

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:
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Kevin R. Huntsman
MASTIO
3300 Dale Ave., Suite 109
St. Joseph, MO 64506
Phone: (816) 364-6200
khuntsman@mastio.com

Press Release: MASTIO publishes the 27th Edition Natural Gas Pipeline Report.

MASTIO recently published the 2023, 27th 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 2023 study is based on 735 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 crucial issue to transporters of natural gas in the latest study is firm gas transportation is highly reliable.

Top 5 Customer Needs

1. Firm gas transportation is highly reliable.
2. Scheduled gas volumes are accurate.
3. Accuracy of invoices.
4. Communicates in an honest and forthright manner.
5. Representatives are accessible when needed.

Source: MASTIO 2023 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.
Eastern Gas Trans. & Storage	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.	Eastern Gas Trans. & Storage Northern 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.	Nova Gas Transmission Line
Canadian Mainline	Panhandle Eastern Pipe Line Co.
Colorado Interstate Gas Co.	Southern Natural Gas Co.
Columbia Gas Transmission Corp.	Southern Star Central
Eastern Gas Trans. & Storage	Tallgrass Interstate Gas Trans.
El Paso Natural Gas Co.	Tennessee Gas Pipeline Co.
Enable Gas Transmission	Texas Eastern Transmission Corp.
Florida Gas Transmission Co.	Texas Gas Transmission
Gulf South Pipeline Co.	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.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Pipeline Group	Northern Natural Gas Co.	Eastern Gas Trans. & Storage Northern Natural Gas Co. 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 Co.	MountainWest Overthrust Pipeline
Alliance Pipeline Ltd.	MountainWest Pipeline
California Gas Transmission	National Fuel Gas Supply Corp.
Carolina Gas Transmission	Nexus Gas Transmission
East Tennessee Natural Gas Co.	Northern Border Pipeline Co.
Enbridge Gas	ONEOK Gas Transportation Co.
Energy Transfer Fuel Co.	ONEOK WesTex
Gas Transmission Northwest	Rockies Express Pipeline
Great Lakes Gas Transmission, Inc.	Southern California Gas Co.
Guardian Pipeline	Transwestern Pipeline Co.
Iroquois Gas Transmission System L.P.	Vector Pipeline
Kern River Gas Transmission Co.	Viking Gas Transmission Co.
Midwestern Gas Transmission Co.	WBI Energy Transmission
Millennium Pipeline	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.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Regional Pipeline Group	Kern River Gas Transmission Co.	California Gas Transmission Carolina Gas Transmission Kern River Gas Transmission Co. MountainWest Pipeline

MAJOR ORGANIZATIONAL PIPELINE GROUP

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

Berkshire Hathaway Energy Group
Boardwalk Pipeline Group
Enbridge Group
Energy Transfer Group
Kinder Morgan Group
ONEOK Partners Group
Tallgrass Energy Group
TC Energy Group
Williams Group

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

The following Major Organizational pipeline groups met the Mastio Quality Award requirements.

Category	Overall Winner / Highest Score	Suppliers Who Exceed the Industry Benchmark
Major Organizational Groups	Berkshire Hathaway Energy Group	Berkshire Hathaway Energy 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 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 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.	94.71
2	Williams Gas Pipeline-Northwest	88.43
3	Eastern Gas Trans. & Storage	87.12
4	Williams Gas Pipeline-Transco	83.54
5	Southern Natural Gas Co.	83.53
6	ANR Pipeline Co.	82.96
7	Columbia Gas Transmission Corp.	81.94
8	Texas Eastern Transmission Corp.	80.77
9	Tennessee Gas Pipeline Co.	80.74
10	El Paso Natural Gas Co.	80.02
11	Panhandle Eastern Pipe Line Co.	80.02
12	Natural Gas Pipeline Co. of America	75.33

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.	
Tallgrass Interstate Gas Trans.	83.29
Texas Gas Transmission	82.99
Gulf South Pipeline Co.	81.54
Canadian Mainline	81.14

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 27th Edition Natural Gas Transportation Customer Value Study – 2023

Legacy Indexes

Customer Satisfaction Index Major Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	94.71
2	Williams Gas Pipeline-Northwest	88.43
3	Eastern Gas Trans. & Storage	87.12
4	Williams Gas Pipeline-Transco	83.54
5	Southern Natural Gas Co.	83.53
6	ANR Pipeline Co.	82.96
7	Southern Star Central	82.76
8	Columbia Gas Transmission Corp.	81.94
9	Texas Eastern Transmission Corp.	80.77
10	Tennessee Gas Pipeline Co.	80.74
11	El Paso Natural Gas Co.	80.02
12	Panhandle Eastern Pipe Line Co.	80.02
13	Natural Gas Pipeline Co. of America	75.33
14	Nova Gas Transmission Line	73.22

