

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:  
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**Press Release: MASTIO publishes the 17th Edition Natural Gas Pipeline Report.**

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MASTIO recently published the 2013, 17th 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 2013 study is based on interviews with industrials, LDC's, independent power producers, producers and marketers. Each respondent rated pipelines on 28 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. Scheduled gas volumes are accurate.
3. Accuracy of invoices.

Source: MASTIO 2013 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.	Panhandle Eastern Pipe Line Co.
Columbia Gas Transmission Corp.	Southern Natural Gas Co.
Dominion Transmission, Inc.	Tennessee Gas Pipeline Co.
El Paso Natural Gas Co.	Texas Eastern Transmission Corp.
Gulf South Pipeline Co.	Texas Gas Transmission
Kinder Morgan Interstate Gas Transmission	TransCanada Pipelines - Mainline System
NGPL	Williams Gas Pipeline-Northwest
Northern Natural Gas 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.*

### **Overall Mega Pipeline Index Winner / Highest Score:**

**Northern Natural Gas Co.**

### **Suppliers Who Exceed the Industry Benchmark:**

Northern Natural Gas Co.  
Southern Natural Gas Co.  
Texas Eastern Transmission Corp.  
Texas Gas Transmission  
Williams Gas Pipeline-Northwest  
Williams Gas Pipeline-Transco

## **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.
CenterPoint Energy Gas Transmission Co.	Southern Natural Gas Co.
Colorado Interstate Gas Co.	Southern Star Central
Columbia Gas Transmission Corp.	Tennessee Gas Pipeline Co.
Columbia Gulf Transmission Co.	Texas Eastern Transmission Corp.
Dominion Transmission, Inc.	Texas Gas Transmission
El Paso Natural Gas Co.	TransCanada Pipelines - Alberta System
Florida Gas Transmission Co.	TransCanada Pipelines - Mainline System
Gulf South Pipeline Co.	Trunkline Gas Co.
Kinder Morgan Interstate Gas Trans.	Williams Gas Pipeline-Northwest
Natural Gas Pipeline Co. of America	Williams Gas Pipeline-Transco
Northern Natural Gas 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.*

### **Major Pipelines**

#### **Overall Major Pipeline Index Winner / Highest Score:**

**Northern Natural Gas Co.**

#### **Suppliers Who Exceed the Industry Benchmark:**

CenterPoint Energy Gas Transmission Co.  
Colorado Interstate Gas Co.  
Dominion Transmission, Inc.  
Northern Natural Gas Co.  
Southern Natural Gas Co.  
Southern Star Central  
Tennessee Gas Pipeline Co.  
Texas Eastern Transmission Corp.  
Texas Gas Transmission  
Williams Gas Pipeline-Northwest  
Williams Gas Pipeline-Transco

## REGIONAL PIPELINE GROUP

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

Algonquin Gas Transmission	Midwestern Gas Transmission
Alliance Pipeline Ltd.	National Fuel Gas Supply Corp.
BC Pipeline	Northern Border Pipeline Co.
California Gas Transmission	ONEOK Gas Transportation Co.
Carolina Gas Transmission	Questar Pipeline Co.
CenterPoint Energy-MRT	Ruby Pipeline
East Tennessee Natural Gas	Southern California Gas Co.
Enogex, Inc.	Transwestern Pipeline Co.
Gas Transmission Northwest	Union Gas Ltd.
Great Lakes Gas Transmission	Vector Pipeline
Iroquois Gas Trans. System	WBI Energy Transmission
Kern River Gas Transmission	Wyoming Interstate Co. Ltd.

**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.*

### Regional Pipelines

#### **Overall Regional Pipeline Index Winner / Highest Score:**

**Kern River Gas Transmission Co.**

#### **Suppliers Who Exceed the Industry Benchmark:**

Carolina Gas Transmission  
CenterPoint Energy-MRT  
Iroquois Gas Transmission System L.P.  
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.

Boardwalk Pipeline Group	ONEOK Partners Group
CenterPoint Energy Group	Spectra Energy Group
Energy Transfer Group	Tallgrass Energy Group
Kinder Morgan Group	TransCanada Group
MidAmerican Energy Group	Williams Group
NiSource Group	

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

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

### **Major Groups**

#### **Overall Major Pipeline Group Index Winner / Highest Score:**

**MidAmerican Energy Pipeline Group**

#### **Suppliers Who Exceed the Industry Benchmark:**

Boardwalk Pipeline Group  
CenterPoint Energy Group  
MidAmerican Energy Group  
Spectra Energy Group  
Williams Group

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 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](mailto:khuntsman@mastio.com).

