

Quality, Craftsmanship, and Integrity

RNG Connect Overview



A MEMBER OF THE CAMPOS FAMILY



Safety Moment

Campos Company Overview

RNG Interconnect Program

Liberty Utilities (NY)

RNG Values & Key Impacts

Agenda





SAFETY MOMENT: ANNUAL CHECKUPS

- Why We Don't
- Why We Should
- What It Could Mean



Company Footprint



Campos Family of Companies

-  Campos
-  Co-Locations
-  Campos EPC
-  Campos CVG Staffing Solutions
-  Campos NACC Construction
-  Campos Fabrication
-  Campos Sage
-  Campos MX



13 STEM Labs built across the nation



Collaborations with Colorado University at Boulder, Syracuse, NY, and University of California Merced
Totaling \$12M in Donations



Office focused funds to support local communities and charities
East Donated \$35K in 2025

Culture and Foundation

THE CAMPOS FAMILY OF COMPANIES



Campos EPC

Ethics, Performance, Compliance
Engineering, Procurement, Construction

Dedicated 100% to Energy



Design and Engineering



Project Management Office



Staffing



Procurement and Fabrication



Construction and Start-Up

Electric and Gas Utilities

Natural Gas Pipelines

Datacenters

Developers

Services



Engineering and Site Design Requirements

MECHANICAL

1

Integration with Interconnect Skid
Pipeline Design
Tie-in Connections to Liberty Pipeline
Piping Layout

CIVIL/ STRUCTURAL

2

Grading
Foundations
Site & Equipment Layout

ELECTRICAL

3

Electrical Layout
Conduit and Grounding Plans
Area Classification Plans
Electric Utility Coordination



DESIGN PROCESS & MILESTONES

30% Design (Preliminary Design)

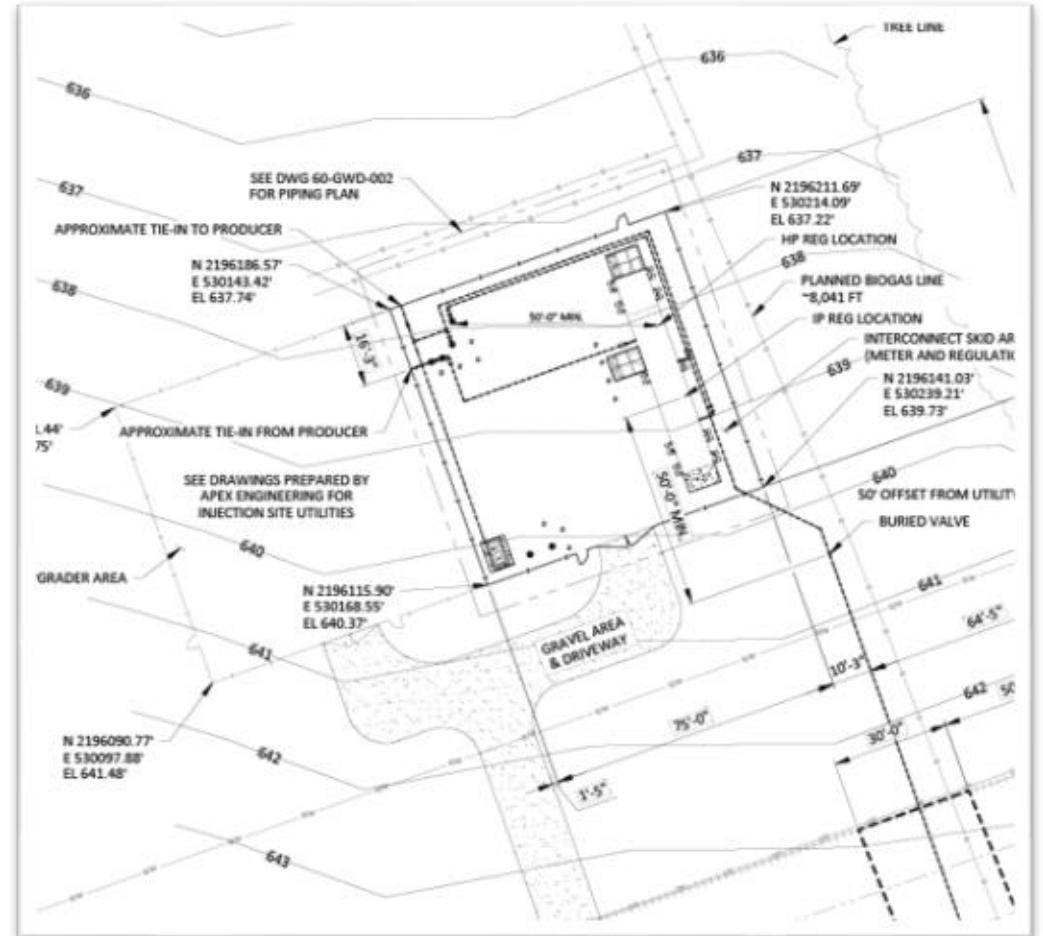
- Define system boundaries and process flow
- Develop Basis of Design (BOD) document
- Produce preliminary P&IDs, layout drawings, and initial equipment lists
- Conduct early hazard identification (HAZID) and stakeholder review

