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February 27, 2026

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Re: Compass Energy Storage Project – Status Update, February 2026

In response to the correspondence from the California Energy Commission, and the recently approved suspension on the processing the Opt-in application for the Compass Energy Storage Project (TN 268025), we are providing the following information on the status of the project and our ongoing efforts to secure an alternative site for the project.

Our efforts to bring the project back into active status include (1) renewed due diligence and landowner outreach on multiple sites within a feasible distance from the Trabuco-Capistrano transmission line; (2) outreach to diverse public, private and NGO stakeholders whose knowledge and interest in the vicinity can provide new insights about project siting in the area; and (3) internal project economic modelling taking into consideration the existing LGIA and market conditions. The following is a summary on those efforts to date:

1. Site Assessment and land owner outreach

- a. Engie Development staff has conducted internal mapping and desktop due diligence on approximately 20 sites in the vicinity of the Trabuco-Capistrano transmission line. These sites are primarily urban infill locations, as well as the nearby Landfill, where approximately 13 acres might be suitable for a BESS project.
- b. We have had direct meetings with several landowners for these sites to assess the owner's interest. We initiated two offers but none of these contacts have matured to become active negotiations. If one or more of these sites appears promising in the upcoming month we will immediately conduct physical site due diligence to evaluate its suitability.

2. Stakeholder Outreach

Engie staff and consultants have contacted key stakeholders and have held in person or virtual meetings to discuss next steps for the Compass project. Each of these meeting have provided additional insights on key siting parameters, as well as possible alternative locations for our consideration.

- a. Direct meeting in February have included, City of San Juan Capistrano Mayor and City Manager, Correspondence with the BLESSIN organization, Juaneño Band of Mission Indians (Acjachemen Nation), Supervisor Katherine Foley, Second Harvest Food Bank, Los Angeles/Orange Counties Building & Construction Trades Council, City of Newport Beach, League of California Cities, Association of California Cities – Orange County (ACC-OC), and the Orange County Business

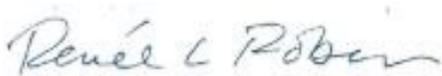
Council. Additional meetings in March will include the City of Laguna Niguel, and the Orange County Fire Authority, among others.

3. **Economic Analysis and Interconnection**

- a. Engie has maintained its Large Generator Interconnection Agreement (LGIA) with CAISO and has continued our meetings with SDGE on this project.
- b. Engie is obtaining comparable equipment procurement options as part of project cost analysis
- c. Engie is running internal financial models for each of the potential site alternatives and project schedule changes to assess feasibility and deliverability.

We anticipate knowing more details in each of these categories in the upcoming month. Please let us know if you have additional questions.

Sincerely yours,



Renée Louise Robin, J.D.

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