where he was responsible for Canada's oil and gas policy, including overseeing the development and implementation of Canada's pipeline safety and offshore oil and gas regulatory regimes as well as serving as Canada's representative on the Governing Board of the International Energy Agency. He is a graduate of the University of Saskatchewan where he obtained both his Bachelor and Master of Arts degrees in economics and now lives in Ottawa.

**(Moderator) Joe Calnan** is Vice President, Energy and Calgary Operations and a Fellow at the Canadian Global Affairs Institute. He is also Co-Host of CGAI's Energy Security Cubed podcast. He frequently appears in the media to provide expertise on energy security and energy trade issues, including on CBC News, The Globe and Mail, Politico, Global News, CTV News, and the Daily Oil Bulletin. Prior to joining CGAI, Joe held positions in public affairs and energy analysis at Sustainable Development Technology Canada and Canadian Natural Resources Ltd. Joe received a Master's Degree in Public Policy from the University of Calgary with a focus on Canadian energy and natural resources in 2020. He also holds a Bachelor of Arts in Western Society and Culture from Concordia University.

## PANEL

### HOW ENERGY INVESTMENT DECISIONS ARE MADE

**Jennifer Pierce** is Chief Administrative Officer at Trans Mountain Corporation. As CAO, Jennifer Pierce provides strategic oversight for Human Resources, Information Technology, Corporate Communications & Government Relations and Corporate Facilities. Jennifer has almost 30 years of experience in the energy sector. Prior to joining Trans Mountain, she was President of Mexico Gas Pipelines and Senior Vice President, Human Resources at TC Energy. She also held senior executive positions at TransAlta Corporation in Business Development, Energy Trading & Marketing, Commercial Management and Investor Relations & Communications. Jennifer holds a Master of Business Administration, a Master of Arts, Government/Political Management and a Bachelor of Science, Communications.

**Jack Mintz** is the President's Fellow at the University of Calgary's School of Public Policy, after serving as the Palmer Chair and founding Director from January 1, 2008, to June 30, 2015. He is a member of the board of directors of Mackenzie Health, York Region, Ontario and the Aristotle Foundation for Public Policy. He is a Distinguished Senior Fellow, MacDonald-Laurier Institute, Senior Fellow at the C.D. Howe Institute, and research fellow at International Tax and Investment Centre in Washington D.C., CESifo Germany and Oxford's Centre of Business Taxation. He is a regulator contributor to the Financial Post and is a member of the editorial board of International Tax and Public Finance.

**Kendall Dilling** is the President of the Oil Sands Alliance, where he is responsible for overseeing the organization's strategic direction, the overall coordination of technology, development and external relations on behalf of the members. Prior to joining Oil Sands Alliance, Kendall was Cenovus's Vice President, Environment & Regulatory. With 30 years of experience in the oil and gas industry, Kendall has expertise in environment, regulatory, project development, health and safety, and Indigenous and government relations. He also led the Cenovus military liaison team, which works closely with the Canadian military to coordinate oil and gas activities on the Cold Lake Air Weapons Range near Cenovus's operations.

**Kellen Foreman** is Director, Government Relations Canada for Ovintiv Canada ULC. He has held multiple key roles at Ovintiv (then-Encana), including Director of Regulatory and Government Relations, Group Lead in the same department, Development Engineer, Completions Engineer, and Production Engineer. Prior to his extensive tenure at Ovintiv, he served as the Alberta Operations Advisor at the Canadian Association of Petroleum Producers (CAPP).

**(Moderator) Monica Gattinger** is a CGAI Fellow, Founding Chair of Positive Energy, Director of the Institute for Science, Society and Policy, and Full Professor at the School of Political Studies at the University of Ottawa. She is a Member of the Board of Directors for Emissions Reduction Alberta, the Clean Resource Innovation Network, the Strategic Advisory Committee of the Independent Electricity System Operator, the National Research Council Canada, the Nuclear Waste Management Organization, the Ontario Energy Board and Women in Nuclear Canada. She was a member of the Government of Ontario's Electrification and Energy Transition Panel.

## PANEL

### ENERGY AND ENVIRONMENT POLICY TAKEAWAYS

**Jay Khosla** is Executive Director, Economic and Energy Policy with the Public Policy Forum, bringing decades of experience as a senior public service leader with specific emphasis on maximizing Canada's economic advantage. Most recently, he was with the Privy Council Office as Senior Assistant Deputy Minister (ADM) in Intergovernmental Affairs, where he worked on strengthening federal-provincial relations while implementing post-pandemic economic recovery, western and eastern infrastructure projects, climate change and energy transition, environmental legislation/regulation, investment attraction, innovation initiatives and internal trade policy. Previously, he served in various senior ADM positions at Natural Resources Canada, where he advanced Canada's energy interests on both the national and international stage.

**Mark Cauchi** is Director General, Energy and Transportation, Environment and Climate Change Canada. He has extensive experience in developing environment policy, regulation and programs with a focus on climate change and biodiversity. Key highlights include playing an executive leadership role in advancing Canada's Clean Electricity Regulations, transportation emissions related regulations, Canada's methane in oil and gas regulations, and Canada-U.S. leadership statements on climate change and clean energy.

**RJ Johnston** is Director of Energy and Natural Resources Policy at the University of Calgary's School of Public Policy. He is a recognized leader in global energy and natural resources policy, geopolitics, and corporate strategy. He was most recently Senior Director of Research at the Center on Global Energy Policy at the Columbia University School of International and Public Affairs. He previously served for 15 years as founding director of the Eurasia Group's Energy, Climate and Resources practice and was the firm's CEO from 2013 to 2018. He will officially join the School in August.

**Dale Friesen** is Senior Vice President, Corporate Affairs & Chief Government Affairs Officer of ATCO. Appointed to the role in 2020, he is responsible for cultivating collaborative relationships with all levels of government and community partners, advancing ATCO's global advocacy initiatives, and fostering authentic dialogue with constituents to create the conditions for shared, sustainable prosperity. Mr. Friesen has more than 30 years of experience with ATCO, having served in a variety of technical, management, and senior leadership roles in both Canada and Australia.

**(Moderator) Catherine Lansley** is a Senior Consultant with Global Public Affairs' federal team. She supports various organizations across Canada's energy, environment and resources sectors, including critical minerals, hydrogen and clean fuels, circular economy, and technology development and deployment.

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