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Docket Number:	24-OPT-02
Project Title:	Compass Energy Storage Project
TN #:	269400
Document Title:	March Status Report
Description:	March Status Report
Filer:	RLR Renee L. Robin
Organization:	Engie
Submitter Role:	Applicant
Submission Date:	4/2/2026 10:54:40 AM
Docketed Date:	4/2/2026



March 31, 2026

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

In keeping with our continued reporting to the California Energy Commission regarding 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 for the month of March 2026, and our ongoing efforts to secure an alternative site for the project.

Our efforts to bring the project back into active status include (1) additional 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 additional internal mapping and desktop due diligence on approximately 4 of the previously vetted sites and the corresponding gen-tie options 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. We are conducting physical site due diligence on at least one new site to evaluate its suitability.
- b. We have had direct meetings with several landowners for these sites to assess the owner's interest. Our direct negotiations with landowners have not matured to become confirmed LOIs and we have no new information on land agreements at this time.

2. Stakeholder Outreach

Engie staff and consultants have continued our contacts with key stakeholders and have held additional 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 March have included, City of Laguna Niguel, and a series of second meetings with Juaneño Band of Mission Indians (Acjachemen Nation), Association of California Cities for Orange County (ACC-OC), and the Orange County Business Council.


- b. Additionally, a comprehensive meeting was held with Orange County Fire Authority leadership and Division Chiefs to ensure close coordination on safety standards and review processes.

3. Economic Analysis and Interconnection

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

We will continue to update the Commission staff on any new developments in these site transition efforts. Please let us know if you have additional questions.

Sincerely yours,



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