90% Design (Detailed Design)

- Complete all engineering disciplines (mechanical, civil, electrical, controls)
- Confirm system performance and layout optimization
- Integrate vendor data, utility markups, and constructability feedback

100% IFC (Issued for Construction)

- Finalized construction package with stamped drawings
- Approved vendor data and detailed fabrication drawings
- Ready for procurement, fabrication, and field construction





COMMON PROJECT COMPLICATIONS

Campos is at the forefront of decarbonization initiatives in support of our clients' environmental goals. We are helping our clients navigate the challenges with these initiatives and provide support and expertise along the way.

Financing & Contracts

- RIN Credits, Interconnect Agreements, Developer Financing

Schedule

- Interconnect vs. In Service Date
- Expectations from Developers
- Long Lead Equipment

Communication and SCADA Integration from 3rd Party Systems

Delivered Flow Rates vs. Anticipated Flow Rates

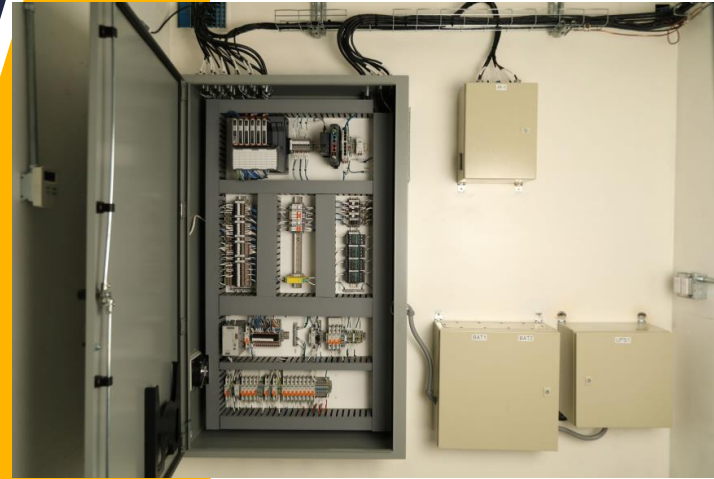
Curtailing, Flow Control, and System Constraints and Capacities





STANDARDIZED RNG INTERCONNECT PROGRAM

- RNG Interconnection Skids
- RNG Interconnect skids-ANSI 150, 300, 600
 - NPS 2"-6"
- RNG/CNG Interconnect skids – Up to 4000 psig
- Capacity up to 60 mcfh (Pressure Dependent)
- Pressure Cuts as Required
 - Worker, Monitor, Relief Configurations
- Odorization, Gas Analysis, Chromatography
- Measurement
- Flow Control and Emergency Isolation
- SCADA Integration
- Fire and Gas Detection
- UPS and Backup Power
- Single Skid or Modular
- Multiple configurations available that can be combined or customized based on client requirements
 - Metering, Regulation, and Odorization
 - RTU and Control Room
 - Gas Chromatography and Analysis
 - Heating and Gas Conditioning (CNG/RNG Truck Only)



Multiple Configurations

- ✓ Conex
- ✓ Open Air Skid
- ✓ Skid w/ Fiberglass Enclosure
- ✓ Skid w/ Pre-Fab Building

Quality, Craftmanship, and Integrity.



