

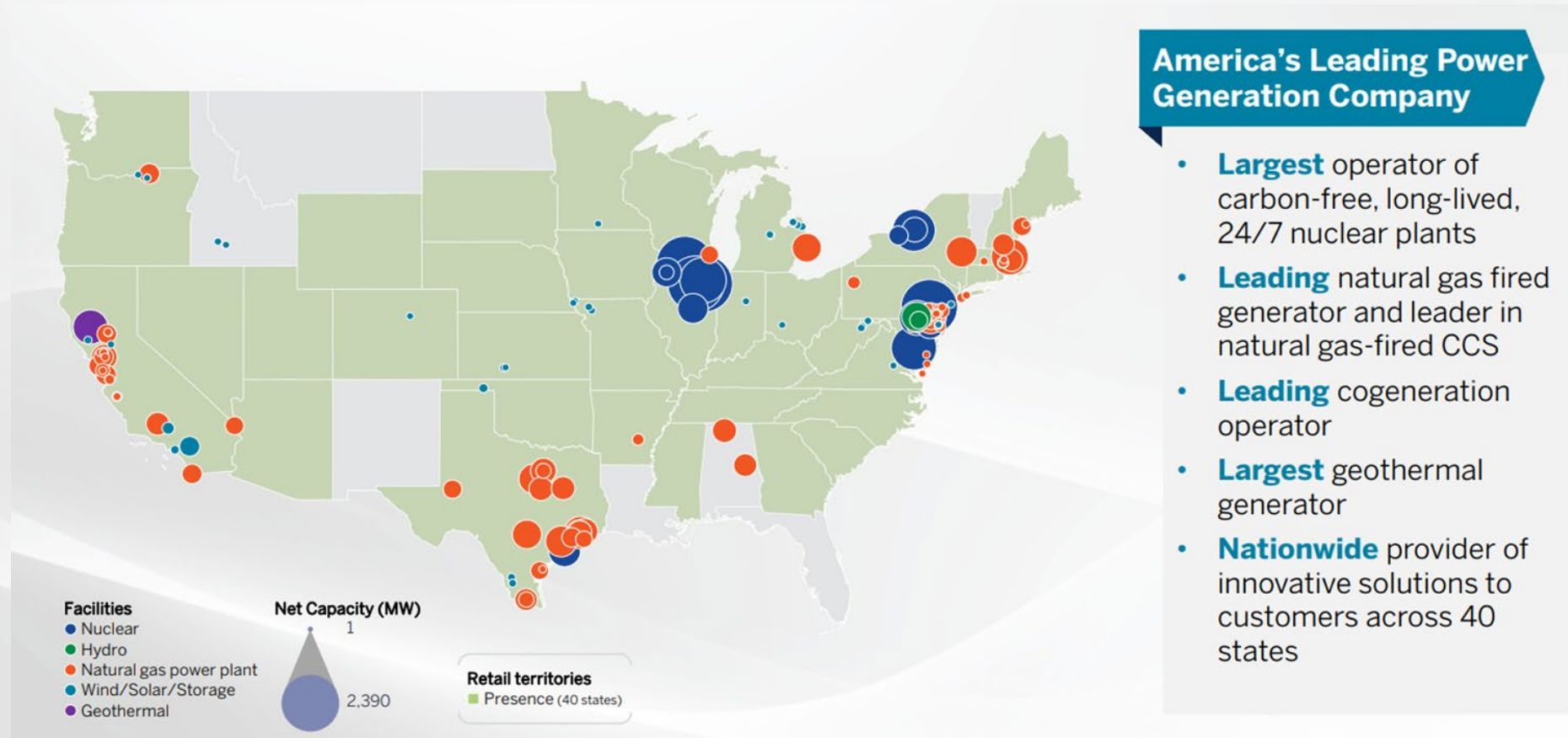


Comprehensive Transmission Planning

September 14-15, 2026

Constellation Energy: Coast-to-Coast Presence

Significant Texas Footprint Including Generation and Retail



Generator Priorities for Comprehensive Transmission Planning: Plan for Growth. Preserve Reliability. Improve Investment Signals.

