

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

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IN RE:

ENERGY EFFICIENCY AND DEMAND
RESPONSE TRANSITION PERIOD PLAN

CASE NO.: NEPR-MI-2022-0001

SUBJECT: Fiscal Year 2026 Fourth Quarter
Consolidated Transition Period Plan
and Demand Response Administrative Costs
Quarterly Report and Fiscal Year 2026 Consolidated
Transition Period Plan and Demand Response
Administrative Costs Annual Report

**MOTION TO SUBMIT FISCAL YEAR 2026 FOURTH QUARTER CONSOLIDATED
TRANSITION PERIOD PLAN AND DEMAND RESPONSE ADMINISTRATIVE COSTS
QUARTERLY REPORT AND FISCAL YEAR 2026 CONSOLIDATED TRANSITION
PERIOD PLAN AND DEMAND RESPONSE ADMINISTRATIVE COSTS ANNUAL
REPORT**

TO THE HONORABLE PUERTO RICO ENERGY BUREAU:

COME now **LUMA Energy, LLC** and **LUMA Energy ServCo, LLC** (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 fourth 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 (the “FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report”) and the annual report on the TPP for FY2026 (the “FY2026 Consolidated TPP and DR Administrative Costs Annual Report”), included in a single document. *See Exhibit 1.* These EE and DR 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 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report covers the period from April 1, 2026, to June 30, 2026, and the FY2026 Consolidated TPP and DR Administrative Costs Annual Report covers the period from July 1, 2025, to June 30, 2026.

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 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. *See id.*, pp. 18, 27, 29 and 30.

3. 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”) ordering 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.

4. On August 29, 2023, the Energy Bureau issued a Resolution and Order (“August 29th Order”) 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 in the August 29th Order (“DR Administrative Costs Quarterly Report”). *See id.*, pp. 3-4. The Energy Bureau further directed that the Q4 report was to include the year-end report (“DR Administrative Costs Year-End Report”). *See id.*, footnote 8.

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

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.

6. 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.*

7. On February 14, 2024, LUMA requested the Energy Bureau to approve the consolidation of the DR Administrative Costs Quarterly Report and the TPP Quarterly Report into a single quarterly report (referred to as the “Consolidated TPP and DR Administrative Costs Quarterly Report”) to be filed within forty-five (45) days of the end of each fiscal quarter, and the consolidation of the TPP Annual Report and the DR Administrative Costs Year-End Report into a single annual report (referred to as “Consolidated TPP and DR Administrative Costs Annual Report”) to be filed within one hundred and twenty (120) days following the end of the fiscal year. *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”).

8. On March 21, 2024, the Energy Bureau issued a Resolution and Order (“March 21st Order”) approving the consolidation of the quarterly and annual reports as proposed in the February 14th Motion. *See March 21st Order*, p. 2.

9. 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. *See June 11th Resolution and Order*, p. 8.

10. 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*, pp. 1-2, 9-10 and Exhibit 1.

11. 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. The Energy Bureau also determined to extend the TPP by an additional six months, ordered LUMA to file a revised TPP, as well as to file a proposed form of permanent CBES program and develop and implement a backup generator DR emergency program (now referred to by LUMA as “Emergency Load Reduction Program” or “ELRP”). *See id.*, pp. 3-5.

12. On October 28, 2024, LUMA requested the Energy Bureau to approve a proposed template for the Consolidated TPP and DR Administrative Costs Annual Reports. *See Motion to Submit Consolidated Transition Period Plan and Demand Response Administrative Cost Annual Report and Request for Approval of Template for These Annual Reports* (“October 28th Motion”).

13. On January 24, 2025, the Energy Bureau issued a Resolution and Order (“January 24th Order”) approving LUMA’s request to use the template for the Consolidated TPP and DR Administrative Costs Annual Reports as proposed in its October 28th Motion conditioned on supplementing the template with additional information and including modifications to three tables in the report, all as specified in the January 24th Order. *See id.*, pp. 4-6. 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 and 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 Order². *See* January 24th Order, pp. 3, 6.

14. On January 31, 2025, LUMA filed the revised TPP, proposing it run until June 30, 2026, and the proposed permanent CBES. *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, and *Motion to Submit Permanent Customer Battery Energy Sharing Program Proposal in Compliance with Resolutions and Orders of October 23, 2024, and December 5, 2024*.

15. On April 30, 2025, the Energy Bureau issued a Resolution and Order ordering LUMA to file proposals for the ELRP and a proposal to expand the CBES program for summer 2025 called “CBES+”.

16. On May 8, 2025, LUMA submitted the 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*) and its Exhibit 1.

17. On May 20, 2025, the Energy Bureau issued a Resolution and Order (“May 20th Order”) approving the CBES+ proposal and remaining portions of the permanent CBES proposal with certain conditions and required filing of monthly reports during the June-October 2025 period. *See* May 20th Order, p. 2.

18. On May 21, 2025, LUMA filed its ELRP proposal. *See Motion to Submit Proposal for Emergency Load Reduction Program in compliance with Resolution and Order of April 30, 2025*.

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.

19. On May 29, 2025, the 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.

20. On June 20, 2025, the Energy Bureau issued a Resolution and Order approving LUMA’s ELRP proposal through October 31, 2025.

21. 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 while specifying that “LUMA retains flexibility to allocate its budget among its proposed EE resource acquisition programs”. *See* June 26th Order, pp. 3-4.

22. 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.*

23. On August 19, 2025, the Energy Bureau issued a Resolution and Order approving LUMA’s amended TPP for implementation in FY2026 (“FY2026 TPP”).

24. On December 11, 2025, the Energy Bureau issued a Resolution and Order requesting information from PREPA and LUMA regarding certain financial constraints resulting in the pause of certain EE programs reported by LUMA in its FY2026 Q1 Consolidated TPP and DR Administrative Costs Quarterly Report.

25. 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 Consolidated TPP and DR Administrative Costs Quarterly Report and include in its future

Consolidated TPP and DR Administrative Costs 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.

26. On January 23, 2026, the Energy Bureau issued a Resolution and Order (“January 23rd Order”) ordering LUMA to report in its FY2026 Q2 through Q4 Consolidated TPP and DR Administrative Costs Quarterly 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* January 23rd Order, p. 5.

27. On June 26, 2026, LUMA informed the Energy Bureau about the status of reactivation of paused EE programs and the shifting of \$1.8 million within the FY2026 EE portfolio budget from the Residential Rebates Program budget to the Residential EE Kits program budget as allowed under the June 26th Order and that it would be providing detailed information in its upcoming FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report. *See Informative Motion on Reallocation of Funding Within the EE Program Portfolio Budget*, pp. 3-4.

III. Submission of FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report and FY2026 Consolidated TPP and DR Administrative Costs Annual Report

28. In compliance with the February 16th Order, the August 29th Order, the March 21st Order, January 9th Order, and the January 23rd Order, LUMA herein submits its FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report. *See Exhibit 1*. This report covers the implementation of the FY2026 TPP, the CBES and the ELRP.

29. In addition, in compliance with the February 16th Order, the August 29th Order, the March 21st Order, and the January 24th Order, LUMA is also submitting its FY2026 Consolidated TPP and DR Administrative Costs Annual Report. This report is consolidated into the FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report included in *Exhibit 1*. LUMA consolidated the quarterly and annual reports to streamline the reporting process, avoid two separate filings in close succession covering overlapping implementation and cost information, and support a more efficient use of resources. This approach promotes better resource planning and a more effective reporting workflow while providing the Energy Bureau with the relevant quarterly and annual information in a single consolidated submission.

30. LUMA further informs the Energy Bureau that it will make a supplemental filing on or before October 28, 2026, which is the regulatory deadline to submit the FY2026 Consolidated TPP and DR Administrative Costs Annual Report, to submit two items that are not available for inclusion with this report. Specifically, LUMA will submit the final balance of the Energy Efficiency Rider Account for FY2026 once the fiscal-year financial closing processes are completed in October 2026. In addition, LUMA will submit the FY2026 Exhibit 2 – Installed Measures by Sector, Segment, and Program, given that additional time is required to complete the necessary data analysis for this Exhibit.

WHEREFORE, LUMA respectfully requests that the Energy Bureau (i) **take notice** of the aforementioned; (ii) **accept** the FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report and the FY2026 Consolidated TPP and DR Administrative Costs Annual Report consolidated in *Exhibit 1* in compliance with the Energy Bureau directives in this proceeding; (iii) **take notice** that LUMA will submit, by supplemental filing on or before October 28, 2026, the FY2026 Energy Efficiency Rider Account final balance and FY2026 Exhibit 2 – Installed

Measures by Sector, Segment, and Program, consistent with the Annual Report requirements; and
(iv) **deem** LUMA in compliance with the reporting requirements under such directives.

RESPECTFULLY SUBMITTED.

In Guaynabo, Puerto Rico, this 14th day of August 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 to: hrivera@jrsp.pr.gov; nzayas@gmlex.net; mvalle@gmlex.net; rcruzfranqui@gmlex.net; javrua@sesapr.org; mrrios@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.



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Exhibit I

*FY2026 Q4 Consolidated TPP and DR Administrative Costs Quarterly Report consolidated with
FY2026 Consolidated TPP and DR Administrative Costs Annual Report*

Consolidated Transition Period Plan and Demand Response Administrative Costs

FY2026 Q4 and Annual Report

NEPR-MI-2022-0001

August 14, 2026



Executive Summary

The final year of the Transition Period Plan (TPP) demonstrated how Puerto Rico's emerging Energy Efficiency (EE) and Demand Response (DR) programs have matured from early pilot initiatives into stable, high-performing resources ready for long-term implementation under the Three-Year Plan (TYP). Although FY2026 began under constrained operating conditions, the progress achieved during Q4 confirmed the resilience of the program structures established throughout the TPP and highlighted LUMA's ability to restore customer-facing services rapidly once funding became available.

After three quarters of limited implementation due to EE Rider cash constraints, the relaunch of EE programs in Q4 produced a marked increase in participation and energy savings. The Residential EE Kits Program became the largest driver of portfolio performance, with 57,552 kits delivered and an estimated 19,813 MWh in annual energy savings, exceeding its revised target by 130 percent. Additional EE offerings reactivated during Q4 supported both residential and commercial customers: the Residential EE Rebates Program reimbursed 422 applications and achieved 96 percent of its annual savings target, while the Business EE Rebates Program served 34 commercial customers, generating 1,714.17 MWh in annual savings. In total, 57,996 customers participated in EE programs during Q4, reflecting strong latent demand for efficiency solutions and reinforcing the effectiveness of LUMA's targeted relaunch strategy.

Across the full fiscal year, 66,174 customers participated in EE programs, including 10,378 low-income households, highlighting the continued focus on equitable access. Strategic funding reallocations allowed LUMA to maximize portfolio performance during FY2026 by directing available resources to the Residential EE Kits Program, which demonstrated the highest demand and cost-effectiveness. Operational readiness also improved through the launch of the online rebate portal, expanded community engagement, and enhancements to customer support functions, processes that now form part of the permanent administrative infrastructure supporting the transition into the TYP.

During Q4 FY2026, LUMA advanced its Streetlight Modernization and Energy Efficiency Initiative by replacing approximately 2,804 streetlights and implementing a refined, fixture-level wattage-based methodology that improves the accuracy and transparency of reported energy savings.

Demand Response programs advanced significantly during FY2026. The Customer Battery Energy Sharing (CBES) Program expanded to 91,466 participants, with approximately 479 MW of available distributed battery capacity providing meaningful system support during 58 emergency events. CBES maintained disciplined cost management, utilizing 56 percent of its annual budget, while earning national recognition through the 2025 Mabel MacFerran Top Innovators Award and 2026 PLMA Award of Excellence. These results confirm that DR capabilities established under the TPP have matured into reliable, scalable resources for Puerto Rico's grid.

FY2026 results demonstrate that the TPP has successfully achieved its purpose. The pilot phase launched Puerto Rico's first EE and DR programs, built data and administrative systems, tested implementation models, developed market interest, and generated measurable energy savings and peak demand reductions. The operational improvements and customer insights gained throughout the TPP now serve as the foundation for permanent program delivery.

Consolidated Transition Period Plan and Demand Response Administrative Costs Quarterly and Annual Report

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Now, LUMA transitions from pilot operations into the structured framework of the Three-Year Plan. The momentum generated during FY2026 Q4, combined with the portfolio growth and system benefits achieved throughout the TPP, positions Puerto Rico's EE and DR programs for long-term expansion, more consistent funding, and continued evolution.

FY2026 ultimately represented a year of operational recovery, portfolio optimization, and foundational strengthening across EE and DR programs. The lessons learned, system improvements, and customer insights gained during the Transition Period Plan position LUMA to enter the FY2027 Three-Year Plan with a more mature implementation framework, improved administrative capacity, and a robust foundation for long-term program delivery.

Regulatory Background

Since 2022, LUMA has collaborated with the Puerto Rico Energy Bureau (Energy Bureau), stakeholders, and industry experts to advance a portfolio of energy efficiency and demand response programs that are now established, field-tested, and well received by customers. This report covers both the Q4 reporting period, from April 1, 2026 to June 30, 2026, and the Annual reporting period, from July 1, 2025 to June 30, 2026, and reflects progress made throughout the Transition Period Plan.

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. The Energy Bureau 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.

During the Transition Period, LUMA continued to refine its EE and DR portfolios. In January 2025, LUMA filed its Demand Response (DR) portfolio, which the Energy Bureau approved later that same year, establishing the Customer Battery Energy Sharing (CBES) program as a permanent DR offering. In parallel, LUMA filed its amended Energy Efficiency (EE) portfolio in July 2025, which the Energy Bureau approved in August 2025 for implementation in Fiscal Year 2026. This amended EE portfolio served as the final update required under the Transition Period Plan, positioning the EE portfolio for the Three-Year planning cycle.

The regulatory framework governing FY2026 implementation is guided by the following Energy Bureau determinations:

- The 2019 determination establishing the EE Rider as the cost recovery mechanism for energy efficiency programs on a per kilowatt-hour basis.
- August 11, 2023, Resolution and Order, which classified Demand Response program costs as recoverable under the Power Purchase Charge Adjustment (PPCA).
- June 11, 2024, Resolution and Order, which approved the implementation of the EE charge to cover the EE program costs.
- January 23, 2026, Resolution and Order, which required PREPA to transfer EE Rider funds to LUMA according to an established schedule to ensure program continuity.

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

As FY2026 concludes, LUMA continues implementing approved DR programs while executing the final stages of the TPP, ensuring a smooth transition into the permanent, multi-year program cycle.

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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, LUMA reached a defining moment in the Transition Period Plan, closing out a multi-year quick start phase that began in FY2023 while also delivering the strongest quarter of implementation in FY2026. Although the first three quarters of the fiscal year were marked by cash flow constraints that paused several customer facing Energy Efficiency programs, the organization used that time to strengthen processes, plan relaunch logistics, and preserve implementation readiness. These efforts allowed LUMA to respond rapidly when funding stability was restored.

The restoration of EE Rider funding made possible through a Resolution and Order from the Energy Bureau establishing the transfer schedule for funding transfers that PREPA was required to meet, gave LUMA the ability to resume full operation of critical EE offerings during Q4. LUMA relaunched its Residential EE Kits, Residential EE Rebates, and Business EE Rebates Programs, each of which demonstrated strong customer engagement. The Residential EE Kits Program saw improved demand following both the targeted low-income campaign and its subsequent public launch. The rebound in participation affirmed that customer interest in EE measures remained strong. The Business EE Kits Program remained inactive following the decision not to relaunch it. The Business EE Kits Program was assessed as less cost-effective and less strategically aligned with the long-term portfolio compared to other measures; as a result, resources were prioritized toward programs that deliver higher savings, stronger market adoption, and optimized operational deployment, while the In-Store Discounts (ISD) Program remained temporarily paused due to the additional operational and retailer-coordination requirements needed for reactivation.

