

**FOR IMMEDIATE RELEASE FOR FURTHER INFORMATION CONTACT:  
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**Press Release: MASTIO publishes the 28<sup>th</sup> Edition Natural Gas Pipeline Report.**

MASTIO recently published the 2024, 28th 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 mid-February. This new study provides results concerning interstate, intrastate, and Canadian pipelines.

The 2024 study is based on 771 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. Communicates in an honest and forthright manner.
3. Scheduled gas volumes are accurate.
4. Accuracy of invoices.
5. Representatives are accessible when needed.

Source: MASTIO 2024 Natural Gas Transportation Customer Value Study4

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
<b>Mega Pipeline Group</b>	<b>Northern Natural Gas Co.</b>	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.*

<b>Category</b>	<b>Overall Winner / Highest Score</b>	<b>Suppliers Who Exceed the Industry Benchmark</b>
<b>Major Pipeline Group</b>	<b>Northern Natural Gas Co.</b>	Eastern Gas Trans. & Storage Northern Natural Gas Co. Panhandle Eastern Pipe Line 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.	MountainWest Pipeline
BC Pipeline	National Fuel Gas Supply Corp.
California Gas Transmission	Nexus Gas Transmission
Carolina Gas Transmission	Northern Border Pipeline Co.
East Tennessee Natural Gas Co.	ONEOK Gas Transportation Co.
Enbridge Gas	ONEOK WesTex
Energy Transfer Fuel Co.	Rockies Express Pipeline
Gas Transmission Northwest	Southern California Gas Co.
Great Lakes Gas Transmission, Inc.	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
MountainWest Overthrust Pipeline	

**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.*

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

<b>Category</b>	<b>Overall Winner / Highest Score</b>	<b>Suppliers Who Exceed the Industry Benchmark</b>
<b>Major Organizational Groups</b>	<b>Berkshire Hathaway Energy Group</b>	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.	94.80
2	Eastern Gas Trans. & Storage	89.77
3	Williams Gas Pipeline-Northwest	86.03
4	Panhandle Eastern Pipe Line Co.	84.44
5	Southern Natural Gas Co.	83.30
6	Texas Gas Transmission	82.51
7	ANR Pipeline Co.	82.23
8	Tennessee Gas Pipeline Co.	82.21
9	Columbia Gas Transmission Corp.	81.35
10	El Paso Natural Gas Co.	81.21
11	Natural Gas Pipeline Co. of America	79.13
12	Texas Eastern Transmission Corp.	78.73
13	Williams Gas Pipeline-Transco	78.68

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.	83.21
Gulf South Pipeline Co.	81.08
Canadian Mainline	78.29

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 28th Edition Natural Gas Transportation Customer Value Study – 2024

## Legacy Indexes

### Customer Satisfaction Index Major Pipelines

Rank	Pipeline	Score
1	Northern Natural Gas Co.	94.80
2	Eastern Gas Trans. & Storage	89.77
3	Southern Star Central	86.33
4	Williams Gas Pipeline-Northwest	86.03
5	Panhandle Eastern Pipe Line Co.	84.44
6	Southern Natural Gas Co.	83.30
7	Colorado Interstate Gas Co.	83.05
8	Texas Gas Transmission	82.51
9	ANR Pipeline Co.	82.23
10	Tennessee Gas Pipeline Co.	82.21
11	Columbia Gas Transmission Corp.	81.35
12	El Paso Natural Gas Co.	81.21
13	Natural Gas Pipeline Co. of America	79.13
14	Texas Eastern Transmission Corp.	78.73
15	Williams Gas Pipeline-Transco	78.68
16	Nova Gas Transmission Line	73.48

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.	85.94
Columbia Gulf Transmission Co.	84.68
Tallgrass Interstate Gas Trans.	83.21
Enable Gas Transmission	81.18
Gulf South Pipeline Co.	81.08
Canadian Mainline	78.29

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

Source: MASTIO 28th Edition Natural Gas Transportation Customer Value Study – 2024

## Legacy Indexes

### Customer Satisfaction Index Regional Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.48
2	Carolina Gas Transmission	95.35
3	MountainWest Overthrust Pipeline	91.42
4	MountainWest Pipeline	85.85
5	Northern Border Pipeline Co.	83.95
6	Rockies Express Pipeline	83.59
7	WBI Energy Transmission	82.04
8	Viking Gas Transmission Co.	81.74

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	90.40
Iroquois Gas Transmission System L.P.	87.72
National Fuel Gas Supply Corp.	87.58
Vector Pipeline	86.21
Enbridge Gas	82.89
Transwestern Pipeline Co.	79.67
Great Lakes Gas Transmission, Inc.	79.18
ONEOK Gas Transportation Co.	79.05
Energy Transfer Fuel Co.	78.81
East Tennessee Natural Gas Co.	77.92
Midwestern Gas Transmission Co.	77.87
BC Pipeline	77.33
Southern California Gas Co.	76.98
Gas Transmission Northwest	76.00
Nexus Gas Transmission	71.98
ONEOK WesTex	70.15
Algonquin Gas Transmission Co.	68.57

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

Source: MASTIO 28th Edition Natural Gas Transportation Customer Value Study – 2024



