GOVERNMENT OF PUERTO RICO
PUBLIC SERVICE REGULATORY BOARD
PUERTO RICO ENERGY BUREAU

IN RE:	**CASE NO.:** NEPR-MI-2022-0001
ENERGY EFFICIENCY AND DEMAND RESPONSE TRANSITION PERIOD PLAN	**SUBJECT:** Motion to Submit FY2026 Q3 Consolidated Transition Period Plan and Demand Response Administrative Cost Quarterly Report

MOTION TO SUBMIT FY2026 Q3 CONSOLIDATED TRANSITION PERIOD PLAN AND DEMAND RESPONSE ADMINISTRATIVE COST QUARTERLY REPORT

TO THE HONORABLE PUERTO RICO ENERGY BUREAU:

COME now **LUMA Energy, LLC** ("ManagementCo"), and **LUMA Energy ServCo, LLC** ("ServCo"), (jointly referred to as "LUMA"), and respectfully state and request the following:

I. Introduction

As the system operator, LUMA is responsible for facilitating the implementation of Puerto Rico's public energy policy, including key customer initiatives such as Energy Efficiency ("EE") and Demand Response ("DR") Programs, which are required by law and mandated by the Energy Bureau of the Puerto Rico Public Service Regulatory Board ("Energy Bureau"). With this motion, LUMA is submitting to the Energy Bureau, as *Exhibit 1*, a consolidated report for the third quarter of the 2026 fiscal year ("FY") providing information and data on progress, performance, and costs associated with the implementation of the EE and DR programs developed by LUMA and related information on program administrative costs, all in accordance with Energy Bureau's directives

(the "FY2026 Q3 Report"). These programs promote energy savings and peak demand reduction, both of which contribute to Puerto Rico's energy consumption reduction targets under the law. The FY2026 Q3 Report covers the period from January 1, 2026, to March 31, 2026.

The FY2026 Q3 Report includes, among others, updates on the progress of the EE programs. These include the EE educational program, in-store EE discount programs, EE rebate programs, and the free mail-order EE Kits program. The report also provides information and updates on the Customer Energy Battery Sharing Program or "CBES" as well as its extended version implemented for the summer of 2025, known as the CBES+.

LUMA remains committed to the implementation of the EE and DR programs which were designed to build a more reliable and resilient energy system for the people of Puerto Rico and advance the energy efficiency marketplace.

II. Relevant Background and Procedural History

1. On June 21, 2022, LUMA filed with the Energy Bureau, in Case No. NEPR-MI-2021-0006, *In Re: Demand Response Plan Review, Implementation, and Monitoring*, a proposed Energy Efficiency and Demand Response Transition Period Plan containing the description of various quick-start EE and DR Programs to be implemented by LUMA during a two (2)-year Transition Period and associated budgets for FY2023 and FY2024 ("Proposed TPP"). *See Motion Submitting Proposed EE/DR Transition Period Plan* in Case No. NEPR-MI-2021-0006, *In Re: Demand Response Plan Review, Implementation and Monitoring*.

2. On February 16, 2023, the Energy Bureau issued a Resolution and Order in the instant proceeding (the "February 16th Order") in which it considered, amended, and approved the Proposed TPP, and, among others, ordered LUMA to: (a) deliver TPP quarterly reports within

sixty (60) days of the end of each quarter ("TPP Quarterly Report")[1] and TPP annual reports within one hundred and twenty (120) days following the end of the program year; (b) fund the FY2024 TPP budget the EE Rider (unless funding was obtained by other means); and (c) file an EE Rider by a specified date. *See id*., pp. 18, 27, 29 and 30 pp. 18.

3. On April 11, 2023, LUMA submitted a petition for approval of the proposed calculated factor for the EE Rider ("EE Rider Petition") to cover the budgeted amount for EE and DR programs for FY2024. *See Motion to Submit EE Rider*, Exhibit 1, p. 7. LUMA also filed a revised EE Rider Petition on May 19, 2023. *See Motion to Submit Revised Exhibit 1 to EE Rider Petition and Translation Thereof, in Compliance with Bench Order of May 5, 2023*, Exhibit 1, Sections 2.1 and 2.3.

4. On July 31, 2023, the Energy Bureau issued a Resolution and Order ("July 31st Resolution and Order") in Case No. NEPR-MI-2020-0001, *In Re: Permanent Rate of the Puerto Rico Electric Power Authority* ("Permanent Rate Case"), in which it determined, among others, that the cost of DR programs will not form part of the EE Rider and ordered LUMA to contemplate the DR programs as part of the proposal of factors corresponding to the Power Purchase Cost Adjustment ("PPCA"). *See* July 31st Resolution and Order, pp. 8 and 10.

5. On August 11, 2023, the Energy Bureau issued a Resolution and Order ("August 11th Order") in which, among others, it ordered LUMA to file the estimated costs associated with the Battery Emergency DR Program of the TPP (now referred to by LUMA as the "Customer

[1] Specifically, the February 16th Order provided for filing of these reports for FY2024 on November 23, 2023, March 29, 2024, March 29, 2024, and August 29, 2024, corresponding to the first quarter ("Q1"), second quarter ("Q2"), third quarter ("Q3") and fourth quarter ("Q4"), respectively. *See id*. Except for the deadline for the Q2 report, this timeline is consistent with the requirement in the Regulation on Energy Efficiency, Regulation 9637 ("EE Regulation"), which provides that quarterly reports on the implementation of the Transition Period Plan must be filed within sixty (60) day of the end of the quarter. See Regulation 9637, Section 2.02(E)(1)(a). The Q2 deadline appears to be a typographical error and should be February 29, 2024.

Battery Energy Sharing Initiative" or "CBES") to be recovered through the PPCA. *See* August 11th Order, p. 3.

6. On August 23, 2023, LUMA submitted to the Energy Bureau the proposed estimated costs associated with the CBES. *See Motion to Submit Costs Associated with Emergency DR Program in Compliance with Resolution and Order of August 11, 2023, and Request for Confidential Treatment*.

7. On August 29, 2023, the Energy Bureau issued a Resolution and Order ("August 29th Order") accepting the proposed CBES budget and determining that administrative costs for DR Programs will be recovered through the PPCA. *See* August 29th Order, p. 3. The Energy Bureau also directed LUMA to submit quarterly reports on the DR Programs' administrative costs, within forty-five (45) days after each quarter closes meeting the information requirements set forth the August 29th Order ("DR Administrative Costs Quarterly Report"). *See id*., pp. 3-4.

8. On November 29, 2023, the Energy Bureau issued a Resolution and Order ("November 29th Order") determining to extend the TPP by one year and ordering LUMA to file a revised TPP. *See* November 29th Order, p. 7.

9. On December 20, 2023, LUMA submitted to the Energy Bureau the revised version of the TPP. *See Motion to Submit Revised TPP and Other Information Requested Under the Resolution and Order of November 29, 2023,* and its Exhibit 1.

10. On February 14, 2024, LUMA requested the Energy Bureau to consolidate the DR Administrative Costs Quarterly Reports and the TPP Quarterly Reports into a single quarterly report to be filed within forty-five (45) days of the end of each fiscal quarter. *See Motion to Submit Second Quarterly Report on Administrative Costs and Expenditures of TPP DR Programs and Request to Consolidate Reporting Requirements* ("February 14th Motion").

11. On March 21, 2024, the Energy Bureau issued a Resolution and Order ("March 21st Order") granting LUMA's request in the February 14th Motion. *See* March 21st Order, p. 2.

12. On June 11, 2024, the Energy Bureau issued a Resolution and Order in the Permanent Rate Case approving the implementation of the EE charge to cover the EE program costs for FY2025. *See* June 11th Resolution and Order, p. 8.

13. On August 13, 2024, LUMA requested approval of a template for the Consolidated TPP and DR Administrative Costs Quarterly Report. *See Motion to Submit FY2024 Q4 Consolidated Transition Period Plan and Demand Response Administrative Cost Quarterly Report and Request for Approval of Template for these Quarterly Reports* ("August 13th Motion"), pp. 1-2, 9-10 and Exhibit 1.

14. On October 23, 2024, the Energy Bureau issued a Resolution and Order ("October 23rd Order") approving the proposed template for the Consolidated TPP and DR Administrative Costs Quarterly Report submitted by LUMA, requiring that it be supplemented with certain additional information specified in the October 23rd Order, including, among others, a requirement to submit invoices and other records to evidence professional services and certain staffing costs. *See* October 23rd Order, pp. 2, 3 and 6.

15. In the October 23rd Order, the Energy Bureau also determined to extend the TPP by an additional six months and ordered LUMA to file a revised TPP. *See id*. The Energy Bureau further ordered LUMA to file a proposed form of a permanent CBES program and develop and implement a program for the use of backup generators as a DR resource in emergency situations (now referred to by LUMA as the "Emergency Load Reduction Program" or "ELRP") before the summer of 2025. *See id*., pp. 3-5.

16. On January 24, 2025, the Energy Bureau issued a Resolution and Order ("January 24th Order") in which it released LUMA from the requirement to provide in its Consolidated TPP and DR Administrative Costs Quarterly Reports the documentation evidencing professional services and certain staffing costs originally arising from the October 23rd Order.[2] *See* January 24th Order, p. 3. The Energy Bureau also ordered LUMA to use in the quarterly reports the same energy efficiency program cost categories used in LUMA's annual reports and modify one of the report tables. *See id*., p. 6.

17. On January 31, 2025, LUMA filed the revised TPP ("Proposed Revised TPP"), containing, among others, a description of EE and DR program offerings, budgets, and the estimated EE Rider amount for FY 2026. *See Motion to Submit Revised Energy Efficiency and Demand Response Transition Period Plan and Request for Modification of Deadlines Relating to Three-Year Energy Efficiency and Demand Response Plan*, pp. 2, 7 and Exhibit 1. On that date, LUMA also filed the proposed permanent CBES. *See Motion to Submit Permanent Customer Battery Energy Sharing Program Proposal in Compliance with Resolutions and Order of October 23, 2024 and December 5, 2024*.

18. On April 3, 2025, the Energy Bureau issued a Resolution and Order ("April 3rd Resolution and Order") partially approved the Permanent CBES Program proposal for three years providing that the unapproved aspects would be considered after obtaining stakeholder comments. *See* April 3rd Resolution and Order, pp. 2-4.