Throughout Q4, LUMA also focused on maturing program administration and improving customer experience. The implementation of the new online rebate application portal, together with expanded community outreach, strengthened customer support processes. In addition, sustained collaboration with government and community organizations helped reinforce operational stability that will support long-term program delivery. These improvements were crucial not only for restoring program momentum in Q4 but also for laying the groundwork for the transition from the pilot phase TPP to the permanent EE and DR portfolio under the Three-Year Plan.

The accomplishments of Q4 represent the culmination of the broader objectives established under the TPP, which aimed to launch early EE and DR programs, accelerate market development, produce initial energy savings and DR capability, and build the foundational processes, systems, and partnerships necessary for permanent program implementation. Energy savings increased, customer participation grew to more than 66,000 participants across EE programs during FY2026, and the DR portfolio matured significantly, highlighted by the rapid expansion of CBES. By the close of the fiscal year, CBES had enrolled more than 91,000 customers, reached over 479 MW of available battery capacity, and supported 58 emergency events, demonstrating the value of customer sited storage and establishing Puerto Rico as a national leader in battery enabled DR innovation.

The experiences and lessons from FY2026, both the constraints and the successes, directly shaped the development of LUMA's Three-Year Plan. The organization identified several areas for evolution, including improving data maturity, advancing EM&V implementation, strengthening staffing and market development, and enhancing contractor coordination.

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 Q4 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 conducted multiple education and outreach activities across Puerto Rico, participating in nine events including Energy Week, five Senate Health Fairs, the MIDA Convention, and two Department of Housing elderly home visits. These engagements strengthened public understanding of EE and DR programs through targeted presentations, informational booths, and community sessions. The team distributed EE kits, provided individualized guidance, and delivered educational materials to support adoption of energy-saving practices. Outreach at regional offices and community events further expanded program visibility and customer participation. Collectively, these efforts provided awareness and drove measurable engagement across residential and business sectors.	Active
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 422 customers received reimbursements in FY2026 Q4.	Relaunch – May 2026
Residential EE Kits	Pilot Program	LUMA offered free mail-order kits that included common energy-efficiency measures and educational materials. During this reporting period, LUMA customers ordered 57,552 Energy Efficiency kits, demonstrating strong public engagement and continued demand for energy-saving resources.	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.	Relaunch – May 2026

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Relevant TPP Section	Initiatives	Description and Experience	Status
		During FY2026 Q4, 34 business customers participated in the program and received a total of \$199,456 in business EE rebates.	
Business EE Kits	Pilot Program	Through this program commercial customers receive free kits by mail that included typical EE measures and educational materials. LUMA did not 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.	Paused
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 Q4 FY2026, LUMA replaced more than 2,600 streetlights. As a result, LUMA achieved 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 91,466 participants enrolled.	Ongoing

1.3 Residential EE Kits Program

FY2026 Q4 marked the strongest quarter of implementation for the Residential EE Kits Program and represented a critical milestone in transitioning from the TPP to the TYP. With funding restored after three consecutive quarters of pause, the relaunch of the program generated unprecedented participation. A total of 57,559 customers placed orders for Residential EE Kits during Q4, the highest enrollment of any EE program this fiscal year. These kits contain standard energy-efficiency measures, including LED bulbs, a smart power strip, and an LED nightlight. In addition, each kit includes an easy-to-follow installation guide, a postcard outlining basic energy-saving practices, and a customer satisfaction survey.

Using LUMA's reporting methodology, which recognizes projected savings at the moment of reservation, these 57,559 Q4 kit reservations represent an estimated 19,813 MWh in annual energy savings, exceeding the program's revised annual savings target by over 130 percent. This spike in savings not only demonstrates latent demand for accessible efficiency measures but also highlights how rapidly customers responded once the program became available again.

Implementation in Q4 was supported through community outreach, targeted engagement, and partnership coordination. Kits were distributed through multiple housing-and community-based events, including collaborations with the Puerto Rico Department of Housing at *Égida El Cemí* in Luquillo and Sagrado Corazón in Arecibo, where residents received kits on-site. Participation in Senate-led health and service fairs across Añasco, Guayanilla, Manatí, Ponce, and San Juan allowed hundreds of additional customers to receive support in person. Moreover, outreach through the *La Margarita* community in Salinas and coordinated distribution with the Puerto Rico Green Energy Trust ensured customers undergoing residential energy assessments could receive kits during their site visits. In total, over 800 kits were distributed through direct community engagement during Q4.

The surge in demand, the exceedance of portfolio savings targets, and the program's broad geographic reach made Q4 a period of progress. These results demonstrated that, despite three quarters of limited implementation, LUMA had built sufficient operational readiness, customer trust, and logistical capability to relaunch quickly and effectively, setting a strong foundation for continued expansion under the TYP.

Summary of FY2026

Throughout FY2026, the Residential EE Kits Program experienced two distinct operational phases driven primarily by funding availability. For the first three quarters of the fiscal year, the program remained paused because EE Rider funding constraints limited all customer-facing activities. During this suspension period, LUMA focused on operational readiness measures necessary for an eventual relaunch. These activities included refining the implementation workflow, updating customer communication templates, coordinating with community-based organizations to strengthen outreach infrastructure, particularly for low-income households, and developing distribution plans intended to improve equitable access once the program could resume.

In conjunction with these readiness efforts, LUMA conducted a data-driven evaluation of overall EE portfolio performance. This review indicated that the Residential EE Kits Program showed stronger demand, higher projected energy-savings potential, and more consistent participation rates than other EE offerings. Based on this assessment, LUMA determined that reallocating funding from the Business EE Kits Program and a portion of the Residential Rebate Program would yield greater energy-savings output and better align program resources with actual customer demand profiles. Section 4.0 of the report details these shifts, where cross-program reassignments were documented and reconciled. See *Section 4.0, Program Cost – Shift in funds between programs*, for more information.

After restoring EE Rider funding, the Residential EE Kits Program relaunched through a phased implementation approach. The initial phase prioritized low-income households, leveraging existing partnerships with government and community-based organizations to ensure early distribution to income-eligible customers. After this targeted phase, the program launched publicly, resulting in substantial uptake. By year-end, participation reached 57,559 kit reservations during Q4 alone. Under LUMA's reporting methodology, these reservations correspond to approximately 19,815 MWh in projected annual energy savings, exceeding the program's revised Fiscal Year 2026 annual savings target by approximately 130 percent.

By the end of FY2026, the Residential EE Kits Program generated the highest energy-savings contribution within the EE portfolio, supported the highest customer participation levels, and

demonstrated the viability of reallocating resources to high-demand, high-impact measures. Fiscal year data indicates that program performance strengthened significantly once funding constraints were resolved, with Q4 results reflecting both accumulated demand and operational readiness efforts conducted during earlier quarters. These outcomes provide relevant inputs for permanent program planning under the TYP, particularly regarding resource prioritization, equity strategies, and expected participation levels in future implementation cycles.

1.4 Residential EE Rebate Program

During FY2026 Q4, the Residential EE Rebates Program reimbursed 422 customer applications, consisting of outstanding FY2025 obligations and newly approved FY2026 applications processed following the program's relaunch in May. These reimbursements correspond to approximately 7,131.50 MWh in projected annual energy savings. Under the revised annual energy savings target of 7,467 MWh, the program achieved approximately 96% of its adjusted FY2026 goal, indicating stable performance.

In addition to participation outcomes, FY2026 Q4 marked a significant administrative milestone with the deployment of LUMA's Residential EE Rebates online application portal. The new platform streamlined application intake and processing, standardized documentation requirements, and introduced a scalable digital interface intended to improve long-term program execution. This system will serve as the primary intake mechanism for rebate submissions under the TYP, enabling more efficient administrative throughput and stronger data consistency.

Summary of FY2026

For the first three quarters of FY2026, the Residential EE Rebate Program remained paused for new applications because limited EE Rider funding required prioritizing existing obligations over new customer enrollments. Throughout this period, program activity focused on administrative continuity rather than expansion. Available funds were used to issue incentive payments for previously approved FY2025 applications, delaying new implementation but allowing LUMA to maintain compliance with existing commitments.

Although customer-facing activities were limited for most of the fiscal year, LUMA completed several operational improvements to strengthen program administration ahead of relaunch. LUMA finalized development, testing, and validation of the EE online rebate portal; updated customer-facing materials such as application guidance and communication templates; coordinated readiness activities with the implementation contractor; and developed training modules for Contact Center representatives. LUMA also produced a step-by-step Rebate Application Guide designed to reduce submission errors and improve data quality upon relaunch.

After completing these operational readiness steps and restoring EE Rider funding in Q4, the Residential EE Rebate Program resumed customer-facing implementation. The launch of the EE online rebate portal established a centralized, user-oriented interface for application submission, status tracking, and program information access. This transition materially improved administrative efficiency and positioned the program to support more structured, scalable delivery under the permanent TYP beginning in FY27.

See *Table 2: Rebates Processed*

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Table 2: Rebates Processed

Period	Customers Served ¹	Applications Processed ²	Rebates Issued ³	Spending in Rebates
Q4	410	422	543	\$207,265.00
FY2026	4,463	4,537	6,062	\$ 2,284,977.00

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

Table 3: Measures Installed FY2026

Measure	Q4 QTY	FY2026 QTY	FY2026 Percentage
Energy Star® Freezer	3	16	0.26%
Energy Star® Tankless Water Heater	6	67	1.11%
Energy Star® Window Air Conditioner	14	71	1.17%
Energy Star® Refrigerator	30	256	4.22%
Solar Water Heater	117	689	11.37%
Mini-Split Air Conditioner	373	4,963	81.87%
Total	543	6,062	100%

¹ Count of unique LUMA account numbers.

² Processed means paid. One application allows for more than one measure.

³ Number of Measures for which rebates were paid.

Figure 1: FY2026 Geographical Distribution of Residential EE Rebates



1.5 Business EE Kits Programs

The Business Energy Efficiency Kits Program remained inactive for the entirety of FY2026 following LUMA's decision in FY2026 Q3 not to relaunch the offering. Historical participation data indicated consistently low uptake relative to other EE programs, particularly when compared to the substantially higher customer demand observed for the Residential EE Kits Program. Based on these participation trends and program performance results, LUMA determined that continued investment in Business EE Kits would not represent an efficient use of limited EE Rider funds.

As documented to the Energy Bureau during FY2026 Q3, LUMA reallocated funding originally assigned to Business EE Kits to support expansion of the Residential EE Kits Program. This reallocation aligned program resources with demonstrated customer demand and produced a higher projected energy-savings return per dollar of program spending. The decision did not modify the total EE portfolio budget; rather, it redistributed available funding to improve portfolio-wide cost-effectiveness during the final year of the TPP.

1.6 Business EE Rebates Program

During FY2026 Q4, the Business EE Rebates Program reimbursed 34 commercial rebate applications, including three FY2025 obligations processed in April and 31 newly approved FY2026 applications following the relaunch. Total incentive disbursements for the quarter amounted to \$281,566, corresponding to an estimated 1,714.17 MWh in projected annual energy savings. These results reflect program stabilization after prior funding constraints and demonstrate steady demand for cost-effective energy efficiency measures within the commercial sector.

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Lighting technologies continued to represent the largest share of customer participation during Q4. Participation data shows that lighting retrofits remain one of the most cost-effective energy efficiency opportunities for commercial facilities in Puerto Rico, contributing to projected savings at relatively low incentive cost levels. To support customer awareness during the relaunch period, LUMA engaged commercial customers directly by participating in industry events, including activities coordinated with the Puerto Rico Marketing, Industry and Food Distribution Chamber (MIDA). These outreach efforts increased program visibility and supported application submissions after rebate processing reopened.

Table 4: Eligible Equipment for Rebates

Eligible Equipment	Rebate Amount
Exit sign	\$10
Omnidirectional 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
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

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Table 5: Business Measures Installed

Eligible Equipment	Q4 Qty (#)	FY2026 Qty (#)	FYTD Percentage
Fryer	0	0	0.00%
Convection Oven	0	0	0.00%
Combination Oven	0	0	0.00%
Commercial Freezer	0	0	0.00%
Energy Star® Window Air Conditioner	0	0	0.00%
Pool Pump Valuable Frequency Drive ("VFD")	0	0	0.00%
Omni Directional LED Replacement	0	0	0.00%
Window Film	0	0	0.00%
Ice Machine	0	0	0.00%
Exterior Lighting	0	0	0.00%
Exit Sign	0	0	0.00%
Solar Water Heater	0	0	0.00%
Commercial Refrigerator	0	1	0.00%
Occupancy Sensor	3	6	0.23%
Chiller	4	4	0.23%
Mini-Split Air Conditioner	15	51	1.93%
Commercial Air Conditioning	29	38	1.44%
Linear Fluorescent LED Replacement	245	290	10.95%
LED Troffer Replacement	2,352	2,642	99.77%
Total	2,648	3,034	100%

Summary of FY2026

The Business EE Rebates Program continued advancing commercial EE adoption throughout FY2026 despite the operational challenges associated with cash flow constraints. During the best part of the fiscal year, LUMA focused on honoring outstanding rebate commitments while preparing for program relaunch and maintaining engagement with commercial stakeholders. LUMA also advanced several operational improvements to strengthen program delivery, including the EE Rebate Portal, which streamlined the application process, enhanced customer experience, and improved overall program administration following its implementation.

Throughout the fiscal year, the Commercial Outreach team actively engaged commercial customers, contractors, trade allies, and industry stakeholders to identify new energy efficiency opportunities and advance projects through the program pipeline. These efforts expanded participation across multiple sectors of Puerto Rico's economy—including retail, manufacturing, hospitality, and higher education—through engagement with customers such as Walgreens, Burlington, ABB, Thermo King, Courtyard by Marriott, and Northbridge University.

LUMA further strengthened these efforts through close collaboration with its Key Account Management organization, customer site inspections that identified additional energy efficiency opportunities, renewed partnerships with experienced contractors and trade allies—including Energy Management Collaborative (EMC) and ENGIE—and reengagement with the *Colegio de Técnicos de Refrigeración y Aire Acondicionado de Puerto Rico* (CTRA) to expand contractor participation and increase market awareness. Collectively, these operational improvements and market development initiatives established a robust pipeline of commercial projects that positions the Business EE Rebates Program for expanded participation, increased energy savings, and stronger program performance during FY2027.

1.7 In-Store EE Discounts Program

During FY2026 Q4, the ISD Program remained in paused status while LUMA completed key operational readiness activities required for full implementation. Although customer incentives were not available during the quarter, program preparations continued, including retailer coordination, inventory verification processes, and point-of-sale system readiness. These steps are necessary components of the ISD delivery model, which relies on real-time discounts at participating retail locations rather than post-purchase rebate processing. With most foundational tasks completed by the end of the fiscal year, the ISD Program is positioned for activation in FY2027 Q1 under the TYP, ensuring a structured transition from pilot-phase implementation to permanent program delivery.

Summary of FY2026

Across FY2026, the ISD Program remained paused after its Q2 suspension due to cash-flow constraints that affected customer-facing Energy Efficiency offerings. Unlike other EE programs that resumed implementation in Q4, the ISD Program's structure required additional operational coordination before relaunch. Implementation of instant, point-of-sale incentives depends on several prerequisites—retailer agreements, product inventory validation, system integration for discount application, and employee training at participating stores—resulting in a longer lead time between funding restoration and program activation.

Although the program was not active during Q4, performance recorded before the pause shows strong customer interest in ISD offerings. Before suspension, the program achieved 4,082 qualifying product sales, generating an estimated 621.68 MWh in projected annual energy savings, exceeding its original annual target by approximately 116 percent. These results indicate high cost-effectiveness and strong market alignment, confirming that the pause reflected funding limitations rather than program performance issues.

Throughout FY2026, LUMA continued preparing for ISD reactivation under the TYP. The product mix planned for relaunch includes high-efficiency ceiling fans and ENERGY STAR® window air conditioners,

measures selected for their high savings potential and broad applicability within Puerto Rico's residential market. LUMA maintained coordination with the program's current retail partner, The Home Depot, and assessed options to expand retailer participation to additional commercial partners to increase geographic coverage and customer access.

