

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:
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Press Release: MASTIO publishes the 23rd Edition Natural Gas Pipeline Report.

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MASTIO recently published the 2019, 23rd 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 February. This new study provides results concerning interstate, intrastate and Canadian pipelines.

The 2019 study is based on 766 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. Communicates in an honest and forthright manner.
3. Accuracy of invoices.

Source: MASTIO 2019 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 Trans.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Gulf South Pipeline Co.	Texas Gas Transmission
Natural Gas Pipeline Co. of America	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.	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.	Panhandle Eastern Pipe Line Co.
Colorado Interstate Gas Co.	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Southern Star Central
Columbia Gulf Transmission Co.	Tallgrass Interstate Gas Trans.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Enable Gas Transmission	Texas Gas Transmission
Florida Gas Transmission Co.	TransCanada Pipelines - Alberta System
Gulf South Pipeline Co.	TransCanada Pipelines - Mainline System
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Northwest
Northern Natural Gas Co.	Williams Gas Pipeline-Transco

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.	Northern Natural Gas Co. Southern Natural Gas Co. 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.	Northern Border Pipeline Co.
BC Pipeline	ONEOK Gas Transportation Co.
California Gas Transmission	ONEOK WesTex
Dominion Energy Questar Pipeline	Rockies Express Pipeline
East Tennessee Natural Gas Co.	Southern California Gas Co.
Enable Oklahoma Intrastate Trans.	Transwestern Pipeline Co.
Gas Transmission Northwest	Union Gas Ltd.
Great Lakes Gas Transmission, Inc.	Vector Pipeline
Iroquois Gas Transmission System L.P.	Viking Gas Transmission Co.
Kern River Gas Transmission Co.	WBI Energy Transmission
National Fuel Gas Supply Corp.	

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.	Dominion Energy Questar Pipeline Kern River Gas Transmission Co. Northern Border Pipeline Co. Union Gas Ltd. Vector Pipeline

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 Group
Enable Group
Enbridge Group
Energy Transfer Group
Kinder Morgan Group
ONEOK Partners Group
Tallgrass Energy Group
TransCanada Group
Williams Group

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

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

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Organizational Groups	Berkshire Hathaway Energy Pipeline Group	Berkshire Hathaway Energy Pipeline Group Boardwalk Pipeline Group Dominion 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.	94.19
2	Williams Gas Pipeline-Northwest	92.49
3	Southern Natural Gas Co.	85.34
4	Williams Gas Pipeline-Transco	81.71
5	Dominion Transmission, Inc.	81.63
6	ANR Pipeline Co.	81.02
7	Tennessee Gas Pipeline Co.	80.85
8	Panhandle Eastern Pipe Line Co.	80.47
9	El Paso Natural Gas Co.	80.40
10	TransCanada Pipelines - Mainline System	77.40
11	Columbia Gas Transmission Corp.	77.31
12	Texas Eastern Transmission Corp.	75.64
13	Natural Gas Pipeline Co. of America	72.35

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Texas Gas Transmission	85.03
Gulf South Pipeline Co.	83.74
Tallgrass Interstate Gas Trans.	78.34

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).

Legacy Indexes

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

Rank	Pipeline	Score
1	Northern Natural Gas Co.	94.19
2	Williams Gas Pipeline-Northwest	92.49
3	Southern Natural Gas Co.	85.34
4	Southern Star Central	82.25
5	Williams Gas Pipeline-Transco	81.71
6	Dominion Transmission, Inc.	81.63
7	ANR Pipeline Co.	81.02
8	Tennessee Gas Pipeline Co.	80.85
9	Panhandle Eastern Pipe Line Co.	80.47
10	El Paso Natural Gas Co.	80.40
11	TransCanada Pipelines - Mainline System	77.40
12	Columbia Gas Transmission Corp.	77.31
13	Texas Eastern Transmission Corp.	75.64
14	Natural Gas Pipeline Co. of America	72.35

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Florida Gas Transmission Co.	86.15
Texas Gas Transmission	85.03
Gulf South Pipeline Co.	83.74
Colorado Interstate Gas Co.	79.92
Columbia Gulf Transmission Co.	78.81
Tallgrass Interstate Gas Trans.	78.34
Enable Gas Transmission	73.65
TransCanada Pipelines - Alberta System	71.11