19. On April 24, 2025, the Energy Bureau held a Technical Conference in which LUMA presented, among others, the Proposed Revised TPP, the status of the ELRP development,

[2] This determination was in response to a request from LUMA in a *Motion for Reconsideration of Resolution and Order of October 23, 2024* filed on November 12, 2024.

the permanent CBES proposal and a preliminary proposal to expand the CBES program for summer 2025, referred to as the "CBES Emergency Expansion" or "CBES +".[3]

20. On April 30, 2025, the Energy Bureau issued a Resolution and Order ("April 30th Order") ordering LUMA to file the proposals for the ELRP and the CBES+, addressing certain topics or questions set forth therein. *See* April 30th Resolution and Order, pp. 2-3.

21. On May 8, 2025, LUMA submitted to the Energy Bureau its proposal for the CBES+ ("CBES+ Proposal"). *See Motion to Submit Proposal for Expanded Customer Battery Energy Sharing Program and Revised Technical Conference Presentation In Compliance with Resolution and Order of April 30, 2025* ("May 8th Motion") and its Exhibit 1.

22. On May 20, 2025, the Energy Bureau issued a Resolution and Order ("May 20th Order") approving the CBES+ Proposal as proposed by LUMA and the remaining unapproved portions of the permanent CBES proposal, conditioned on LUMA submitting certain additional information. *See* May 20th Order, p. 2.

23. On May 21, 2025, LUMA filed its proposal for the ELRP ("ELRP" Proposal"), in compliance with the April 30th Order. *See Motion to Submit Proposal for Emergency Load Reduction Program in Compliance with Resolution and Order of April 30, 2025*.

24. On May 29, 2025, Energy Bureau issued a Resolution and Order ("May 29th Order") determining that LUMA had fulfilled the requirements of the May 20th Order and approving the CBES+ proposal and the remaining unapproved portions of LUMA's permanent CBES proposal. *Id*., pp. 2-3.

[3] *See Motion to Submit Presentation for Technical Conference Scheduled for April 25, 2025,* filed on April 23, 2025, which includes as Exhibit 1 the presentation submitted by LUMA for the Technical Conference.

25. On June 20, 2025, the Energy Bureau issued a Resolution and Order ("June 20th Order") in which it approved the ELRP Proposal through October 31, 2025[4].

26. On June 26, 2025, the Energy Bureau issued a Resolution and Order ("June 26th Order") directing LUMA to file an amended EE program plan for Fiscal Year 2026 in accordance with specified budget limits and the EE Rider level set forth in the June 26th Order. *See id*. p. 4.

27. On July 22, 2025, LUMA filed an amended EE program plan as part of the Proposed Revised TPP with the associated revised budget. *See Motion to Submit Amended Energy Efficiency Program Plan in Compliance with Resolution and Order of June 26, 2025*.

28. On August 19, 2025, the Energy Bureau issued a Resolution and Order approving LUMA's amended TPP for implementation in FY2026 ("FY2026 TPP").

29. On November 14, 2025, LUMA filed its Consolidated TPP and DR Administrative Costs Quarterly Report ("Q1 FY26 Report") for the first quarter of ("Q1") FY 2026. *See Motion to Submit FY26 Q1 Consolidated Transition Period Plan and Demand response Administrative Cost Quarterly Report* ("November 14th Motion"). In the November 14th Motion, LUMA informed about the pause of certain EE programs due to underfunding challenges. *See id*., Exhibit 1, p. 8.

30. On November 17, 2025, LUMA filed a *Motion to Submit November 2025 Report on the Development of the Pilot Emergency Backup Generators Demand Response Program* ("November 17th Motion") and submitted, as Exhibit 1, its monthly status report covering activities conducted during October 2025. In the November 17th Motion, LUMA also requested the Energy Bureau to release LUMA from the requirement to file further reports, given that the

[4] The Energy Bureau did not approve a budget at that time, establishing a requirement to submit additional information once the program is ready to commence implementation. *See* June 20th Order, p. 3.

purpose of the monthly reports was to monitor progress towards implementation by June 2025, a milestone that could not be met. *See* November 17th Motion, p. 3.

31. On November 20, 2025, LUMA filed a *Motion to Submit Monthly Status Report on the CBES+ Program for October 2025, in Compliance with Resolutions and Orders of May 20, 2025, and May 29, 2025* ("November 20th Motion") and submitted as, Exhibit 1, its monthly status report on the CBES+ program, covering October 2025. In the November 20th Motion, LUMA noted that, pursuant to the May 20th and May 29th Orders, it was ordered to submit monthly status reports for the summer 2025 season (June 1, 2025 – October 31, 2025). Therefore, LUMA stated it had submitted its final monthly status report for the CBES+ program. *See* November 20th Motion, p. 4.

32. On December 11, 2025, the Energy Bureau issued a Resolution and Order ("December 11th Order") in which it noted the information in the Q1 FY26 Report regarding the financial constraints and resulting pause of certain EE programs and requested information from PREPA and LUMA. *See* December 11th Order, pp. 2-3.

33. On January 9, 2026, the Energy Bureau issued a Resolution and Order ("January 9th Order") in which it released LUMA from the monthly reporting requirements for the ELRP and ordered LUMA to continue to report on ELRP implementation progress in its future TPP Quarterly Reports. Furthermore, the Energy Bureau ordered LUMA to include in its future TPP Quarterly Reports the information it was submitting in its monthly CBES reports, including the monthly information in Tables 2 and 3 of those monthly reports. *See* January 9th Order, p. 2.

34. On January 23, 2026, the Energy Bureau issued a Resolution and Order ("January 23rd Order") ordering LUMA to report in its FY2026 Q2-4 TPP and DR Administrative Cost Reports: (1) whether any EE program(s) continue to be paused or otherwise not in operation, (2)

an explanation of why the program is not in operation, (3) the steps LUMA is taking to re-open the program, and (4) when LUMA expects the program to be operational. *See id*.

III. Submission of FY2026 Q3 Consolidated TPP and DR Administrative Costs Report

37. In compliance with the February 16th Order, the August 29th Order, March 21st Order, January 9th Order, and the January 23rd Order, LUMA herein submits its FY2026 Q3 Consolidated TPP and DR Administrative Costs Quarterly Report. *See Exhibit 1*. This report follows the template approved by this Energy Bureau in the October 23rd Order, and includes the additional information required under the October 23rd Order, the January 24th Order, the January 9th Order and the January 23rd Order. This report covers the implementation of the FY2026 TPP, the Permanent CBES, the CBES+, and the ELRP.

WHEREFORE, LUMA respectfully requests that the Energy Bureau (i) **take notice** of the aforementioned; (ii) **accept** the FY2026 Q3 Consolidated DR Administrative Costs and TPP Quarterly Report in *Exhibit 1* in compliance with the February 16th Order, the August 29th Order, March 21st Order, October 23rd Order, and the January 24th Order, the January 9th Order and the January 23rd Order; and (iii) **deem** LUMA in compliance with the quarterly reporting requirements under such orders for FY2026 Q3.

RESPECTFULLY SUBMITTED.

In Guaynabo, Puerto Rico, this 14th day of May 2026.

We hereby certify that we filed this Motion using the electronic filing system of this Energy Bureau and that we will send an electronic copy of this Motion hrivera@jrsp.pr.gov nzayas@gmlex.net; mvalle@gmlex.net; rcruzfranqui@gmlex.net; hrivera@jrsp.pr.gov; javrua@sesapr.org; mrios@arroyorioslaw.com; jordgraham@tesla.com; forest@cleanenergy.org; customerservice@sunnova.com; pjcleanenergy@gmail.com; agraitfe@agraitlawpr.com; info@sesapr.org; cfl@mcvpr.com; mqs@mcvpr.com.

DLA Piper (Puerto Rico) LLC
B-7 Tabonuco St.
Suite 1501
Guaynabo, PR 00968
Tel. 787-945-9147
Fax 939-697-6147

/s/ Laura T. Rozas
Laura T. Rozas
RUA No. 10,398
Laura.rozas@us.dlapiper.com

/s/ Emmanuel Porro González
Emmanuel Porro González
RUA No. 23,704
Emmanuel.porrogonzalez@us.dlapiper.com

Exhibit 1

FY2026 Q3 Consolidated TPP and DR Administrative Costs Quarterly Report

Consolidated Transition Period Plan and Demand Response Administrative Costs

FY2026 Q3 Report

NEPR-MI-2022-0001

May 14, 2026

LUMA

Executive Summary

LUMA remains committed to working with the Puerto Rico Energy Bureau (PREB) in its mission to build a more reliable, resilient energy system for the people of Puerto Rico as the operator of Puerto Rico's electric Transmission and Distribution (T&D) System. This report provides an update on LUMA's Transition Period Plan (TPP) and an overview of LUMA's progress in implementing EE and DR programs during the third quarter (Q3) of fiscal year 2026 (FY2026), from January 1 to March 31, 2026.

LUMA's EE and DR Progress

During FY2026 Q3, LUMA made progress on the following programs and initiatives:

- **EE Education:** Continued preparation and development of educational materials to support customer awareness and readiness of EE program relaunch
- **EE Rebates:** Completed final validations of the EE online rebate portal and continued fulfilling existing obligations through issuance of payments for **1,656** previously approved rebate applications
- **EE Kits:** Continued coordination and outreach planning activities to support the relaunch of the EE Kits Program, with a continued focus on serving low-income households
- **Community Streetlight Initiative:** LUMA replaced approximately **1,821** streetlights, bringing the total since commencement to approximately **192,742**[1] across municipalities in Puerto Rico, enhancing safety and energy efficiency for customers while contributing to a brighter, more modern, and resilient grid for communities
- **Customer Battery Energy Sharing Initiative (CBES):** Enrolled **82,490** participants through this initiative, representing **512.5 MW** of battery capacity to support grid stability during peak demand. During this reporting period, the CBES program did not experience any emergency events; however, the team remained fully prepared to respond at any moment, confident in the significant value this program provides to the grid and to LUMA customers

Regulatory Background

Since 2022, LUMA has collaborated with PREB, stakeholders, and industry experts to advance a portfolio of energy efficiency and demand response programs that is now established, field-tested, and well received by customers.

