State of Florida
Public Service Commission
INTERNAL AFFAIRS AGENDA
Tuesday –November 17, 2026
9:30 AM
Room 105 – Gerald L. Gunter Building

1. Draft Report on Florida Lifeline Assistance (Attachment 1)

2. Draft Report on Efforts of the FPSC to Reduce Regulatory Assessment Fees for Telecommunications Companies (Attachment 2)

3. Draft 2026 Ten-Year Site Plans Review (Attachment 3)

4. Draft 2026 Status Report on Utility Storm Protection Plan Activities of Florida Investor-Owned Utilities (Attachment 4)

5. Draft 2026 Annual Report on Activities Pursuant to Florida Energy Efficiency and Conservation Act (Attachment 5)

6. Legislative Update

7. General Counsel's Report

8. Executive Director's report

9. Other Matters

BB/aml

OUTSIDE PERSONS WISHING TO ADDRESS THE COMMISSION ON ANY OF THE AGENDAED ITEMS SHOULD CONTACT THE OFFICE OF THE EXECUTIVE DIRECTOR AT (850) 413-6463.

Attachment 1

State of Florida

Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD
TALLAHASSEE, FLORIDA 32399-0850

-M-E-M-O-R-A-N-D-U-M-

DATE: November 3, 2026

TO: Braulio L. Baez, Executive Director

FROM: Office of Industry Development & Market Analysis (Day, Deas, Mallow, Fogleman) CH
Office of External Affairs (Crump, Thompson) DF

RE: 2026 Annual Lifeline Report Regarding the Number of Customers Subscribing to Lifeline Service and the Effectiveness of any Procedures to Promote Participation.

CRITICAL INFORMATION: ACTION IS NEEDED – Please place on the November 17, 2026 Internal Affairs agenda. **Commission approval of the draft Lifeline Report is sought.** The 2026 Lifeline Report is due to the Governor, President of the Senate, and Speaker of the House by December 31, 2026.

Staff is seeking Commission approval of the draft 2026 Annual Lifeline Report detailing the number of customers subscribing to Lifeline Service and the effectiveness of procedures to promote participation. The report also describes state and federal regulatory action impacting the Lifeline program and Lifeline Awareness promotions in Florida.

Section 364.10(2)(h), Florida Statutes, requires the FPSC to provide this report to the Governor, President of the Senate, and Speaker of the House of Representatives by December 31 of each year.

Attachment

cc: Mark Futrell, Deputy Executive Director, Technical
Apryl Lynn, Deputy Executive Director, Administrative
Adria E. Harper, General Counsel

DRAFT

A report to the
Governor
President of the Senate
Speaker of the House of Representatives



December 2026

DRAFT

Table of Contents

List of Tables iii
List of Figures iii
List of Acronyms iii
Executive Summary 1
I. Lifeline Program 2
A. Eligibility 3
B. Application Process 4
C. Minimum Service Standards 4
D. Duplicate Lifeline Support 5
E. Non-Usage Rule 5
II. Regulatory Activities and Updates 6
A. Federal Communications Commission Activities 6
1. Phase Out of Voice-Only Support 6
2. IM Telecom. LLC d/b/a Infiniti Mobile 6
B. Florida Public Service Commission Activities 7
1. Prevention of Waste, Fraud, & Abuse of the Universal Service Fund 7
2. USAC's Company Near Me Tool 7
3. Frontier Florida / Frontier Communications of the South – ETC relinquishment 8
4. Tempo Telecom – ETC relinquishment 8
5. Lifeline Promotion Process 8
6. Lifeline Promotion Activities 9
III. Lifeline Providers 11
A. Funding Distributions 11
B. Lifeline Service Obligations by Technology 12
C. Mobile Service Standards 13
D. Fixed Service Standards 14
E. Carrier-Supplied Cell Phone 14
F. Tribal Services 14
G. ETC Updates 15
1. Amerimex Communications Corp. 15
2. CenturyLink 16
3. DISH Wireless 16
4. Windstream / Uniti 16
H. Florida ETCs Not Offering Lifeline 17
1. Florida TerraCom 17
2. IM Telecom 17
IV. Lifeline Participation 19
A. Participation 19
B. Transitional Lifeline 22

Appendix A 2026 Federal Poverty Guidelines 23
Appendix B Agency, Organization, and Business Lifeline Partners 24
Appendix C Wireless Lifeline Providers and Networks Used 26
Appendix D Lifeline Enrollment and Year-to-Year Growth Rate 27
Appendix E Lifeline Subscription by Service Type (June 2025) 29

List of Tables

Table 1 Lifeline Support Transition Schedule 6
Table 2 Lifeline Subscription by Service Type 12
Table 3 Minimum Mobile Service Standards 13
Table 4 Enhanced Tribal Lifeline Broadband 15
Table 5 Lifeline Participation Rate in Eligible Florida Households 20

List of Figures

Figure 1 Lifeline Disbursements to Florida ETCs 12
Figure 2 Florida Lifeline Tribal Subscribership 15
Figure 3 Florida Lifeline Subscribership 19
Figure 4 Top Three Florida Lifeline ETCs 20
Figure 5 National Verifier Qualification Results in Florida 21
Figure 6 Average Monthly Transitional Lifeline Participants 22

List of Acronyms

C.F.R.	Code of Federal Regulations
DCF	Department of Children and Families
ETC	Eligible Telecommunications Carrier
FCC	Federal Communications Commission
FPSC	Florida Public Service Commission
F.S.	Florida Statutes
GB	Gigabytes
Mbps	Megabits per second
NARUC	National Association of Regulatory Utility Commissioners
SAC	Study Area Code
SNAP	Supplemental Nutrition Assistance Program (formerly Food Stamps)
USAC	Universal Service Administrative Company
U.S.C.	United States Code
USF	Universal Service Fund
WCB	Wireline Competition Bureau

Executive Summary

The Florida Lifeline Assistance report is prepared pursuant to the requirements of Section 364.10(2)(g), Florida Statutes (F.S.). The Florida Public Service Commission (FPSC or Commission) is required to report to the Governor, the President of the Senate, and the Speaker of the House of Representatives each year on the number of customers subscribing to Lifeline service and the effectiveness of procedures to promote participation in the program.

The Lifeline program is designed to enable low-income households to obtain and maintain telephone and broadband services by offering qualifying households a discount on their monthly bills. Alternatively, consumers can choose to receive monthly wireless minutes and/or measured data service from certain wireless providers. This report presents Lifeline participation data from July 2025 through June 2026, and evaluates procedures put in place to strengthen the Lifeline program.