INTERCONNECTION KEY COMPONENTS

Pressure Control Philosophy

- Worker, Monitor, Token Relief
- Regulators or Control Valves

Metering

- Accuracy Requirements and Preference

Odorization

Isolation

- System Protection and Gas Quality
- Rejected Gas Handling

Analysis

- Gas Analyzer(s) – H₂S, O₂, H₂O, Siloxanes
- Gas Chromatograph – C₆+

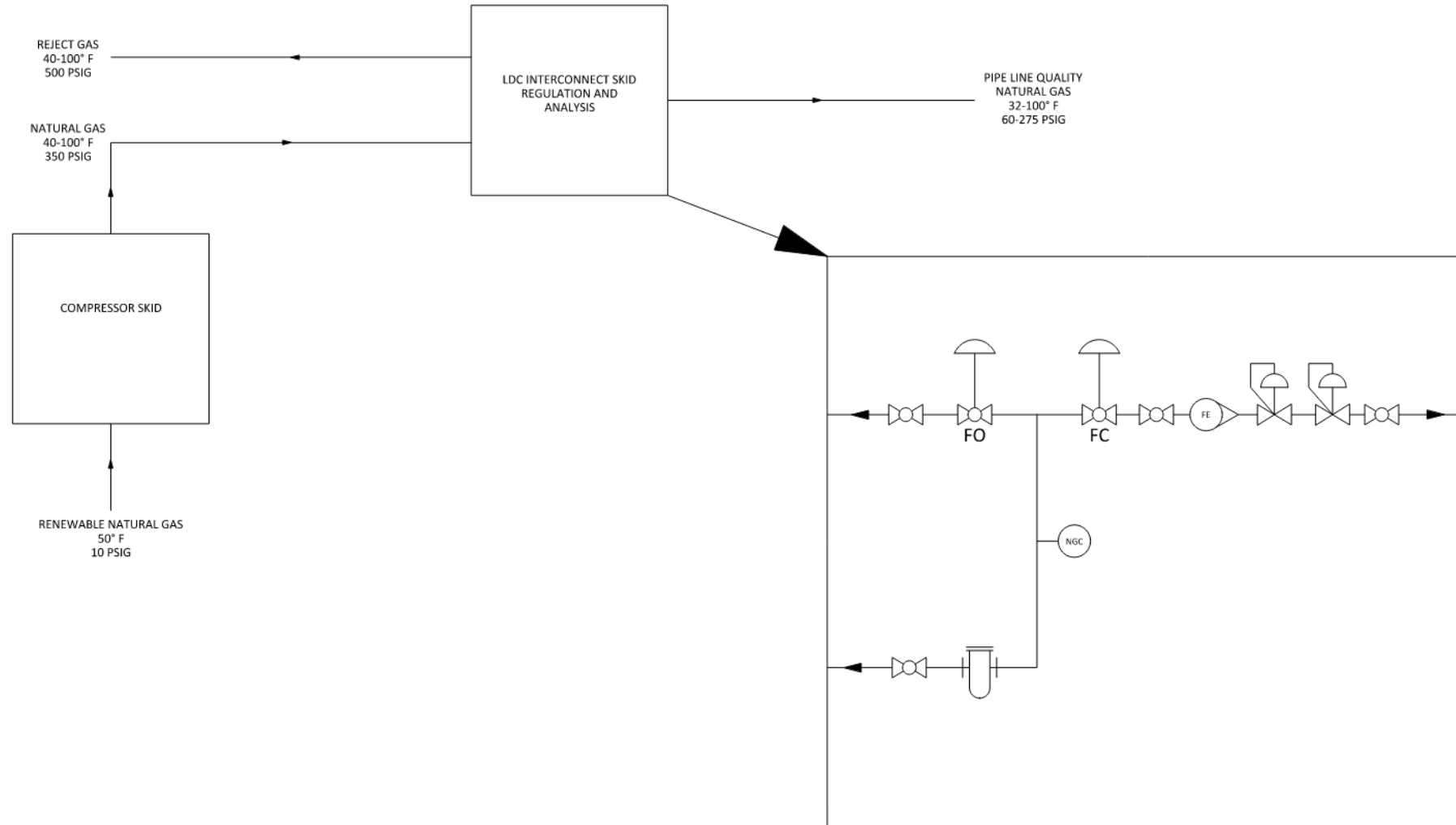
Flow Control

- Curtailment and System Tuning





INTERCONNECTION TYPICAL PFD





INTERCONNECTION SITE DESIGN

Utility Inlet Valve

