

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:
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Kevin R. Huntsman or Bar Thedinger
MASTIO
2921 N. Belt Hwy., Suite M-14
St. Joseph, MO 64506
Phone: (816) 364-6200
Fax: (816) 364-3606

Press Release: MASTIO publishes the 21st Edition Natural Gas Pipeline Report.

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MASTIO recently published the 2017, 21st Edition of the industry wide Natural Gas Pipeline Customer Value / Loyalty Benchmarking Study and is pleased to present its findings. The study was released to subscribers in late early March. This new study provides results concerning interstate, intrastate and Canadian pipelines.

The 2017 study is based on interviews with industrials, LDC's, independent power producers, producers and marketers. Each respondent rated pipelines on 29 attributes such as: representatives who listen well, effective after hours support, firm gas transportation is highly reliable, timely resolution of problems plus overall company performance and how likely would you be to recommend your pipeline. The study also asks several open-ended questions. For example, all respondents are asked "Besides price, what is the most important factor that you use to select one transportation provider over another". Respondents are also asked "What was the biggest disappointment you have experienced with each of your pipelines over the last 12 months".

The most important issue to transporters of natural gas in the latest study is firm gas transportation is highly reliable.

Top 3 Customer Needs

1. Firm gas transportation is highly reliable.
2. Accuracy of invoices.
3. Scheduled gas volumes are accurate.

Source: MASTIO 2017 Natural Gas Transportation Customer Value Study

The study findings are divided into the following 4 groups located on the proceeding pages:

- **Mega Pipelines**
- **Major Pipelines**
- **Regional Pipelines**
- **Major Organizational Groups**

MASTIO QUALITY AWARDS

The criterion MASTIO uses to recognize the best pipelines are:

- 1) Determined by the pipelines with the highest overall Customer Value Weighted Quality (Benefit) Score that have also met a minimum of 30 ratings.

Please note that companies need to meet the above criteria to be considered for the Mastio Quality Award.

MEGA PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Mega Pipeline Group.

ANR Pipeline Co.	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Tallgrass Interstate Gas Tran.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Gulf South Pipeline Co.	Texas Gas Transmission
NGPL	TransCanada Pipelines - Mainline System
Northern Natural Gas Co.	Williams Gas Pipeline-Northwest
Panhandle Eastern Pipe Line Co.	Williams Gas Pipeline-Transco

Mega Pipeline Group – The Mega Pipeline Group consists of pipelines with at least 3,500 miles of transportation pipe and deliveries of at least 1 trillion CF (TCF).

The following Mega pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Mega Pipeline Group	Northern Natural Gas Co.	Dominion Transmission, Inc. El Paso Natural Gas Co. Northern Natural Gas Co. Southern Natural Gas Co. Williams Gas Pipeline-Northwest

MAJOR PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Major Pipeline Group.

ANR Pipeline Co.	Southern Natural Gas Co.
Colorado Interstate Gas Co.	Southern Star Central
Columbia Gas Transmission Corp.	Tallgrass Interstate Gas Trans.
Columbia Gulf Transmission Co.	Tennessee Gas Pipeline Co.
Dominion Transmission, Inc.	Texas Eastern Transmission Corp.
El Paso Natural Gas Co.	Texas Gas Transmission
Enable Gas Transmission	TransCanada Pipelines - Alberta System
Florida Gas Transmission Co.	TransCanada Pipelines - Mainline System
Gulf South Pipeline Co.	Trunkline Gas Co.
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Northwest
Northern Natural Gas Co.	Williams Gas Pipeline-Transco
Panhandle Eastern Pipe Line Co.	

Major Pipeline Index - The Major Pipeline Index consists of pipelines with at least 3,500 miles of transportation pipe and serves at least 3 states.

The following Major pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Pipeline Group	Northern Natural Gas Co.	Dominion Transmission, Inc. El Paso Natural Gas Co. Northern Natural Gas Co. Southern Natural Gas Co. Southern Star Central Williams Gas Pipeline-Northwest

REGIONAL PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Regional Pipeline Group.

Algonquin Gas Transmission Co.	Millennium Pipeline
BC Pipeline	National Fuel Gas Supply Corp.
California Gas Transmission	Northern Border Pipeline Co.
Dominion Carolina Gas Transmission	ONEOK Gas Transportation Co.
East Tennessee Natural Gas Co.	Questar Pipeline Co.
Enable Mississippi River Trans (MRT)	Southern California Gas Co.
Enable Oklahoma Intrastate Trans.	Transwestern Pipeline Co.
Energy Transfer Fuel Co.	Union Gas Ltd.
Gas Transmission Northwest	Vector Pipeline
Great Lakes Gas Transmission, Inc.	Viking Gas Transmission Co.
Iroquois Gas Transmission System L.P.	WBI Energy Transmission
Kern River Gas Transmission Co.	