LUMA filed its initial Transition Period Plan in June 2022, establishing a set of quick-start EE and DR programs for the two-year transition period. PREB approved the plan with modifications in February 2023 and later extended the Transition Period twice: first in November 2023 and again in October 2024. These actions extended implementation through December 31, 2025, and adjusted the planning deadlines for the upcoming Three-Year Plan development.

[1] Note that this figure represents replacements since commencement from the Community Streetlight Initiative (federally funded) and T&D (rate-funded) initiatives.

Under this regulatory framework, LUMA filed an amended EE portfolio in July 2025, which PREB approved in August 2025 for implementation in Fiscal Year 2026. This EE amended portfolio served as the final update required under the Transition Period Plan, positioning the EE suite for the Three-Year Plan cycle.

In parallel, LUMA filed its DR portfolio in January 2025. PREB's approval later that year established the Customer Battery Energy Sharing (CBES) program as a permanent DR offering for a three-year period, facilitating the integration of customer-sited resources as key assets for grid flexibility and reliability.

Building on that foundation, LUMA filed the integrated Three-Year Energy Efficiency and Demand Response Plan on March 2, 2026. This filing fulfills the planning requirements of Act 17, 2019, and PREB directives, outlining program designs, implementation budgets, and expected system and customer impacts for the two-year cycle running from July 2026 to June 2028.

During this period, LUMA continues to operate under the approved DR portfolio while executing the final year of the Transition Period Plan and concluding its EE pilot programs. This approach ensures the continuity of customer benefits and maintains compliance with PREB's regulatory requirements.

Contents

Tables and Figures

List of Acronyms

Acronym	Definition
C&I	commercial, industrial, and agricultural
CBES	customer battery energy sharing
DR	demand response
EE	energy efficiency
LED	light-emitting diode
PREB	Puerto Rico Energy Bureau
PREPA	Puerto Rico Electric Power Authority
PP&A	program planning and administrative costs
PPCA	power purchase charge adjustment
PRGET	Puerto Rico Green Energy Trust
TPP	Transition Period Plan
TPPERP	Transition Period Plan Emergency Response Plan
VFD	valuable frequency drive
VPPs	virtual power plants

1.0 Description of Implementation Progress

1.1 Programs Status

During FY2026 Q3, LUMA continued advancing operational readiness efforts to support the controlled relaunch of Energy Efficiency (EE) programs, following a period during which funding limitations prevented program implementation. Activities during the quarter focused on final system-readiness efforts, customer service preparation, program administration, and customer communication readiness necessary to support future program activation in a coordinated and responsible manner.

By the end of the quarter, LUMA had completed final validations and configurations for the EE online rebate portal, remaining on track for its FY2026 Q4 launch. The following sections provide a summary of the operational status and additional details for each EE program during the reporting period.

EE Rebates Programs

During FY2026 Q3, the Residential and Business EE Rebates Programs remained in operational readiness status, pending a full relaunch aligned with the EE online rebate portal in FY2026 Q4. Activities focused on final portal readiness, program administration, and customer communication. Additionally, LUMA fulfilled existing obligations by issuing payments for previously approved rebate applications.

EE Kits Programs

During FY2026 Q3, the Residential EE Kits Program remained in preparation as LUMA continued outreach coordination and readiness activities to support low-income households. Meanwhile, LUMA evaluated the Business EE Kits Program and will not move forward in future cycles due to low historical participation and program performance.

In-Store EE Discounts Program

The In-Store EE Discounts Program remained paused during FY2026 Q3 to allow for the additional coordination, retailer engagement, and operational readiness required for relaunch. LUMA planned program activation for FY2027 Q1, following the completion of these necessary preparation activities.

Overall, EE programs remained inactive during FY2026 Q3 as LUMA advanced the operational and administrative activities necessary for a coordinated relaunch. The Residential and Business EE Rebates Programs, along with the Residential EE Kits Program, are expected to launch in FY2026 Q4. Conversely, LUMA will discontinue the Business EE Kits Program. Finally, the In-Store EE Discounts program will become operational in FY2027 Q1 upon completion of readiness and retailer coordination efforts.

1.2 Summary of Program Implementation Experience and Progress

This section provides a high-level summary of the implementation experience and progress to date for each program and initiative. *Table 1: Activities and Achievements* for FY2026 Q3 summarizes the activities, achievements, and status of various programs under the TPP.

Table 1: Activities and Achievements

Relevant TPP Section	Initiatives	Description and Experience	Status
Education and Outreach	Stakeholder Outreach	LUMA took part in Energy Week at the La Concha Resort on March 12–13, 2026. The company operated an informational booth where team members interacted with customers and stakeholders, sharing details about the EE and DR programs. Engagement efforts included verbal explanations, distribution of printed resources, and visual displays.	Relaunch - May 2026
Residential EE Rebates	Pilot Program	LUMA provided customers with a financial incentive to purchase and install eligible high-efficiency equipment and appliances. A total of **1,650** customers received reimbursements in FY2026 Q3. These payments supported the fulfillment of existing program obligations and ongoing administrative activities for applications submitted before the program pause. No new residential rebate applications were accepted during the quarter.	Relaunch – May 2026
Residential EE Kits	Pilot Program	LUMA offered free kits by mail that included typical EE measures and educational materials. During this reporting period, LUMA did not distribute residential EE kits.	Relaunch - May 2026
Business EE Rebates	Pilot Program	LUMA provided commercial customers with a financial incentive to purchase and install eligible high-efficiency equipment and appliances. During FY2026 Q3, **six** business customers participated in the program, receiving a total of **$64,770** in business EE rebates. These payments fulfilled existing program obligations associated with applications submitted prior to the program pause and supported ongoing program administration activities. No new business rebate applications were accepted during this quarter.	Relaunch – May 2026
Business EE Kits	Pilot Program	Commercial customers received free kits by mail that included typical EE measures and educational materials. LUMA did not	Paused

Relevant TPP Section	Initiatives	Description and Experience	Status
		distribute business EE kits during this reporting period and based on performance findings, has decided not to activate the Business EE Kits Program in future cycles.	
In-Store Discounts	Pilot Program	The program offers customer point-of-sale discounts on eligible Energy Star products at participating retail stores, such as The Home Depot, including window air-conditioning units and ceiling fans. The In-Store EE Discounts Program remained in paused status during this quarter.	Preparing for relaunch – FY2027 Q1
Street Light Conversion Program	Street Light Conversion Program	During Q3 FY2026, LUMA replaced approximately **1,821** streetlights enhancing public safety and energy efficiency for customers while contributing to a brighter, more modern, and resilient electric grid for communities across Puerto Rico. As a result of these replacements, LUMA achieved an estimated energy savings of approximately **18,000 kWh**, demonstrating its commitment to holistic infrastructure improvements that integrate energy efficiency with grid modernization.	Ongoing
Customer Battery Energy Sharing Program	Program	The CBES pilot program has successfully scaled with a total of **82,490** participants enrolled.	Ongoing

1.3 Residential EE Kits Program

During FY2026 Q3, the Residential EE Kits Program continued targeted outreach and coordination activities to support program readiness, with a sustained focus on serving low-income communities and expanding equitable access to energy efficiency resources.

During the quarter, LUMA strengthened strategic alliances with community-based organizations and non-profit partners to optimize outreach for low-income populations. These efforts focused on co-designing participation frameworks through coordination meetings and engagement events specifically for underserved communities. By refining its communication channels, LUMA aims to ensure equitable access for the households that benefit most from energy efficiency measures.

No new kit distributions occurred during FY2026 Q3, as program implementation remained in preparation status pending completion of final readiness activities aligned with the broader relaunch of EE programs. However, coordination and outreach planning activities continued to ensure program readiness and effective service delivery upon program activation.

LUMA will continue advancing outreach coordination and operational readiness activities to support the relaunch of the Residential EE Kits Program in FY2026 Q4, with continued emphasis on serving low-

income households and strengthening partnerships with community-based organizations to support program participation.

1.4 Residential EE Rebate Program

During FY2026 Q3, the Residential EE Rebate Program continued advancing operational readiness activities to support the program relaunch following a period during which funding limitations prevented program implementation. Continued preparation activities characterized the quarter to ensure responsible program delivery and effective administration, in alignment with the planned launch of the EE online rebate portal in FY2026 Q4.

A primary focus during the quarter was completing final system validations and configurations for the EE online rebate portal. By the end of FY2026 Q3, LUMA had completed final readiness activities for the portal and remained on track for launch in FY2026 Q4. The platform will support improved application intake, processing, and tracking capabilities, enabling enhanced coordination with participating vendors providing customers with greater visibility into application status and program participation.

Additionally, LUMA continued implementing program administration and case management activities to maintain accurate program records and ensure efficient processing of rebate applications.

During FY2026 Q3, LUMA also used available EE Rider funds to issue payments for previously approved residential rebate applications identified as ready to pay. These payments fulfilled existing program obligations associated with applications submitted before the program pause and continued program administration activities. No new residential rebate applications were accepted during the quarter. See *Table 2: Rebates Processed.*

Table 2: Rebates Processed

Customers Served[2]	Applications Processed[3]	Rebates Issued[4]	Spending in Rebates
1,650	1,659	2,165	$ 846,511.51

For a detailed breakdown of the measures and their distribution, refer to *Table 3: Measures Installed* in FY2026 Q3 below.

In parallel, LUMA continued operational readiness activities to support the program relaunch, including refining internal processes, coordinating implementation contractor readiness activities, and preparing customer communication materials and application guidance resources. These efforts were designed to ensure consistent program administration, improve customer experience, and support efficient processing of applications upon program activation.

LUMA will continue advancing final readiness activities to support the transition of the Residential EE Rebate Program to full operational activity aligned with the launch of the EE online rebate portal in FY2026 Q4.

[2] Count of unique LUMA account numbers.