As of June 30, 2026, there were a total of 288,923 Florida households participating in the Lifeline program, a decline of 43,964 households from last year. This equates to approximately 1 out of every 41 Florida households participated in the Lifeline program.[1] The Supplemental Nutrition Assistance Program (SNAP) continues to be the largest qualifying program for Lifeline assistance in Florida. However, only 22.3 percent of SNAP participants subscribed to Lifeline as of June 2026.[2] Using SNAP participation as a proxy for Lifeline-eligible households suggests that significant growth opportunities remain for Lifeline enrollment. It should be noted that to offer this discount, service providers must be designated as an Eligible Telecommunications Carrier (ETC), a status required to receive federal reimbursement from the program. If a customer's preferred carrier is not an ETC, they may be less likely to participate if the program requires switching providers.

During National Digital Connectivity and Lifeline Awareness Week (September 13–19), the FPSC promoted affordable voice and broadband access for eligible consumers. Outreach for the 2026 event focused on senior and community centers in Nassau, Columbia, Leon, Jackson, and Madison counties.

[1] Florida Legislature Office of Economic and Demographic Research, Demographic Estimating Conference, Florida Households, released June 22, 2026, http://edr.state.fl.us/Content/conferences/population/ConferenceResults_Tables.pdf, accessed on October 12, 2026, p. 2, Households 9,430,993.

[2] Florida DCF, Access Florida: Standard Data Reports by Caseload, https://www.myflfamilies.com/services/public-assistance/additional-resources-and-services/ess-standard, accessed on October 12, 2026, Element – Food Assistance Households: 1,293,203.

I. Lifeline Program

The Lifeline program has provided phone service discounts for qualifying low-income consumers since 1985.[3] It was later codified as a universal service program in the Telecommunications Act of 1996. Initially, the program's goal was to ensure that all Americans had the opportunity and security that phone service provides. In 2016, the Federal Communications Commission (FCC) expanded that goal to include broadband service.

One of the principles of the universal service program in the Telecommunications Act of 1996 is fairness in access to service. Consumers in all regions should have reasonably comparable access to telecommunications and information services at rates reasonably comparable to those charged in urban areas. This includes low-income consumers and those in rural or high-cost areas.[4] The federal Lifeline program supports this principle by providing a monthly discount for services to qualifying households, ensuring that they have access to modern communications networks capable of providing voice and broadband service.[5]

Qualifying households can receive up to a $9.25 discount on their monthly phone or broadband bills from ETCs offering service to their home. Alternatively, consumers can choose to receive monthly minutes and measured data service from ETCs for mobile services. Although some ETCs offer a free cell phone, the distribution of wireless devices is not funded by the Lifeline program.

Support for the Lifeline program comes from the federal Universal Service Fund (USF), which also provides funding for the high-cost, rural healthcare, and schools and libraries programs. Lifeline is available to eligible low-income households in every state, territory, and on federally recognized Tribal lands.

The rules governing the Lifeline program are established by the FCC; however, the FCC has designated the Universal Service Administrative Company (USAC), an independent not-for-profit corporation, as the administrator. USAC is responsible for data collection, maintenance, support calculation, and fund disbursement for all USF programs. USAC also administers the National Verifier, which determines customer eligibility for the Lifeline discount. The FPSC has oversight over the Lifeline program in Florida pursuant to Section 364.10, F.S.

[3] The Lifeline program was originally established by the Federal Communications Commission by order in 1985 to ensure that low-income consumers had access to affordable, landline telephone service in the wake of the divestiture of AT&T. See MTS and WATS Market Structure, and Amendment of Parts 67 & 69 of the Commission's Rules and Establishment of a Joint Board, Report and Order, 50 Fed. Reg. 939, released January 8, 1985.
[4] 47 U.S.C. § 254(b)(3).
[5] FCC, Third Report and Order, WC Docket No. 11-42, FCC 11-42, released April 27, 2016, https://docs.fcc.gov/public/attachments/FCC-16-38A1.pdf, accessed on September 9, 2026.

A. Eligibility

Consumers can qualify to participate in the Lifeline program either through program-based or income-based eligibility standards. Program-based eligibility is determined by a customer's enrollment in specific qualifying programs selected by the FCC. Customers can qualify for the Lifeline program if they or someone in their household participates in one of the following programs:

- SNAP
- Medicaid
- Federal Public Housing Assistance
- Supplemental Security Income
- Veterans and Survivors Pension Benefit
- Bureau of Indian Affairs Programs: Tribal Temporary Assistance to Needy Families, Tribal Head Start, and Food Distribution Program on Indian Reservations

Consumers qualify for Lifeline under the income-based eligibility standard if their total household income is at or below 135 percent of the Federal Poverty Guidelines. The Federal Poverty Guidelines are updated annually and can be found in Appendix A.

In addition to these eligibility criteria established by the FCC, Congress expanded access to Lifeline benefits for survivors of domestic violence, human trafficking and related crimes through the Safe Connections Act of 2022. Under this Act, survivors may receive emergency Lifeline support for up to six months.

To receive these benefits, a survivor must first request that their phone company separate their line from the abuser's account. The company will then provide documentation of the line separation request. Survivors can qualify if they or anyone in their household participates in one of the following additional programs:

- The Special Supplemental Nutrition Program for Women, Infants, and Children
- The Free and Reduced-Price School Lunch or Breakfast program
- A Federal Pell Grant in the current award year

Income-based eligibility standards for survivors are also expanded to include households with incomes at or below 200 percent of the Federal Poverty Guidelines.[6]

[6] USAC, Survivor Benefits, https://www.lifelinesupport.org/survivor-benefit/, accessed on September 9, 2026.

B. Application Process

Consumers can apply for Lifeline benefits using one of the following methods:

- Through USAC's website using the National Verifier consumer portal
- In person with certain ETCs using the National Verifier service provider portal
- By mailing their application to USAC's Lifeline Support Center
- Through an ETC websites that have access to the National Verifier

Eligibility is validated by the National Verifier through available automated eligibility data sources. Applications are checked to confirm identity, verify that the consumer is not already a Lifeline participant, and ensure compliance with all program rules. If eligibility cannot be validated through automated sources, customers can upload supporting documentation to the National Verifier portal or mail it to the Lifeline Support Center. Those who qualify must then contact a participating provider in their area to enroll in the Lifeline program.