Regional Pipeline Index - The Regional Pipeline Index consists of pipelines with less than 3,500 miles of transportation pipe and/or serves less than 3 states.

The following Regional pipelines met the requirements to receive the Mastio Quality Award.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Regional Pipeline Group	Kern River Gas Transmission Co.	Kern River Gas Transmission Co. Northern Border Pipeline Co. Questar Pipeline Co.

MAJOR ORGANIZATIONAL PIPELINE GROUP

The following is an alphabetical listing of the pipelines included in the Major Organization Group.

Berkshire Hathaway Energy Pipeline Group
Boardwalk Pipeline Group
Dominion Pipeline Group
Enable Group
Energy Transfer Group
Kinder Morgan Group
ONEOK Partners Group
Spectra Energy Group
Tallgrass Energy Group
TransCanada Group
Williams Group

The following Intrastate pipelines groups met the requirements to receive the Mastio Quality Award.

Major Pipeline Group Index – Includes the pipelines that the parent company owns and operates.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Organizational Groups	Berkshire Hathaway Energy Pipeline Group	Berkshire Hathaway Energy Pipeline Group Dominion Pipeline Group Williams Group

Legacy Indexes

The following MASTIO Customer Satisfaction Indexes are included for legacy purposes. MASTIO realizes many companies have relied on these indexes to benchmark their performance over the years. In light of the migration to Customer Value Analysis from the traditional Customer Satisfaction, we feel the Customer Value Indexes provide a clearer picture of a company's performance relative to other companies. The Customer Value Index places a higher level of importance on price than the legacy Customer Satisfaction Index. Also, please note that awards are presented based on a company's performance on the CV Index.

Customer Satisfaction Index Mega Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.49
2	Williams Gas Pipeline-Northwest	88.93
3	Southern Natural Gas Co.	85.16
4	Texas Gas Transmission	84.53
5	Dominion Transmission, Inc.	82.66
6	El Paso Natural Gas Co.	82.27
7	Williams Gas Pipeline-Transco	81.69
8	Panhandle Eastern Pipe Line Co.	81.16
9	ANR Pipeline Co.	80.72
10	Tennessee Gas Pipeline Co.	79.66
11	Gulf South Pipeline Co.	79.50
12	Columbia Gas Transmission Corp.	78.58
13	Texas Eastern Transmission Corp.	78.11
14	Natural Gas Pipeline Co. of America	76.63
15	TransCanada Pipelines - Mainline System	75.58
16	Tallgrass Interstate Gas Trans.	75.09

The *Mega Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe, serves at least 3 states, and deliveries of at least 1 trillion CF (TCF).

Source: MASTIO 21st Edition Natural Gas Transportation Customer Value Study – 2017

Legacy Indexes

Customer Satisfaction Index Major Pipelines (Formerly the Long Haul Pipelines)

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.49
2	Williams Gas Pipeline-Northwest	88.93
3	Southern Star Central	86.95
4	Southern Natural Gas Co.	85.16
5	Texas Gas Transmission	84.53
6	Dominion Transmission, Inc.	82.66
7	Columbia Gulf Transmission Co.	82.47
8	El Paso Natural Gas Co.	82.27
9	Colorado Interstate Gas Co.	81.73
10	Williams Gas Pipeline-Transco	81.69
11	Panhandle Eastern Pipe Line Co.	81.16
12	ANR Pipeline Co.	80.72
13	Tennessee Gas Pipeline Co.	79.66
14	Gulf South Pipeline Co.	79.50
15	Trunkline Gas Co.	78.61
16	Columbia Gas Transmission Corp.	78.58
17	TransCanada Pipelines - Alberta System	78.26
18	Texas Eastern Transmission Corp.	78.11
19	Natural Gas Pipeline Co. of America	76.63
20	Florida Gas Transmission Co.	75.79
21	TransCanada Pipelines - Mainline System	75.58
22	Tallgrass Interstate Gas Trans.	75.09
23	Enable Gas Transmission	72.71

The *Major Pipeline Index* consists of pipelines with at least 3,500 miles of transportation pipe and serves at least 3 states.