See Table 6: In-Store Discounts Units Sold During FY2026.

Table 6: In-Store Discounts Units Sold During Q4 and Full FY2026

Measure	Q4 QTY	FY2026 QTY
Energy Star® Ceiling Fan	0	1,947
Energy Star® Window AC	0	2,135
Total	0	4,082

1.8 Program and Implementation Strategies

Focus on Equity and Access

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-savings 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 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
Electric tankless water heater	\$60	\$85
Energy Star® refrigerator	\$210	\$280
Energy Star® freezer	\$210	\$280

Eligible Equipment	Non-low-Income Incentive	Low-Income Incentive
Energy Star® window air conditioning unit	\$130	\$175
Mini-split air conditioning unit	\$375 - \$500	\$375 - \$500

Summary of FY2026

A key priority throughout FY2026 implementation was expanding access to EE opportunities for income-eligible customers. Consistent with this objective, LUMA adopted a phased implementation strategy for the Residential EE Kits Program, initially reserving kit inventory exclusively for low-income households before opening participation to the general customer population. Prior to the public launch, LUMA conducted targeted community outreach activities and collaborated with strategic partners, including the Puerto Rico Department of Housing, the Senate of Puerto Rico, and the Puerto Rico Green Energy Trust (PRGET), to build program awareness, familiarize partners with the program, and support local distribution efforts. Through these community outreach activities, 810 kits were distributed.

Building upon these outreach activities, LUMA launched a targeted email campaign between May 21 and June 18, reaching 92,871 low-income customers with an email address on file. To maximize participation, customers who had not yet reserved a kit received up to three reminder emails, resulting in a total of 285,457 emails distributed throughout the campaign. Each communication included a unique promotional code that restricted participation to the intended customer population, ensuring that available inventory was prioritized for income-qualified households. By the conclusion of the campaign, 9,568 Residential EE Kits were successfully reserved by low-income customers.

This phased implementation strategy balanced LUMA's commitment to equitable access with broad customer participation, maximizing customer benefits and projected energy savings while directing limited program resources first to the customers most likely to benefit.

Table 8: Measures Installed by Low-Income Customers

Measure	FY2026 Q4 QTY #	Total FY2026 QTY #
Energy Star® Freezer	0	0
Energy Star® Air Conditioner – Window	2	4
Electric Tankless Water Heater	1	6
Energy Star® Refrigerator	7	21
Solar Water Heater	8	24
Air Conditioner – Mini-Split	51	260
EE Kits	10,378	10,378
Total	10,447	10,693

1.9 Funding Sources and Cost Recovery

Energy Efficiency Funding Source

In June 2024, LUMA, as ordered by the Energy Bureau, 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 Energy Bureau's 2019 determination to recover program costs from all customers on a per-kilowatt-hour basis.

Demand Response Funding Source

The Energy Bureau 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. 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 to align efforts and ensure 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 Q4, LUMA's EE programs experienced a significant increase in customer participation following the relaunch of several EE programs. A total of 57,996 customers participated in the EE programs during the quarter, driven primarily by the successful relaunch of the Residential EE Kits Program, which accounted for 57,552 participants and represented the highest quarterly participation achieved by any EE program during FY2026. The Residential EE Rebates Program also resumed customer participation, serving 422 customers, while the Business EE Rebates Program continued to support the commercial sector with 34 participating customers. These results demonstrate the strong customer response following program relaunch and highlight the effectiveness of LUMA's targeted implementation strategy during the final quarter of the fiscal year.

Summary of FY2026

Customer participation throughout FY2026 reflected the operational challenges experienced during the first three quarters of the fiscal year, followed by a significant increase after program funding became available and key EE programs relaunched in Q4. As shown in Table 9, LUMA served 66,174 participants across its EE programs during FY2026. The Residential EE Kits Program accounted for the largest share of participation following its successful relaunch, while the Residential and Business EE Rebates Programs resumed customer participation during the fourth quarter after operating under funding constraints for much of the fiscal year.

Consistent with LUMA's commitment to equitable program delivery, 10,378 low-income customers participated across the EE portfolio during FY2026, reflecting continued efforts to prioritize underserved communities while expanding customer access to energy efficiency opportunities throughout Puerto Rico. As reflected in the annual participation results, the Business EE Kits Program did not serve customers during FY2026, as the program was not relaunched following LUMA's strategic decision to reallocate available funding to the Residential EE Kits Program in response to stronger customer demand and greater portfolio energy savings potential. Similarly, the In-Store Discounts Program did not record customer participation following its pause in October 2025, as implementation activities during the remainder of FY2026 focused on operational readiness and retailer coordination in preparation for the program's planned relaunch in FY2027 Q1.

The substantial increase in customer participation during the final quarter of FY2026 demonstrates the strong market demand for LUMA's EE programs and establishes a solid foundation for continued program expansion under the FY2027 TYP.

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	Q4 Participants	FY2026 Participants
Residential Rebates	410	4,491
Low-Income	52	269
Non-Low-Income	358	4,222
Business Rebates	34	49
In-Store Discount	0	04,082
Residential EE Kits	57,559	57,559
Business EE Kits	0	0
Total	58,003	66,181

Table 10: Installed Measures by Sector, Segment, and Program provides an overview of the energy efficiency measures implemented across various sectors. This table categorizes the installed measures

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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 Q4 & FYTD)

Sector	Segment	Program	Installed Measure	FY2026 Q1 Quantity	FY2026 Q2 Quantity	FY2026 Q3 Quantity	FY2026 Q4 Quantity	YTD Quantity	FY26 Q1 Energy Savings kWh	FY26 Q2 Energy Savings kW	FY26 Q3 Energy Savings kWh	FY26 Q4 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	FY26 Q4 Peak Demand Savings kW	YTD Peak Demand Savings kW
Residential	Single-Family Homes	Residential Rebate	Air Conditioner - Window	8.00	23.00	26.00	14.00	71.00	6,407.59	15,332.55	17,495.59	10,491.94	49,727.67	0.20	0.59	1.00	0.59	2.38
Residential	Single-Family Homes	Residential Rebate	Mini-Split Air Conditioner	1,817.00	1,218.00	1,555.00	373.00	4,963.00	2,149,543.86	1,417,797.63	1,848,348.29	487,631.03	5,903,320.81	220.45	145.89	190.18	50.09	606.60
Residential	Single-Family Homes	Residential Rebate	Solar Water Heaters	71.00	62.00	439.00	117.00	689.00	123,472.86	105,224.26	751,297.10	179,202.98	1,159,197.21	17.91	15.66	111.81	26.66	172.04
Residential	Single-Family Homes	Residential Rebate	Tankless Water Heaters	16.00	16.00	29.00	6.00	67.00	1,427.72	1,258.54	2,400.18	457.68	5,544.12	2.08	1.83	3.49	0.66	8.05
Residential	Single-Family Homes	Residential Rebate	Refrigerators	51.00	63.00	112.00	30.00	256.00	2,594.98	3,205.57	5,698.78	1.53	11,500.86	0.31	0.38	0.67	0.18	1.54
Residential	Single-Family Homes	Residential Rebate	Freezers	3.00	2.00	8.00	3.00	16.00	128.28	85.52	342.08	0.13	556.01	0.02	0.01	0.04	0.02	0.08
Residential	Single-Family Homes	In-Store Discount Program	Window ACs	1,915.00	220.00	0.00	0.00	2,135.00	448,002.00	51,480.00	0.00	0.00	499,482.00	63.16	7.26	0.00	0.00	70.42
Residential	Single-Family Homes	In-Store Discount Program	Ceiling Fans	1,675.00	272.00	0.00	0.00	1,947.00	105,525.00	17,136.00	0.00	0.00	122,661.00	30.15	4.90	0.00	0.00	35.05
Residential	Single-Family Homes	Energy Efficiency Kits Program	LED Bulbs	0.00	0.00	0.00	345,354	345,354	0.00	0.00	0.00	15,804,930.24	15,804,930.24	0.00	0.00	0.00	2,960.60	2,960.60
Residential	Single-Family Homes	Energy Efficiency Kits Program	Advanced Power Strip	0.00	0.00	0.00	57,559	57,559	0.00	0.00	0.00	1,816,341.12	1,816,341.12	0.00	0.00	0.00	65.16	65.16
Residential	Single-Family Homes	Energy Efficiency Kits Program	LED Night Light	0.00	0.00	0.00	57,559	57,559	0.00	0.00	0.00	2,191,580.16	2,191,580.16	0.00	0.00	0.00	250.21	250.21
Commercial	Small Business	Business Rebate Program	Exit Sign	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Omni Directional LED Replacement	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	LED Troffer Replacement	0.00	0.00	290.00	2,352.00	2,642.00	0.00	0.00	43,285.19	339,775.81	383,061.00	0.00	0.00	4.53	44.22	48.75



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Sector	Segment	Program	Installed Measure	FY2026 Q1 Quantity	FY2026 Q2 Quantity	FY2026 Q3 Quantity	FY2026 Q4 Quantity	YTD Quantity	FY26 Q1 Energy Savings kWh	FY26 Q2 Energy Savings kW	FY26 Q3 Energy Savings kWh	FY26 Q4 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	FY26 Q4 Peak Demand Savings kW	YTD Peak Demand Savings kW
Commercial	Small Business	Business Rebate Program	Linear Fluorescent LED Replacement	0.00	0.00	45.00	245.00	290.00	0.00	0.00	11,200.24	24,699.27	35,899.51	0.00	0.00	1.02	2.21	3.23
Commercial	Small Business	Business Rebate Program	Occupancy Sensor	0.00	0.00	3.00	3.00	6.00	0.00	0.00	2,794.73	3,090.03	5,884.75	0.00	0.00	1.49	1.92	3.40
Commercial	Small Business	Business Rebate Program	Exterior Lighting	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Fryer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Convention Oven	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Combination Oven	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Ice Machine	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Commercial Refrigerator	0.00	0.00	1.00	0.00	1.00	0.00	0.00	765.05	0.00	765.05	0.00	0.00	0.09	0.00	0.09
Commercial	Small Business	Business Rebate Program	Commercial Freezer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Commercial Air Conditioner	2.00	0.00	7.00	29.00	38.00	11,970.39	0.00	21,028.00	469,423.29	502,421.69	2.07	0.00	3.17	50.38	55.62
Commercial	Small Business	Business Rebate Program	Window Air Conditioner	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Mini-Split Air Conditioner	31.00	4.00	1.00	15.00	51.00	31,231.30	4,229.45	737.34	20,086.12	56,284.20	3.49	0.47	0.08	2.52	6.56
Commercial	Small Business	Business Rebate Program	Chillers	0.00	0.00	2.00	4.00	6.00	0.00	0.00	395,363.02	335,033.80	730,396.82	0.00	0.00	71.32	44.58	115.90
Commercial	Small Business	Business Rebate Program	Solar Water Heaters	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commercial	Small Business	Business Rebate Program	Window Film*	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



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Sector	Segment	Program	Installed Measure	FY2026 Q1 Quantity	FY2026 Q2 Quantity	FY2026 Q3 Quantity	FY2026 Q4 Quantity	YTD Quantity	FY26 Q1 Energy Savings kWh	FY26 Q2 Energy Savings kW	FY26 Q3 Energy Savings kWh	FY26 Q4 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	FY26 Q4 Peak Demand Savings kW	YTD Peak Demand Savings kW
Commercial	Small Business	Business Rebate Program	Pool Pump VFD	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	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, LUMA's EE programs delivered energy (MWh) and peak demand (MW) saving across various market sectors and subsegments, shown in *Table 11: Energy and Peak Demand Savings Performance by Market Sector and Subsegment*, which includes preliminary estimates of savings archived during the FY2026 Q4 and FY2026 in relation to annual targets.

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

Market Sector	Subsegment	Revised Annual Energy Savings Target (Mwh)	FY2026 Q4 Energy Savings (Mwh)	FY2026 Energy Savings (Mwh)	Actual Savings (%) of Annual Target	Peak Demand Savings Target (Mw)	FY2026 Q4 Peak Demand Savings (Mw)	FY2026 Peak Demand Savings (Mw)	Actual Peak Demand Savings (%) Annual Target	FY2026 Lifetime Energy Savings Target (MWh)	FY2026 Lifetime Energy Savings (MWh)	Actual Lifetime Energy Savings (%) Annual Target	FY2026 Gross Lifetime Ghg Savings (MT of CO2)
Residential Sector	Low-Income	6,904	3,640	3,907	57%	3	0.60	0.63	1.1%	136,614	61,812	45%	43,391.76
Residential Sector	Non-Low-Income	16,233	16,855	23,661	146%	2	2.76	3.52	52.4%	191,429	367,310	192%	257,851.76
Commercial, Industrial, and Agricultural (C&I) Sectors	Small Business	4,619	1,192	1,715	37%	1	0.15	0.23	13.6%	74,826	34,041	45%	23,896.79
Commercial, Industrial, and Agricultural (C&I) Sectors	Other Commercial/Industrial, and Agricultural Sector	4,619	0	0	0%	1	0.00	0.00	0.0%	124,233	0	0%	0.00

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Market Sector	Subsegment	Revised Annual Energy Savings Target (Mwh)	FY2026 Q4 Energy Savings (Mwh)	FY2026 Energy Savings (Mwh)	Actual Savings (%) of Annual Target	Peak Demand Savings Target (Mw)	FY2026 Q4 Peak Demand Savings (Mw)	FY2026 Peak Demand Savings (Mw)	Actual Peak Demand Savings (%) Annual Target	FY2026 Lifetime Energy Savings Target (MWh)	FY2026 Lifetime Energy Savings (MWh)	Actual Lifetime Energy Savings (%) Annual Target	FY2026 Gross Lifetime Ghg Savings (MT of CO2)
Government/Public	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Portfolio Total		32,375	21,687	29,283	90%	6	3.50	4.38	73.8%	527,101	463,163	8%	325,140



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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 FY2026, and how these relate to annual targets.

Table 12: Energy and Peak Demand Savings Performance

Program	Revised Annual Energy Savings Target (MWh) ⁴	FY26 Q4 Energy Savings (MWh)	FY2026 Energy Savings (MWh)	FY2026 Energy Savings (%)	FY2026 Peak Demand Savings Target (MW)	FY2026 Q4 Peak Demand Savings (MW)	FY2026 Peak Demand Savings (MW)	FY2026 YTD Peak Demand Savings (%)	FY2026 Lifetime Energy Savings Target (MWh)	FY2026 Lifetime Energy Savings (MWh)	FY2026 Lifetime Energy Savings (%)	FY2026 Gross Lifetime GHG Savings (MT of CO2)	FY26 Q4 Spend (\$)	FY2026 Program Spend (\$)	\$/kWh
Residential EE Rebates	7,467	679	7,131	96%	2	0.08	0.79	37%	268,890	110,179	41%	77,346	711,826	3,476,787	\$0.49
In-Store EE Discounts	536	0	622	116%	0	0.00	0.11	127%	6,059	4,555	75%	3,198	15,289	212,697	\$0.34
Residential EE Kits	15,134	19,815	19,815	131%	2	3.28	3.28	159%	55,955	314,387	562%	220,700	3,446,608	3,449,121	\$0.17
Business EE Rebates	9,239	1,192	1,715	19%	2	0.15	0.23	18%	149,651	34,041	23%	23,897	510,515	850,976	\$0.50

⁴ During FY2026, two fund reallocations shifted resources from Business EE Kits and Residential EE Rebates to Residential EE Kits. This redistribution adjusts the savings reported and the percentage of target achievement shown in Table 12.