In Florida, USAC's National Verifier connects to the Florida Department of Children and Families (DCF) database to confirm SNAP and Medicaid participation. At the national level, it also interfaces with the U.S. Department of Housing and Urban Development and the U.S. Department of Veterans Affairs.[7] In 2025, these automated connections enabled the National Verifier to confirm eligibility for most Lifeline applicants.[8]

C. Minimum Service Standards

ETCs are required to provide broadband access that meets minimum service standards established by the FCC to be eligible for USF support, unless the FCC grants them forbearance. These standards are reviewed annually through an FCC update mechanism to ensure that Lifeline customers continue to receive viable service options as technology improves.[9] However, there has not been an increase in these standards in several years, in part because the FCC determined that raising them would likely impose costs that would ultimately be passed on Lifeline customers.[10] The current minimum service standards include:

- Mobile voice allowance of 1,000 minutes per month
- Mobile broadband allowance of 4.5 gigabytes (GB) per month
- Fixed broadband speed of 25 megabits per second (Mbps) downstream and 3 Mbps upstream
- Fixed broadband allowance of 1,280 GB per month

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[7] USAC, Eligibility Verification, https://www.usac.org/lifeline/national-verifier/eligibility-verification/, accessed on September 9, 2026.

[8] USAC, National Verifier Annual Report, released January 30, 2026, https://www.usac.org/wp-content/ uploads/ lifeline/documents/Data/2026-National-Verifier-Annual-Report-and-Data.pdf accessed on September 9, 2026.

[9] FCC, Public Notice, WC Docket No. 11-42, DA 23-621, released July 14, 2025, https://docs.fcc.gov/public/ attachments/DA-25-619A1_Rcd.pdf accessed on September 9, 2026.

[10] FCC, Order, WC Docket No. 11-42, DA 25-567, released July 1, 2025, https://docs.fcc.gov/public/ attachments/DA-25-567A1.pdf, accessed on September 9, 2026.

D. Duplicate Lifeline Support

Eligible consumers can only receive one Lifeline-supported service per household.[11] If two households reside at one address and each desires to participate in the Lifeline program, each applicant must complete USAC's Household Worksheet. The worksheet demonstrates that each applicant lives in a separate economic unit and not sharing income or living expenses with another resident.[12]

To prevent waste in the program, the FCC created the National Lifeline Accountability Database and mandated its use to ensure that multiple ETCs do not seek and receive reimbursement for the same Lifeline subscriber.[13] This database conducts a nationwide real-time check to determine if the consumer or another person at their address is already receiving Lifeline service. States have read-only access to this database to help prevent waste, fraud, and abuse within the Lifeline program.

E. Non-Usage Rule

In general, ETCs offering mobile Lifeline service do not charge the consumer beyond the support provided by the universal service program. While customers can elect to purchase additional minutes or data, the program pays ETCs to provide a basic level of service.

To address potential waste if support is received for cell phones that are no longer functional or belonged to a subscriber who has passed away, the FCC has established rules regarding support for Lifeline connections with no usage. Specifically, if an ETC does not assess or collect a monthly fee from the customer above the support received from the USF, the Lifeline customer must use the service at least once every 30 days. The FCC defines usage as the customer completing one of the following actions:

- Completing an outgoing call or using data
- Sending a text message
- Buying minutes or data to add to the subscriber's service plan
- Answering an call from a party other than the customer's Lifeline provider or its agent
- Responding to direct contact from the customer's Lifeline service provider to confirm that the subscriber wants to continue receiving Lifeline service

If the Lifeline customer does not use their service for 30 consecutive days, the ETC must give the customer a 15-day notice that if they do not use the service it will be terminated. ETCs must de-enroll Lifeline customers who do not meet the usage requirement within the final 15-day grace period. Consumers de-enrolled from the Lifeline program for non-usage may reapply at any time to USAC.

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[11] 47 C.F.R. § 54.409(c).
[12] USAC, Household Eligibility Pre-Screening Tool, www.lifelinesupport.org, accessed on September 9, 2026.
[13] FCC, Report and Order, WC Docket No. 11-42, FCC 12-11, released February 6, 2012, https://docs.fcc.gov/public/attachments/FCC-12-11A1.pdf, accessed on September 9, 2026.

II. Regulatory Activities and Updates

A. Federal Communications Commission Activities

1. Phase Out of Voice-Only Support

In its 2016 Lifeline Modernization Order, the FCC planned to transition Lifeline into a broadband-focused program.[14] Support for voice-only service was scheduled to be completely phased out on December 1, 2021, but the FCC has delayed this deadline several times. Support for bundled broadband/voice and stand-alone broadband plans were unaffected. In its most recent Order, the FCC extended eligibility through December 1, 2027.[15] Under a 2026 rulemaking proposal, the FCC is considering permanently locking in the current $5.25 monthly voice-only subsidy rather than eliminating it.[16] Table 1 outlines the revised phase down schedule under the FCC's current rules.

Table 1
Lifeline Support Transition Schedule

Effective Dates	Voice	Broadband & Broadband / Voice
From 12/1/19 to 11/30/20	$7.25	$9.25
From 12/1/20 to 12/1/27	$5.25	$9.25
After 12/1/27	$0	$9.25

Source: FCC, Order (DA 26-651)

In Florida, enrollment data shows that voice-only Lifeline participation has dwindled to a fraction of the program. As of June 2026, voice-only Lifeline enrollment in Florida dropped 28 percent over the previous year to just 669 Lifeline households. In comparison, the national total fell 50 percent to 68,187 voice-only Lifeline customers.[17]

2. IM Telecom. LLC d/b/a Infiniti Mobile

On July 27, 2026, the FCC's Wireline Competition Bureau (WCB) issued a letter to IM Telecom notifying the company that its access to the National Lifeline Accountability Database has been terminated. This action follows investigatory proceedings in which the WCB found that IM

[14] FCC, Third Report and Order, WC Docket No. 11-42, FCC 16-38, released April 27, 2016, https://docs.fcc.gov/public/attachments/FCC-16-38A1.pdf, accessed on September 9, 2026.
[15] FCC, Order, WC Docket No. 11-42, DA 26-651, released July 1, 2026, https://docs.fcc.gov/public/attachments/DA-26-651Apdf, accessed on August 26, 2026.
[16] FCC, Notice of Proposed Rulemaking, WC Docket No. 11-42, FCC 26-8, released February, 18, 2026, https://docs.fcc.gov/public/attachments/FCC-26-8A1.pdf accessed on September 9, 2026.
[17] USAC, Lifeline Disbursement Tool, https://opendata.usac.org/Lifeline/Lifeline-Disbursements-Tool/rink-mije, accessed on September 9, 2026. After True-Ups, USAC displays a June 2025 national total of 136,726.

