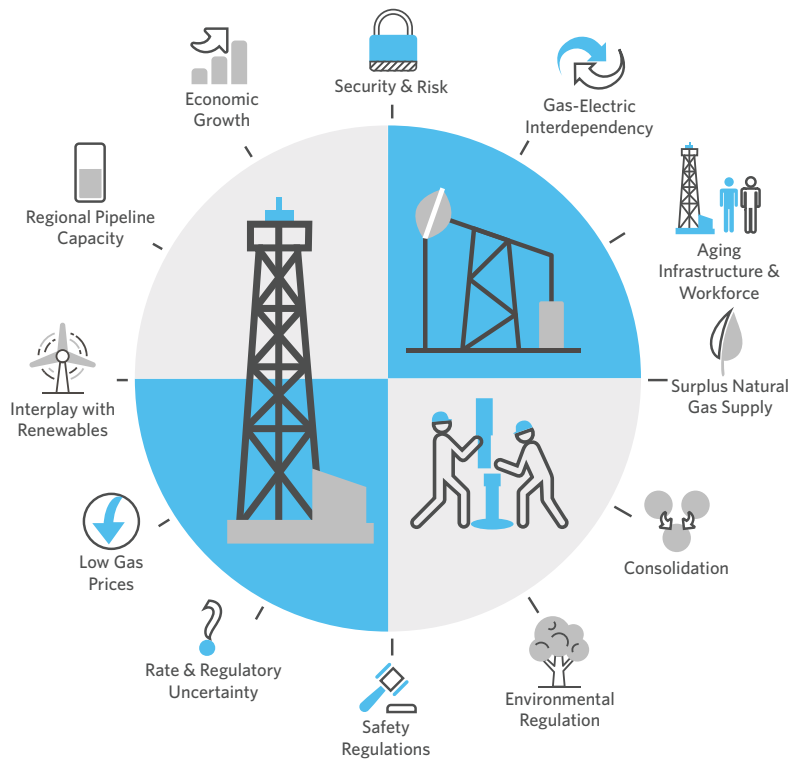


The Oil & Gas Industry

Our mission is to facilitate development and operation of reliable, efficient and value-laden oil & gas assets in an increasingly demanding regulatory environment to help our industry participants improve their overall decision making, risk management, and safety performance.

As Strategic "Owner's Advisor," we will facilitate the next gen of asset intelligence and management with projects aligned to market solutions.

TOP NATURAL GAS INDUSTRY ISSUES



KEY FACTS

- Gas utilities spend \$24B annually to enhance safety of gas distribution and transmission
- U.S. pipeline investment at \$12-20B annually through 2035
- LNG capacity by 2030 increases by 70% to 600 MTPA
- LNG investment \$200B by 2030 globally to meet demand

THE CHALLENGES

- Mergers or acquisitions of gas utilities by electric utilities push gas utilities up the technology curve
- Aging infrastructure drives capital spend and asset replacement programs
- High profile safety incidents increase regulatory scrutiny and mandates
- Sustained low gas prices driven by technological advances and efficiency
- Regional constraints remain with opposition to new pipeline infrastructure
- LNG's role grows in global energy mix, traditions upended as US emerges a dominant supplier

MC SOLUTIONS

| Coordinated Market Solution | Offering/Project Focus |
|-----------------------------|---|
| Connected Enterprise | AMR to AMI |
| | Capital Prioritization & Risk |
| | Resource & Infrastructure Planning |
| | EADM Solutions |
| | Operational & Risk Assessments |
| New Energy Economy | Distribution Pipeline Resiliency & Safety |
| | Strategy for New Energy |
| Capital Efficiency | Regulatory, Transactions Support |