## Legacy Indexes

### Customer Satisfaction Index Interstate Pipelines

Rank	Pipeline	Score
1	Kern River Gas Transmission Co.	97.48
2	Carolina Gas Transmission	95.35
3	Northern Natural Gas Co.	94.80
4	Eastern Gas Trans. & Storage	89.77
5	Southern Star Central	86.33
6	Williams Gas Pipeline-Northwest	86.03
7	MountainWest Pipeline	85.85
8	Panhandle Eastern Pipe Line Co.	84.44
9	Northern Border Pipeline Co.	83.95
10	Rockies Express Pipeline	83.59
11	Southern Natural Gas Co.	83.30
12	Colorado Interstate Gas Co.	83.05
13	Texas Gas Transmission	82.51
14	ANR Pipeline Co.	82.23
15	Tennessee Gas Pipeline Co.	82.21
16	WBI Energy Transmission	82.04
17	Viking Gas Transmission Co.	81.74
18	Columbia Gas Transmission Corp.	81.35
19	El Paso Natural Gas Co.	81.21
20	Natural Gas Pipeline Co. of America	79.13
21	Texas Eastern Transmission Corp.	78.73
22	Williams Gas Pipeline-Transco	78.68

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.	
Iroquois Gas Transmission System L.P.	87.72
National Fuel Gas Supply Corp.	87.58
Vector Pipeline	86.21
Florida Gas Transmission Co.	85.94
Columbia Gulf Transmission Co.	84.68
Tallgrass Interstate Gas Trans.	83.21
Enable Gas Transmission	81.18
Gulf South Pipeline Co.	81.08
Transwestern Pipeline Co.	79.67
Great Lakes Gas Transmission, Inc.	79.18
East Tennessee Natural Gas Co.	77.92
Midwestern Gas Transmission Co.	77.87
Gas Transmission Northwest	76.00
Nexus Gas Transmission	71.98
Algonquin Gas Transmission Co.	68.57

Source: MASTIO 28th Edition Natural Gas Transportation Customer Value Study – 2024

## Legacy Indexes

### Customer Satisfaction Index Canadian Pipelines

Rank	Pipeline	Score
1	Enbridge Gas	82.89
2	Canadian Mainline	78.29
3	BC Pipeline	77.33
4	Nova Gas Transmission Line	73.48

### Customer Satisfaction Index Intrastate Pipelines

Rank	Pipeline	Score
1	MountainWest Overthrust Pipeline	91.42
2	California Gas Transmission	90.40
3	ONEOK Gas Transportation Co.	79.05
4	Energy Transfer Fuel Co.	78.81
5	Southern California Gas Co.	76.98
6	ONEOK WestTex	70.15

Source: MASTIO 28th Edition Natural Gas Transportation Customer Value Study – 2024

## Legacy Indexes

### Customer Satisfaction Index Major Organizational Groups

Rank	Pipeline	Score
1	Berkshire Hathaway Energy Pipeline Group	94.49
2	Williams Group	83.86
3	Tallgrass Energy Group	82.76
4	Boardwalk Pipeline Group	81.97
5	Kinder Morgan Group	81.88
6	Energy Transfer Group	80.70
7	TC Energy Group	79.87
8	ONEOK Partners Group	78.61
9	Enbridge Group	77.47

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*.

	Subsidiaries		
<b>Berkshire Hathaway Energy Pipeline Group</b>	Carolina Gas Transmission	Eastern Gas Transmission & Storage	Kern River Gas Transmission.
	Northern Natural Gas Co.		
<b>Boardwalk Pipeline Group</b>	Gulf South Pipeline	Texas Gas Transmission	
<b>Enbridge Group</b>	Algonquin Gas Transmission	BC Pipeline	East Tennessee Natural Gas
	Enbridge Gas	Nexus Gas Transmission	Texas Eastern Transmission
<b>Energy Transfer Group</b>	Enable Gas Transmission Co.	Enable Mississippi River Trans.	Enable Oklahoma Intrastate Trans.
	Enable Midstream Partners	Energy Transfer Fuel Co.	ETC Tiger Pipeline
	Florida Gas Transmission	Houston Pipe Line Co.	Oasis Pipeline Co.
	Panhandle Eastern Pipe Line	Sea Robin Pipeline Co.	Transwestern Pipeline Co.
	Trunkline Gas Co.		
<b>Kinder Morgan Group</b>	Cheyenne Plains Gas Pipeline	Colorado Interstate Gas Co.	El Paso Natural Gas Co.
	Kinder Morgan Texas Pipeline	Midcontinent Express Pipeline	Natural Gas Pipeline Co. of America
	Ruby Pipeline	Southern Natural Gas Co.	Tennessee Gas Pipeline Co.
	TransColorado Gas Transmission Co.	Wyoming Interstate Co.	
<b>ONEOK Partners Group</b>	Guardian Pipeline	Midwestern Gas Transmission	ONEOK Gas Transportation
	ONEOK Westex	Viking Gas Transmission	
<b>Tallgrass Energy Group</b>	Rockies Express Pipeline	Tallgrass Interstate Gas Trans.	Trailblazer Pipeline Co.
<b>TC Energy Group</b>	ANR Pipeline Co.	Columbia Gas Transmission	Columbia Gulf Transmission
	Gas Transmission Northwest	Great Lakes Gas Transmission	Northern Border Pipeline
	Nova Gas Transmission Line	Foothills System	Canadian Mainline
<b>Williams Group</b>	Williams Gas Pipeline-Northwest	Williams Gas Pipeline-Transco	MountainWest Pipeline
	MountainWest Overthrust Pipeline		

Source: MASTIO 28th Edition Natural Gas Transportation Customer Value Study – 2024

Mastio has accumulated over 35 years of experience in delivering actionable insights and impartial data, having successfully executed more than 900 projects and served over 350 clients across a spectrum of commodity-centric sectors. These include but are not limited to energy, utilities, transportation, logistics, plastics, chemicals, manufacturing, and service industries. Notably, Mastio maintains collaborative partnerships with numerous Fortune 100 and Fortune 500 enterprises.

For more information, contact Kevin Huntsman at 816-279-5200 or at [khuntsman@mastio.com](mailto:khuntsman@mastio.com).

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