Telecom had violated numerous program integrity rules and was therefore indefinitely barred from enrolling new customers.[18]

Specifically, the apparent rule violations include:

- Transferring thousands of former subscribers back to IM Telecom without their consent after they decided to switch providers.
- Creating a payment scheme to evade the FCC's non-usage rules, which ensure that legitimate customers are actually using the federally subsidized service.
- Failing to obtain affirmative consent from subscribers before enrolling or transferring them to IM Telecom.
- Changing corporate control without obtaining required federal approvals.
- Using bots to evade limits previously imposed on IM Telecom's suspicious application, enrollment, and customer transfer activity.

IM Telecom has challenged the WCB's authority to impose these penalties and argued that the WCBs relied on inaccurate factual allegations.[19] The FPSC has opened a show cause proceeding against IM Telecom regarding these circumstances.[20] IM Telecom was designated by the FPSC as an ETC in July 2024, but it never received a Study Area Code (SAC) number from USAC. As a result, IM Telecom has been unable to receive reimbursements from the USF for the Lifeline discount, and therefore has not been providing Lifeline services in Florida

B. Florida Public Service Commission Activities

1. Prevention of Waste, Fraud, & Abuse of the Universal Service Fund

The FPSC remains committed to enforcing safeguards to prevent waste, fraud, and abuse of the USF. Protecting the integrity of the Lifeline program in Florida is a priority, and the FPSC takes appropriate enforcement action when necessary. With statutory authority to grant and revoke wireline and wireless ETC designations, the FPSC actively monitors federal USF disbursements to Florida's ETCs, ensuring funds are used in compliance with state and federal regulations.

2. USAC's Company Near Me Tool

The Company Near Me Tool enables Florida residents to identify which Lifeline providers are available in their area. From April through September 2026, the FPSC and USAC coordinated directly with the ETCs that had not yet uploaded their data. As a result of this five-month effort, all Lifeline participating carriers' information is now available on the tool. Eligible Floridians

[18] FCC, FCC Blocks Lifeline Provider From Enrolling Any New Customers, released July 27, 2026, https://www.fcc.gov/document/fcc-blocks-lifeline-provider-enrolling-any-new-customers, accessed September 9, 2026.
[19] IM TELECOM, LLC, Application for Review, released August 25, 2026, https://www.fcc.gov/ecfs/document/26110073091/1, accessed October 5, 2026.
[20] FPSC Docket No. 20260107-TP.

who qualify for Lifeline are encouraged to use this resource to easily find participating providers in their community.

3. Frontier Florida / Frontier Communications of the South – ETC relinquishment

On August 8, 2026, Frontier Florida petitioned the Commission to relinquish its ETC designations in select wire centers in its territory in the Tampa Bay region. At the same time, Frontier Communications of the South, LLC filed a petition to relinquish ETC designations in all of its service territory in northeast Florida.[21] The Commission approved staff's recommendation granting the relinquishment petitions in September 2026. Combined, this will impact seven Lifeline households; however, the FPSC confirmed these customers can transition to an alternative Lifeline provider.

4. Tempo Telecom – ETC relinquishment

On October 6, 2026, Tempo Telecom (Tempo) petitioned the Commission to relinquish its statewide ETC designation.[22] The Commission approved staff's recommendation granting the relinquishment petition in November 2026. Tempo had no Lifeline customers at the time of relinquishment, and no Florida customers were affected. According to Tempo's response to staff's 2026 Request for Status Update Data Request, the company had been unable to participate in the Lifeline program because it had not received a SAC from USAC and was given no explanation for the delay.[23]

5. Lifeline Promotion Process

The Lifeline Promotion Process is a computer interface connecting the FPSC, DCF and Florida ETCs to provide information to Medicaid and SNAP participants interested in the Lifeline discount. This process requires the DCF applicant to first express an interest in receiving the Lifeline discount and select an ETC. The selected ETC then contacts the customer to determine if they have already been approved for the Lifeline program through the National Verifier. If the customer has been approved, the ETC provides the Lifeline discount.

For customers who have not yet applied for Lifeline, the ETC or the FPSC sends instructions on how to apply using the National Verifier. Between January and November 2026, the FPSC sent 7,672 such letters to eligible households. In comparison, the FPSC mailed a total of 16,292 letters in 2025. This significant decrease is attributed to ETCs assuming more responsibility for sending letters to prospective customers and DCF updating its list of companies offering Lifeline for applicants to select. These changes are estimated to have saved the agency approximately $9 thousand so far in 2026.[24]

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[21] FPSC, Docket Nos. 20260112-TL and 20260113-TL.
[22] FPSC, Docket No. 20260150-TL.
[23] FPSC, Docket No. 20260000-OT, Document No. 07269-2026, 2026 Request for Status Update Data Request.

[24] Estimated savings are calculated by comparing the full 2025 Lifeline mailing costs against the costs incurred from January to November 2026.

6. Lifeline Promotion Activities

In 2026, the FPSC's Lifeline promotion efforts included participation in National Digital Connectivity and Lifeline Awareness Week, National Consumer Protection Week, and ongoing grassroots outreach initiatives designed to increase awareness of and participation in the Lifeline program.

The FPSC collaborates with other state commissions, the National Association of Regulatory Utility Commissioners (NARUC), and the FCC to support National Lifeline Awareness Week and educate consumers about the nationwide implementation of USAC's National Eligibility Verifier. These efforts help ensure eligible households understand the Lifeline program, including eligibility criteria, annual recertification requirements, and the limitation of one Lifeline benefit per household.

Through community events and outreach opportunities, the FPSC continues to share Lifeline educational materials and connect consumers with available resources. To expand accessibility and reach more consumers, the FPSC conducts outreach both in person and virtually throughout the year.

a) National Digital Connectivity and Lifeline Awareness Week

Each year, NARUC and the FCC designate the week following Labor Day as National Digital Connectivity and Lifeline Awareness Week. Florida observed National Digital Connectivity and Lifeline Awareness Week September 13–19, 2026.

The annual observance highlights the importance of connecting eligible consumers with affordable voice and broadband services through the Lifeline program. During Florida's 2026 observance, the FPSC focused its outreach efforts on senior and community centers in Nassau, Columbia, Leon, Jackson, and Madison counties, providing information on Lifeline benefits, eligibility, and recertification requirements. Lifeline program information also remains available year-round on the FPSC's website.

b) National Consumer Protection Week

National Consumer Protection Week, observed March 1–7, 2026, provided an important opportunity to expand Lifeline outreach and consumer education efforts. Led annually by the Federal Trade Commission and supported by the FCC and numerous government agencies, advocacy organizations, and private-sector partners, National Consumer Protection Week encourages consumers to understand their rights and make informed financial decisions.