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Program	Revised Annual Energy Savings Target (MWh) ⁴	FY26 Q4 Energy Savings (MWh)	FY2026 Energy Savings (MWh)	FY2026 Energy Savings (%)	FY2026 Peak Demand Savings Target (MW)	FY2026 Q4 Peak Demand Savings (MW)	FY2026 Peak Demand Savings (MW)	FY2026 YTD Peak Demand Savings (%)	FY2026 Lifetime Energy Savings Target (MWh)	FY2026 Lifetime Energy Savings (MWh)	FY2026 Lifetime Energy Savings (%)	FY2026 Gross Lifetime GHG Savings (MT of CO2)	FY26 Q4 Spend (\$)	FY2026 Program Spend (\$)	\$/kWh
Business EE Kits	0	0	0	0%	0	0.00	0.00	0%	49,407	0	0%	0	0	-48	\$0.00
Total	32,375	21,684	29,281	90%	6	3.50	4.41	73.8%	529,963	463,163	87%	325,140	\$4,684,237.04	\$7,989,533.57	\$0.27

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3.3 Customer Education and Outreach

After LUMA relaunched its customer-facing EE programs in FY2026 Q4, customer education and outreach resumed with a strategic focus on increasing awareness of available EE programs and expanding customer access to program benefits. Outreach efforts during the quarter primarily supported the Residential EE Kits Program and the Business EE Rebates Program, reflecting the implementation priorities set after restoring program funding.

Customer education and technical outreach also helped commercial customers identify and implement cost-effective EE projects. For example, during a site visit with an industrial customer planning to replace rooftop HVAC equipment, LUMA's team identified an opportunity to improve the project's energy performance by recommending high-efficiency equipment eligible for incentives under the Business EE Rebates Program. Based on this guidance, the customer selected the higher-efficiency option, resulting in an estimated \$53,725 incentive, approximately 290,659 kWh in annual savings, 30 kW of demand reduction, and more than 4.35 million kWh in lifetime savings. This example illustrates how proactive engagement and technical assistance help customers maximize the value of EE investments while strengthening program participation and long-term savings.

As summarized in Table 13, LUMA participated in a variety of community outreach events with government agencies and strategic partners to educate customers about EE, promote available program offerings, and assist with program participation. Educational activities included information on energy-saving practices, available customer incentives, and guidance on accessing EE resources. These outreach efforts also provided opportunities to distribute Residential EE Kits directly to eligible customers and strengthen engagement with communities across Puerto Rico.

Summary of FY2026

Customer education and outreach remained an important component of LUMA's EE implementation strategy throughout FY2026. Although promotional activities were intentionally limited during the first half of the fiscal year because cash flow constraints temporarily suspended customer-facing programs, outreach efforts resumed after the program relaunched, with an emphasis on supporting participation, increasing customer awareness, and promoting the benefits of EE.

Throughout FY2026, LUMA collaborated with government agencies, community organizations, and strategic partners to deliver EE education to residential and commercial customers across Puerto Rico. As presented in *Table 13, Customer Education and Outreach Activities for Each EE Program*, outreach activities provided opportunities to educate customers on energy-saving practices, introduce available incentive programs, and expand awareness of EE technologies. These activities also reinforced the importance of community partnerships as an effective way to reach underserved populations and support equitable access to EE resources.

The experience gained throughout FY2026 confirmed that customer education continues to play a critical role in increasing public awareness of EE and supporting long-term customer participation. LUMA will continue leveraging community outreach and strategic partnerships as key components of its customer engagement strategy under the TYP.

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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.	Q3
Residential EE Kits and Rebates	Feria de Salud y Servicios del Senado de PR	LUMA participated in five PR Senate Health and Services Fairs held in Manatí, Ponce, San Juan, Guayanilla, and Añasco. At these events, the team provided guidance on energy efficiency, promoted the rebates programs, and distributed free EE kits, directly supporting increased public awareness and adoption of energy-saving measures.	Q4
Residential EE Kits and Rebates	Dept of Housing – Elderly Homes	LUMA visited two Department of Housing elderly homes— <i>Egida El Cemi</i> in Luquillo and Sagrado Corazón in Arecibo. Through these visits, LUMA delivered targeted presentations that increased resident awareness of energy efficiency concepts, program benefits, and available offerings. The team also distributed EE kits directly to residents, achieving a total delivery of 140 kits across both visits and advancing energy-saving behaviors within these communities.	Q4
Residential EE Kits and Rebates	Mesa Informativa	Outreach activities were conducted through informational tables at LUMA's regional offices in Monacillos and Palo Seco. Staff provided guidance on EE programs, addressed public inquiries, and promoted available program resources. Visitors received individualized assistance and clear information on program benefits and requirements, supporting increased awareness and participation in energy-efficiency initiatives	Q4
Residential EE Kits and Rebates	Comunidad La Margarita, Salinas	A community event was held in the La Margarita community in Salinas, with approximately 42 residents participating. Attendees received an educational session on energy efficiency, gaining practical tips and strategies to reduce energy consumption in their homes. The activity strengthened community engagement and increased awareness of the importance of adopting sustainable energy practices, contributing to greater participation in energy-saving behaviors.	Q4
Business Rebates	MIDA Convention	LUMA participated in the MIDA Convention, where staff engaged with attendees and provided information about the Energy Efficiency Business programs. Approximately 300 individuals were assisted throughout the event, receiving guidance, educational materials, and support on program benefits and requirements. This outreach effort expanded program visibility and helped drive increased interest and participation among the business community.	Q4

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3.4 Marketing Performance

Marketing activities during FY2026 Q4 focused on supporting the relaunch of LUMA's customer-facing EE programs and increasing customer awareness of available program offerings. LUMA continued utilizing its EE website as the primary source of program information, providing customers with access to program eligibility requirements, incentive information, educational resources, and online application tools, please refer to *Table 14: EE Program Website Traffic – FY2026 Q4*.

Digital communications also played a key role in supporting program participation following the relaunch of the Residential EE Kits Program. During the quarter, LUMA published four social media posts across X, Facebook, and Instagram, including three educational posts promoting energy-efficient practices and one post announcing the availability of Residential EE Kits to the general public. Collectively, these posts generated more than 516,000 views, with the Residential EE Kits announcement alone receiving approximately 511,586 views, demonstrating the effectiveness of digital communications in rapidly increasing customer awareness and supporting program participation.

Summary of FY2026

Marketing activities throughout FY2026 supported LUMA's strategy of educating customers about EE while promoting awareness of available customer programs as operational conditions allowed. Although promotional activities remained limited during the first half of the fiscal year because cash constraints temporarily suspended customer-facing programs, marketing efforts resumed after the program relaunch, with a primary focus on customer education and program awareness.

Throughout the fiscal year, LUMA utilized its EE website and digital communication platforms to provide customers with program information, educational content, and access to available EE resources. Website traffic, summarized in Table 14, together with the strong performance of social media communications during FY2026 Q4, demonstrated the importance of digital engagement as an effective tool for increasing customer awareness and supporting participation in EE programs.

The customer response following the Residential EE Kits campaign further confirmed that targeted digital communications are an effective strategy for reaching customers, promoting Energy Efficiency awareness, and supporting future program implementation under the TYP

For a detailed breakdown of traffic by EE program webpage, please refer to *Table 14: EE Program Website Traffic – FY2026 Q4*.

Table 14: EE Program Website Traffic – FY2026 Q4

EE Program Webpage	Number of Visits
Business EE Kits	0
Business EE Rebates	473
In-Store EE Discounts	623
Customer Battery Energy Sharing	1,223

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EE Program Webpage	Number of Visits
Energy Savings Tips	4,473
Business Incentive Program (landing page)	5,659
Residential EE Rebates	11,272
Customer Incentives Programs (landing page)	55,491
Residential EE Kits	218,000
Total	297,214

3.5 Stakeholders' Consultations

During FY2026 Q4, LUMA continued engaging with key stakeholders to support the ongoing implementation of its EE program and identify opportunities to expand customer access to program benefits. Stakeholder consultations during the quarter focused on maintaining communication with organizations that support customer outreach, program awareness, and future collaboration opportunities.

LUMA also continued coordinating with the Puerto Rico Department of Economic Development and Commerce (DDEC) regarding a proposed collaboration to support the distribution of Residential EE Kits. However, the agency postponed implementation due to organizational leadership changes. LUMA remains interested in continuing discussions as organizational conditions allow.

Summary of FY2026

Stakeholder consultations continued to support LUMA's Energy Efficiency implementation strategy throughout FY2026 by maintaining communication with organizations that contribute to customer outreach, program awareness, and future program development. While consultation activities were more limited than anticipated because of operational conditions during portions of the fiscal year, LUMA continued to identify opportunities to strengthen relationships with government agencies and community partners.

The proposed collaboration with DDEC illustrates LUMA's continued commitment to expanding customer access to EE resources through strategic partnerships. Although LUMA deferred implementation of this initiative during FY2026, it anticipates continuing discussions as opportunities become available. These stakeholder consultations continue to provide valuable input for future program implementation and support the continued evolution of the EE programs under the TYP.

3.6 Research Activities

During FY2026 Q4, LUMA continued expanding its customer research efforts to support the evaluation and continuous improvement of its EE programs. As part of the relaunch of the Residential EE Kits Program, each kit distributed during the quarter included a postcard containing a QR code that directed customers to an online survey.

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The survey was developed to collect customer feedback on overall satisfaction with the Residential EE Kits Program, as well as information on product installation, reasons individual measures may not have been installed, customer interest in participating in other EE programs (including the Residential Energy Efficiency Rebates Program), and general demographic information.

Survey results indicated strong customer engagement with the program. Approximately 85% to 88% of respondents reported installing the major kit components, including LED light bulbs, an advanced power strip, and an LED nightlight, demonstrating that customers were actively using the energy-saving measures provided. Among participants who had not yet installed all items, the majority indicated that they planned to do so in the future, most commonly because the products had been recently received, they intended to replace existing equipment at a later time, or they were waiting for assistance with installation, rather than due to product-related concerns.

Overall customer satisfaction with the kit was very positive. Between 74% and 82% of respondents reported being “Extremely Satisfied” with the individual products, with the advanced power strip receiving the highest satisfaction rating. Open-ended feedback further reinforced these findings, with many participants describing the kit as useful, practical, and helpful in reducing household energy costs. Several respondents also indicated that receiving the kit increased their awareness of energy-efficient technologies and influenced future purchasing decisions, particularly regarding LED lighting.

The survey also provided valuable insights to support future program enhancements. Customers expressed interest in additional energy-saving products, suggested offering brighter (cool white) LED bulbs rather than warm-colored bulbs, and recommended including additional surge protection devices and other hurricane preparedness measures. In addition, more than half of respondents (75 of 144, or 52%) indicated that they would like more information about available EE rebates, highlighting the opportunity to use the Residential EE Kits Program as a gateway to increase awareness and participation in other EE offerings.

Summary of FY2026

Throughout FY2026, LUMA conducted customer research activities to better understand customer awareness, participation, and satisfaction with its EE programs. During the fiscal year, customer surveys gathered information to support program evaluation, identify opportunities for continuous improvement, and inform future implementation strategies.

As previously reported during FY2026, LUMA conducted an in-person customer survey at Regional Service Centers to assess customer awareness of EE, communication preferences, barriers to participation, and customer interest in available EE programs. The results provided valuable input for customer outreach strategies and program planning.

Building upon those efforts, the Residential EE Kits Program incorporated a customer satisfaction survey during FY2026 Q4 through a QR code included with each kit. Together, these research initiatives reflect LUMA's continued commitment to incorporating customer feedback into program design, improving customer experience, and supporting data-driven decision-making throughout the EE programs.

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3.7 Collaboration with Key Strategic Groups

During FY2026 Q4, LUMA continued collaborating with key strategic organizations to expand customer access to EE programs and strengthen community-based program implementation. These collaborations complemented LUMA's customer outreach efforts by leveraging trusted community partners to increase awareness of available EE resources and facilitate customer participation.

During the quarter, LUMA continued its collaboration with the Puerto Rico Green Energy Trust (PRGET) by providing Residential EE Kits for distribution to customers participating in PRGET's residential energy assessments. This initiative complemented PRGET's energy audit services by giving customers immediate access to practical energy-saving measures they could implement after completing their home energy assessments. Through this collaboration, customers benefited from both technical guidance and direct access to EE technologies, reinforcing the shared objective of reducing residential energy consumption throughout Puerto Rico.

Summary of FY2026

Throughout FY2026, LUMA strengthened collaboration with strategic organizations that support customer education, community outreach, and EE program implementation. These partnerships complemented LUMA's direct customer engagement efforts by expanding opportunities to reach residential and commercial customers through organizations already serving communities across Puerto Rico.

Collaboration with organizations such as the PRGET, the Puerto Rico Department of Housing, and other strategic partners supported customer education activities, Residential EE Kit distribution, and broader awareness of available EE programs. These collaborative efforts also strengthened LUMA's ability to reach underserved communities while supporting equitable access to Energy Efficiency resources.

LUMA also expanded its collaboration with commercial market partners to support the continued implementation of the Business EE Rebates Program. The Commercial Outreach team reestablished relationships with experienced energy service providers and Trade Allies that have historically supported program participation. These collaborations continue to play an important role in identifying, developing, and implementing large-scale commercial energy efficiency opportunities.

Additionally, LUMA reengaged with the *Colegio de Técnicos de Refrigeración y Aire Acondicionado de Puerto Rico* (CTRA) and began developing a formal contractor engagement strategy to strengthen Trade Ally participation, increase market awareness, and expand the pipeline of qualifying energy efficiency projects. These collaborative efforts are expected to enhance program delivery and support broader participation as the Business EE Rebates Program continues to grow.

The experience gained throughout FY2026 reinforced the importance of strategic partnerships as an integral component of successful program implementation. By combining LUMA's EE programs with the outreach capabilities of trusted community, trade allies, and governmental organizations, these collaborations expanded customer engagement and established a strong foundation for continued partnership opportunities under the EE and DR Three-Year Plan.

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3.8 LUMA's Streetlight Modernization and Energy Efficiency Initiative⁵

During Q4 FY2026, LUMA replaced more than 2,600 streetlights, improving safety and energy efficiency and contributing to a brighter and more modern electric grid. As a result, LUMA achieved estimated energy savings of approximately 18,000 kWh. Each new LED streetlight uses about 65% less energy and lasts up to four times longer than traditional lighting.

To strengthen the accuracy and consistency of reported savings, LUMA has updated its energy-savings methodology. The updated energy-savings methodology is built around the actual wattage of each fixture before and after replacement. Previously, savings estimates relied on broad category wattage assumptions, which didn't always align with what was installed in the field. By shifting to real fixture-level wattage data, the reported reductions now directly reflect true performance differences between existing equipment and new LED installations.

Under this approach, savings are recognized only when the installed LED uses less energy than the specific fixture it replaces, strengthening the accuracy and credibility of reported efficiency gains. The method also increases transparency by removing the need for generalized estimates and grounding all calculations in verified field data.

Additionally, energy savings are now attributed only to the months in which each fixture is active, rather than distributing savings retroactively across installation periods. This produces a more consistent, reliable, and representative monthly efficiency trend.

During FY2026, LUMA replaced more than 12,000 streetlights representing estimated energy savings of approximately 71,800kWh.

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, 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*.

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

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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
FY2026 – April 2026	\$1,006,421.26	\$1,004,000.00
FY2026 – May 2026	\$1,073,006.89	\$1,156,557.00
FY2026 – June 2026	\$1,173,711.58	\$1,156,557.00
Total	\$14,444,632.05	\$13,265,871.96

For a detailed breakdown of costs for each EE program, please refer to *Table 16: EE Budget and Costs*, which outlines expenditures for FY2026 Q4 and year-to-date.

Table 16: EE Budget and Costs

Program	Cost For FY2026 Q4 (\$)	FY2026 Costs (\$)	Revised Total Program Budget FY2026 (\$) ⁷	% of Total FY2026 Program Budget
Residential Rebates	711,826	3,476,788	5,850,656	59%
In-Store Discounts	15,289	212,698	700,000	30%
Residential EE Kits	3,446,608	3,449,121	3,600,000	96%
Business Rebates	510,515	850,976	4,337,000	20%
Business EE Kits	0	(48)	0	0%
Education and Outreach	370	36,784	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.