# APPENDIX

## 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.	90.40
2	Texas Gas Transmission	84.58
3	Southern Natural Gas Co.	84.14
4	Williams Gas Pipeline-Northwest	83.65
5	Williams Gas Pipeline-Transco	83.43
6	Texas Eastern Transmission Corp.	81.03
7	Dominion Transmission, Inc.	80.45
8	Tennessee Gas Pipeline Co.	79.76
9	Panhandle Eastern Pipe Line Co.	79.20
10	Gulf South Pipeline Co.	78.63
11	ANR Pipeline Co.	77.42
12	El Paso Natural Gas Co.	77.08
13	TransCanada Pipelines - Mainline System	74.89
14	Natural Gas Pipeline Co. of America	74.66
15	Tallgrass Interstate Gas Trans.	74.01
16	Columbia Gas Transmission Corp.	72.03

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 17th Edition Natural Gas Transportation Customer Value Study – 2013

## Legacy Indexes

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

Rank	Pipeline	Score
1	Northern Natural Gas Co.	90.40
2	Southern Star Central	85.77
3	Texas Gas Transmission	84.58
4	Southern Natural Gas Co.	84.14
5	Williams Gas Pipeline-Northwest	83.65
6	Williams Gas Pipeline-Transco	83.43
7	CenterPoint Energy Gas Transmission Co.	81.20
8	Texas Eastern Transmission Corp.	81.03
9	Colorado Interstate Gas Co.	80.60
10	Dominion Transmission, Inc.	80.45
11	Florida Gas Transmission Co.	80.24
12	Tennessee Gas Pipeline Co.	79.76
13	Panhandle Eastern Pipe Line Co.	79.20
14	Gulf South Pipeline Co.	78.63
15	ANR Pipeline Co.	77.42
16	El Paso Natural Gas Co.	77.08
17	TransCanada Pipelines - Alberta System	76.89
18	Trunkline Gas Co.	75.74
19	TransCanada Pipelines - Mainline System	74.89
20	Natural Gas Pipeline Co. of America	74.66
21	Tallgrass Interstate Gas Trans.	74.01
22	Columbia Gas Transmission Corp.	72.03
23	Columbia Gulf Transmission Co.	71.51

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

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013

## Legacy Indexes

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

Rank	Pipeline	Score
1	Kern River Gas Transmission	89.05
2	CenterPoint Energy-MRT	85.74
3	Union Gas Ltd.	83.32
4	Midwestern Gas Transmission	82.30
5	Vector Pipeline	82.26
6	Northern Border Pipeline Co.	82.05
7	Carolina Gas Transmission	81.83
8	California Gas Transmission	80.65
9	Iroquois Gas Trans. System	80.50
10	East Tennessee Natural Gas	80.38
11	Algonquin Gas Transmission	79.99
12	Enogex, Inc.	78.56

Rank	Pipeline	Score
13	Transwestern Pipeline Co.	77.99
14	Gas Transmission Northwest	77.87
15	ONEOK Gas Transportation Co.	77.76
16	WBI Energy Transmission	77.44
17	Wyoming Interstate Co. Ltd.	76.73
18	Great Lakes Gas Transmission	75.79
19	National Fuel Gas Supply Corp.	75.63
20	BC Pipeline	75.34
21	Alliance Pipeline Ltd.	74.18
22	Questar Pipeline Co.	73.83
23	Ruby Pipeline	73.31
24	Southern California Gas Co.	72.90

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

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013



## Legacy Indexes

### Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	90.40
2	Kern River Gas Transmission	89.05
3	Southern Star Central	85.77
4	CenterPoint Energy-MRT	85.74
5	Texas Gas Transmission	84.58
6	Southern Natural Gas Co.	84.14
7	Williams Gas Pipeline-Northwest	83.65
8	Williams Gas Pipeline-Transco	83.43
9	Midwestern Gas Transmission	82.30
10	Vector Pipeline	82.26
11	Northern Border Pipeline Co.	82.05
12	Carolina Gas Transmission	81.83
13	CenterPoint Energy Gas Transmission Co.	81.20
14	Texas Eastern Transmission	81.03
15	Colorado Interstate Gas Co.	80.60
16	Iroquois Gas Transmission System L.P.	80.50
17	Dominion Transmission, Inc.	80.45
18	East Tennessee Natural Gas	80.38
19	Florida Gas Transmission Co.	80.24