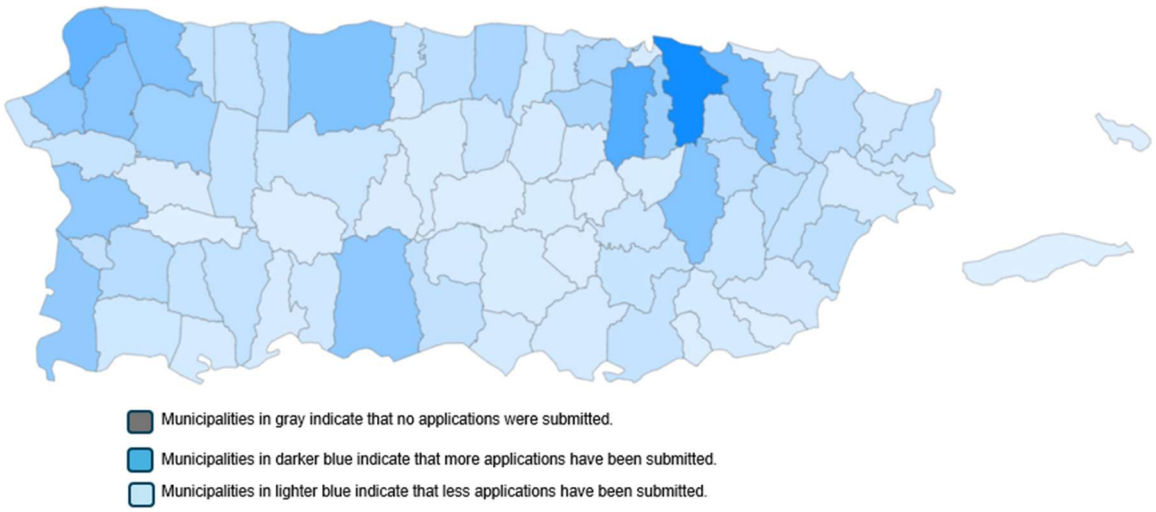
[3] Processed means paid. One application allows for more than one measure.

[4] Number of Measures for which rebates were paid.

Table 3: Measures Installed

Measure	QTY	Percentage
Energy Star® freezer	8	0.37%
Energy Star® window air conditioning unit	26	1.20%
Energy Star® tankless water heater	29	1.34%
Energy Star® refrigerator	112	5.17%
Solar water heater	439	20.28%
Mini-split air conditioning unit	1,551	71.64%
Total	**2,165**	**100%**

Figure 1: Geographical Distribution of Residential EE Rebates



1.5 Business EE Kits Programs

During FY2026 Q3, LUMA conducted a program performance evaluation of the Business Energy EE Kits Program to assess customer participation levels, program effectiveness, and alignment with broader portfolio objectives. This evaluation was part of LUMA's ongoing efforts to ensure responsible program administration and effective use of available program funding.

The assessment considered participation trends observed during prior implementation periods. LUMA launched the Business EE Kits Program during FY2024 Q4, offering approximately 6,000 free kits available for commercial customers; however, customer participation during the initial launch period was limited, with only 62 kits ordered. During FY2025, LUMA continued to offer the program and implemented additional outreach and customer engagement efforts, including participation in community and customer

events and targeted promotional activities for commercial customers. Despite these efforts, customer participation remained below expected levels, with approximately 3,073 kits requested during FY2025.

Based on this evaluation and the overall level of engagement achieved relative to other EE programs within the portfolio, LUMA determined that the Business EE Kits Program did not achieve sufficient market adoption to continue supporting implementation. LUMA will continue focusing implementation efforts on programs with demonstrated participation and demand, including rebate programs and targeted outreach initiatives that support energy savings and customer engagement across residential and commercial sectors.

This decision supports LUMA's commitment to optimizing program delivery, maintaining program effectiveness, and ensuring that available program funding is directed toward initiatives that provide the greatest benefit to customers and support long-term energy efficiency objectives.

1.6 Business EE Rebates Program

During FY2026 Q3, the Business EE Rebates Program continued advancing operational readiness activities to support the program relaunch following a period during which funding limitations prevented program implementation. Continued preparation activities characterized the quarter to ensure responsible program delivery and effective coordination with participating customers in advance of program activation planned for FY2026 Q4.

During the quarter, LUMA used available EE Rider funds to issue payments for previously approved business rebate applications identified as ready to pay. These payments fulfilled existing program obligations associated with applications submitted before the program pause and continued program administration activities. No new business rebate applications were accepted during FY2026 Q3. For a more detailed breakdown of eligible equipment and measures installed, please refer to *Table 4: Eligible Equipment for Rebates* and *Table 5: Business Measures Installed*.

Table 4: Eligible Equipment for Rebates

Eligible Equipment	Rebate Amount
Exit sign	$10
Omni-directional LED replacement	$10
LED troffer replacement	$25 - $30
Linear fluorescent LED replacement	$5 - $10
Exterior lighting system	$40 - $280
Occupancy sensor	$20 per sensor
Fryer	$350
Convection oven	$350
Combination oven	$800
Ice machine	$500

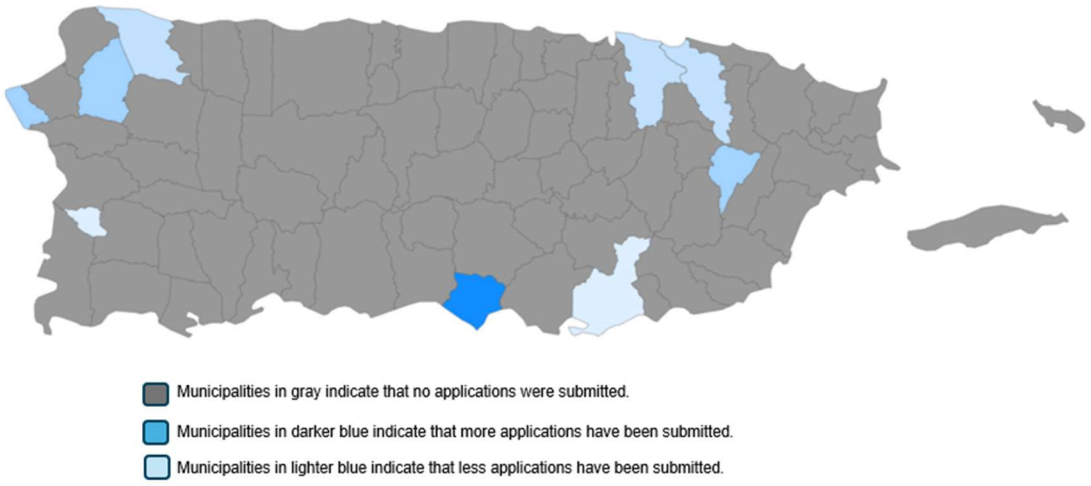
Eligible Equipment	Rebate Amount
Solar water heater	$550
Commercial refrigerators and commercial freezer	$100 each
Commercial air conditioning unit	Tier 1: $100 per ton Tier 2: $175 per ton
Ductless split air conditioning systems	$250 - $750
Energy Star® window air conditioning unit	$130
Chiller	Tier 1: $100 per ton Tier 2: $175 per ton
Window film	$1 per square foot
Pool pumps with variable frequency drive	$200 per HP

Table 5: Business Measures Installed

Eligible Equipment	Qty (#)	Percentage
Fryer	0	0%
Convection oven	0	0%
Combination oven	0	0%
Commercial refrigerator	0	0%
Energy Star® window air conditioning unit	0	0%
Pool pump with valuable frequency drive	0	0%
Omni-directional LED replacement	0	0%
Window film	0	0%
Ice machine	0	0%
Exterior lighting	0	0%
Exit sign	0	0%
Solar water heater	0	0%
Commercial refrigerator	1	0.29%
Mini-split air conditioning unit	1	0.29%
Chiller	2	0.57%
Occupancy sensor	3	0.86%
Commercial air conditioning unit	7	2.01%
Linear fluorescent LED replacement	45	12.89%
LED troffer replacement	290	83.09%

Eligible Equipment	Qty (#)	Percentage
Total	**349**	**100%**

Figure 2: Geographical Distribution of Business EE Rebates



In parallel with readiness activities, LUMA initiated proactive customer engagement efforts to support pipeline development for the relaunch of the Business EE Rebates Program. These efforts included outreach to commercial customers who had previously received program guidance and were planning or implementing EE improvement projects within their facilities. The purpose of these engagement activities was to maintain communication with prospective participants, provide updated program information, and support readiness for project implementation once program operations resume.

Additionally, LUMA continued operational readiness activities to support program relaunch, including coordination of implementation contractor readiness, refinement of program administration processes, and preparation of customer communication materials and application guidance resources. These activities were designed to ensure consistent program implementation, strengthen customer engagement, and support efficient processing of applications upon program activation.

LUMA will continue advancing customer engagement and operational readiness activities to support the transition of the Business EE Rebates Program to full operational activity aligned with the planned launch of the EE online rebate portal in FY2026 Q4.

1.7 In-Store EE Discounts Program

During FY2026 Q3, the In-Store EE Discounts Program remained in paused status as LUMA continued evaluating program readiness requirements and planning future implementation activities. The program was not active during the quarter, and no customer incentives were issued.

The In-Store EE Discounts Program requires coordination with participating retailers, inventory planning, promotional campaign development, and operational alignment across multiple stakeholders to support successful implementation. Based on current program planning and implementation timelines, LUMA has determined that it requires additional preparation time to support effective program delivery. As a result, LUMA does not expect to activate the In-Store EE Discounts Program during FY2026; it plans to implement the program in FY2027 Q1, subject to completion of required readiness activities and alignment with available program funding and operational readiness conditions.

LUMA will continue coordinating planning and readiness activities to support future program implementation and ensure a controlled, sustainable launch that supports customer participation and the efficient use of program resources. See *Table 6: In-Store Discount Units Sold During FY2026 Q3*.

Table 6: In-Store Discounts Units Sold During FY2026 Q3

Measure	QTY
Energy Star® window AC unit	0
Energy Star® ceiling fan	0
Total	**0**

1.8 Program and Implementation Strategies

Focus on Equity and Access

During FY2026 Q3, LUMA's Energy Efficiency program implementation strategies continued to prioritize equity and access. LUMA expanded access and strengthened equitable participation among low-income participants, helping to address the challenges these households face when adopting EE technologies. Through this approach, LUMA aims to reduce the financial burden on vulnerable families by making energy-saving measures more accessible. See *Table 7: Residential Rebates: Contrast by Sector of Eligible Measures*.