⁷ During FY2026, two fund reallocations shifted resources from Business EE Kits and Residential EE Rebates to Residential EE Kits. This redistribution adjusts the savings reported and the percentage of target achievement shown in Table 12.

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Program	Cost For FY2026 Q4 (\$)	FY2026 Costs (\$)	Revised Total Program Budget FY2026 (\$) ⁷	% of Total FY2026 Program Budget
Cross-Cutting Planning, Administration, and Evaluation Costs	174,956	1,243,732	1,200,000	104%
Total Portfolio	4,859,564	9,270,050	16,187,656	57%

Please refer to *Table 17: Energy Efficiency Costs by Program and Cost Category* for a breakdown of energy efficiency costs by categories in FY2026 Q4, 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: Q4 Energy Efficiency Costs by Program and Cost Category

Program	Participant Incentives (\$)	PP&A (\$)	Marketing (\$)	EM&V (\$)	Other Costs (\$)	Total
Residential Rebates	180,300	531,526	0	n/a	0	711,826
In-Store Discounts	0	15,289	0	n/a	0	15,289
Residential EE Kits	3,364,252	82,355	0	n/a	0	3,446,608
Business Rebates	199,457	311,059	0	n/a	0	510,515
Business EE Kits	0	0	0	n/a	0	0
Education & Outreach	n/a	370	0	n/a	0	370
Cross-Cutting Planning, Administration & Evaluation Costs	n/a	174,956	n/a	0	0	174,956
Total Portfolio	3,744,009	\$1,115,554	\$0	\$0	\$0	\$4,859,564

Table 18: FY2026 Energy Efficiency Costs by Program and Cost Category

Program	Participant Incentives (\$)	PP&A (\$)	Marketing (\$)	EM&V (\$)	Other Costs (\$)	Total
Residential Rebates	2,024,146	1,452,641	0	n/a	0	3,476,787
In-Store Discounts	206,920	5,777	0	n/a	0	212,697
Residential EE Kits	3,364,252	84,868	0	n/a	0	3,449,120
Business Rebates	277,289	573,687	0	n/a	0	850,976
Business EE Kits	0	-48	0	n/a	0	-48
Education & Outreach	n/a	36,783	0	n/a	0	36,783

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Program	Participant Incentives (\$)	PP&A (\$)	Marketing (\$)	EM&V (\$)	Other Costs (\$)	Total
Cross-Cutting Planning, Administration & Evaluation Costs	n/a	1,243,732	n/a	0	0	1,243,732
Total Portfolio	5,872,607	\$3,397,441	\$0	\$0	\$0	\$9,270,048

Managing Budget Variations Above 20 Percent

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

Summary of FY2026 Shift in Funds

During FY2026, LUMA implemented two strategic budget reallocations within the EE programs to maximize customer participation and projected energy savings while maintaining the total portfolio budget approved by the PREB.

The first budget reallocation, reported during FY2026 Q3, transferred \$400,000 from the Business EE Kits Program to the Residential Energy Efficiency Kits Program following the decision not to relaunch the commercial kits initiative. This adjustment increased the Residential EE Kits Program budget from \$1.4 million to \$1.8 million, allowing LUMA to expand customer participation in response to the significantly higher demand observed for the residential program.

The second budget reallocation was executed in FY2026 Q4, following the successful relaunch of the Residential EE Kits Program and the exceptional customer response to both the Low-Income and general public campaigns. This reallocation transferred \$1.8 million from the Residential EE Rebates Program to the Residential EE Kits Program. This adjustment increased the Residential EE Kits Program budget from \$1.8 million to \$3.6 million and reduced the Residential EE Rebates Program budget from \$7.7 million to \$5.9 million.

Both budget reallocations were based on portfolio performance evaluations, customer participation trends, projected energy savings, implementation readiness, and prudent financial management. These adjustments did not increase the overall EE programs budget approved by PREB; rather, they optimized the allocation of existing program funds to maximize customer participation and portfolio-wide energy savings.

EE Program Non-Incentive Administrative Costs

Table 19: Breakdown of EE Program Non-Incentive Administrative Costs provides a breakdown of EE programs' non-incentive administrative costs incurred by LUMA in FY2026 Q4, including staff administrative costs, planning and regulatory professional services, program implementation contractors, program evaluation, and other administrative costs.

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Table 19: Breakdown of EE Program Non-Incentive Administrative Costs

Categories	Program Budget FY2026 (\$)	Costs For FY2026 Q4 (\$)	YTD Costs (\$)
LUMA Staff	600,000	66,059	256,103
Professional Services	600,000	21,665	581,936
Program Implementation Contractors	3,987,656	1,071,159	2,559,402
Other Administrative Costs	0	0	0
Total	\$ 5,187,656	\$1,115,553	\$3,397,441

Table 20: Energy Efficiency Program Non-Incentive Costs

Program	LUMA Staff	Professional Services	Program Implementation Contractors	Other Administrative Cost	Total Non-Incentive Cost
Residential Rebates	0	0	1,452,641	0	1,452,641
In-Store Discounts	0	0	5,777	0	5,777
Residential EE Kits	0	0	84,868	0	84,868
Business Rebates	0	0	573,687	0	573,687
Business EE Kits	0	0	-48	0	-48
Education and Outreach	38,828	0	-1,851	0	36,977
Cross-Cutting Planning and Administration Costs	217,275	581,936	444,328	0	1,243,538
Total Portfolio	256,103	581,936	2,559,402	0	\$3,397,441

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 actuals 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.

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Additionally, the section includes key program performance indicators for the same periods, aligns them with underlying assumptions, and highlights 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 Q4, the CBES Program was deployed ten times. The program expanded customer enrollment and increased event capacity. By adding 8,986 new participants, LUMA brought total enrolled customers to 91,466. The program's total enrolled battery capacity at the end of the quarter reached 584 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.

During FY26, the CBES Program experienced significant growth and operational activity, supporting 58 emergency events. After the Energy Bureau approved automatic enrollment on May 29, LUMA worked closely with participating aggregators to implement the enrollment process. This coordinated effort enabled the Program to enroll 79,051 new customers this fiscal year and add approximately 504 MW of nameplate capacity.

CBES's rapid maturation has earned the 2025 Public Utilities Fortnightly Mabel MacFerran Top Innovators Award and the 2026 PLMA Award of Excellence, distinctions typically associated with the country's most established demand response programs.

5.1.1 CBES Progress and Distributed Energy Resource Management System Implementation

Since its launch in November 2023, CBES has successfully enrolled 91,466 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.

LUMA evaluated the potential implementation of a Distributed Energy Resource Management System (DERMS) as a future program enhancement. After careful assessment, it determined that such a system is not required at the current stage of operational maturity, thereby avoiding estimated implementation costs exceeding \$2 million. As the program evolves and its operational complexity increases, additional system enhancements or new platforms may be necessary to support reliable dispatch, participant coordination, and expanded analytical capabilities.

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5.1.2 CBES Participants

Table 21: 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 21: Number of Participants and Total MW Available in Each DR Program

Sector	Total Participants Enrolled	Total MW Available	Total MW Enrolled
Residential	90,400	471	574.5
Commercial – Small Business	1,066	8	9.7
	91,466	479 MW	584 MW

5.1.3 CBES Performance

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 22: DR Performance Values

Performance	FY2026
Enrolled Customers (#)	91,466
Enrolled Power per Event (MW)	584
Enrolled Energy per Event (MWh)	1,428
Events Dispatched (#)	58
Average Customer Response (%)	82%
Average Dispatched Battery Power per Event (MW)	53.7
Average Dispatched Battery Energy per Event (MWh)	233.7
Peak Demand Savings Target (MW)	40
Peak Demand Savings (MW)	53.7
Peak Demand Savings (%)	134%
Costs (\$)	\$ 11,829,280

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Table 23: DR YTD Performance Indicators

Program Parameters	YTD Forecast (A)	YTD Actual (B)	Variance Between YTD Forecast and Actual YTD [(A-B)] ⁸
Enrolled Customers (#)	60,000	91,466	31,466
Enrolled Load (kW)	369,600	584,129	214,529
Average Battery Capacity (kWh/battery)	15.56	15.63	0.07
Average Battery Reserve (%)	50%	73%	23%
Average Impacts per Event (kW)	40,000	37,194	2,806
Aggregate Seasonal/Annual Impacts (kW)	2,760,000	2,157,252	602,748
Impacts as % of Enrolled Load	11%	6%	5%
Average Participation Rate per Event (%)	85%	82%	3%
Average Event Duration (Hours)	4	4	0
Events (#)	49	58	9
Capacity per Event (kW)	48,277	53,727	5,450
Estimated Energy per Event (kWh)	277,143	170,743	106,400
Total Energy Delivered (kWh)	6,899,752	9,903,124	3,003,372
Participant Incentive Payments (\$)	\$24,506,300	\$11,829,280	\$12,677,020
Program Planning and Administrative (PP&A) Costs (\$)	\$ 1,834,764	\$ 404,136	\$ 1,430,628
Total program costs (\$)	\$26,341,064	\$12,233,416	\$ 14,107,648

⁸ Variances are expressed on an absolute basis.

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Table 24: Number of Participants Enrolled During the Quarter (Broken Out by Auto-Enrolled and Opt-In)

Period	Opt-In	Auto-Enrolled	Total
July 2025	717	54,134	54,851
August 2025	325	12,986	13,311
September 2025	366	0	366
October 2025	101	0	101
November 2025	377	0	377
December 2025	416	0	416
January 2026	170	0	170
February 2026	102	0	102
March 2026	363	0	363
April 2026	241	241	241
May 2026	135	0	135
June 2026	118	8,492	8,610
Total	3,431	75,853	79,043

Understanding DR Variances

The FY2026 results demonstrate strong year-to-date program performance, marked by substantial enrollment growth, expanded available capacity, and operational delivery above several key forecast indicators.

Enrollment significantly exceeded expectations, reaching 91,466 customers compared with the forecast of 60,000 a positive variance of 31,466 participants. Correspondingly, enrolled load reached 584.1 MW, surpassing the forecast by 214.5 MW. Average battery capacity remained stable at 15.63 kWh per battery, while the average battery reserve reached 73%, exceeding the 50% forecast by 23 percentage points and supporting the Program's dispatch readiness.

Operationally, CBES supported 58 events, nine more than forecast, while maintaining the planned average event duration of four hours. Average capacity delivered per event reached 53.7 MW, exceeding the 48.3 MW forecast by approximately 5.5 MW. Although the average participation rate of 82% was three percentage points below forecast, it remained strong in the context of the Program's significant expansion. Total energy delivered reached approximately 9.9 million kWh, exceeding the forecast by approximately 3.0 million kWh.

These results should be viewed alongside the Program's rapid enrollment growth, increased number of events, and substantial expansion in enrolled capacity.

Financially, total program costs were approximately \$12.2 million, which is \$14.1 million below forecast, including participant incentive payments and program planning and administrative costs that remained below their respective forecasts.

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5.1.4 CBES Program Administrative Costs

Table 25: DR (CBES) PP&A Budget and Costs provides the fiscal year-to-date costs for the CBES Program, broken down by category.

Table 25: DR (CBES) PP&A Budget and Costs

Categories	PP&A Total Budget FY2026	YTD Costs for FY2026
Program Management	\$270,000	\$181,857
System Operations	\$0	\$216
Customer Service	\$0	\$0
Professional Services ⁹	\$2,050,000	\$222,238
Program Evaluation	\$0	\$0
Other Expenses ¹⁰	\$0	\$41
Total PP&A	\$2,320,000	\$404,352

Table 26: Annual demand response program costs

Cost Category	Annual Budget	Annual Cost	Annual Cost as a Percent of Budget
Participant Incentives	\$18,680,000	\$11,425,144	61%
Program Management	\$270,000	\$181,857	67%
System Operations	\$0	\$0	\$0
Customer Service	\$0	\$0	\$0
Professional Services	\$2,047,500	\$222,238	11%
Program Evaluation	\$0	\$0	\$0
Other Expenses	\$2,500	\$41	2%
Total Demand Response Program	\$21,000,000	\$11,829,280	56%

⁹Please note that planning and regulatory professional services are included in this line item.

¹⁰ Actual costs correspond to payments made to legal services.

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

Table 27: 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 actuals aligns 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 best practices.

Table 27: FY2026 CBES Costs and PPCA Fund Overview¹¹

CBES FY2026 Q4 Costs (\$)	CBES YTD Costs (\$)	Estimated Budget Inflows for CBES from the PPCA ¹²	PPCA Fiscal YTD Actual Fund Balance
\$2,688,262 ¹³	\$11,829,280	\$21,000,000	\$9,170,720

¹¹ 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.

¹² This figure represents the sum of the quarterly budget YTD and has been revised for this period.

¹³ 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.

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5.2 CBES Reports

Table 28: CBES Event-by-Event Summary

Event Information ¹⁴			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)	Total Event Cost ¹⁵
7-Jul	4	18:30	45,471	7	206,310.67	4.5	43,935.03	1.0	\$ 257,888.34
8-Jul	4	18:30	45,441	6	205,356.58	4.5	43,718.39	1.0	\$ 256,695.73
10-Jul	4	18:30	44,657	7	195,334.09	4.4	41,623.06	0.9	\$ 244,167.62
11-Jul	4	18:30	44,617	7	191,575.76	4.3	40,834.41	0.9	\$ 239,469.71
12-Jul	4	18:30	44,498	6	188,297.21	4.2	40,069.04	0.9	\$ 235,371.51
13-Jul	4	18:30	43,789	6	187,166.84	4.3	39,822.37	0.9	\$ 233,958.55
14-Jul	4	18:30	53,130	7	190,083.78	3.6	40,504.87	0.8	\$ 237,604.72
15-Jul	4	18:30	53,088	6	196,189.96	3.7	41,792.96	0.8	\$ 245,237.45
16-Jul	4	18:30	52,827	6	191,027.32	3.6	40,698.56	0.8	\$ 238,784.15
17-Jul	4	18:30	43,793	7	186,596.32	4.3	39,773.24	0.9	\$ 233,245.40
18-Jul	4	18:30	43,953	7	187,718.70	4.3	40,014.87	0.9	\$ 234,648.37

¹⁴ The data presented in this report are provided directly by the third-party aggregator.

¹⁵ The data presented in Table 25 are derived from the post-event reports submitted by the third-party aggregator. These values may differ from the current incentive payment amounts reflected in this report, which represent the audited final results of the Quarterly Energy Report submitted by the aggregator and ultimately compensated in accordance with the approved program compensation model.