Rank	Pipeline	Score
20	Algonquin Gas Transmission	79.99
21	Tennessee Gas Pipeline Co.	79.76
22	Panhandle Eastern Pipe Line	79.20
23	Gulf South Pipeline Co.	78.63
24	Transwestern Pipeline Co.	77.99
25	Gas Transmission Northwest	77.87
26	WBI Energy Transmission	77.44
27	ANR Pipeline Co.	77.42
28	El Paso Natural Gas Co.	77.08
29	Wyoming Interstate Co. Ltd.	76.73
30	Great Lakes Gas Transmission	75.79
31	Trunkline Gas Co.	75.74
32	National Fuel Gas Supply Corp.	75.63
33	Natural Gas Pipeline Co. of America	74.66
34	Tallgrass Interstate Gas Trans.	74.01
35	Questar Pipeline Co.	73.83
36	Ruby Pipeline	73.31
37	Columbia Gas Transmission	72.03
38	Columbia Gulf Transmission	71.51

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013

## Legacy Indexes

### Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Union Gas Ltd.	83.32
2	TransCanada Pipelines - Alberta System	76.89
3	BC Pipeline	75.34
4	TransCanada Pipelines - Mainline System	74.89
5	Alliance Pipeline Ltd.	74.18

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013

### Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	80.65
2	Enogex, Inc.	78.56
3	ONEOK Gas Transportation Co.	77.76
4	Southern California Gas Co.	72.90

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013

## Legacy Indexes

### Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	MidAmerican Energy Group	89.79
2	Williams Group	83.51
3	Boardwalk Pipeline Group	82.97
4	CenterPoint Energy Group	82.70
5	Spectra Energy Group	80.50
6	Kinder Morgan Group	78.63
7	ONEOK Partners Group	78.52
8	Energy Transfer Group	78.31
9	TransCanada Group	77.52
10	Tallgrass Energy Group	74.47
11	NiSource Group	71.85

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

The following table lists the entities that comprise the *Major Organizational Groups Index*. Please note that some pipelines may have been sold since the beginning of our research.

	Subsidiaries		
<b>Boardwalk Pipeline Group</b>	Gulf South Pipeline	Texas Gas Transmission	
<b>CenterPoint Energy</b>	CenterPoint Energy-MRT	CenterPoint Energy Gas Transmission Co.	
<b>Energy Transfer Group</b>	Florida Gas Transmission	Panhandle Eastern Pipe Line	Sea Robin Pipeline Co.
	Tiger Pipeline	Transwestern Pipeline Co.	Trunkline Gas Co.
<b>Kinder Morgan Group</b>	Colorado Interstate Gas Co.	Midcontinent Express Pipeline	Natural Gas Pipeline Co. of America
	Southern Natural Gas Co.	Tennessee Gas Pipeline Co.	TransColorado Gas Transmission Co.
	El Paso Natural Gas Co.	Ruby Pipeline	Wyoming Interstate Co.
	Cheyenne Plains Gas Pipeline Co.		
<b>MidAmerican Energy Group</b>	Kern River Gas Transmission.	Northern Natural Gas Co.	
<b>NiSource Group</b>	Columbia Gas Transmission	Columbia Gulf Transmission	
<b>ONEOK Partners Group</b>	Midwestern Gas Transmission	ONEOK Gas Transportation	Viking Gas Transmission
<b>Spectra Energy Group</b>	Algonquin Gas Transmission Co.	BC Pipeline	East Tennessee Natural Gas Co.
	Texas Eastern Transmission	Union Gas Ltd.	
<b>Tallgrass Energy Group</b>	Tallgrass Interstate Gas Trans.	Trailblazer Pipeline Co.	Rockies Express Pipeline
<b>TransCanada Group</b>	ANR Pipeline Co.	Gas Transmission Northwest	Great Lakes Gas Transmission
	Northern Border Pipeline	TransCanada Pipelines - Alberta System	TransCanada Pipelines - B.C. System
	TransCanada Pipelines - Mainline System		
<b>Williams Group</b>	Williams Gas Pipeline-Northwest	Williams Gas Pipeline-Transco	

Source: MASTIO 17th Edition Natural Gas Transportation Customer Value Study – 2013