LUMA determines eligibility for the low-income incentives based on applicants' combined yearly income and household information, in conjunction with LUMA's low-income tariff. LUMA carefully reviews this information to ensure incentives reach those most in need and promote equitable participation in the programs. This structure reflects LUMA's commitment to bridging gaps in access to EE and fostering inclusivity across diverse income groups.

To increase participation among low-income customers, LUMA implements targeted measures, including enhanced data tracking, focused outreach initiatives, and strategic program expansion to improve accessibility for these communities.

Table 7: Residential Rebates: Contrast by Sector of Eligible Measures

Eligible Equipment	Non-low-Income Incentive	Low-Income Incentive
Solar water heater	$550	$775

Eligible Equipment	Non-low-Income Incentive	Low-Income Incentive
Electric tankless water heater	$60	$85
Energy Star® refrigerator	$210	$280
Energy Star® freezer	$210	$280
Energy Star® window air conditioning unit	$130	$175
Mini-split air conditioning unit	$375 - 500	$375 - $500

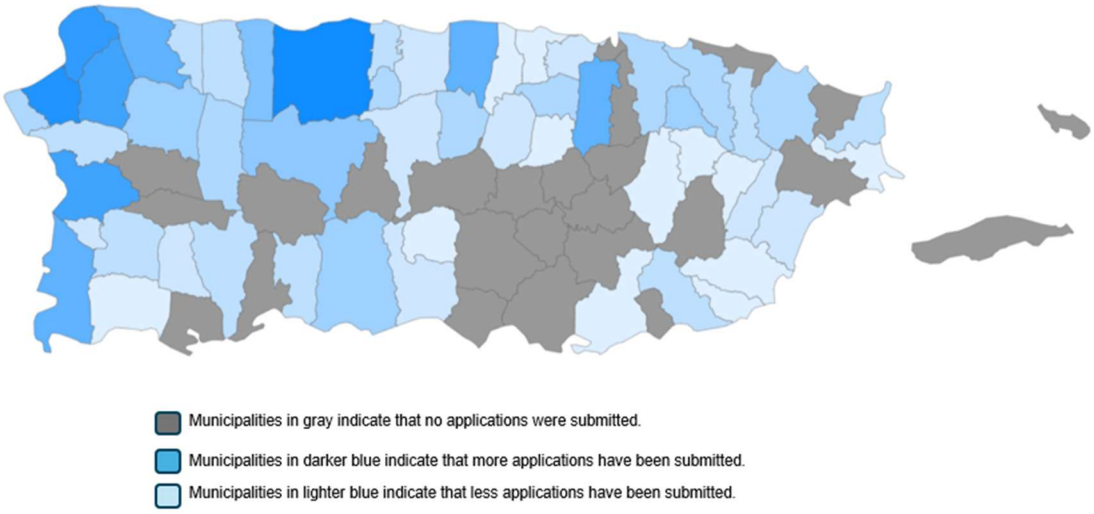
During FY2026 Q3, LUMA issued approved rebate payments, including 78 payments to low-income participants. See *Table 8: Measures Installed by Low-income Customers*.

This effort highlights LUMA's dedication to providing long-term community benefits through energy savings. By ensuring that low-income households can participate meaningfully in EE programs, LUMA fosters broader program engagement and drives economic and environmental benefits. The focus on equity remains central to LUMA's strategy, ensuring that all customers, regardless of income, can benefit from EE technologies.

Table 8: Measures Installed by Low-Income Customers

Measure	QTY #
Energy Star® freezer	0
Energy Star® window air conditioning	1
Electric tankless water heater	3
Energy Star® refrigerator	10
Solar water heater	13
Mini-split air conditioning unit	71
Total	**98**

Figure 3: Geographic Distribution of Residential EE Rebates for Low-Income Customers



1.9 Funding Sources and Cost Recovery

Energy Efficiency Funding Source

In June 2024, LUMA, as ordered by the PREB, implemented the EE Rider as a reliable and long-term funding source essential for planning and delivering EE programs to meet Act 17-2019 objectives, as amended. While LUMA explored other funding options like federal grants - which support individual projects but do not provide direct funding to utilities – the EE Rider was established, in line with the PREB's 2019 determination to recover program costs from all customers on a per-kilowatt-hour basis.

Demand Response Funding Source

The PREB issued a determination on August 11, 2023, classifying Demand Response program costs as recoverable expenses under the purchase power cost adjustment clause (PPCA).

LUMA continues to explore expanding its program's reach and impact through additional funding sources, including partnerships with the U.S. Department of Energy and the Central Office for Recovery, Reconstruction, and Resiliency.

LUMA is coordinating with the Central Office for Recovery, Reconstruction, and Resiliency on the potential use of the Department of Energy-approved federal funding. At this stage, LUMA is only assessing eligibility, permissible uses, and administrative requirements related to this funding. LUMA has not drawn, spent, or committed federal funds for CBES, nor has it made a final decision regarding their use or implementation.

LUMA continues to hold recurring discussions with key stakeholders, including the State Office of Public Energy Policy in Fortaleza and the Department of Energy. These conversations are critical for aligning

efforts and ensuring comprehensive support for LUMA's initiatives. Collaboration remains active, with a commitment to fostering strong partnerships that advance EE and DR goals.

2.0 Energy Efficiency Participants Enrolled and Installed Measures

2.1 Number of Participants in Energy Efficiency Programs

During FY2026 Q3, no new participants were enrolled in EE programs, as program implementation remained in preparation status pending completion of final readiness activities associated with the planned relaunch of EE programs in FY2026 Q4.

The number of participants reported for the quarter reflects customers who had previously enrolled in EE programs before the program pause. These participant counts are associated with previously completed program activities and do not represent new program enrollments during the reporting period.

LUMA will resume enrollment of new participants upon activation of EE programs aligned with the planned launch of the EE online rebate portal in FY2026 Q4.

Table 9: Number of Participants Enrolled or Receiving Incentives in Each EE Program below includes the number of participants enrolled or receiving benefits in the EE programs by program to date (limited to those programs in which customers enrolled or received rebates or incentives).

Table 9: Number of Participants Enrolled or Receiving Incentives in Each EE Program

Program	Participants FY2026
Residential Rebates	1,650
Low-Income	98
Non-Low-Income	1,552
Business Rebates	6
In-Store Discount	0
Residential EE Kits	0
Business EE Kits	0
Total	**1,656**

Table 10: Installed Measures by Sector, Segment, and Program provides an overview of the energy efficiency measures implemented across various sectors during the third quarter of FY2026. This table categorizes the installed measures into distinct sectors, including residential, commercial, industrial, and utility segments, allowing for a clear understanding of where energy efficiency efforts are concentrated. Each sector is further broken down into specific programs that detail the types of measures installed, such as lighting upgrades, heating, ventilation, and air conditioning improvements, and insulation enhancements.

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Table 10: Installed Measures by Sector, Segment, and Program (FY2026 Q3)

Program	Installed Measure	FY2026 Q1 Quantity	FY2026 Q2 Quantity	FY2026 Q3 Quantity	YTD Quantity	FY26 Q1 Energy Savings kWh	FY26 Q2 Energy Savings kW	FY26 Q3 Energy Savings kWh	YTD Energy Savings kWh	FY26 Q1 Peak Demand Savings kW	FY26 Q2 Peak Demand Savings kW	FY26 Q3 Peak Demand Savings kW	YTD Peak Demand Savings kW
Residential Rebate	Window air conditioning unit	8	23	26	57	6407.59	15332.55	17495.59	39235.73	0.20	0.59	1.00	1.79
Residential Rebate	Mini-split air conditioning unit	1,817	1,218	1,551	4,586	2,149,543.86	1,417,797.63	1845081.34	5412422.83	220.45	145.89	189.83	556.17
Residential Rebate	Solar water heater	71	62	439	572	123,472.86	105,224.26	751297.10	979994.23	17.91	15.66	111.81	145.38
Residential Rebate	Tankless water heater	16	16	29	61	1427.72	1258.54	2400.18	5086.43	2.08	1.83	3.49	7.39
Residential Rebate	Refrigerator	51	63	112	226	2594.98	3205.57	5698.78	11499.33	0.31	0.38	0.67	1.36
Residential Rebate	Freezer	3	2	8	13	128.28	85.52	342.08	555.88	0.02	0.01	0.04	0.07
In-Store Discount Program	Window AC unit	1,915	220	0	2,135	448,002	51,480	0.00	499482.00	63.16	7.26	0.00	70.42
In-Store Discount Program	Ceiling fan	1,675	272	0	1,947	105,525	17,136	0.00	122661.00	30.15	4.90	0.00	35.05
Business Rebate Program	Exit sign	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Omni-directional LED replacement	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	LED troffer replacement	0	0	290	290	0	0	43285.19	43285.19	0.00	0.00	4.53	4.53
Business Rebate Program	Linear fluorescent LED replacement	0	0	45	45	0	0	11200.24	11200.24	0.00	0.00	1.02	1.02
Business Rebate Program	Occupancy sensor	0	0	3	3	0	0	2794.73	2794.73	0.00	0.00	1.49	1.49
Business Rebate Program	Exterior lighting	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Fryer	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00

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Program	Installed Measure	FY2026 Q1 Quantity	FY2026 Q2 Quantity	FY2026 Q3 Quantity	YTD Quantity	FY26 Q1 Energy Savings kWh	FY26 Q2 Energy Savings kW	FY26 Q3 Energy Savings kWh	YTD Energy Savings kWh	FY26 Q1 Peak Demand Savings kW	FY26 Q2 Peak Demand Savings kW	FY26 Q3 Peak Demand Savings kW	YTD Peak Demand Savings kW
Business Rebate Program	Convention oven	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Combination oven	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Ice machine	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Commercial refrigerator	0	0	1	1	0	0	765.05	765.05	0.00	0.00	0.09	0.09
Business Rebate Program	Commercial freezer	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Commercial air-conditioning unit	2	0	7	9	32998.394	0	21028.00	54026.40	2.07	0.00	3.17	5.24
Business Rebate Program	Window air conditioning unit	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Mini-split air conditioning unit	31	4	1	36	31231.295	4229.452	737.34	36198.08	3.49	0.47	0.08	4.04
Business Rebate Program	Chiller	0	0	2	2	0	0	395363.02	395363.02	0.00	0.00	71.32	71.32
Business Rebate Program	Solar water heater	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Window film*	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Business Rebate Program	Pool pump with VFD	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00	0.00

3.0 Energy Efficiency Performance

3.1 Energy and Peak Demand Savings by Sector

During FY2026 Q3, LUMA's EE programs delivered energy (MWh) and peak demand (MW) savings across various market sectors and subsegments, as shown in *Table 11: Energy and Peak Demand savings performance by Market Sector and Subsegment,* which includes preliminary estimates of savings achieved during the quarter in relation to annual targets.