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Event Information ¹⁴			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)	Total Event Cost ¹⁵
29-Jul	4	18:30	43,899	4	157,860.54	3.6	33,575.28	0.8	\$ 197,325.67
1-Aug	4	6:30:00PM	43,668	7	192,713.37	4.4	42,211.69	1.0	\$ 240,891.71
4-Aug	4	6:30:00PM	44,226	7	195,130.70	4.4	41,607.18	0.9	\$ 243,913.37
5-Aug	4	6:30:00PM	44,141	7	199,228.51	4.5	42,465.52	1.0	\$ 249,035.63
6-Aug	4	6:30:00PM	58,224	7	194,584.85	3.3	41,486.63	0.7	\$ 243,231.06
12-Aug	4	6:30:00PM	58,371	6	196,763.53	3.4	41,950.08	0.7	\$ 245,954.41
14-Aug	4	6:30:00PM	58,988	7	199,421.23	3.4	42,359.86	0.7	\$ 249,276.54
15-Aug	4	6:30:00PM	58,317	7	189,650.47	3.3	40,240.81	0.7	\$ 237,063.09
16-Aug	4	6:30:00PM	58,383	6	151,089.01	2.6	32,033.36	0.5	\$ 188,861.27
17-Aug	4	6:30:00PM	55,030	6	137,046.92	2.5	29,042.30	0.5	\$ 171,308.65
18-Aug	4	6:30:00PM	70,482	7	213,796.86	3.0	45,310.06	0.6	\$ 267,246.08
19-Aug	4	6:30:00PM	70,157	7	220,980.20	3.1	46,842.31	0.7	\$ 276,225.25
20-Aug	4	6:30:00PM	69,802	7	221,213.18	3.2	46,895.61	0.7	\$ 276,516.48
21-Aug	4	6:30:00PM	69,657	7	203,574.70	2.9	43,166.08	0.6	\$ 254,468.38
22-Aug	4	6:30:00PM	69,063	7	217,201.24	3.1	46,055.45	0.7	\$ 271,501.54
25-Aug	4	6:30:00PM	69,350	7	227,731.73	3.3	46,667.26	0.7	\$ 284,664.66
31-Aug	4	6:30:00PM	68,603	4	208,737.91	3.0	44,180.90	0.6	\$ 260,922.39



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Event Information ¹⁴			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)	Total Event Cost ¹⁵
29-Sep	4	6:30:00PM	32,392	6	110,665.50	3.4	26,215.65	0.8	\$ 138,331.87
30-Sep	4	6:30:00PM	31,571	6	106,901.11	3.4	25,339.43	0.8	\$ 133,626.39
1-Oct	4	6:30:00PM	31,891	6	112,201.18	3.5	26,593.45	0.8	\$ 140,251.48
3-Oct	4	6:30:00PM	31,966	6	111,154.43	3.5	26,347.20	0.8	\$ 138,943.03
6-Oct	4	6:30:00PM	31,903	6	108,244.72	3.4	25,653.44	0.8	\$ 135,305.90
8-Oct	4	6:30:00PM	31,734	6	108,580.28	3.4	25,732.16	0.8	\$ 135,725.36
15-Oct	4	6:30:00PM	31,550	4	98,639.91	3.1	24,795.08	0.8	\$ 123,299.89
17-Oct	4	6:30:00PM	31,880	6	110,487.87	3.5	26,183.75	0.8	\$ 138,109.84
19-Oct	4	6:30:00PM	31,402	4	106,056.94	3.4	25,090.20	0.8	\$ 132,571.17
20-Oct	4	6:30:00PM	31,831	6	110,571.64	3.5	26,203.41	0.8	\$ 138,214.55
21-Oct	4	6:30:00PM	31,705	6	109,695.55	3.5	25,993.06	0.8	\$ 137,119.43
28-Oct	4	6:30:00PM	32,570	6	110,678.24	3.4	26,231.12	0.8	\$ 138,347.80
29-Oct	4	6:30:00PM	32,420	6	115,396.70	3.6	27,343.94	0.8	\$ 144,245.88
30-Oct	4	6:30:00PM	32,051	5	111,641.54	3.5	26,408.37	0.8	\$ 139,551.92
31-Oct	4	6:30:00PM	31,983	6	46,472.42	1.5	11,086.80	0.3	\$ 58,090.53
3-Nov	4	6:30:00PM	32,057	6	106,027.56	3.3	25,119.52	0.8	\$ 132,534.45
4-Nov	4	6:30:00PM	31,732	6	108,310.56	3.4	25,659.46	0.8	\$ 135,388.20



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Event Information ¹⁴			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)	Total Event Cost ¹⁵
5-Nov	4	6:30:00PM	31,542	6	108,327.46	3.4	25,662.22	0.8	\$ 135,409.33
17-Nov	4	6:30:00PM	31,735	5	110,280.09	3.5	26,112.12	0.8	\$ 137,850.11
18-Nov	4	6:30:00PM	31,685	5	108,475.22	3.4	25,681.97	0.8	\$ 135,594.03
28-Apr	4	6:30:00PM	67,783	6	214,306.24	0.7	45,117.10	3.2	\$ 267,882.80
4-May	4	6:30:00PM	67,955	6	215,122.87	0.7	45,289.02	3.2	\$ 268,903.59
9-Jun	4	6:30:00PM	75,645	6	250,067.13	0.8	58,839.32	3.3	\$ 312,583.91
10-Jun	4	6:30:00PM	75,583	6	250,020.75	0.8	58,828.41	3.3	\$ 312,525.94
14-Jun	4	6:30:00PM	77,215	5	243,556.76	0.7	57,307.50	3.2	\$ 304,445.95
15-Jun	4	6:30:00PM	76,641	6	251,607.12	0.8	59,201.68	3.3	\$ 314,508.90
16-Jun	4	6:30:00PM	74,144	6	245,624.66	0.8	57,794.04	3.3	\$ 307,030.83
23-Jun	4	6:30:00PM	75,733	6	259,016.12	0.8	60,944.97	3.4	\$ 323,770.15
24-Jun	4	6:30:00PM	75,747	6	261,636.39	0.8	61,561.50	3.5	\$ 327,045.49
25-Jun	4	6:30:00PM	75,785	5	146,190.95	0.5	34,397.87	1.9	\$ 182,738.69



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Table 29: CBES Program Events and Minimum Load Shed (MLS) Avoidance

Dates	MW DE CBESS	Time Sub- Group A	Time Sub- Group B	Duration (Hours)	Total Reserve MW Sub-A	Total Reserve MW Sub-B	Total Reserve MW Sub-C	Total Reserve MW Sub-D	MLS Start Time	MLS End Time	MLS Duration	Avoided Load Shed
Monday, July 7, 2025	58.2	18:30	18:45	4	382	368	369	327	N/A	N/A	N/A	Morning Forecasted Reserve -293 MW
Tuesday, July 8, 2025	58.2	18:30	18:45	4	131	134	128	81	7:53:20 h	8:00:14 h	6 min	Minimize MLS Effect
Thursday, July 10, 2025	59	18:30	18:45	4	314	305	178	117	N/A	N/A	N/A	Morning Forecasted Reserve -141 MW
Friday, July 11, 2025	57.6	18:30	18:45	4	176	168	145	93	8:10 h	8:40:00 h	29 min	Minimize MLS Effect
Saturday, July 12, 2025	57.6	18:30	18:45	4	178	205	212	175	N/A	N/A	N/A	Morning Forecasted Reserve 75 MW
Sunday, July 13, 2025	57.6	18:30	18:45	4	238	230	221	161	N/A	N/A	N/A	Morning Forecasted Reserve -14 MW
Monday, July 14, 2025	59.3	18:30	18:45	4	342	375	341	349	N/A	N/A	N/A	Morning Forecasted Reserve 112 MW
Tuesday, July 15, 2025	58.8	18:30	18:45	4	154	152	145	100	7:44 h	9:03:00 h	1 hour 18 min	Minimize MLS Effect
Wednesday, July 16, 2025	59.9	18:30	18:45	4	285	275	268	215	N/A	N/A	N/A	Morning Forecasted Reserve -62 MW
Thursday, July 17, 2025	59.9	18:30	18:45	4	453	417	414	371	N/A	N/A	N/A	Morning Forecasted Reserve 35 MW
Friday, July 18, 2025	59.9	18:30	18:45	4	546	554	554	531	N/A	N/A	N/A	Morning Forecasted Reserve 375 MW
Tuesday, July 29, 2025	56.8	18:30	18:45	4	161	125	99	34	6:25 h	8:42 h	2 hours 16 min	Minimize MLS Effect



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Dates	MW DE CBESS	Time Sub- Group A	Time Sub- Group B	Duration (Hours)	Total Reserve MW Sub-A	Total Reserve MW Sub-B	Total Reserve MW Sub-C	Total Reserve MW Sub-D	MLS Start Time	MLS End Time	MLS Duration	Avoided Load Shed
Friday, August 1, 2025	42.2	18:30	18:45	4	185	-	-	-	N/A**	N/A	0 Hours	Morning Forecasted Reserve Near 200 MW (207 MW). Also, Forced Outage on Costa Sur 6.
Monday, August 4, 2025	41.6	18:30	18:45	4	73	-	-	-	N/A	N/A	0 Hours	Help Avoid MLS
Tuesday, August 5, 2025	42.5	18:30	18:45	4	313	-	-	-	N/A	N/A	0 Hours	Morning Forecasted Reserve Under 200 MW (90 MW)
Wednesday, August 6, 2025	41.5	18:30	18:45	4	235	-	-	-	N/A	N/A	0 Hours	Morning Forecasted Reserve Under 200 MW (185 MW)
Tuesday, August 12, 2025	42	18:30	18:45	4	77	-	-	-	N/A	N/A	0 Hours	Help Avoid MLS
Thursday, August 14, 2025	42.4	18:30	18:45	4	20	-	-	-	20:23 h	21:12 h	0.82 Hours	Minimize MLS Effect
Friday, August 15, 2025	40.2	18:30	18:45	4	82	-	-	-	17:28 h	22:39 h	6.18 Hours	Not Enough to Avoid MLS
Saturday, August 16, 2025	32	18:30	18:45	4	623	-	-	-	N/A	N/A	0 Hours	Unclear Return to Service of San Juan CT 6 and AES 1 (414 Mw)
Sunday, August 17, 2025	29	18:30	18:45	4	677	-	-	-	N/A	N/A	0 Hours	Unclear Return to Service of San Juan CT 6 and AES 1 (414 Mw)
Monday, August 18, 2025	64.2	18:30	18:45	4	213	211	227	209	8:28 h	8:31 h	3 min	Minimize MLS Effect
Tuesday, August 19, 2025	64.5	18:30	18:45	4	178	139	105	78	N/A	N/A	N/A	Morning Forecasted Reserve 36 MW
Wednesday, August 20, 2025	64.6	18:30	18:45	4	311	291	250	191	N/A	N/A	N/A	Morning Forecasted Reserve -1 MW
Thursday, August 21, 2025	63.8	18:30	18:45	4	130	101	88	50	5:19 h	9:39 h	4 hours & 20 min	No avoid MLS
Friday, August 22, 2025	64.6	18:30	18:45	4	389	374	341	327	N/A	N/A	N/A	Morning Forecasted Reserve 34 MW
Monday, August 25, 2025	63.5	18:30	18:45	4	392	355	325	287	N/A	N/A	N/A	Morning Forecasted Reserve 90 MW
Sunday, August 31, 2025	62.4	18:30	18:45	4	511	519	457	453	N/A	N/A	N/A	Morning Forecasted Reserve 196 MW
Monday, September 29, 2025	33.8	18:30	18:45	4	-1	-7	-	-	5:47 h	9:47 AM	4 hours	No avoid MLS
Tuesday, September 30, 2025	33.3	18:30	18:45	4	101	101	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 72 MW



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Wednesday, October 1, 2025	33	18:30	18:45	4	292	256	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 165 MW
Friday, October 3, 2025	33.7	18:30	18:45	4	189	192	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -21 MW
Monday, October 6, 2025	34.1	18:30	18:45	4	380	384	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -71 MW
Wednesday, October 8, 2025	33.8	18:30	18:45	4	294	276	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 156 MW
Wednesday, October 15, 2025	32.7	18:30	18:45	4	345	299	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 189 MW
Friday, October 17, 2025	33.3	18:30	18:45	4	206	221	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 173 MW
Sunday, October 19, 2025	33	18:30	18:45	4	6	33	-	-	7:19 h	9:46 h	2 hours & 27 min	Minimize MLS Effect
Monday, October 20, 2025	34.2	18:30	18:45	4	136	66	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -6 MW
Tuesday, October 21, 2025	34.7	18:30	18:45	4	524	528	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 91 MW
Tuesday, October 28, 2025	33.9	18:30	18:45	4	56	82	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 190 MW
Wednesday, October 29, 2025	33.4	18:30	18:45	4	72	80	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 70 MW
Thursday, October 30, 2025	33.3	18:30	18:45	4	51	51	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 151 MW
Friday, October 31, 2025	34.2	18:30	18:45	4	142	142	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 142 MW
Monday, November 3, 2025	34	18:30	18:45	4	10	10	-	-	6:04 h	8:16 h	2 hours & 12 min	Minimize MLS Effect
Tuesday, November 4, 2025	34.2	18:30	18:45	4	165	154	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 26 MW
Wednesday, November 5, 2025	34.6	18:30	18:45	4	169	176	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 73 MW
Monday, November 17, 2025	34.2	18:30	18:45	4	246	244	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -1 MW
Tuesday, November 18, 2025	34.5	18:30	18:45	4	391	400	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 191 MW
Tuesday, April 28, 2026	66.98	18:30	18:45	4	418	400	376	397	N/A	N/A	N/A	Morning Forecasted Reserve 154 MW
Monday, May 4, 2026	66.95	18:30	18:45	4	521	516	210	219	5:05 h	7:55 h	2 hours & 50 min	No avoid MLS
Tuesday, June 9, 2026	72.3	18:30	18:45	4	167	290	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -21 MW
Wednesday, June 10, 2026	72.4	18:30	18:45	4	268	329	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 127 MW

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Dates	MW DE CBESS	Time Sub- Group A	Time Sub- Group B	Duration (Hours)	Total Reserve MW Sub-A	Total Reserve MW Sub-B	Total Reserve MW Sub-C	Total Reserve MW Sub-D	MLS Start Time	MLS End Time	MLS Duration	Avoided Load Shed
Sunday, June 14, 2026	73	18:30	18:45	4	312	382	-	-	N/A	N/A	N/A	Morning Forecasted Reserve -9 MW
Monday, June 15, 2026	72.3	18:30	18:45	4	312	368	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 71 MW
Tuesday, June 16, 2026	72.6	18:30	18:45	4	475	534	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 180 MW
Tuesday, June 23, 2026	84.7	18:30	18:45	4	486	562	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 140 MW
Wednesday, June 24, 2026	83.4	18:30	18:45	4	319	363	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 98 MW
Thursday, June 25, 2026	85.2	18:30	18:45	4	287	313	-	-	N/A	N/A	N/A	Morning Forecasted Reserve 69 MW



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5.3 DR Emergency Load Reduction Program

During the most recent reporting period, progress on the Emergency Load Reduction Program remained limited, reflecting the continued pause in key development activities. Although foundational work and preliminary coordination were completed earlier in the program's lifecycle, no further actions have been taken during the current reporting period. LUMA is no longer advancing the Emergency Load Reduction Program and will not pursue it as part of its future program portfolio. 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-efficient 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 Reduction Program addresses its outstanding regulatory challenges.

6.0 Conclusions and Recommendations

6.1 Analysis and Observations

FY2026 closed the final chapter of the TPP and demonstrated that, even under challenging operating conditions, LUMA's Energy Efficiency and Demand Response programs have matured into capable, high-impact offerings ready for the permanent TYP. The fiscal year began with constraints, but ended with clear evidence of program resilience, strong customer demand, operational improvements, and measurable grid benefits. FY2026 results mark the TPP's development from pilot-phase testing to a fully developed foundation for long-term implementation.

Across the EE portfolio, FY2026 highlighted how quickly customers re-engage when programs are available. After three quarters of limited activity due to temporary cash-flow constraints, the program relaunch in Q4 sparked a sharp increase in participation and energy savings. The Residential EE Kits Program alone reached 57,559 customers in Q4, generating 19,813 MWh of projected annual energy savings and exceeding its revised savings target by 130%. This response demonstrated that interest in accessible EE measures remained strong throughout the pause period and validated LUMA's decision to prioritize funding toward high-demand measures capable of producing measurable system impact. The relaunch also underscored the importance of maintaining flexible portfolio management. Reallocations made during the year allowed LUMA to redirect resources to programs producing the strongest cost-effective results without increasing the total portfolio budget approved by the Energy Bureau.

FY2026 further showed continued advancement in program administration. The launch of the online rebate portal, improvements in the customer Contact Center, refinement of internal processes, and coordination with implementation contractors collectively increased administrative efficiency and enhanced customer experience. These operational improvements are not isolated achievements; they represent permanent capacity gains that will directly support the more structured and scaled delivery

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required under the TYP. In addition, targeted outreach strategies, including low-income campaigns, community events, and digital engagement, demonstrated that combining direct community work with online communications is an effective strategy for expanding equitable access to EE programs.