In recognition of the 28th Annual National Consumer Protection Week, the FPSC promoted its free energy efficiency, water conservation, and consumer assistance resources. Staff also engaged directly with consumers in Marion and Leon counties, providing information about the Lifeline program and other Commission resources designed to help Floridians save money and make informed utility decisions.

c) Older Americans Month

Each May, the FPSC participates in Older Americans Month, a nationwide observance recognizing the contributions and achievements of older adults in their families, communities,

and across the nation. The 2026 theme, “Champion Your Health,” highlighted the importance of supporting older adults in maintaining their health and well-being. As part of the observance, the FPSC partnered with community centers in Wakulla, Holmes, Leon, and Duval counties to connect directly with seniors and provide information about the Lifeline program, energy conservation, and ways to help reduce utility bills.

d) Library Outreach Campaign

As part of its ongoing consumer education efforts, the FPSC annually provides public libraries throughout Florida with educational materials, including Commission publications and Lifeline brochures and applications in both English and Spanish. In 2026, the Library Outreach Campaign reached 538 public libraries and library branches statewide through an email distribution. The campaign generated requests from libraries for additional printed materials, enabling them to continue providing valuable consumer resources to their communities throughout the year.

e) Ongoing Lifeline Outreach & Partners

Connecting eligible consumers with Lifeline information through agencies and organizations that regularly serve those in need remains a key component of the FPSC’s outreach efforts. Throughout the year, the FPSC works with numerous community partners to increase awareness of the program and help consumers understand the application process.

The local, state, and federal agencies, organizations, businesses, and telecommunications companies listed in Appendix B are integral to this ongoing effort. These partners strengthen outreach by building new community partnerships, participating in outreach events, providing training opportunities, sharing program updates, and distributing Lifeline informational materials and applications to eligible consumers. The Commission also promotes Lifeline through monthly in-person and virtual outreach events and participates in senior expos to reach eligible Floridians and connect them with available telecommunications assistance.

III. Lifeline Providers

Congress has granted state commissions the authority to designate carriers as ETCs if they meet certain requirements.[25] Conversely, state commissions may rescind ETC designation should a company fail to follow the Lifeline program requirements. In instances where a state commission lacks jurisdiction to grant ETC status, the FCC may make the designation.[26]

To qualify as an ETC, a telecommunications carrier must offer services supported by federal USF program.[27] A company applying for designation as an ETC must demonstrate that it is financially and technically capable of providing Lifeline service.[28] The services can be provided either using its own facilities or a combination of its own facilities and another carrier's resold service, and they must advertise the availability of such services and charges. Companies that exclusively resell services may seek forbearance for the facilities requirement from the FCC. The majority of ETCs that utilize the facilities and services of other carriers are Commercial Mobile Radio Service (wireless) providers. A list of wireless Lifeline providers and the underlying network they use can be found in Appendix C.

When the Telecommunications Act of 1996 was initially implemented, all ETCs were eligible to participate in the high-cost program and were required to offer Lifeline services. Since then, the FCC has revised its rules to allow companies to request ETC designation to participate in the Lifeline program only and forgo participation in the high-cost programs.

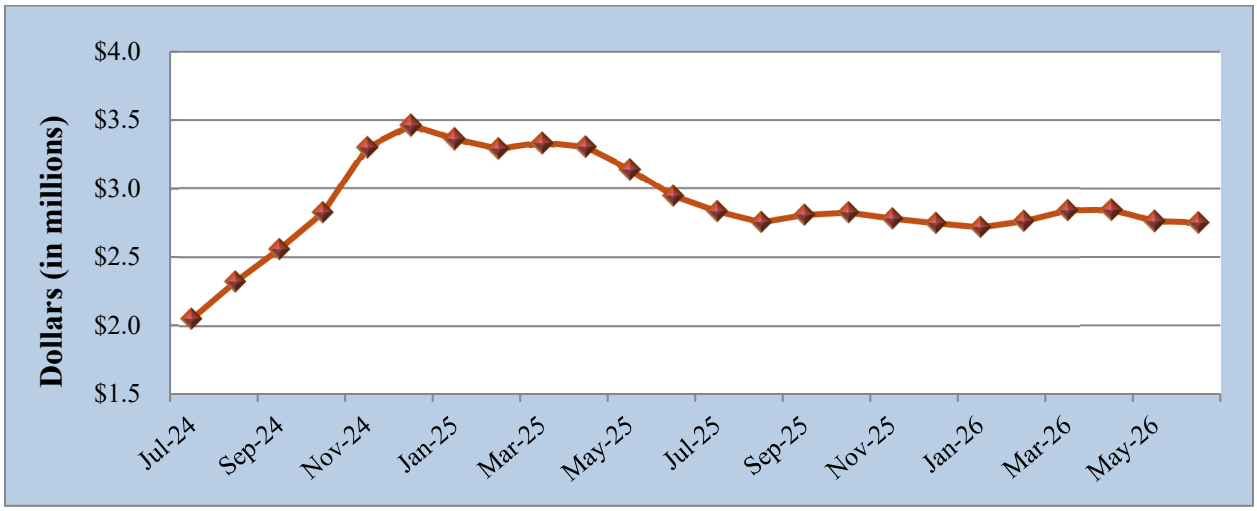
Florida has 29 ETCs, of which 14 are wireless carriers.[29] Two ETCs designated in 2024 – IM Telecom and Florida TerraCom – have not yet been assigned a Study Area Code (SAC) by USAC and are not offering Lifeline service in Florida. Appendix D identifies the 29 ETCs by technology and provides enrollment data for 2023 through 2026.

A. Funding Distributions

Only carriers that have been designated as an ETC can be reimbursed for the Lifeline discount from the USF. Figure 1 reflects the monthly USAC Lifeline disbursements to ETCs in Florida during the past two reporting periods. The total amount disbursed between July 2025 and June 2026 was $33.4 million, representing an decrease of $2.5 million from the last reporting period. These amounts include prior period support corrections. Between July 2024 and June 2026, thirteen wireless companies seeking ETC status in Florida were granted designations. These new designations, which expanded Lifeline subscribership, contributed to a disbursement peak of $3.47 million in December 2024. As of June 2026, wireless ETCs received approximately 99.2 percent of all Lifeline disbursements from USAC in Florida.