Table 11: Energy and Peak Demand Savings Performance by Market Sector and Subsegment

Market Sector	Subsegment	Annual Energy Savings Target (Mwh)	FY2026 Q3 Energy Savings (Mwh)	YTD Energy Savings (Mwh)	Actual Savings (%) of Annual Target	Peak Demand Savings Target (Mw)	FY2026 Q3 Peak Demand Savings (Mw)	YTD Peak Demand Savings (Mw)	Actual Peak Demand Savings (%) Annual Target
Residential Sector	Low-Income	6,904	104	267	4%	3	0.01	0.03	1.1%
Residential Sector	Non-Low-Income	12,479	2,519	6,803	55%	2	0.29	0.79	52.4%
Commercial, Industrial, and Agricultural (C&I) Sectors	Small Business	4,619	371	523	11%	1	0.08	0.09	13.6%
Commercial, Industrial, and Agricultural (C&I) Sectors	Other Commercial/Industrial, and Agricultural Sector	8,373	0	0	0%	1	0.00	0.00	0.0%
Government/ Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Portfolio Total		**32,375**	2,994	7,593	23%	**7**	0.39	0.91	15.2%

3.2 Energy and Peak Demand Savings by Program

Table 12: Energy and Peak Demand Savings Performance provides preliminary estimates of energy (MWh) and peak demand (MW) savings achieved during the quarter for each program, and how these relate to annual targets.

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Table 12: Energy and Peak Demand Savings Performance

Program	Annual Energy Savings Target (MWh)[1]	FY26 Q3 Energy Savings (MWh)	YTD Energy Savings (MWh)	FY26 YTD Energy Savings (%)	FY26 Peak Demand Savings Target (MW)	FY26 Q3 Peak Demand Savings (MW)	YTD Peak Demand Savings (MW)	FY26 YTD Peak Demand Savings (%)	FY26 Q3 Spend ($)	YTD Program Spend ($)	$/kWh
Residential EE Rebates	17,106	2,622	6,449	38%	2	0.31	0.71	0.34	912,245	2,764,962	$0.43
In-Store EE Discounts	1,741	0	622	36%	0	0.00	0.11	1.27	0	197,409	$0.32
Residential EE Kits	536	0	0	0%	2	0.00	0.00	0.00	66	2,513	$0.00
Business EE Rebates	9,239	475	523	6%	2	0.08	0.09	0.06	215,749	340,461	$0.65
Business EE Kits	3,754	0	0	0%	0	0.00	0.00	0.00	0	-48	$0.00
Total	**32,375**	**3,097**	**7,593**	**23%**	**6**	**0.39**	**0.91**	**15.2%**	**1,128,060**	**3,305,296.53**	**$0.44**

3.3 Customer Education and Outreach

Customer Education and Outreach activities remained in preparation status during FY2026 Q3. During the quarter, LUMA continued developing and refining educational materials and program guidance resources to support customer understanding of program requirements and participation processes. These materials will improve customer readiness, reduce participation barriers, and facilitate a smooth transition to activities once programs relaunch.

LUMA will implement education and outreach initiatives and launch EE programs in FY2026 Q4, following final readiness activities. These efforts will promote equitable access and support participation across diverse communities.

Table 13: Customer Education and Outreach Activities for Each EE Program

Program	Event	Event Description	Month
EE and DR Programs (Portfolio-Wide)	Energy Week – San Juan	LUMA participated in Energy Week held at La Concha Resort on March 12–13, 2026. LUMA hosted an informational booth where representatives engaged with customers and stakeholders to provide information on EE and DR programs. Outreach included verbal guidance, distribution of printed materials, and visual presentation.	March

3.4 Marketing Performance

During FY2026 Q3, LUMA continued implementing marketing and communications activities to support program readiness and ensure accurate, timely communication of EE program information to customers and stakeholders in preparation for the program relaunch.

A primary focus during the quarter was the review, refinement, and preparation of program communication materials to ensure consistency with updated program requirements and operational readiness conditions. These activities included updates to customer-facing materials, guidance documents, and program information resources to support customer understanding and participation once LUMA reactivates programs.

In addition, LUMA initiated updates to the EE program webpages to reflect the most recent program information, including program availability status, updated participation guidance, and revised program requirements. These website updates will ensure that customers have access to clear, accurate, and up-to-date information on program participation and availability. The updates also support transparency and help manage customer expectations as programs transition toward relaunch. LUMA currently anticipates that the updated EE program webpage will be available, with delivery targeted for the end of Q4.

Although EE programs were not active during FY2026 Q3, customer engagement with program information continued through digital platforms. Website traffic data indicates that customers remained interested in energy efficiency programs and continued accessing program resources and information during the reporting period. These interactions reflect sustained customer awareness and support ongoing communication readiness for program relaunch. For a detailed breakdown of traffic by EE program webpage, please refer to *Table 14: EE Program Website Traffic – FY2026 Q3*.

LUMA did not publish social media posts during FY2026 Q3, as the company prioritized program readiness and relaunch preparation over active promotional campaigns.

During the quarter, LUMA also planned future promotional campaigns, developed messaging strategies to boost customer awareness, and prepared the communication channels needed to announce program availability upon relaunch.

LUMA will continue coordinating marketing and communications activities to support program relaunch and ensure that customers receive timely, accurate, and accessible information regarding EE programs and participation opportunities.

Table 14: EE Program Website Traffic – FY2026 Q3

EE Program Webpage	Number of Visits
Customer Incentives Programs (landing page)	2,088
Residential EE Rebates	2,064
In-Store EE Discounts	137
Residential EE Kits	330
Business Incentive Program (landing page)	497
Business EE Rebates	229
Business EE Kits	102
Energy Savings Tips	1,008
Customer Battery Energy Sharing	862
Total	**7,317**

3.5 Stakeholders' Consultations

During FY2026 Q3, LUMA continued its efforts to support energy-efficiency and demand-response initiatives. However, the company postponed EE/DR-specific stakeholder consultations to prioritize program scheduling and readiness activities.

Coordination with the Department of Economic Development and Commerce remains an important component of LUMA's stakeholders' engagement efforts. LUMA postponed coordination activities during this period to focus on scheduling and ongoing program readiness. These meetings will resume in FY2026 Q4 in alignment with program relaunch activities.

Resuming coordination supports future joint planning for the rollout of complementary programs and educational campaigns, ensuring that each organization can efficiently reach different customer segments across the island. The collaboration aims to enhance community engagement, improve market penetration, and align efforts with Puerto Rico's broader economic development objectives.

3.6 Research Activities

During the reporting period, LUMA continued its research and customer engagement efforts to understand better customer awareness, participation, and interest in energy efficiency programs. LUMA conducted a customer survey in December 2025 at its Regional Service Centers to collect feedback on customer knowledge of energy efficiency, prior participation in programs, perceived barriers to participation, and preferred communication channels.

Initially, the survey consisted of a comprehensive questionnaire. Eventually, LUMA streamlined the instrument to reduce completion time and improve response rates. Both versions collected consistent core information, enabling combined responses and analysis using descriptive statistics. In total, LUMA collected 370 customer responses via in-person surveys at LUMA Service Centers across the island.

Survey results indicate that customer awareness of energy efficiency concepts remains limited. Approximately 59.7% of respondents reported not having previously heard the term energy efficiency, while 35.7% indicated familiarity with it. In addition, responses related to prior participation and customer experience suggest low recall of program participation among respondents. Among the number of customers who evaluated their experience, feedback was generally positive.

Survey responses also indicate continued customer interest in participating in energy efficiency programs. A majority of respondents, approximately 84.9%, expressed interest in participating in program offerings, and 80.6% indicated interest in receiving notifications regarding available programs. These results demonstrate customer willingness to participate in energy efficiency initiatives, subject to program availability and eligibility requirements.

Customer feedback identified several perceived barriers to participation related to operational and communication factors. These findings will be considered in ongoing efforts to improve program accessibility, simplify program processes, and strengthen customer communication.

Survey responses further indicate that customers prefer accessible communication and participation options. While many respondents preferred completing forms online, a segment of customers preferred in-person, telephone, or assisted methods. These results support maintaining multiple participation pathways to ensure accessibility for a diverse customer population.

Survey results were also reviewed by Customer Rate Class to identify potential differences in awareness, participation, and interest across customer segments. Customers classified as Low Income (1.62%) and Commercial (2.97%) represent a small proportion of the total survey population; however, responses from these segments reflect patterns consistent with the overall survey results, including limited awareness of energy efficiency concepts and continued interest in participating in programs. These findings support the continued development of targeted outreach and communication strategies for priority customer segments.

These research activities support ongoing program planning, customer engagement, and outreach efforts and will continue to inform implementation strategies under the Three-Year Plan.

3.7 Collaboration with Key Strategic Groups

During FY2026 Q3, LUMA continued coordinating with key strategic partners to support program planning and identify opportunities for collaboration aligned with the relaunch of EE programs.

LUMA temporarily deferred coordination with the Puerto Rico Housing Authority this quarter to prioritize program-readiness efforts, The company plans to resume engagement in FY2026 Q4 to coordinate implementation opportunities and outreach for residential customers.

During the quarter, LUMA initiated new collaboration efforts with the Puerto Rico Green Energy Trust (PRGET). LUMA and PRGET conducted coordination meetings to explore potential opportunities to support residential customers through complementary program initiatives. Specifically, discussions included the potential coordination of EE kits distribution to households receiving free home energy audits conducted by PRGET.