The DR portfolio grew significantly during FY2026, led by the continued expansion of the CBES Program. With 79,051 new enrollments, 91,466 total participants, 584 MW of enrolled nameplate capacity, and approximately 479 MW of available capacity, CBES delivered meaningful grid support across dispatch events, reinforcing its role as a critical system resource. Importantly, CBES achieved these results while maintaining disciplined cost management. The Program's recognition through national awards, including the 2025 Mabel MacFerran Top Innovators Award and the 2026 PLMA Award of Excellence, further demonstrates the maturity of Puerto Rico's emerging battery-enabled virtual power plant ecosystem and the readiness of DR programs for placement within the long-term planning cycle.

Collectively, these results illustrate that the TPP has achieved its intended purpose. The pilot period successfully launched EE and DR offerings, tested early program models, built foundational systems and processes, established aggregator and vendor relationships, and generated initial savings and demand reduction outcomes. FY2026 reinforced that these pilots have evolved into structured, scalable, and effective components of the energy transition.

Now, LUMA enters the next phase of implementation with a clear trajectory: stable funding, improved administrative infrastructure, strong customer demand, and proven program frameworks. The TPP closeout confirms readiness to move from pilot operations into a more permanent program delivery. The FY2026 Q4 results demonstrate that, when funding and operational readiness align, both EE and DR programs can deliver substantial benefits that will be expanded, standardized, and scaled under the TYP.

7.0 Program Retrospective and Transition Close-Out Summary

7.1 Energy Efficiency

7.1.1 Purpose of the Transition Period Plan Close-Out

The submission of this FY2026 Q4 and Annual Report marks the completion of LUMA's EE component of the TPP, implemented from FY2023 through FY2026. The TPP was established as a transitional framework to rapidly deploy Energy Efficiency and Demand Response programs, accelerate customer adoption of energy-efficient technologies, establish the operational and administrative infrastructure required to support long-term program delivery, and begin developing Puerto Rico's energy efficiency marketplace.

With the conclusion of FY2026, the TPP reaches its intended completion, and FY2027 marks the beginning of the EE and DR TYP. The experience gained throughout the TPP transformed the portfolio from an initial implementation effort into a mature operating model supported by standardized processes, enhanced customer engagement strategies, improved reporting capabilities, stronger market relationships, and increased organizational readiness.

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7.1.2 Portfolio Evolution: Launch, Growth, and Pause and Relaunch

Table 30: Overview of Portfolio Launch, Growth, and Relaunch Phases

Implementation Phase	Fiscal Year	Primary Focus	Key Outcomes
Launch	FY2024	Establish the EE portfolio and operational infrastructure	Program launches, contractor and retailer network, customer support processes, reporting framework, stakeholder engagement
Growth	FY2025	Expand participation and strengthen program delivery	Increased participation, enhanced outreach, expanded partnerships, operational maturity, improved program administration
Pause and Relaunch	FY2026	Maintain operational readiness during cash constraints and prepare for program relaunch	Processing FY2025 obligations, online rebate portal, Contact Center training, improved reporting, May 2026 relaunch, FY27 readiness

The Energy Efficiency portfolio evolved through three distinct implementation phases during the Transition Period Plan. During FY2024, LUMA established the foundational framework for the Energy Efficiency portfolio by launching the Residential EE Rebates, Residential EE Kits, Business EE Rebates, Business EE Kits, and subsequently the In-Store Discount Program. Initial implementation focused on developing administrative procedures, establishing contractor and retailer relationships, creating customer support capabilities, implementing reporting and financial management processes, and building the operational infrastructure required to support statewide program delivery.

Building upon that foundation, FY2025 focused on expanding customer participation while strengthening program administration and market engagement. Customer education and outreach activities increased significantly through collaboration with community organizations, retailers, contractors, government agencies, and industry stakeholders. Operational processes continued to mature as customer participation increased, allowing the portfolio to gain implementation experience while expanding awareness of Energy Efficiency opportunities throughout Puerto Rico.

The portfolio entered a significantly different phase during FY2026, when cash constraints resulting from delays in the transfer of Energy Efficiency Rider funds collected by PREPA required LUMA to temporarily suspend most customer-facing program activities beginning in FY2025 Q4. While new program participation remained limited, LUMA continued processing outstanding FY2025 rebate applications and prioritized reimbursement of previously approved customer incentives as funding became available.

Following the Energy Bureau's Resolution and Order establishing a monthly Rider funding transfer schedule, LUMA began receiving regular funding transfers in January 2026. Rather than reopening the

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portfolio immediately, LUMA implemented a four-month operational readiness phase to ensure a successful relaunch. During this period, the organization developed the online Residential EE Rebate Application Portal, enhanced customer communication materials, trained Contact Center representatives, refined internal operating procedures, expanded commercial outreach, strengthened management reporting, and prepared implementation materials supporting both the program relaunch and the transition to the TYP.

These activities culminated in the successful relaunch of the Residential and Business EE Rebates and Residential EE Kits Programs on May 18, 2026. The In-Store Discount Program continued transition activities in preparation for FY2027 implementation, while the Business EE Kits Program was discontinued following an evaluation of customer participation and overall program performance.

7.1.3 Portfolio Performance and Program Value

Table 31: Transition Period Plan Portfolio Legacy (FY2023–FY2026)

Portfolio Milestone	Achievement
Implementation Period	FY2023 - FY2026
Customer-Facing Programs Implemented	5 (Residential EE Rebates, Residential EE Kits, Business EE Rebates, Business EE Kits, and In-Store Discounts)
Customer Participants	147,304
Low-Income Participants	10,587
Projected Annual Energy Savings	77,115 MWh
Operational Enhancements	Online Residential EE Rebate Application Portal implemented; standardized reporting, application processing, customer communications, and performance monitoring
Market Development	Expanded contractor, retailer, Trade Ally, community organization, and government agency partnerships supporting statewide program delivery
Funding Milestone	PREB Resolution and Order establishing the EE Rider monthly funding transfer schedule, enabling portfolio relaunch in FY2026

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Portfolio Milestone	Achievement
Program Transition	Business EE Kits discontinued based on program evaluation; In-Store Discounts prepared for FY2027 implementation
Transition Readiness	Operational framework, reporting systems, customer engagement strategies, and implementation processes established to support the FY2027 - FY2028 EE and DR Three-Year Plan

Throughout the Transition Period, LUMA successfully established a diversified Energy Efficiency portfolio that provided residential and commercial customers with multiple pathways to adopt energy-efficient technologies through rebates, no-cost Energy Efficiency Kits, and point-of-sale discounts.

Over the four-year implementation period, the portfolio served 147,304 customer participants, including 10,587 Low-Income customers, and achieved approximately 77,115 MWh in cumulative projected annual energy savings.

Beyond quantitative performance, the Transition Period successfully demonstrated the value of offering multiple participation pathways tailored to different customer needs. Residential Rebates encouraged investment in high-efficiency equipment through financial incentives, Business Rebates supported commercial energy efficiency investments, the Residential EE Kits Program expanded access to practical no-cost energy-saving products, and the In-Store Discount Program increased adoption of qualifying ENERGY STAR® products through participating retailers.

The Transition Period also demonstrated meaningful progress in advancing equitable access to Energy Efficiency resources. Enhanced rebate incentives for Low-Income customers, partnerships with community organizations, targeted outreach campaigns, and the FY2026 phased distribution strategy for Residential EE Kits significantly expanded participation among income-eligible households and strengthened the portfolio's focus on underserved communities.

7.1.4 Operational Experience and Lessons Learned

Implementation of the TPP provided valuable operational, technical, regulatory, and customer engagement experience that directly informed the design of the FY2027–FY2029 EE and DR TYP.

One of the most significant lessons learned was the importance of maintaining a diversified portfolio that can serve customers through multiple participation pathways. Direct-install initiatives consistently generated broad participation and rapid customer adoption, while rebate programs supported longer-term investments in higher-efficiency technologies that deliver greater individual energy savings.

The Transition Period also reinforced the importance of adaptive portfolio management. Continuous monitoring of participation, projected savings, budget utilization, and program performance enabled LUMA to strategically reallocate available funding during FY2026 toward higher-performing initiatives while maintaining compliance with PREB-approved budgets and maximizing overall portfolio benefits.

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Perhaps the most important lesson emerged during the funding interruption experienced throughout FY2025 Q4 and much of FY2026. Rather than allowing the program pause to delay overall portfolio development, LUMA used this period to strengthen operational readiness. LUMA refined administrative processes, modernized customer-facing technologies, enhanced reporting capabilities, improved customer communications, continued commercial outreach, and strengthened cross-functional coordination across Program Delivery, Regulatory, Finance, Information Technology, Communications, Customer Experience, and the implementation contractor. These efforts positioned the portfolio for a successful relaunch once stable funding became available.

Customer engagement strategies also evolved throughout the Transition Period. Digital communications, community partnerships, targeted Low-Income outreach, stakeholder collaboration, and simplified participation processes consistently proved effective in expanding customer awareness and improving access to Energy Efficiency programs. The overwhelming response to the FY2026 Residential EE Kits campaign further confirmed strong customer demand for practical, easily accessible energy-saving solutions.

7.1.5 Implementation Contractor Experience

The TPP established a collaborative implementation model between LUMA and its implementation contractor that evolved considerably throughout the four-year implementation period. Initial efforts focused on developing the operational infrastructure necessary to support islandwide program implementation, including program procedures, application processing workflows, eligibility requirements, quality assurance protocols, reporting methodologies, contractor coordination, customer support processes, and data management practices.

As implementation progressed, the relationship matured into an integrated operating model characterized by continuous coordination, joint problem-solving, and ongoing process improvement. Regular collaboration among Program Delivery, Regulatory, Finance, Information Technology, Communications, Customer Experience, and the implementation contractor strengthened program administration while improving responsiveness to operational and regulatory requirements.

The implementation contractor also played a critical role during the FY2026 funding pause. Although customer-facing implementation activities were temporarily suspended and contractor staffing levels were adjusted to reflect reduced field activity, collaboration remained focused on advancing the portfolio's operational readiness. Resources were redirected to developing the online rebate application portal, refining program procedures, preparing customer communication materials, Contact Center training, reporting enhancements, commercial outreach, Trade Ally engagement, and implementation planning. This collaborative approach ensured that program development continued despite the temporary suspension of new customer participation.

The partnership also strengthened Puerto Rico's Energy Efficiency marketplace by expanding relationships with contractors, retailers, Trade Allies, and commercial customers. These efforts enhanced market awareness, supported commercial project development, and established stronger implementation capabilities that will continue supporting portfolio growth under the EE and DR Three-Year Plan.

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7.1.6 Transition to the EE and DR Three-Year Plan

The experience gained throughout the Transition Period directly informed the design and implementation strategy of the FY2027–FY2029 EE and DR Three-Year Plan.

Programs demonstrating sustained customer demand and market value—including Residential EE Rebates, Residential EE Kits, Business EE Rebates, and the In-Store Discount Program—will continue under the Three-Year Plan with enhancements informed by implementation experience and customer feedback. Planned improvements include expanded Low-Income outreach, continued digital modernization, strengthened customer engagement strategies, broader retailer participation, updated EE Kit measures, and continued development of Puerto Rico's Trade Ally network.

Implementation experience also informed strategic portfolio decisions. After evaluating customer participation and overall program performance, LUMA determined that the Business EE Kits Program would be discontinued under the TYP, allowing available resources to be redirected to higher-impact initiatives with greater customer demand and energy-savings potential.

More broadly, the operational framework, reporting systems, stakeholder relationships, customer communication strategies, financial oversight processes, implementation experience, and institutional knowledge established during the Transition Period position LUMA to administer a more mature, scalable, and data-driven Energy Efficiency and Demand Response portfolio.

7.1.7 Transition Period Plan Close-Out Statement

The Transition Period Plan successfully fulfilled its intended purpose of establishing Puerto Rico's initial Energy Efficiency portfolio while developing the operational, administrative, technological, and market foundation necessary to support long-term program implementation.

Although the implementation period included significant challenges, most notably funding constraints in FY2025 and FY2026, LUMA adapted its implementation strategy by honoring customer commitments, maintaining operational readiness during the funding pause, and executing a coordinated portfolio relaunch once stable funding became available. These experiences strengthened the organization's program management capabilities and reinforced the importance of proactive planning, organizational flexibility, and cross-functional collaboration.

The Transition Period ultimately became more than a pilot implementation effort. It was the period during which LUMA built the institutional knowledge, implementation experience, stakeholder relationships, operational processes, and organizational capabilities needed to transition Puerto Rico's Energy Efficiency portfolio from initial program deployment to long-term portfolio management under the EE and DR TYP.

With the submission of this FY2026 Q4 and Annual Report, the Energy Efficiency reporting requirements associated with the Transition Period Plan are complete. Beginning in FY2027, LUMA will continue advancing Puerto Rico's Energy Efficiency objectives by implementing the EE and DR Three-Year Plan, building on the operational capabilities, customer insights, market development, and implementation experience established throughout the Transition Period.

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Demand Response

The CBES Program was established under the Transition Period Plan to leverage customer-sited battery systems as flexible demand response resources that support grid reliability during emergency conditions. Through its aggregator-based model, the Program was designed to enable coordinated battery dispatch while compensating participating customers. Since its launch in November 2023, CBES has grown significantly in scale and operational maturity, supported by improved participant enrollment and validation processes and closer coordination among LUMA, System Operations, and participating aggregators.

The implementation period also provided important operational lessons. Manual processes required substantial coordination to support enrollment, participant validation, event dispatch, performance monitoring, and regulatory reporting. Improvements to enrollment and validation procedures strengthened program administration; however, the Program's continued growth highlights the need to evaluate scalable operational capabilities as participation expands. Persistent generation challenges and exceptionally high summer temperatures also stressed the electric system, reinforcing the value of responsive, customer-sited battery resources and the need to maintain reliable event readiness.

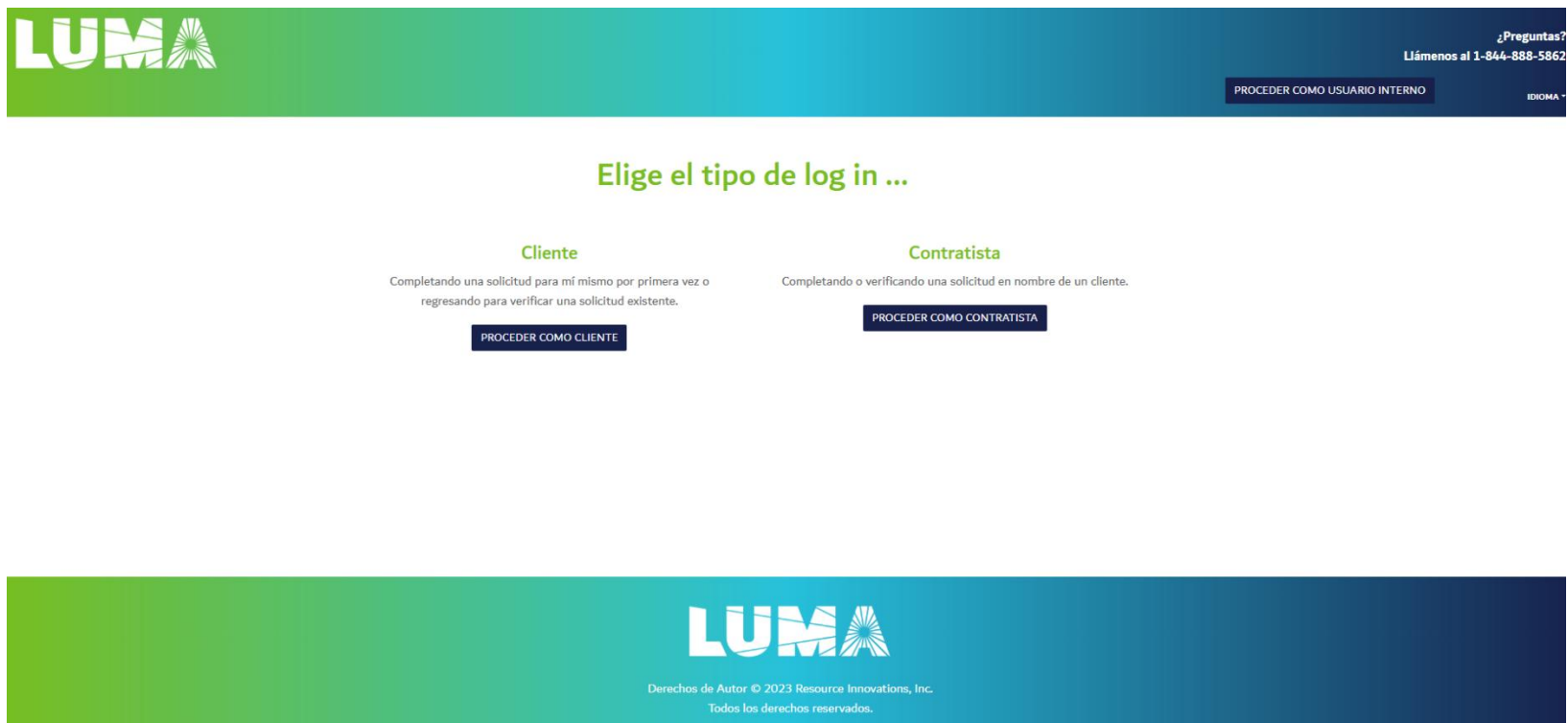
Transition close-out activities focused primarily on completing required regulatory reporting and preparing CBES for continuity under the TYP for EE and DR. The experience, performance data, and operational lessons developed during the Transition Period Plan will inform the Program's next phase. CBES will continue under the TYP as an important demand response resource supporting customer participation, operational flexibility, and Puerto Rico's evolving grid-reliability needs.