[25] 47 U.S.C. § 214(e)(2).
[26] 47 U.S.C. § 214(e)(6).
[27] 47 C.F.R. § 54.101.
[28] 47 C.F.R. § 54.201(h).
[29] This count reflects the ETC relinquishment of two carriers following the June 2026 reporting period, as discussed in Chapter II.

Figure 1
Lifeline Disbursements to Florida ETCs



Source: USAC, July 2024 – June 2026 (Lifeline disbursements adjusted for true-ups as of October 8, 2026). Industry Responses to 2026 FPSC Data Requests substitute any missing USAC data.

B. Lifeline Service Obligations by Technology

ETCs may meet their Lifeline service obligations through offering voice, broadband, or a combination of both. Table 2 shows Lifeline subscription by service type and the underlying technology used by the ETC. Currently, wireless ETCs primarily offer bundled services that meet the federal standards for both voice and broadband. In contrast, wireline subscriptions were spread across all three service types. The 18 wireless broadband-only customers reported were associated with legacy plans no longer offered. Florida has two non-traditional ETCs, one operating via satellite and the other via fixed-wireless technology. Both providers offer service exclusively to fixed residential locations and are required to offer Lifeline as a condition for receiving federal high-cost universal support. Appendix E provides the percentage of Lifeline subscriptions by service type for each carrier.

Table 2
Lifeline Subscription by Service Type
(As of June 2026)

Technology	Voice	Broadband	Bundled
Wireless	0	18	286,458
Wireline	669	963	814
Satellite	0	1	0
Fixed Wireless	0	0	0
Total	**669**	**982**	**287,272**

Source: Industry Responses to 2026 FPSC Data Requests.

C. Mobile Service Standards

All 12 wireless ETCs that are currently offering Lifeline services in Florida meet the minimum FCC standards by offering either a minimum of 1,000 voice minutes or 4.5 gigabytes (GB) of data per month to Lifeline subscribers. These providers offer plans at no cost to the Lifeline consumer; however, customers can elect to purchase additional voice minutes, data, or upgrade their services by selecting alternate plans. Table 3 outlines the different Lifeline services that are offered by wireless ETCs at no cost to the Lifeline subscriber and their compliance with federal standards.

Table 3
Minimum Mobile Service Standards
(As of June 2026)

Brand (ETC)	Compliance Method	Voice (Minutes)	Data (GB)
Access Wireless (i-Wireless)	Voice/Data	1,000	4.5
AirTalk Wireless* (AirVoice)	Plan 1: Voice/Data Plan 2: Voice/Data	Plan 1: Unlimited Plan 2: Unlimited	Plan 1: 5 Plan 2: 10
American Assistance (American Broadband & Telecommunications)	Voice/Data	Unlimited	4.5
Assurance Wireless (T-Mobile)	Voice/Data	1,000	4.5
enTouch Wireless (Boomerang Wireless)	Plan 1: Voice Plan 2: Data	Plan 1: 1,000 Plan 2: 300	Plan 1: 0.1 Plan 2: 4.5
Gen Mobile (DISH Wireless)	Voice/Data	1,000	4.5
Life Wireless (Telrite Corp.)	Voice/Data	Unlimited	4.5
SafeLink Wireless (Verizon Value)	Voice/Data	Unlimited	10
SafetyNet Wireless (Amerimex)	Voice/Data	1,000	4.5
StandUp Wireless (Global Connection)	Voice/Data	1,000	4.5
TAG Mobile*	Plan 1: Voice/Data Plan 2: Voice/Data	Plan 1: Unlimited Plan 2: Unlimited	Plan 1: 5 Plan 2: 10
TruConnect	Voice/Data	Unlimited	4.5

* Plan 2 for AirTalk and TAG requires the customer bring their own phone.
Source: Industry Responses to 2026 FPSC Data Requests / Websites.
Not listed are the two wireless ETCs without a SAC.

Not all wireless ETCs offer plans at no cost to the customer. Verizon Value brands other than SafeLink offer Lifeline customers a monthly $10.00 discount on any of its plans that offer more than 4.5 GB of data per month.[30] As of June 2026, Boomerang Wireless reported offering free plans that met either the voice or the broadband service standards, but not both. However, no Lifeline customers were enrolled in those plans; customers instead opted for alternative bundle plans.

D. Fixed Service Standards

Florida has 13 wireline ETCs, one satellite ETC, and one fixed-wireless ETC that are required to meet the FCC's fixed service standards for broadband, absent a FCC waiver. This standard requires broadband plans to provide at least 1,280 GB of data per month at minimum download and upload speeds of 25 Mbps and 3 Mbps, respectively.[31] Viasat, Florida's only satellite ETC, received an exemption from this requirement and offers 1,000 GB data allowance. The only wireline ETC in Florida that does not offer broadband service is Phone Club Corp., which provides voice-only service throughout AT&T's service territory.

E. Carrier-Supplied Cell Phone

Some wireless ETCs offer cell phones at no cost to new Lifeline customers as part of their standard offerings. In these cases, the devices must also be accessible to customers with disabilities at no additional charge.[32] ETCs are not reimbursed for providing these phones and may choose to lock the devices, limiting their usability should the Lifeline subscriber choose to switch providers.[33] As of June 2026, only three ETCs reported offering free devices: AirVoice through its AirTalk brand, TAG, and DISH through its Gen Mobile brand. This represents a significant decrease from the June 2025 Lifeline Data Request responses, where seven ETCs reported offering free devices in some capacity.

F. Tribal Services

Some ETCs have begun offering Tribal Support to qualified Florida Tribal members. Most Florida Tribal subscribers receive Enhanced Tribal Lifeline support after requesting the benefit and establishing that they live in a qualifying Tribal area. Others qualify for Lifeline through automated checks for Medicaid or Federal Public Housing Assistance, while a small number of Florida Tribal Lifeline recipients were approved following a manual USAC review.[34]

In July 2025, Florida had only three Tribal Lifeline subscribers. As of June 2026, TruConnect, AirTalk, and TAG reported a combined 4,971 Tribal Lifeline subscribers, of which 4,966 were

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[30] These include: TracFone, Total Wireless, Straight Talk, Simple Mobile, and Walmart Family Mobile.

[31] FCC, DA 26-796, released July 29, 2026, https://docs.fcc.gov/public/attachments/DA-26-796A1.pdf, accessed October 5, 2026.