This collaboration will drive greater customer participation, improve the delivery of energy-efficiency resources to households, and align the efforts of organizations promoting energy efficiency across Puerto Rico. LUMA and PRGET have scheduled follow-up meetings for FY2026 Q4 to evaluate implementation options and define specific roles and responsibilities.

LUMA will continue coordinating with key strategic partners to support program readiness, expand collaboration opportunities, and promote effective delivery of energy efficiency services to customers across Puerto Rico.

3.8 LUMA's Streetlight Modernization and Energy Efficiency Initiative[5]

LUMA plans to install 300,000 streetlights over the next three years to improve public safety and energy efficiency in Puerto Rico. During Q3 FY2026, LUMA replaced approximately 1,821 streetlights, improving safety and energy efficiency and contributing to a brighter and more modern electric grid. As a result of these replacements, LUMA achieved an estimated energy savings of approximately 18,000 kWh. Each new LED streetlight consumes approximately 65% less energy and has a lifespan up to four times longer than traditional lighting.

4.0 EE Program Cost

4.1 EE Rider

On January 23, 2026, PREB issued a Resolution and Order that, among other directives, required LUMA to report the EE Rider amount billed to customers, by month, for the past quarter and fiscal year-to-date,

[5] Energy savings are presented using the revised calculation methodology implemented for FY2026 Q3, with reconciliation planned for the annual Q4 closeout.

as well as the amount of EE Rider funds transferred from PREPA to LUMA during the same periods. In compliance with this Order, LUMA prepared *Table 15: EE Rider billed to customers and funds transferred from PREPA to LUMA by month*.

Table 15: EE Rider Billed to Customers and Funds Transferred from PREPA to LUMA by Month

Fiscal Year - Month	EE Rider Amount Billed to Customers by Month	EE Rider Funds Transferred from PREPA to LUMA
FY2026 – July 2025	$1,197,224.02	$1,196,312.98
FY2026 – August 2025	$1,184,929.10	$0
FY2026 – September 2025	$1,258,781.42	$500,000
FY2026 – October 2025	$2,100,000.00	$0
FY2026 – November 2025	$1,325,278.08	$0
FY2026 – December 2025	$1,084,936.64	$0
FY2026 – January 2026	$1,372,982.97	$5,899,445.00[6]
FY2026 – February 2026	$999,889.38	$1,348,000.00
FY2026 – March 2026	$667,470.71	$1,004,000.00
Total	**$11,191,492.32**	**$9,947,757.98**

For a detailed breakdown of costs for each EE program, please refer to *Table 16: EE Budget and Costs*, which outlines expenditures for FY2026 Q3 and year-to-date.

Table 16: EE Budget and Costs

Program	Cost For FY2026 Q3 ($)	FY2026 YTD Costs ($)	Total Program Budget FY2026 ($)	% of Total Program Budget
Residential Rebates	912,245	2,764,962	7,650,656	36%
In-Store Discounts	8,706	197,409	700,000	28%
Residential EE Kits	66	2,513	1,400,000	0%
Business Rebates	215,749	340,461	4,337,000	8%
Business EE Kits	0	(48)	400,000	0%
Education and Outreach	2,515	36,414	500,000	7%

[6] Transfers follow the Energy Bureau's January 23, 2026 Resolution and Order in Docket NEPR-MI-2022-0001 directing PREPA to transfer EE Rider funds to LUMA.

Program	Cost For FY2026 Q3 ($)	FY2026 YTD Costs ($)	Total Program Budget FY2026 ($)	% of Total Program Budget
Cross-Cutting Planning, Administration, and Evaluation Costs	235,592	1,068,776	1,200,000	89%
Total Portfolio	**1,374,873**	**4,410,486**	**16,187,656**	**27%**

Please refer to *Table 17: Energy Efficiency Costs by Program and Cost Category* for a breakdown of energy efficiency costs by categories in FY2026 Q3, including participant incentives, PP&A, marketing, evaluation, measurement and verification (EM&V), and other costs for incentive program costs. Negative figures represent adjustments to accrued expenses from the previous period. LUMA has not incurred EM&V costs to date because it awaits notification from the PREB regarding the selection of an EM&V contractor.

Table 17: Energy Efficiency Costs by Program and Cost Category

Program	Participant Incentives ($)	PP&A ($)	Marketing ($)	EM&V ($)	Other Costs ($)	Total
Residential Rebates	1,843,846	921,115	0	n/a	0	2,764,962
In-Store Discounts	206,920	(9,511)	0	n/a	0	197,409
Residential EE Kits	0	2,513	0	n/a	0	2,513
Business Rebates	77,833	262,628	0	n/a	0	340,461
Business EE Kits	0	(48)	0	n/a	0	(48)
Education & Outreach	n/a	36,414	0	n/a	0	36,414
Cross-Cutting Planning, Administration & Evaluation Costs	n/a	1,068,776	n/a	0	0	1,068,776
Total Portfolio	**2,128,599**	**$2,281,887**	**$0**	**$0**	**$0**	**$4,410,486**

Shifts in funds between programs

Following the determination to discontinue the Business EE Kits Program based on prior participation levels and program performance, LUMA plans to reallocate funds originally designated for the program to support future implementation activities associated with the Residential EE Kits Program during FY2026 Q4. This planned reallocation is intended to align available program resources with programs demonstrating stronger customer participation and demand, while supporting continued delivery of energy efficiency resources to residential customers, particularly low-income households.

Managing Budget Variations Above 20 Percent

As shown in *Table 16: EE Budget and Cost*, during FY2026 Q3, LUMA did not incur any budget variations exceeding 20 percent.

EE Program Non-Incentive Administrative Costs

Table 18: Breakdown of EE Program Non-Incentive Administrative Costs provides a breakdown of EE programs' non-incentive administrative costs incurred by LUMA in FY2026 Q3, including staff administrative costs, planning and regulatory professional services, program implementation contractors, program evaluation, and other administrative costs.

Table 18: Breakdown of EE Program Non-Incentive Administrative Costs

Categories	Program Budget FY2026 ($)	Costs For FY2026 Q3 ($)	YTD Costs ($)
LUMA Staff	600,000	63,576	190,044
Professional Services	600,000	114,806	606,575
Program Implementation Contractors	3,987,656	523,349	1,415,269
Other Administrative Costs	0	0	0
Total	**$5,187,656**	**$701,731**	**$2,211,887**

5.0 Demand Response Programs

In accordance with the Resolution and Order issued on August 29, 2023, and consistent with applicable reporting requirements, this section provides a comprehensive overview of the DR Program's financial and operational status. It summarizes administrative costs and actual receipts for both the quarterly and fiscal-year-to-date periods and compares these figures against the approved budget. This section also presents the current fund balance to reflect the program's financial position.

Additionally, the section includes key program performance indicators for the same periods, aligning them with underlying assumptions and highlighting any material variances from the approved budget. It further outlines quarterly and year-to-date expenditures by major line items, noting any discrepancies and providing context where necessary.

5.1 DR: Customer Battery Energy Sharing Program

On May 20, 2025, PREB issued a Resolution and Order approving LUMA's proposal to expand the CBES program to provide critical support to the grid during the forecasted Summer 2025 generation shortfall.

During this quarter, the DR Program expanded customer enrollment and increased event capacity. By adding 635 new participants, LUMA brought the total number of enrolled customers to 82,490. The program's total enrolled battery capacity at the end of the quarter reached 512.5 MW (nameplate), as reported by LUMA's aggregator partners. This growth strengthens the program's ability to manage demand fluctuations by adjusting energy supply during critical grid shortages.

The CBES program did not encounter any emergency events this quarter. Therefore, the performance metrics reported for the previous quarter, such as the average event impact, participation rate, and average event duration across all aggregators, remain unchanged for this cycle.

5.1.1 CBES Progress and Distributed Energy Resource Management System Implementation

Since its launch in November 2023, CBES has successfully enrolled 82,490 customers through third-party aggregators. These aggregators are responsible for customer recruitment, battery dispatch, telemetry data collection, and performance reporting. Currently, LUMA's System Operations determines the need for emergency DR events based on system conditions and communicates dispatch instructions to aggregators via email.

As the CBES program continues to grow in scale and impact, LUMA has successfully executed all tasks related to event dispatch and performance analysis. This achievement underscores strong operational capacity, coordination, and commitment to delivering results aligned with program goals and regulatory expectations.

While LUMA evaluated the Distributed Energy Resource Management System as a potential future capability, it determined that it is not required at the current program stage, with a steady or nearly flat enrollment pace, avoiding estimated implementation costs exceeding $2 million. However, as enrollment expands, additional system enhancements or operational platforms may become necessary to support reliable dispatch, participant coordination, and program analytics on a much larger scale.

5.1.2 CBES Participants

Table 19: Number of Participants and Total MW Available in Each DR Program shows the number of participants enrolled in the CBES Program to date, by program and sector/segment, and the total MW enrolled. Total MW figures are estimates based on aggregator self-reported data and may be subject to future validation and updates.

Table 19: Number of Participants and Total MW Available in Each DR Program

Sector	Segment	Program	Total Participants Enrolled (YTD)	Total MW Available (YTD)	Total MW Enrolled (YTD)
Residential	Residential	Customer Battery Energy Sharing	81,492	307.14	503.5
Commercial	Small Business	Customer Battery Energy Sharing	998	5.49	9
Total			**82,490**	**312.63MW**	**512.5MW**

5.1.3 CBES Performance for FY2026 Q3

LUMA has been closely monitoring key performance indicators to evaluate the effectiveness of the CBES Program, as detailed in *Table 20: DR Performance Values*. This monitoring includes tracking the number of enrolled customers, the power and energy enrolled per event, and the total number of events dispatched. By analyzing indicators such as average battery power and energy dispatched per event,

LUMA aims to gain insights into program performance. This data helps assess the program's benefits and guide future improvements to enhance customer engagement and operational efficiency.