- **Use Credible Planning Assumptions**
 - Prioritize mature projects and realistic load forecasts.
 - Differentiate committed load from speculative requests.
- **Increase Transparency**
 - Improve visibility into planning assumptions, studies, and upgrade drivers.
 - Provide stakeholders greater confidence in planning outcomes.
- **Align Transmission and Reliability Needs**
 - Ensure planning identifies infrastructure needed to support long-term load growth.
 - Recognize the reliability and transmission benefits of co-located dispatchable generation.

Key Message: Comprehensive planning should produce actionable signals for transmission and generation investment while maintaining reliability.

Generator Priorities for Batch 1+:

Connect Serious Projects Faster. Improve Certainty. Maintain Reliability

- **Advance High-Quality Projects**
 - Strengthen readiness requirements and project screening.
 - Reduce the influence of speculative load on planning outcomes.
- **Enable Timely Interconnection**
 - Maintain an efficient pathway for load that is ready to connect.
 - Avoid processes that unnecessarily delay viable projects.
- **Value Flexible and Co-Located Resources**
 - Recognize the system benefits of controllable load and BYOG configurations.
 - Reflect reduced transmission impacts from co-located resources.
- **Increase Process Transparency**
 - Improve visibility into study assumptions, queue progression, and allocation decisions.

Key Message: The Batch framework should quickly advance credible projects, support efficient infrastructure planning, and reward reliability-enhancing generation and load configurations.

ERCOT BOARD OF DIRECTORS

Comprehensive Transmission Planning

September 14-15, 2026



50+ GW

2024

57+ GW

2025

95 GW

End of 2030

**SOLAR**

11.6+ GW of capacity

**WIND**

- 17.3+ GW onshore capacity
- 2.9+ GW offshore capacity

**NUCLEAR**

- 2+ GW capacity

**BATTERY STORAGE**

- 6 GW capacity

**HYDRO GENERATION**

21.7+ GW of capacity

**NETWORKS**

- #1 gas infrastructure operator in Europe
- #2 biomethane supplier to businesses in France
- 5,400+ KM of electrical grid networks worldwide
- 260,000+ KM of gas distribution networks worldwide

**ENERGY SUPPLY**

- 4.3 GW of green PPAs signed
- 500+ TWH delivered

**ENGIE WORLDWIDE**

(FY 2025 data)

\$71.9B
\$63B

In Revenue
Market Cap

90k+ Employees
30 Countries

13.7+ GW
Total capacity
In operation
& construction

WIND ENERGY

(In operation and under construction)

- 30 projects
- 4+ GW of capacity

BATTERY STORAGE

(In operation and under construction)

- 42 projects
- 4.8+ GW of capacity
- One of the largest BESS operators

SOLAR ENERGY

(In operation and under construction)

- 27 projects
- 4.6+ GW of capacity

ENERGY SUPPLY

- 35k+ business customers
- 295+ Twh of energy traded
- 50+ TWh delivered

Local Presence

2K+ Employees
10+ States with
Operating Projects
100+ Communities

ENGIE in America

\$5.1B

In Revenue

\$11.1B

Capital Employed

Generator Priorities for Comprehensive Transmission Planning: Plan for Growth. Preserve Reliability. Improve Investment Signals.

- **Planning Process Transparency**

- Ensure transparency and stability in the study assumptions, and allocation decisions.
- Prioritize development of a status tool for data input and status progression.

- **Ensure Both Local and Bulk Transmission and Reliability Needs**

- Ensure the importance of local planning to identify and move forward local congestion and reliability needs.
- Integrate into comprehensive planning process the resolution of Generic Transmission Constrains
- Recognize the reliability and transmission benefits Grid Enhancing and Topology configurations.

Generator Priorities for Comprehensive Transmission Planning: Plan for Growth. Preserve Reliability. Improve Investment Signals.

- **Prioritize Reliability and Speed to Market by Developing Flexible Bring Your Own Generation and Co-Location Configurations**
 - Define Netted Network
 - Develop process for Multiple POIs and/or Customer Owned Substations
 - Develop a process for Large Loads to connect without consuming from the grid until the load goes through a batch process
 - Allow BYOG when generation is at a different location from the Large Load
- **Increase Reliability Uses of Generation Resources**
 - Define a registration for resources that are only used for loads meeting operational requirements,
 - Develop rules for resources that are added for operational requirements that also want to participate in Ancillary Services