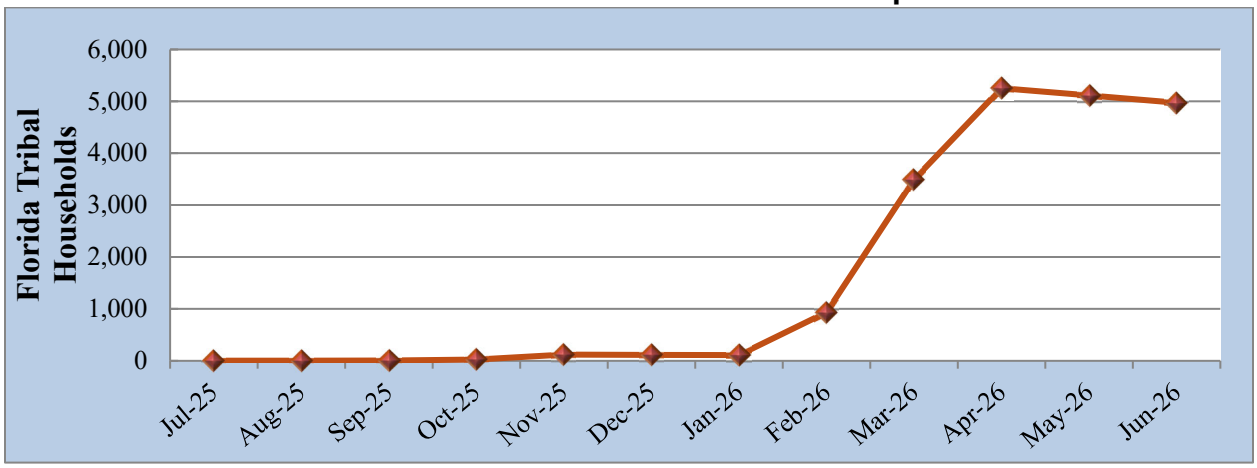
[32] FCC, Order, DA-24-633, released July 8, 2024, https://docs.fcc.gov/public/attachments/DA-24-633A1.pdf, accessed on September 9, 2026.

[33] FCC, Cell Phone Unlocking, last updated/reviewed January 14, 2025, https://www.fcc.gov/consumers/guides/cell-phone-unlocking, accessed on September 9, 2026.

[34] Email correspondence with USAC on July 23, 2026.

TruConnect customers. Figure 2 shows the rapid growth in Tribal subscribership during the reporting period.

Figure 2
Florida Lifeline Tribal Subscribership



Source: Industry Responses to 2026 FPSC Data Requests.

A few Florida ETCs offer additional Tribal benefits. AirTalk, Boomerang, DISH, TAG, and TruConnect all provide phones and Tribal plans featuring unlimited voice and extra data. AirTalk offers more data to Tribal customers who choose to bring their own cell phone. The data allowances for these Tribal plans are detailed in Table 4 below.

Table 4
Enhanced Tribal Lifeline Broadband
(Data in GB / month)

AirTalk	Boomerang	DISH	TAG	TruConnect
Plan 1: 16 Plan 2: 30	4.5	11	16	10

Source: Industry Responses to 2026 FPSC Data Requests / Websites.

G. ETC Updates

1. Amerimex Communications Corp.

In January 2026, AmeriMex Communications Corp., d/b/a SafetyNet Wireless (Amerimex) notified the FPSC that it had filed an amended compliance plan with the FCC to transfer control of AmeriMex from its founder and current majority owner, Donald L. Aldridge, to its current minority owners, Stephen Klein and Jeffrey Matthews. Upon approval of an updated FCC compliance plan, Mr. Klein will hold an 80 percent ownership interest in the company,

while Mr. Matthews will hold a 20 percent ownership interest.[35] AmeriMex has notified the FPSC that it intends to refile its Florida ETC petition once the transfer is finalized.

2. CenturyLink

On February 2, 2026, Lumen Technologies, the parent company of CenturyLink of Florida, Inc., sold its consumer fiber-to-the-home business and associated fiber access assets in Florida and ten other states to AT&T. As part of the transaction, AT&T acquired the Quantum Fiber brand and the associated consumers using the sold fiber-to-the-home service. These customers were notified that if no action was taken their service would be transferred to AT&T, with the transfer occurring effective March 5, 2026.[36]

In the 2026 Lifeline data request, CenturyLink reports a significant loss of Lifeline customers attributed to this transition. Affected customers were informed that they could remain CenturyLink customers by migrating to a new VoIP offering, "Connected Voice with Air-Life," which relies on cellular data transmission rather than a wireline connection.[37] As of the June 2026 reporting period, CenturyLink reports that no Lifeline customers were enrolled in this VoIP plan.

3. DISH Wireless

During this reporting period, DISH was the only ETC to report financial distress. DISH Wireless L.L.C. and other affiliated DISH entities commenced voluntary Chapter 11 proceedings on June 30, 2026.[38] DISH Wireless had previously defaulted on certain payment obligations to its network infrastructure providers, while also pursuing the sale of spectrum assets to AT&T and SpaceX.[39] On July 28, 2026, the AT&T spectrum transaction was finalized. DISH/EchoStar intends to sell additional spectrum to SpaceX, with the Spectrum Acquisition Closing targeted for November 30, 2027.[40] DISH/EchoStar also intends to sell its remaining terrestrial spectrum by September 1, 2028, with a private auction proposed by March 1, 2029, if the spectrum cannot be sold for fair value by that date.[41]

4. Windstream / Uniti

On August 1, 2025, a merger between Uniti Group Inc. and Windstream Holdings II, LLC was completed. Uniti's pre-closing shareholders hold approximately 62 percent after the

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[35] FPSC, Amerimex Amended Compliance Plan Before the FCC, Docket No. 20240096-TP, Document No. 00040-2026, Filed January 5, 2026.

[36] 2026 Lifeline Data Requests. See also, CenturyLink, Notice of Section 63.71 FCC Application, Docket No 20260000-OT, Document No. 04324-2026, Filed July 14, 2026

[37] Ibid, Attachment A.

[38] EchoStar SEC, https://archive.fast-edgar.com/20260803/A5B2N22C8Z22H2ZZ2RZA2WZZMTPQ72X2Z28G/,

[39] Crown Castle SEC, https://www.sec.gov/Archives/edgar/data/1051470/000105147026000003/cci-20260112.htm, released January 12, 2026, Exhibit 99.1 Press Release, accessed September 1, 2026.