- Piping system demarcation line between RNG supplier and LDC

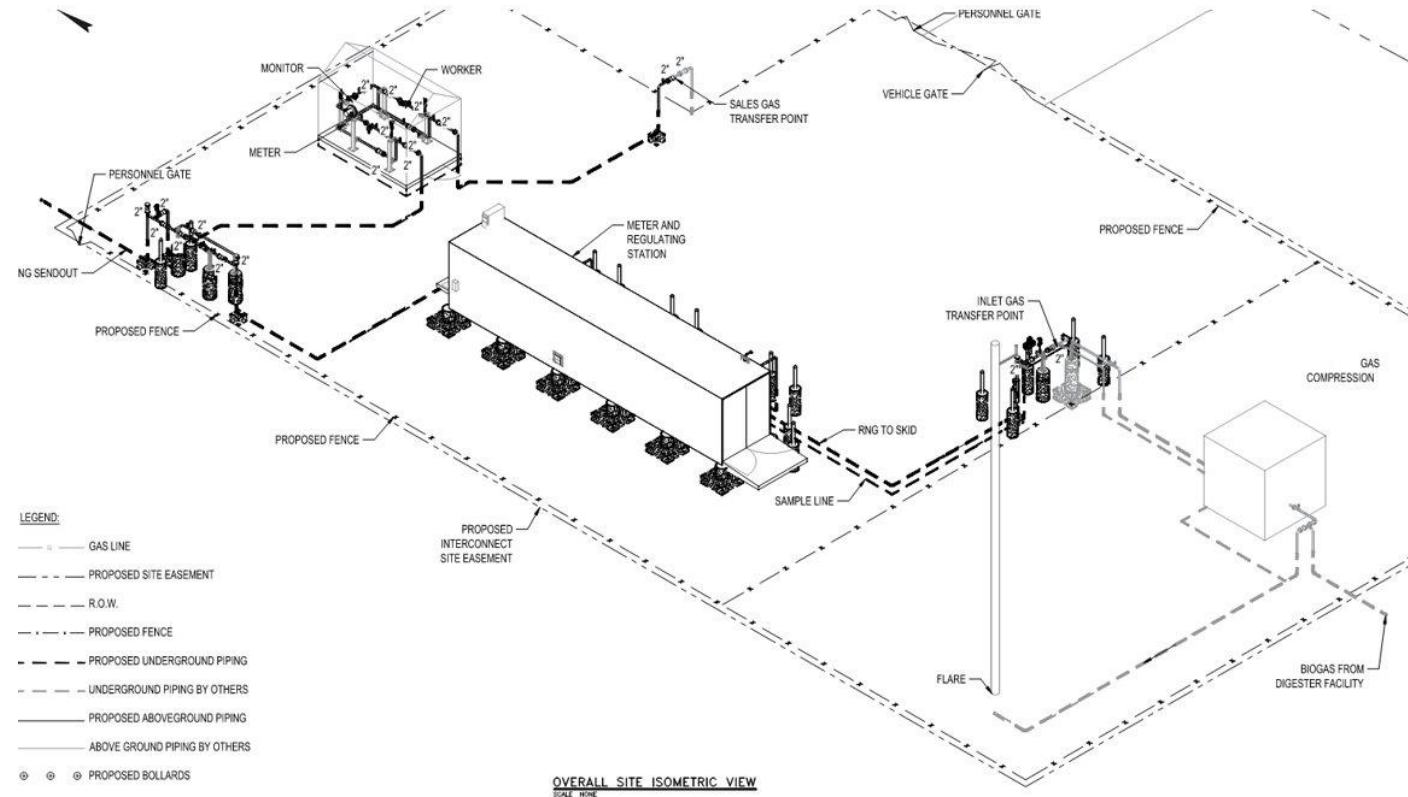
Gas Regulation and Analysis Facility

- Pressure protection from RNG Supplier System
- Shut-Off and/or flow control valve
- Utility Gas Analyzer's
- Control Room for PLC Housing and SCADA Communications

RNG Supplier Buy-back meter

Utility Outlet Valve

- Manual Isolation valve





PROJECT LIFE CYCLE

Planning

- Identify Utility Specific Requirements, Standards, and Inputs
- Develop Standard Approved Materials List