Table 20: DR Performance Values

Performance	YTD FY2026
Enrolled Customers (#)	82,490
Enrolled Power per Event (MW)	512.5
Enrolled Energy per Event (MWh)	1,283
Events Dispatched (#)	48
Average Customer Response (%)	61%
Average Dispatched Battery Power per Event (MW)	34.7
Average Dispatched Battery Energy per Event (MWh)	157.7
Peak Demand Savings Target (MW)	40
Peak Demand Savings (MW)	34.7
Peak Demand Savings (%)	87%
Costs ($)	$9,141,017.00

Table 21: DR YTD Performance Indicators

Program Parameters	YTD Forecast (A)	YTD Actual (B)	Variance Between YTD Forecast and Actual YTD [(A-B)][7]
Enrolled Customers (#)	60,000	82,490	22,490
Enrolled Load (kW)	369,600	512,525	142,924.64
Average Battery Capacity (kWh/battery)	15.56	15.58	0.02
Average Battery Reserve (%)	50%	73%	23%
Average Impacts per Event (kW)	40,000	34,570	5,430
Aggregate Seasonal/Annual Impacts (kW)	2,760,000	1,659,360	1,100,640
Impacts as % of Enrolled Load	11%	7%	4%

[7] Variances are expressed on an absolute basis.

Program Parameters	YTD Forecast (A)	YTD Actual (B)	Variance Between YTD Forecast and Actual YTD [(A-B)][7]
Average Participation Rate per Event (%)	85%	61%	24%
Average Event Duration (Hours)	4	4	0
Events (#)	49	48	1
Capacity per Event (kW)	48,277	34,570	13,707
Estimated Energy per Event (kWh)	277,143	157,747	119,396
Total Energy Delivered (kWh)	6,899,752	7,571,869	672,117
Participant Incentive Payments ($)	$15,535,229	$8,756,889	$6,778,340
Program Planning and Administrative (PP&A) Costs ($)	$ 1,495,011	$ 384,128.63	$ 1,110,882.37
Total program costs ($)	$15,750,000	$ 9,141,017.63	$ 6,608,982.37

Table 22: Number of Participants Enrolled During the Quarter (Broken Out by Auto-Enrolled and Opt-In)

Period	Opt-In	Auto-Enrolled	Total
January 2026	170	0	170
February 2026	102	0	102
March 2026	363	0	363
Total	**635**	**0**	**635**

Understanding DR Variances

The FY2026 Q3 results reflect program stability and continued operational readiness throughout the reporting period. As noted previously, the CBES program did not encounter any emergency events this quarter. Consequently, the performance indicators established in the prior period remain unchanged and continue to represent the current operational baseline for the program.

Regarding financials, the variances presented in *Table 21: DR YTD Performance Indicators* reflect updates limited solely to the administrative costs incurred during this period. These updates demonstrate effective resource management and disciplined oversight of program expenditures, ensuring alignment with budget expectations and regulatory requirements.

5.1.4 CBES Program Administrative Costs

Total PP&A costs for the quarter amounted to $37,076. Program Management expenses totaled $36,518, supporting core oversight, coordination, and stakeholder engagement functions. Professional Services costs were $342, and System Operations costs were $216 for the reporting quarter. This stability reflects consistent cost control and the absence of additional regulatory, planning, or technical support needs beyond those already accounted for in prior periods under NEPR-MI-2022-0001. No expenditures were recorded under Customer Service, Program Evaluation, or Other Expenses categories this quarter, demonstrating continued fiscal restraint and targeted resource allocation. *Table 23: DR (CBES) PP&A Budget and Costs* provides the costs corresponding to fiscal year to date for the CBES Program, broken down by category.

Table 23: DR (CBES) PP&A Budget and Costs

Categories	PP&A Total Budget FY2026	YTD Costs for FY2026
Program Management	$270,000	$156,491
System Operations	$0	$216
Customer Service	$0	$0
Professional Services[8]	$2,050,000	$227,381
Program Evaluation	$0	$0
Other Expenses[9]	$0	$41
Total PP&A	**$2,320,000**	**$384,129**

5.1.5 CBES Quarterly and Fiscal-Year-to-Date PPCA Fund Inflows and Balances Comparison

Table 24: FY2026 CBES Costs and PPCA Fund Overview below presents the actual fund inflows received relative to the budgeted inflows specified in the PPCA. It also includes the fiscal-year-to-date actual fund balance, providing a clear view of how actual receipts align with the planned budget and how they affect the overall year-end fund balance. This detailed comparison helps assess budgeting, identify discrepancies, and ensure that financial operations align with the requirements of the August 29 Resolution and Order and best practices.

[8]Please note that planning and regulatory professional services are included in this line item.
[9] Actual costs correspond to payments made to legal services.

Table 24: FY2026 CBES Costs and PPCA Fund Overview[10]

CBES FY2026 Q3 Costs ($)	CBES YTD Costs ($)	Estimated Budget Inflows for CBES from the PPCA[11]	PPCA Fiscal YTD Actual Fund Balance
$52,859[12]	$9,141,017	$15,750,000	$6,608,983

[10] PPCA-related factors are based on the quarterly filings in Docket NEPR-MI-2020-0001 (PREPA Permanent Rate), in alignment with Energy Bureaus approved quarterly adjustment clause factors. Table 24 provides an overview of CBES program expenditures through the reporting quarter and year-to-date, together with the associated PPCA budget and current fund balance.

[11] This figure represents the sum of the quarterly budget YTD and has been revised for this period.

[12] The amount of $52,859 reflects $37,076 in administrative costs incurred in this quarter, plus $15,783 in incentive payments owed from Q2 and issued during Q3.

5.2 CBES Reports

Table 25: CBES Event-by-Event Summary

Table 25 does not contain reported values for this period due to the absence of CBES events during the quarter.

Event Information			Participants		Event Statistics				
Date	Duration (Hours)	Start Time (AST)	Participating Customers	# of Participating Aggregators	Total Battery Energy Dispatched (kWh/Event)	Average Energy Per Participant (kWh/Event)	Total Battery Power Dispatched (KW)	Average Power Per Participant (KW)	Estimated Total Event Cost

Table 26: CBES Program Events and Minimum Load Shed (MLS) Avoidance

Table 26 does not contain reported values for this period due to the absence of CBES events during the quarter.

Dates	MW DE CBESS	Time Sub-Group A	Time Sub-Group B	Duration (Hours)	Total Reserve MW Sub-A	Total Reserve MW Sub-B	MLS Start Time	MLS End Time	MLS Duration	Avoided Load Shed

5.3 DR Emergency Load Reduction Program

During the most recent reporting period, progress on the Emergency Load Relief Program remained limited, reflecting the continued pause in key development activities. LUMA maintained only essential coordination efforts to preserve program optionality; however, no substantive progress toward deployment occurred due to unresolved regulatory and permitting requirements, including those associated with U.S. Environmental Protection Agency regulations governing the operation of backup generators.

In contrast, the CBES program continues to demonstrate stable operational performance and strong growth potential, offering a more reliable and near-term resource aligned with current system needs. The program's performance-based compensation structure remains a cost-effective approach, ensuring expenditures correlate directly with delivered grid benefits while providing predictable enrollment expansion and operational readiness. This stability allows CBES to support ongoing system reliability needs as the Emergency Load Relief Program addresses its outstanding regulatory challenges.

6.0 Conclusions and Recommendations

6.1 Analysis and Observations

EE Programs

During FY2026 Q3, LUMA continued advancing key operational readiness activities to support the responsible relaunch of EE programs following a period during which funding limitations prevented program implementation. The quarter represented a focused transition period during which LUMA completed final system validations associated with the EE online rebate portal, strengthened program administration processes, and prepared customer service and communication functions to support program activation. The implementation of the EE online rebate portal represents an important enhancement to program operations by improving customer access to program information, streamlining application submission and tracking, and strengthening transparency in program administration. In parallel, LUMA successfully fulfilled all existing program commitments by ensuring that every approved rebate was fully paid using available EE Rider funds, while also carrying out comprehensive case-management activities to maintain accurate records and sustain program readiness.

Overall, the activities conducted during FY2026 Q3 demonstrate continued progress toward restoring full program operations through a structured and disciplined approach to program implementation. Continued coordination across operational areas, including system readiness, customer service preparation, stakeholder engagement, and customer communication, positions EE programs for relaunch in FY2026 Q4 and supports long-term program stability and effective delivery of energy efficiency services to customers across Puerto Rico.

Demand Response Programs

The CBES Program continues to demonstrate strong progress and measurable results, reinforcing its role as a cornerstone of Puerto Rico's demand response and distributed energy resource strategy. With more than 82,400 enrolled customers, over 512 MW of enrolled flexible capacity, and consistent participation

and reliability during dispatch events, the program continues to provide meaningful grid support and operational flexibility during periods of system stress.

The program's performance and innovative implementation approach have also received significant industry recognition at the national level. In 2025, the CBES Program received the Public Utilities Fortnightly Mabel MacFerran Top Innovators Award in Energy Storage, and in 2026, the program was further recognized with the Peak Load Management Alliance ("PLMA") Award of Excellence. These awards are widely recognized within the utility and demand response industry and are typically granted to utilities, grid operators, and program administrators demonstrating leadership, innovation, and measurable impact in advanced distributed energy resource and Virtual Power Plant ("VPP") initiatives.

Historically, similar recognitions have been associated with large-scale and highly mature utility demand response and VPP programs across major U.S. jurisdictions. The recognition of the CBES Program alongside these industry-leading initiatives highlights the scale, innovation, and operational effectiveness achieved in Puerto Rico's market despite the unique grid challenges and resource constraints faced by the Island. The awards further validate the program's ability to deliver measurable reliability benefits through customer-sited battery resources while supporting the evolution of distributed energy resource integration practices within the utility sector.

Notably, these recognitions underscore the significance of the results achieved through the CBES Program relative to the program's available funding and operational environment. The program has successfully positioned Puerto Rico as a visible leader in customer battery-enabled demand response and VPP implementation, demonstrating that meaningful grid reliability benefits and customer participation can be achieved through strategic coordination, innovative program design, and effective stakeholder collaboration.

These accomplishments continue to strengthen the visibility of Puerto Rico's demand response initiatives within the broader utility industry and support continued confidence in the long-term value and scalability of customer-based distributed energy resources as part of Puerto Rico's evolving energy strategy.

Appendix A:

This report contains no images for the current period. Instead, the main report details all relevant activities in their respective sections.