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

Legacy Indexes

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

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	93.33
2	Dominion Energy Questar Pipeline	88.11
3	Union Gas Ltd.	85.25
4	Vector Pipeline	83.31
5	Northern Border Pipeline Co.	82.71
6	Iroquois Gas Transmission System L.P.	81.33
7	WBI Energy Transmission	80.78
8	ONEOK Gas Transportation Co.	78.56
9	ONEOK WesTex	76.58

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Rockies Express Pipeline	85.51
Viking Gas Transmission Co.	83.52
Transwestern Pipeline Co.	83.13
California Gas Transmission	78.61
Great Lakes Gas Transmission, Inc.	78.36
Gas Transmission Northwest	76.31
East Tennessee Natural Gas Co.	73.66
Algonquin Gas Transmission Co.	72.36
BC Pipeline	71.08
National Fuel Gas Supply Corp.	69.63
Southern California Gas Co.	66.96
Enable Oklahoma Intrastate Trans.	64.66

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

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	94.19
2	Kern River Gas Transmission Co.	93.33
3	Williams Gas Pipeline-Northwest	92.49
4	Dominion Energy Questar Pipeline	88.11
5	Southern Natural Gas Co.	85.34
6	Vector Pipeline	83.31
7	Northern Border Pipeline Co.	82.71
8	Southern Star Central	82.25
9	Williams Gas Pipeline-Transco	81.71
10	Dominion Transmission, Inc.	81.63
11	Iroquois Gas Transmission System	81.33
12	ANR Pipeline Co.	81.02
13	Tennessee Gas Pipeline Co.	80.85
14	WBI Energy Transmission	80.78
15	Panhandle Eastern Pipe Line Co.	80.47
16	El Paso Natural Gas Co.	80.4
17	Columbia Gas Transmission Corp.	77.31
18	Texas Eastern Transmission Corp.	75.64
19	Natural Gas Pipeline Co. of America	72.35

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
Florida Gas Transmission Co.	86.15
Rockies Express Pipeline	85.51
Texas Gas Transmission	85.03
Gulf South Pipeline Co.	83.74
Viking Gas Transmission Co.	83.52
Transwestern Pipeline Co.	83.13
Colorado Interstate Gas Co.	79.92
Columbia Gulf Transmission Co.	78.81
Great Lakes Gas Transmission	78.36
Tallgrass Interstate Gas Trans.	78.34
Gas Transmission Northwest	76.31
East Tennessee Natural Gas Co.	73.66
Enable Gas Transmission	73.65
Algonquin Gas Transmission Co.	72.36
National Fuel Gas Supply Corp.	69.63

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Union Gas Ltd.	85.25
2	TransCanada Pipelines - Mainline System	77.40

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
TransCanada Pipelines - Alberta System	71.11
BC Pipeline	71.08

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	ONEOK Gas Transportation Co.	78.56
2	ONEOK WesTex	76.58

Pipeline	Score
The companies listed below do not meet the criteria of having at least 30 respondents to be included in the Customer Satisfaction Index.	
California Gas Transmission	78.61
Southern California Gas Co.	66.96
Enable Oklahoma Intrastate Trans.	64.66

Source: MASTIO 23rd Edition Natural Gas Transportation Customer Value Study – 2019

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	93.84
2	Williams Group	86.42
3	Dominion Group	85.57
4	Boardwalk Pipeline Group	84.46
5	Tallgrass Energy Group	80.97
6	Energy Transfer Group	79.80

Rank	Pipeline	Score
7	Enbridge Group	79.27
8	Kinder Morgan Group	79.00
9	TransCanada Group	78.67
10	ONEOK Partners Group	78.59
11	Enable Group	76.51

The *Major Organizational Groups Index* consists of organizational scores compiled from the combined scores of their transportation subsidiaries.

Source: MASTIO 23rd Edition Natural Gas Transportation Customer Value Study – 2019

MASTIO, celebrating 30 years in business, 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.

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