Engineering

- Detailed Engineering Drawings (Similar to Engineering Consultant Design Process)
- Engineering and Operations Feedback and Comment Incorporation

Procurement

- Identify Long lead components and vendor stocking strategies to streamline execution time

Execution

- In House Fabrication, Welding, Controls, Electrical, Assembly, and Testing

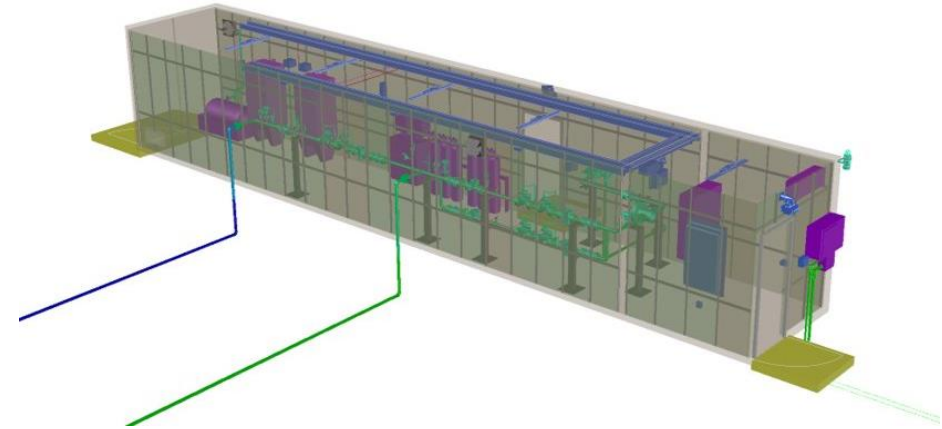
Quality Assurance & Control

- Robust QMS with Documentation from Material Procurement through implementation and multiple layers of oversight
- Utility Hold Points for Sign off and Verification

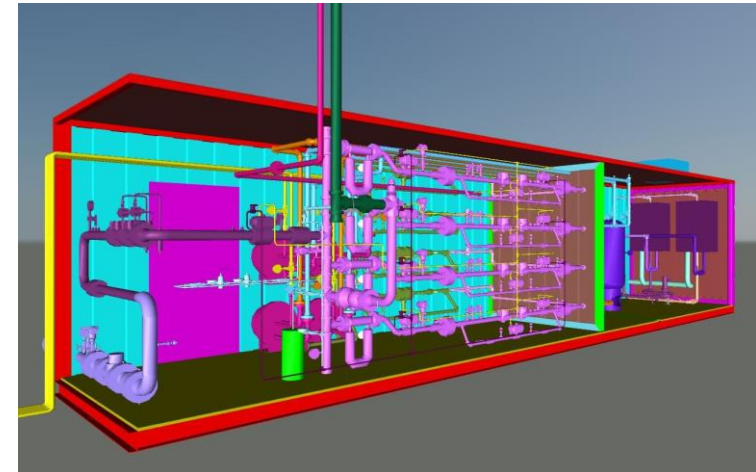
Documentation and Job Book Delivery

- Delivery of all Project Documentation, TVC Records, Operations & Maintenance Manuals

EACH UTILITY IS UNIQUE – YOUR SOLUTION SHOULD BE TOO



- **BRAND AGNOSTIC**
- **BUILT TO UTILITY PREFERRED AML & SPECIFICATIONS**
- **OPERATIONS AND MAINTENANCE**
- **SCALABLE, MAINTAINABLE, AND STANDARDIZED**





INTERCONNECT CONFIGURATIONS

Modular fabrication is most beneficial when as much scope can be completed on skid limiting on-site construction of piping & wiring

Truck Unloading

- Inlet Pressures from 4000 psig Delivered @ 60 psig
- Typically 2 Pressure Cuts
- Gas Heating and Conditioning
- 1”-6” Piping (Pressure Dependent)

Pipeline Interconnects

- Inlet Pressures from 1480 psig Delivered @ 60 psig
- Mitigate Pressure Regulation Drop by managing Developer Delivery Pressure
- 2” to 6” Piping (Pressure Dependent)

ENCLOSED SKID

- Allows for Conditioning and Controlled Space partitioned and designed to the end user requirements segmenting process, power & controls
- Typically Utilizes a Conex or Drop Over Building

