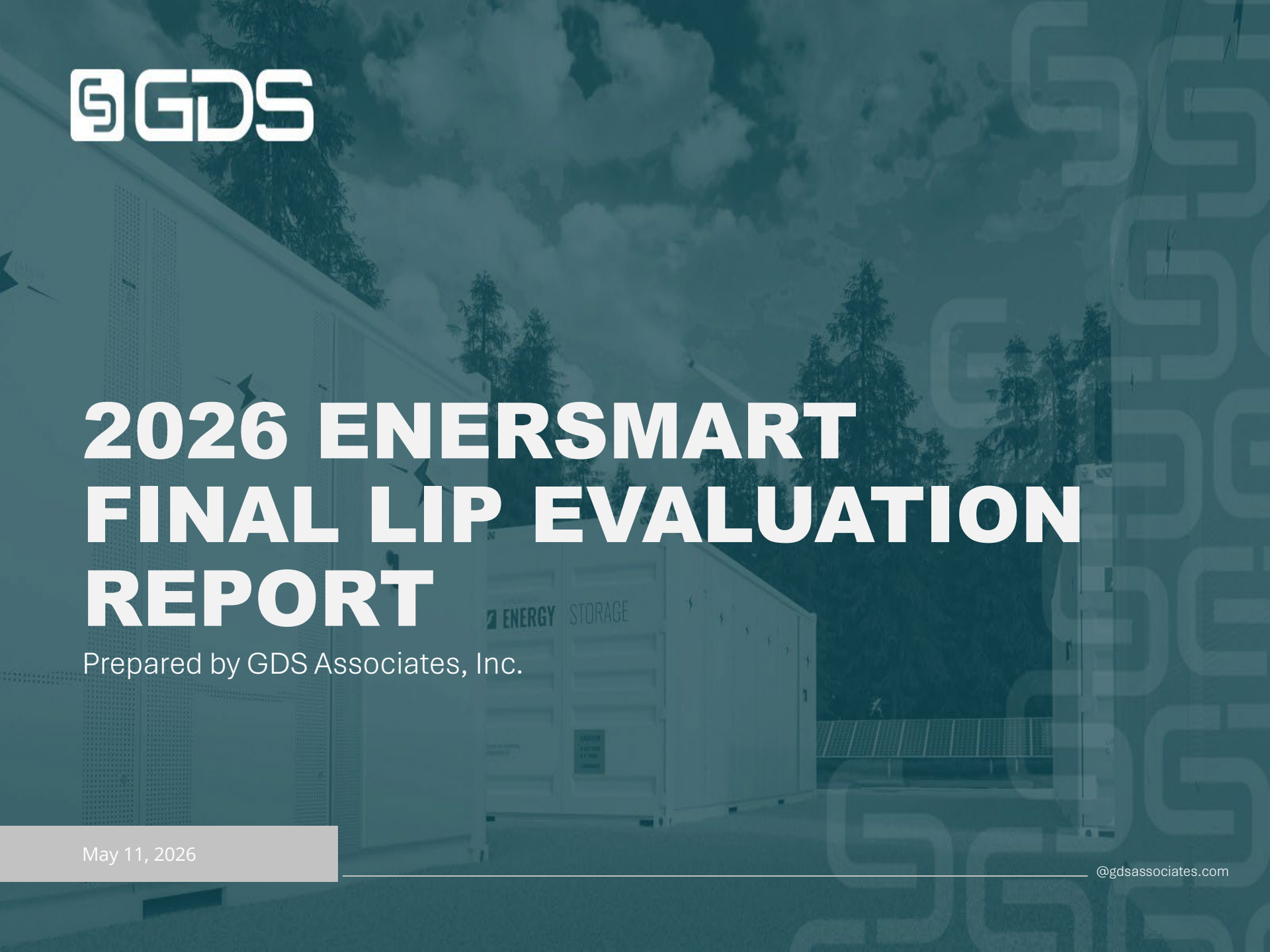

2026 ENERSMART FINAL LIP EVALUATION REPORT

Prepared by GDS Associates, Inc.