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.	85.96
Tallgrass Interstate Gas Trans.	83.29
Texas Gas Transmission	82.99
Colorado Interstate Gas Co.	82.67
Gulf South Pipeline Co.	81.54
Canadian Mainline	81.14
Enable Gas Transmission	77.08

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

Source: MASTIO 27th Edition Natural Gas Transportation Customer Value Study – 2023

Legacy Indexes

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

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.79
2	Carolina Gas Transmission	95.80
3	MountainWest Pipeline	89.82
4	California Gas Transmission	88.21
5	WBI Energy Transmission	84.92
6	Northern Border Pipeline Co.	82.38
7	Gas Transmission Northwest	79.22
8	ONEOK Gas Transportation Co.	78.31
9	Enbridge Gas	77.69
10	Southern California Gas Co.	76.23

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.	
MountainWest Overthrust Pipeline	92.58
Wyoming Interstate Co. Ltd.	90.35
Vector Pipeline	87.41
Iroquois Gas Transmission System L.P.	86.42
Viking Gas Transmission Co.	86.20
Energy Transfer Fuel Co.	81.78
National Fuel Gas Supply Corp.	81.37
Great Lakes Gas Transmission, Inc.	81.05
East Tennessee Natural Gas Co.	81.02
Rockies Express Pipeline	80.87
Transwestern Pipeline Co.	79.43
Millennium Pipeline	78.45
Alliance Pipeline Ltd.	76.33
Midwestern Gas Transmission Co.	76.27
ONEOK WesTex	75.81
Guardian Pipeline	74.42
Nexus Gas Transmission	71.37
Algonquin Gas Transmission Co.	69.61

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

Source: MASTIO 27th Edition Natural Gas Transportation Customer Value Study – 2023

Legacy Indexes

Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.79
2	Carolina Gas Transmission	95.80
3	Northern Natural Gas Co.	94.71
4	MountainWest Pipeline	89.82
5	Williams Gas Pipeline-Northwest	88.43
6	Eastern Gas Trans. & Storage	87.12
7	WBI Energy Transmission	84.92
8	Williams Gas Pipeline-Transco	83.54
9	Southern Natural Gas Co.	83.53
10	ANR Pipeline Co.	82.96
11	Southern Star Central	82.76
12	Northern Border Pipeline Co.	82.38
13	Columbia Gas Transmission Corp.	81.94
14	Texas Eastern Transmission Corp.	80.77
15	Tennessee Gas Pipeline Co.	80.74
16	Panhandle Eastern Pipe Line Co.	80.02
17	El Paso Natural Gas Co.	80.02
18	Gas Transmission Northwest	79.22
19	Natural Gas Pipeline Co. of America	75.33

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.	
Wyoming Interstate Co. Ltd.	90.35
Vector Pipeline	87.41
Iroquois Gas Transmission System L.P.	86.42
Viking Gas Transmission Co.	86.20
Florida Gas Transmission Co.	85.96
Tallgrass Interstate Gas Trans.	83.29
Texas Gas Transmission	82.99
Colorado Interstate Gas Co.	82.67
Gulf South Pipeline Co.	81.54
National Fuel Gas Supply Corp.	81.37
Great Lakes Gas Transmission, Inc.	81.05
East Tennessee Natural Gas Co.	81.02
Rockies Express Pipeline	80.87
Transwestern Pipeline Co.	79.43
Enable Gas Transmission	77.08
Midwestern Gas Transmission Co.	76.27
Guardian Pipeline	74.42
Nexus Gas Transmission	71.37
Algonquin Gas Transmission Co.	69.61

Source: MASTIO 27th Edition Natural Gas Transportation Customer Value Study – 2023

Legacy Indexes

Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas	77.69
2	Nova Gas Transmission Line	73.22

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.	
Canadian Mainline	81.14
Alliance Pipeline Ltd.	76.33

Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	California Gas Transmission	88.21
2	ONEOK Gas Transportation Co.	78.31
3	Southern California Gas Co.	76.23

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.	
MountainWest Overthrust Pipeline	92.58
Energy Transfer Fuel Co.	81.78
Millennium Pipeline	78.45
ONEOK WesTex	75.81

Source: MASTIO 27th Edition Natural Gas Transportation Customer Value Study – 2023

Legacy Indexes

Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Group	94.11
2	Williams Group	85.65
3	Tallgrass Energy Group	82.99
4	Boardwalk Pipeline Group	82.44
5	Kinder Morgan Group	81.35
6	Energy Transfer Group	80.43
7	TC Energy Group	80.36
8	ONEOK Partners Group	78.89
9	Enbridge Group	78.00

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

Mastio has been providing actionable insights and unbiased data for nearly 35 years, including international with over 900 projects and 300+ clients in various commodity-driven industries, such as energy, utilities, transportation, logistics, plastics, chemicals, manufacturing, and service industries. Mastio works with many Fortune 100 and 500 companies.

For more information, contact Kevin Huntsman at 816-279-5200 or at khuntsman@mastio.com.

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