FRAMED SKID

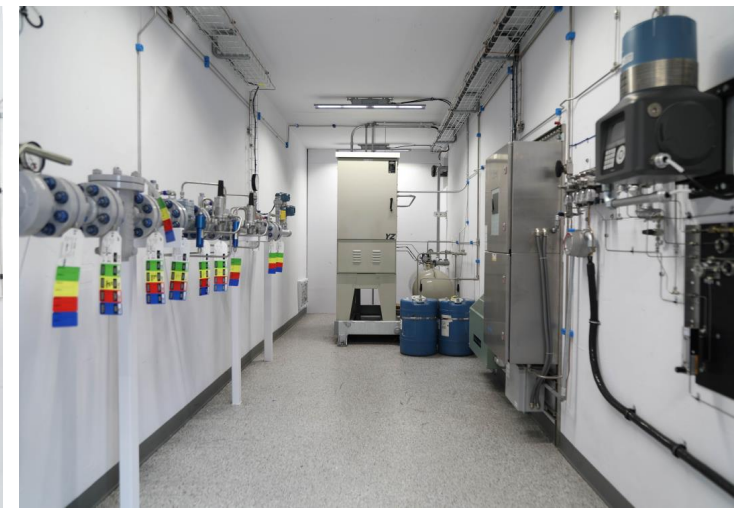
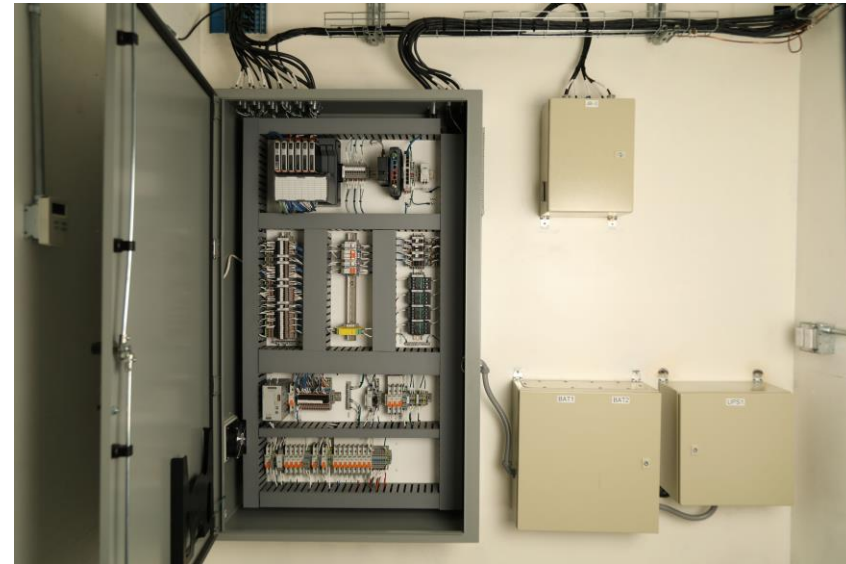
- Greatest Flexibility for design and access. Best suited for areas with milder climates, or incorporated into a larger building.
- Typically requires an adjacent or supplementary Analysis and RTU Enclosure off skid resulting.

INTEGRATED ANALYSIS AND RTU ON SKID

- Incorporating of the RTU and Analysis within the same skid while satisfying area classification requirements allows for more robust QA/QC and testing offsite and reduced construction costs.



INTERCONNECT SKID EXAMPLES



Safety.

Repeatability.

Scalability.



CONSTRUCTION

Pre-Construction

- Site Survey
- Geotechnical Investigation
- Permitting
- Utility Coordination

Construction

- Site Preparation
 - Site Grading & Foundations
- Equipment Delivery & Placement
 - Skid Delivery
- Mechanical Interconnect Piping
 - Upgrader to skid
 - Skid to transmission/distribution
 - Feed to farm
- Electrical and Control Integration
- Commissioning and Testing





Safety and Quality Management

Safety is embedded at every project phase... not an afterthought.

