



H. E. Daniel Francisco Chapo
President of the Republic of
Mozambique

Paris, October 24th, 2025

Your Excellency, Mr. President,

I would like to follow on our previous exchanges related to Mozambique LNG project, with the objective of moving forward in a proactive manner.

Regarding the lifting of the Force Majeure, as previously communicated to Your Excellency, a secure environment is required for the Mozambique LNG Concessionaire to exercise its rights and carry out its obligations under the Exploration and Production Concession Contract (EPCC). In particular, the Concessionaire needs to be able to safely access and use the land and maritime areas required for the execution of the project, as provided in the EPCC.

In this respect, the Mozambique LNG co-venturers' sponsors have taken note with high interest of the official address that Your Excellency delivered in Maputo on 2nd October 2025 and the assurances that you provided in this address: *"Our government, in collaboration with the Concessionaires, has been taking measures to address security challenges. To this end, last August, we signed the Status of Forces Agreement (SOFA) between Mozambique and Rwanda, an international instrument that confirms the continued presence of Rwandan forces in Cabo Delgado, at least during the construction period of the Mozambique LNG and Rovuma LNG projects, and the capacity building of Mozambican forces, with support from Rwandan forces and others, including forces from other nations. The ultimate goal is to equip our forces to independently maintain security. Therefore, we affirm that the conditions are now in place for the lifting of the Force Majeure, and we await, in the near future, the statement from the Area 1 Concessionaire, the Mozambique LNG Project, on this matter"*.

Considering these assurances and the security organization established by the project based on a containment mode, the Mozambique LNG Concessionaire assesses that the required security conditions are now in place to allow it to resume its activities and the Concessionaire has taken the decision to lift the Force Majeure.

As a final step before fully relaunching the project, the Mozambique LNG Concessionaire looks forward to receiving the approval by the Government of Mozambique of the revised project cost and schedule, as submitted to the Ministry of Energy on 2nd of October 2024. This revised budget's approval shall cover the incremental costs incurred by the project due to the Force Majeure, which amount to 4.5 billion dollars, on which the government has conducted an audit for the years 2021 to 2024, the report of which the Concessionaire is expecting to receive as soon as possible.

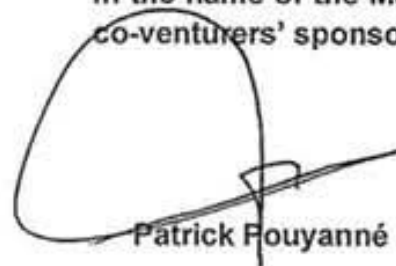
Moreover, the prolonged Force Majeure Suspension Period has significantly impacted the Project schedule. The updated schedule considers that the target date for lifting of the first cargo from Train 1, initially planned in July 2024, is revised to occur by first half 2029 and the completion of the two Trains, initially planned in March 2025 before end 2029. As consequence of the Force Majeure, in application of clause 25.4 of the EPCC, the term of the Golfinho-Atum Development and Production Period shall be extended by 4.5 years (54-month Force Majeure period from 24th March 2021 to 9th October 2025).

However, in order to compensate partially the economic impact of the extended Force Majeure on the Project economics, the Concessionaire respectfully requires the Government to grant an extension of the term of the Golfinho-Atum Development and Production Period under the EPCC by a duration of 10 years, without prejudice to clause 25.4 of the EPCC. As a counterpart to such license extension, as discussed with His Excellency the Minister of Energy, the Concessionaire would agree that the terms of the ENH Funding Agreement, executed on 21st October 2016, shall be amended to allow Empresa Nacional de Hidrocarbonetos E.P. ("ENH"), to reimburse the development costs funded under the ENH Additional Funding Agreement before the repayment of amounts under the EPCC Carry, thereby optimizing its financial obligations.

I remain fully available to discuss this with your Excellency as required.

Yours respectfully,

In the name of the Mozambique LNG
co-venturers' sponsors,



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