Source: MASTIO 21st Edition Natural Gas Transportation Customer Value Study – 2017

Legacy Indexes

Customer Satisfaction Index Regional Pipelines (Formerly the Short Haul Pipelines)

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	91.58
2	Enable Mississippi River Trans	87.64
3	Questar Pipeline Co.	85.85
4	Northern Border Pipeline Co.	84.94
5	Iroquois Gas Transmission System	84.72
6	Viking Gas Transmission Co.	83.78
7	Union Gas Ltd.	81.51
8	National Fuel Gas Supply Corp.	81.29
9	California Gas Transmission	80.67
10	WBI Energy Transmission	80.49
11	Vector Pipeline	80.28
12	Transwestern Pipeline Co.	80.24

Rank	Pipeline	Score
13	East Tennessee Natural Gas Co.	79.96
14	Great Lakes Gas Transmission	79.29
15	Millennium Pipeline	79.19
16	Dominion Carolina Gas Trans.	79.17
17	ONEOK Gas Transportation Co.	76.05
18	Energy Transfer Fuel Co.	74.55
19	BC Pipeline	73.39
20	Gas Transmission Northwest	73.11
21	Enable Oklahoma Intrastate Trans.	70.43
22	Southern California Gas Co.	67.45
23	Algonquin Gas Transmission Co.	64.03

The *Regional Pipeline Index* consists of pipelines with less than 3,500 miles of transportation pipe or serves less than 3 states.

Source: MASTIO 21st Edition Natural Gas Transportation Customer Value Study – 2017

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	93.49
2	Kern River Gas Transmission Co.	91.58
3	Williams Gas Pipeline-Northwest	88.93
4	Enable Mississippi River Trans	87.64
5	Southern Star Central	86.95
6	Questar Pipeline Co.	85.85
7	Southern Natural Gas Co.	85.16
8	Northern Border Pipeline Co.	84.94
9	Iroquois Gas Transmission System	84.72
10	Texas Gas Transmission	84.53
11	Viking Gas Transmission Co.	83.78
12	Dominion Transmission, Inc.	82.66
13	Columbia Gulf Transmission Co.	82.47
14	El Paso Natural Gas Co.	82.27
15	Colorado Interstate Gas Co.	81.73
16	Williams Gas Pipeline-Transco	81.69
17	National Fuel Gas Supply Corp.	81.29
18	Panhandle Eastern Pipe Line Co.	81.16

Rank	Pipeline	Score
19	ANR Pipeline Co.	80.72
20	WBI Energy Transmission	80.49
21	Vector Pipeline	80.28
22	Transwestern Pipeline Co.	80.24
23	East Tennessee Natural Gas Co.	79.96
24	Tennessee Gas Pipeline Co.	79.66
25	Gulf South Pipeline Co.	79.50
26	Great Lakes Gas Transmission	79.29
27	Dominion Carolina Gas Trans.	79.17
28	Trunkline Gas Co.	78.61
29	Columbia Gas Transmission Corp.	78.58
30	Texas Eastern Transmission Corp.	78.11
31	Natural Gas Pipeline Co. of America	76.63
32	Florida Gas Transmission Co.	75.79
33	Tallgrass Interstate Gas Trans.	75.09
34	Gas Transmission Northwest	73.11
35	Enable Gas Transmission	72.71
36	Algonquin Gas Transmission Co.	64.03

Source: MASTIO 21st Edition Natural Gas Transportation Customer Value Study – 2017

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Union Gas Ltd.	81.51
2	TransCanada Pipelines - Alberta System	78.26
3	TransCanada Pipelines - Mainline System	75.58
4	BC Pipeline	73.39

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	80.67
2	Millennium Pipeline	79.19
3	ONEOK Gas Transportation Co.	76.05
4	Energy Transfer Fuel Co.	74.55
5	Enable Oklahoma Intrastate Trans.	70.43
6	Southern California Gas Co.	67.45

Source: MASTIO 21st Edition Natural Gas Transportation Customer Value Study – 2017

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	92.65
2	Williams Group	84.03
3	Dominion Pipeline Group	83.88
4	Boardwalk Pipeline Group	82.49
5	ONEOK Partners Group	81.27
6	Kinder Morgan Group	80.52

Rank	Pipeline	Score
7	Energy Transfer Group	79.84
8	TransCanada Group	79.70
9	Enable Group	78.62
10	Spectra Energy Group	77.43
11	Tallgrass Energy Group	76.14

MASTIO specializes in providing an independent third party perspective for clients who want to truly assess their corporate image, discover their perceived level of customer value, find new customers, understand the strengths and weakness of the competition, and supplement their market intelligence. Our strength is in helping clients re-think established norms, eliminate internal biases, collect and analyze data and transform market research into actions that achieve superior business results.

For more information, contact Kevin Huntsman at MASTIO, 2621 N Belt Hwy. Suite M-14, St. Joseph, MO 64506. (Phone) 816-364-6200, (Fax) 816-364-3606 or at khuntsman@mastio.com.