PLANNING

Pre-Startup Safety Review (SSP)
Daily JHA
Qualified Operators

QA/QC

Weld inspection
Pressure testing
Coating verification



TRAINING

Project close out
Lessons learned

HANDOVER

Handover package from Campos
Ongoing support through startup



Overall Program Benefits



IMPROVED PROJECT
CONSISTENCY AND
EFFICIENCY



REDUCED SITE
CONSTRUCTION RISK AND
DURATION



STREAMLINED REVIEW AND
APPROVAL PROCESS



ENHANCED SAFETY AND
COMPLIANCE



SUPPORT UTILITY
DECARBONIZATION AND
RNG INTEGRATION TARGETS

Liberty Utilities (St. Lawrence Gas) Corp. (Liberty SLG)

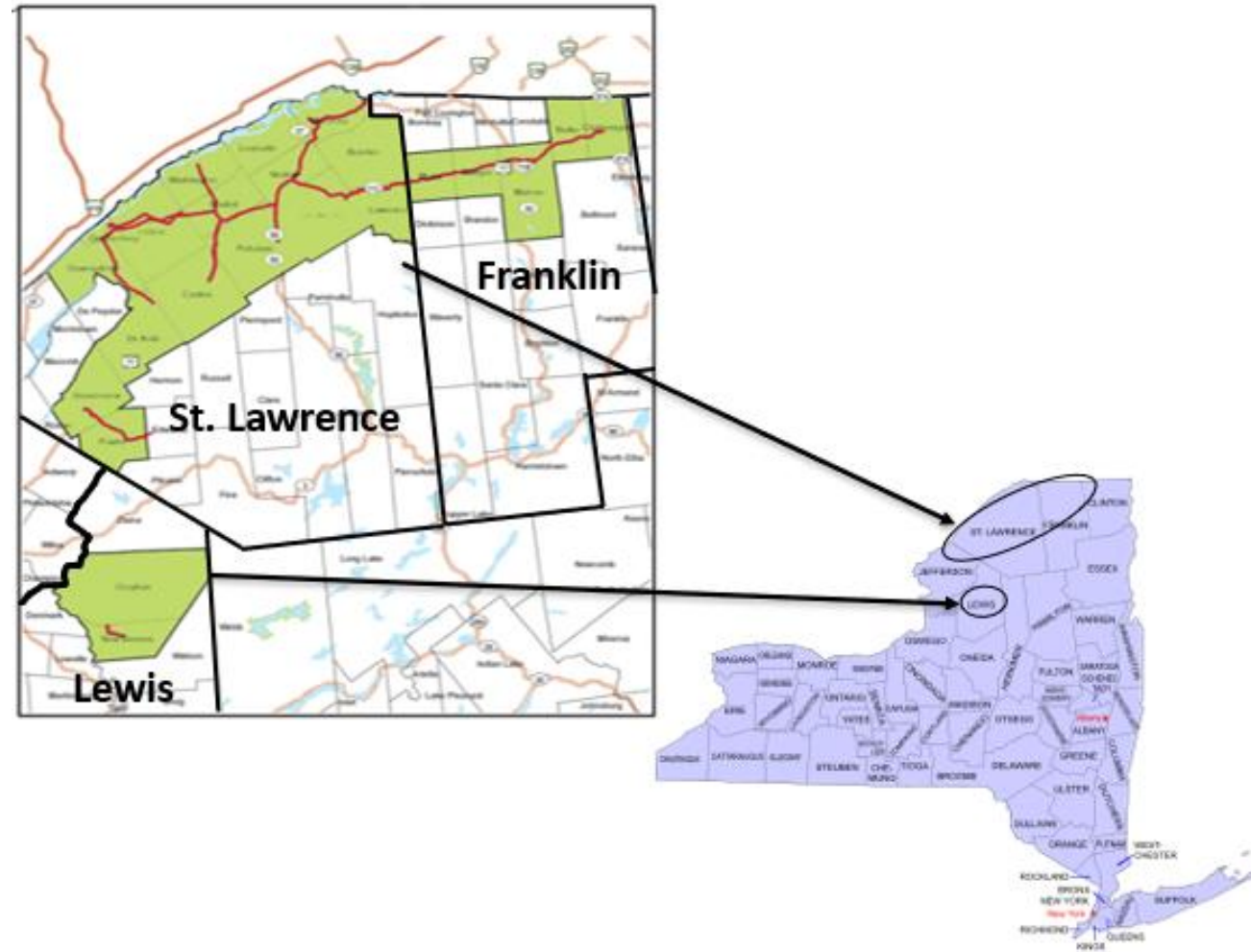
RNG Update

April 21, 2026



St. Lawrence Gas

- **Headquarters**
 - East Region, Massena, NY
- **Management**
 - Mark Murray, Utility President
 - Dan Burke – Director Operations
 - Ryan Hayes – Senior Manager Engineering
- **Key Operational Data**
 - 739 miles of Transmission and Distribution lines
 - Majority plastic distribution system
 - 2.6 MMCF per hour at peak load
 - 5 active Renewable Natural Gas (RNG) digestors
 - 2 additional by end of 2026
- **Customers: 17,400**