May 11, 2026

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AGENDA - 2026 Final LIP Evaluation

01 EnerSmart System Overview

02 Ex-Ante Methodology

03 Ex-Ante Results

04 Summary Findings

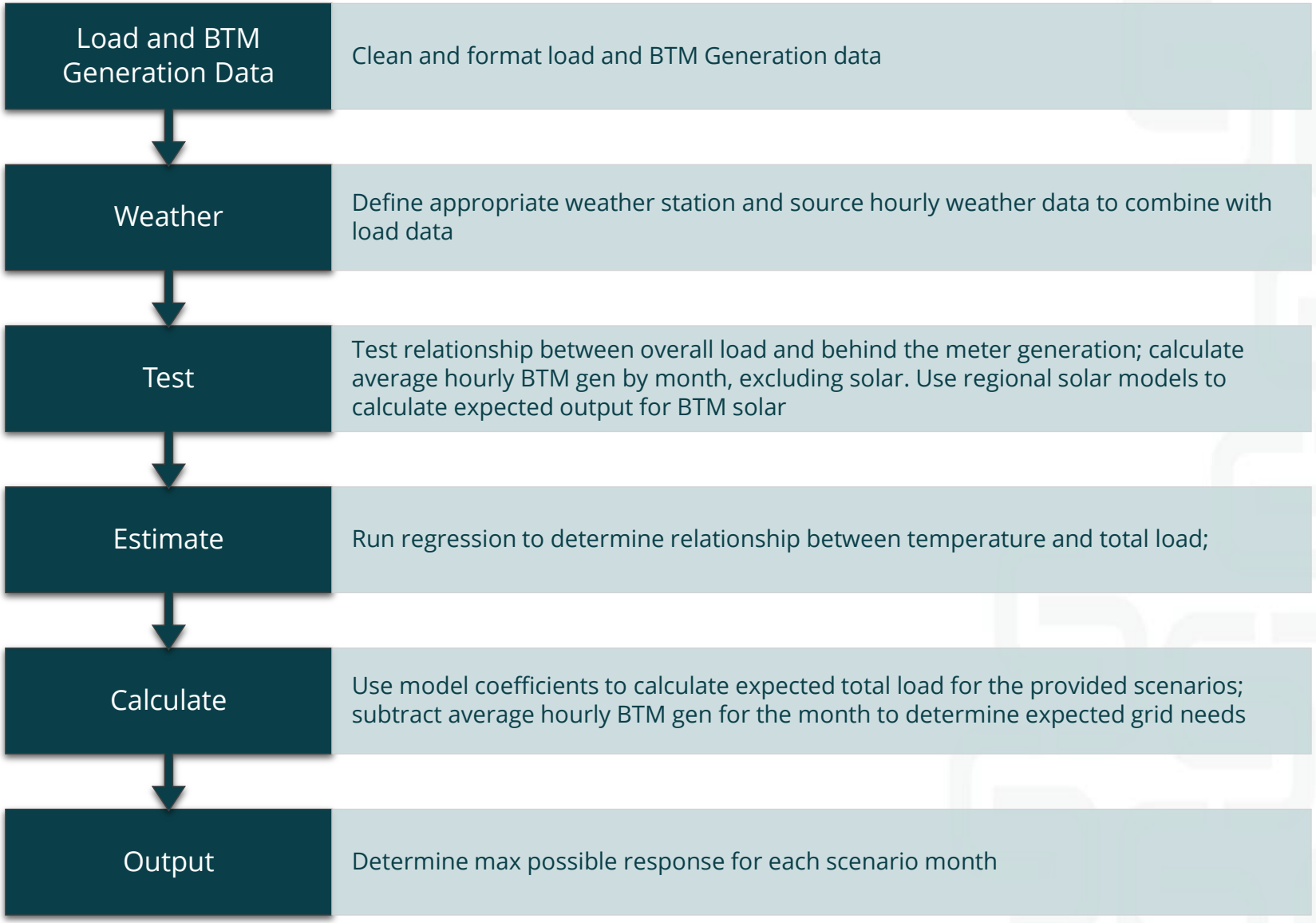
ENERSMART SYSTEM DESCRIPTION

- EnerSmart installs BTM batteries to provide PDR capacity to the CAISO grid
- Systems are designed to provide 5 hour response capability, and sized to ensure that full response is available year round
- EnerSmart retains full dispatch capability on the BTM systems and can respond to CAISO dispatch
- Customer/site benefits come in the form of decreased costs for energy at peak times

EX ANTE METHODOLOGY

- Review data for completeness
- Weather station selected
- Estimate relationship between total site demand and temperature
- Use coefficients from that estimate to calculate expected total site demand on provided scenarios
- Remove demand that will be met by BTM generation to determine the amount of energy needed from grid
- Compare expected grid demand to system output capability to determine maximum response during simulated events
  - *Potential load reduction calculated as* $\min(\text{demand}, \text{system max capability})$

PROCESS FLOW



EX ANTE RESULTS/SUMMARY FINDINGS

- **Demand for energy was significantly related to temperature**
- **System size should be able to provide complete response at all times of year**
  - *Minimum grid demand during AAH in all months was at least as high as system capacity*

- **BTM generation on site was not related to temperature in a significant way, so no special methods needed to account for endogeneity**
- **No existing installations, so no Ex Post analysis at this time**