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A.1 ANNEX A

LUMA Rebate Application Portal



The screenshot shows the LUMA Rebate Application Portal login page. At the top, there is a header bar with the LUMA logo on the left, a link to '¿Preguntas? Llámennos al 1-844-888-5862' on the right, and a button labeled 'PROCEDER COMO USUARIO INTERNO'. Below the header, the main heading is 'Elige el tipo de log in ...'. There are two columns of options. The first column is for 'Cliente' (Client), with the description 'Completando una solicitud para mí mismo por primera vez o regresando para verificar una solicitud existente.' and a button 'PROCEDER COMO CLIENTE'. The second column is for 'Contratista' (Contractor), with the description 'Completando o verificando una solicitud en nombre de un cliente.' and a button 'PROCEDER COMO CONTRATISTA'. At the bottom, there is a footer bar with the LUMA logo, the text 'Derechos de Autor © 2023 Resource Innovations, Inc. Todos los derechos reservados.', and a URL.

LUMA

¿Preguntas?
Llámennos al 1-844-888-5862

PROCEDER COMO USUARIO INTERNO

IDIOMA ▼

Elige el tipo de log in ...

Cliente
Completando una solicitud para mí mismo por primera vez o
regresando para verificar una solicitud existente.

PROCEDER COMO CLIENTE

Contratista
Completando o verificando una solicitud en nombre de un cliente.

PROCEDER COMO CONTRATISTA

LUMA

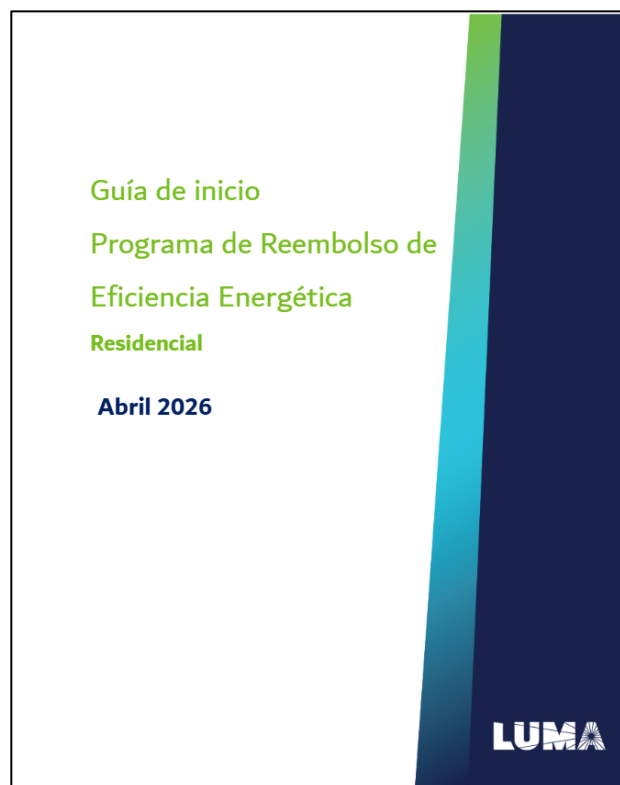
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<https://eerebates.lumapr.com/program/>

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NEPR-MI-2022-0001

Guía rápida para solicitar reembolso residencial



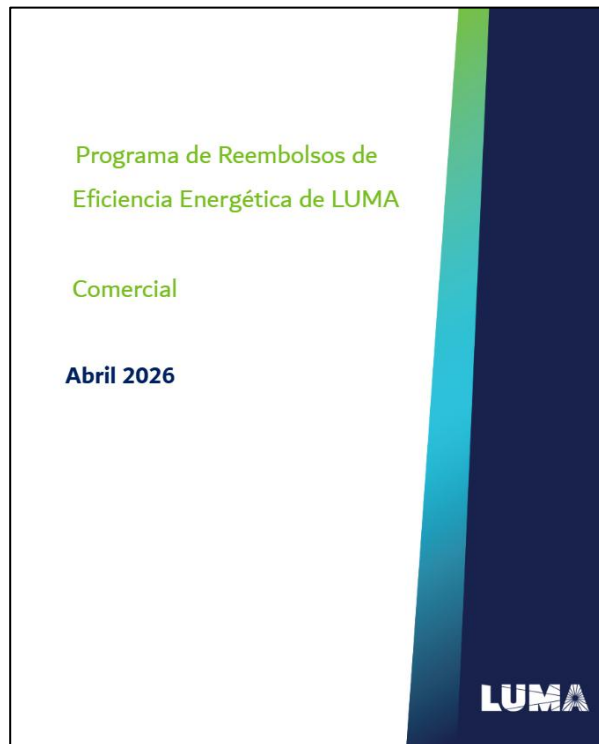
GUÍA DE INICIO		GUÍA DE INICIO
ÍNDICE		
Propósito.....	3	Propósito
Información general del programa.....	3	Esta guía ofrece instrucciones claras y sencillas para solicitar tu reembolso. En ella se detallan los criterios de elegibilidad, la documentación requerida y los pasos para completar tu solicitud a través del Portal de solicitudes de reembolso.
Cómo solicitar el reembolso.....	3	Información general del programa
Pasos para completar tu solicitud en el portal.....	6	El programa está disponible desde el 1 de julio de 2025 al 30 de junio de 2026.
Subir documentos requeridos.....	9	Para clientes residenciales:
Completar la información del beneficiario.....	10	Debes someter tu solicitud dentro de 90 días a partir de la fecha de compra del equipo.
Somete tu solicitud.....	13	Cómo solicitar el reembolso
Completar encuesta (opcional).....	13	PASO 1 – Verificar elegibilidad
Recibir correo electrónico de confirmación.....	13	Puedes presentar una solicitud si:
Cómo verificar el estado de tu solicitud.....	14	- Tienes una cuenta residencial activa con nosotros. - Adquiriste un equipo que cumpla con los criterios de elegibilidad.
Incentivos, límites y tiempo de procesamiento.....	15	Para cualificar, es necesario que:
Preguntas y apoyo.....	15	- El equipo sea completamente nuevo; no se aceptarán equipos reacondicionados, alquilados ni usados. - El equipo cumpla con los estándares de eficiencia establecidos por el programa.
LUMA		LUMA

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Guía rápida para solicitar reembolso comercial



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Égida Sagrado Corazón – Arecibo



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Feria de Salud y Servicios del Senado de Puerto Rico – Bayamón



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Feria de salud y servicios del Senado de Puerto Rico – Ponce

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Post-cards distributed inside Energy Efficiency Kits box.



**AHORRA
ENERGÍA.
REDUCE
TU FACTURA.**

Con los Kits de Eficiencia Energética queremos ofrecerte soluciones prácticas para optimizar el consumo de energía en tu hogar.

Estos equipos consumen menos energía y pueden ayudarte a reducir el pago de tu factura de luz, mientras haces tu hogar más eficiente.

Si ya recibiste tu kit de Eficiencia Energética, queremos saber tu experiencia. Tu opinión nos ayuda a mejorar y a seguir apoyando a más clientes como tú.



CONSEJOS SENCILLOS PARA AHORRAR ENERGÍA

Pequeños cambios pueden hacer una gran diferencia en tu consumo:

- Desconecta equipos que no estés usando
- Usa ventiladores para reducir el uso de aire acondicionado
- Cambia a bombillas LED
- Sella espacios por donde entra aire caliente
- Usa luces exteriores con sensores o temporizadores

Escanea el código QR para brindarnos tu opinión sobre el Kit de Eficiencia Energética.

También puedes llamarnos al: 1-844-888-5862

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Energy Efficiency Kits Installation Guide:




Guía de Instalación

Gracias por pedir un kit de ahorro de energía. Todos los productos y materiales incluidos en este kit le ayudarán a ahorrar energía en su hogar a la vez que lo hacen más cómodo. Le ofrecemos algunos consejos e instrucciones para que aproveche al máximo el contenido de su kit.

Instalación de Multienchufe Eléctrico Avanzado

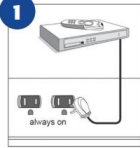
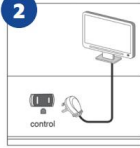
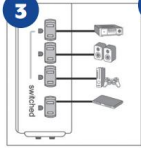
Un multienchufe eléctrico avanzado ayuda a reducir la pérdida de energía en espera y, a la vez, protege contra sobretensiones con tres tipos de tomacorrientes: control, controlado y siempre encendido. La protección contra sobretensiones protege los dispositivos electrónicos de picos de voltaje inesperados, evitando daños al redirigir el exceso de voltaje. El multienchufe avanzado detecta cuando el dispositivo conectado al tomacorriente de control, como su computadora o televisor, está apagado y elimina la energía a los tomacorrientes controlados para que no puedan seguir consumiendo electricidad. Cuando vuelve a encender el dispositivo de control, se restablece la energía.

PASO 1: Conecte los dispositivos "always on" (siempre encendidos) en los tomacorrientes designados.

PASO 2: Conecte su televisor al tomacorriente de "control".

PASO 3: Conecte todos los demás dispositivos a los tomacorrientes "switched" (conmutados) que normalmente no se usan sin su televisor, ej. consolas de videojuegos.

PASO 4: Conecte el multienchufe avanzado a un tomacorriente con conexión a tierra.


Consejos para instalar bombillas



Instalación de Luz Nocturna LED



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Social Media Posts

Facebook - April 2, 2026

×



LUMA Energy ✓

April 2 · 🌐

Adoptar hábitos eficientes ayuda a reducir el consumo energético y optimizar el uso de los recursos.



Eficiencia energética en el hogar

El hogar es uno de los lugares donde más energía consumimos, pero también donde podemos aplicar prácticas sencillas para usarla mejor.





Electrodomésticos

Usa electrodomésticos eficientes. Los equipos con certificaciones de eficiencia consumen menos energía y reducen tu factura.



Aire acondicionado

Configura el aire acondicionado en temperaturas adecuadas. Un ajuste óptimo puede hacer una gran diferencia en tu consumo diario.



Sellado del hogar

Sella puertas y ventanas. Evita fugas de aire y mejora el rendimiento de tus equipos de enfriamiento.



+3 Iluminación

Cambia a iluminación LED. Dura más, consume menos y reduce el gasto energético del hogar.





37

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Instagram -April 2, 2026

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Aire acondicionado

Configura el aire acondicionado en temperaturas adecuadas. Un ajuste óptimo puede hacer una gran diferencia en tu consumo diario.

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15w
Adoptar hábitos eficientes ayuda a reducir el consumo energético y optimizar el uso de los recursos.



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April 2

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15w
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No comments yet.

Start the conversation.



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April 2

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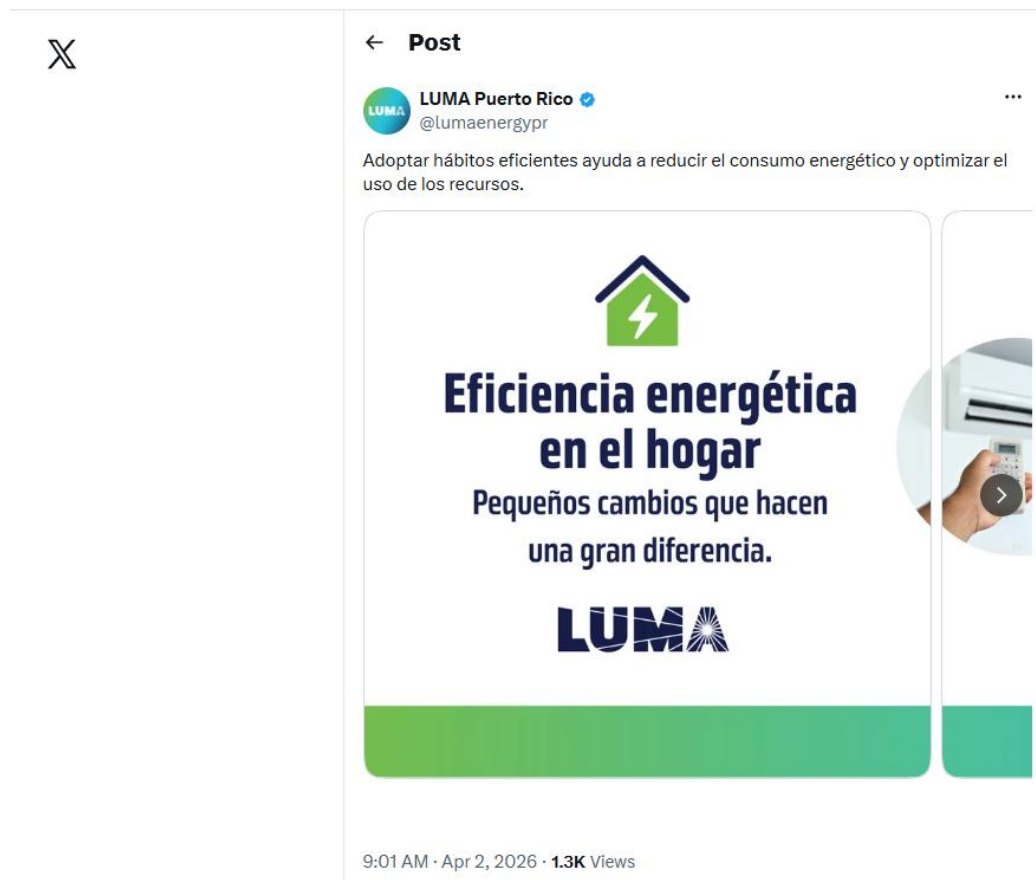
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X – April 2, 2026



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Facebook – June 26, 2026

LUMA Energy's Post

 **LUMA Energy** 
June 26 at 4:01 PM · 

Solicita hoy tu Kit de Eficiencia Energética.

Ya puedes pedir tu kit, diseñado para ayudarte a optimizar el consumo de energía en tu hogar y promover un mayor ahorro.

El kit incluye:

- Seis bombillas LED
- Un multienchufe eléctrico avanzado
- una lámpara LED

Si necesitas ayuda con tu orden, puedes escribir a EE@lumapr.com. Para ordenar, solo visita eekit.lumapr.com.

Cantidades limitadas, la oferta estará vigente hasta agotar inventario.



  870

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