Liberty SLG - RNG from the Dairy Industry

- 5 Digester Projects in 2023–25 injecting RNG into Liberty's system (1,726 dth/day)
- 2 additional projects expected to be online in 2026
- System will comprise of 15% RNG by Y/E 2026
- Renewable Natural Gas purchased at a 5% discount from Dawn Index - No upfront ratepayer funding
- Policy required for RNG as a verifiable GHG reduction option & clear cost recovery/crediting rules.



10,700 metric ton CO₂e annual reduction
- Upstream emissions from import natural gas displaced by locally produced RNG in 2025

Question? *“Why would a rational gas utility spend political capital, staff time, or voluntary dollars supporting RNG developers when there’s no rate recovery, no legislative recognition, and no customer compliance pathway”?*

A gas utility supports RNG developers not because **RNG “works” today**, but because it:

1. *Preserves future compliance options under regulatory uncertainty*
2. *Maintains relevance and credibility in a decarbonization policy environment*
3. *Buys learning, data, and operational readiness at low cost*
4. *Positions the utility as a managed transition actor, not a stranded incumbent*
5. *Builds political, agricultural, and municipal alliances the utility will need later*
6. *Creates upside optionality if policy, federal markets, or accounting rules shift*

RNG support is insurance, not investment





ENVIRONMENTAL IMPACT DASHBOARD

Renewable Natural Gas (RNG) Program Performance



2025 HIGHLIGHTS

Annual Volume	6.9 BCF
RNG Volume	0.62 BCF
CO ₂ Avoided	34,900 Metric Tons
Vehicles Off Roads	7,600 Vehicles/Year



2026 HIGHLIGHTS

Annual Volume	7.1 BCF
RNG Volume	1 BCF
CO ₂ Avoided	57,000 Metric Tons
Vehicles Off Roads	12,500 Vehicles/Year



YEAR-OVER-YEAR GROWTH (2025 → 2026)

Volume Growth:	+3.0%	RNG Growth:	+72.3%
CO ₂ Impact Growth:	+63.3%	Vehicles Impact Growth:	+64.5%

RNG Supply & Cost benefits to customers – 2025/26

WINTER ENERGY COST COMPARISON

System Gas vs RNG Pricing at SLG | Winter Period (Nov - Mar)

KEY INSIGHT

MONTHLY PRICE COMPARISON - Per MMBtu

Cost of Sales (Gas Costs) - SLG		Nov-25	Dec-25	Jan-26	Feb-26	Mar-26	System Gas	RNG Index	Difference	
Actual (\$USD)		1,504,883	2,691,169	3,171,923	3,440,444	4,384,054	2.72	4.28	-\$1.55	
Budget (\$USD)		1,447,089	2,118,788	2,439,072	2,153,415	1,988,613				
Variance (\$USD)		(57,794)	(572,381)	(732,851)	(1,287,029)	(2,395,441)				
							Dec	3.19	4.75	-\$1.56
							Jan	5.14	5.04	\$0.10
							Feb	6.53	4.28	\$2.25
							Mar	10.13	3.80	\$6.33
							OVERALL	5.54	4.43	\$1.12

↑ Actual exceeded RNG by 20.1%

- As Gas cost increased over the winter, System Gas exceed RNG costs by over 20%
- Liberties RNG procurement costs to follow the Dawn Hub index proved to benefit customers
- Despite a lack of Framework for RNG cost recovery, including it in supply portfolio has been positive



Key Insights

1. When policy is fragile, early engagement reduces downside risks
2. Provides reputational capital with key stakeholders
3. Preserving the gas system as a transition asset, not a stranded liability
4. Early RNG engagement provides high strategic value at low cost
5. Hedge against future accounting and compliance rule changes

Thank you



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