[40] EchoStar SEC, https://www.sec.gov/Archives/edgar/data/1415404/000141540426000035/sats-20260728x8k.htm, Date of Report July 28, 2026, accessed September 1, 2026

[41] EchoStar Corporation, Extension of Time and Waiver Request, submitted May 28, 2026, https://www.fcc.gov/ecfs/search/search-filings/filing/1052876479067, accessed October 19, 2026.

merger, while Windstream's holders own approximately 38 percent.[42] Following this transaction, Kinetic ABS FL, a sister company of Windstream Florida, notified the FPSC that by July 15, 2026, it would acquire certain Windstream Florida fiber and copper assets. This includes the related mass-market VoIP and long-distance services, fiber-based residential broadband and internet services, and the operations and customers associated with those services.[43] Windstream Florida will retain its existing telecommunication certificates issued by the FPSC, and will continue providing all existing services to non-transferred customers, including customers served via copper technology, Lifeline customers, and non-residential customers receiving fiber-based services.[44]

H. Florida ETCs Not Offering Lifeline

Florida TerraCom and IM Telecom are wireless ETCs that received conditional forbearance from the FCC's facilities requirement and were designated as ETCs by the FPSC in July 2024. Each subsequently sold portions of its business. Because their approved compliance plans did not include information relating to the new owners, the FCC required the companies to refile those plans. While awaiting FCC approval, the FCC instructed USAC not to issue a SAC to the carriers.[45] Without a SAC, the companies cannot be reimbursed by USAC for providing Lifeline services.

1. Florida TerraCom

In 2023, Florida TerraCom sold 49 percent interest to Maxsip Tel; subsequently, Florida TerraCom submitted a revised compliance plan to the FCC reflecting the transaction. According to the 2026 data request, the FCC directed Florida TerraCom to terminate its relationship with Maxsip Tel. Florida TerraCom states that, as of August 28, 2025, it filed documents with the Florida Department of State to relinquish "Maxsip" as a fictitious name. The company also reported that it had repurchased the 49 percent interest previously sold to Maxsip Tel. To date, the FCC has taken no public action to resolve this issue.

2. IM Telecom

In January 2024, IM Telecom sold a 49 percent interest to Excess Telecom, while its parent company, KonaTel, retained the remaining 51 percent. IM Telecom subsequently sought to sell that remaining 51 percent to Excess Telecom, subject to the FCC's approval of an updated compliance plan. However, the company withdrew its revised compliance plan in

[42] FPSC, Notice Regarding the Transfer of Control of the Windstream Licensees and Uniti Licensees, Docket 20260000-OT, Document 01047-2026.
[43] FPSC, Notification Regarding the Proposed Pro Forma Transfer of Certain Assets of Windstream Florida, LLC and Windstream Communications, LLC to Kinetic ABS FL LLC, Docket No. 20260000-OT, Document No. 03614-2026.
[44] Ibid.
[45] SEC, KonaTel and Insite Mobile Purchase of Rights Agreement, effective April 6, 2023 https://www.sec.gov/Archives/edgar/data/845819/000151597123000045/exhibit101.htm, accessed September 1, 2026.

May 2025. As mentioned in Section II, IM Telecom is also under investigation by the FCC, prompting the FPSC to open a compliance investigation against the company.[46]

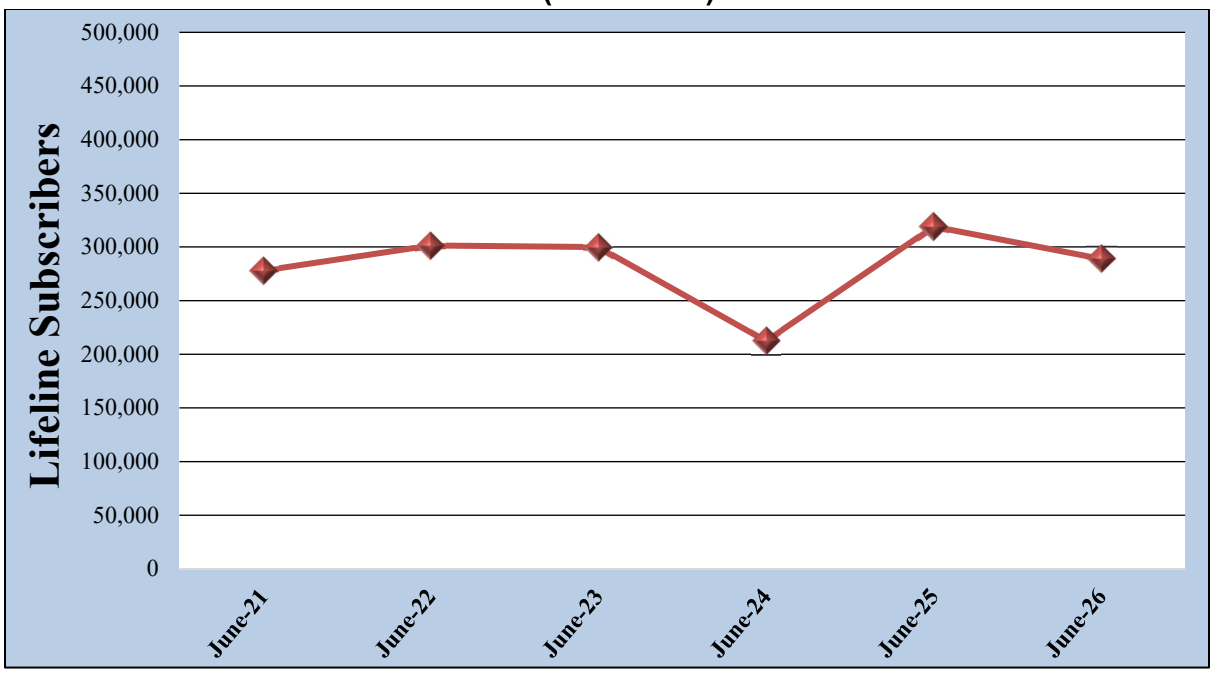
[46] KonaTel SEC Filing https://www.sec.gov/Archives/edgar/data/845819/000149315226017104/form10-k.htm, for fiscal year ended December 31, 2025, accessed September 1, 2026.

IV. Lifeline Participation

A. Participation

As of June 30, 2026, there were 288,923 subscribers enrolled in Lifeline in Florida. During the 2025-2026 reporting period, Lifeline subscribership decreased by 43,964, which represents a 13 percent decrease from the previous year. Florida also experienced a decline in Lifeline participation in 2024, while there were minimal changes in 2022 and 2023. In 2025, the increase in Lifeline subscribership was likely attributable to new wireless ETC designations in Florida. Figure 3 shows annual Lifeline subscribership for the last six years.

Figure 3
Florida Lifeline Subscribership
(2021-2026)



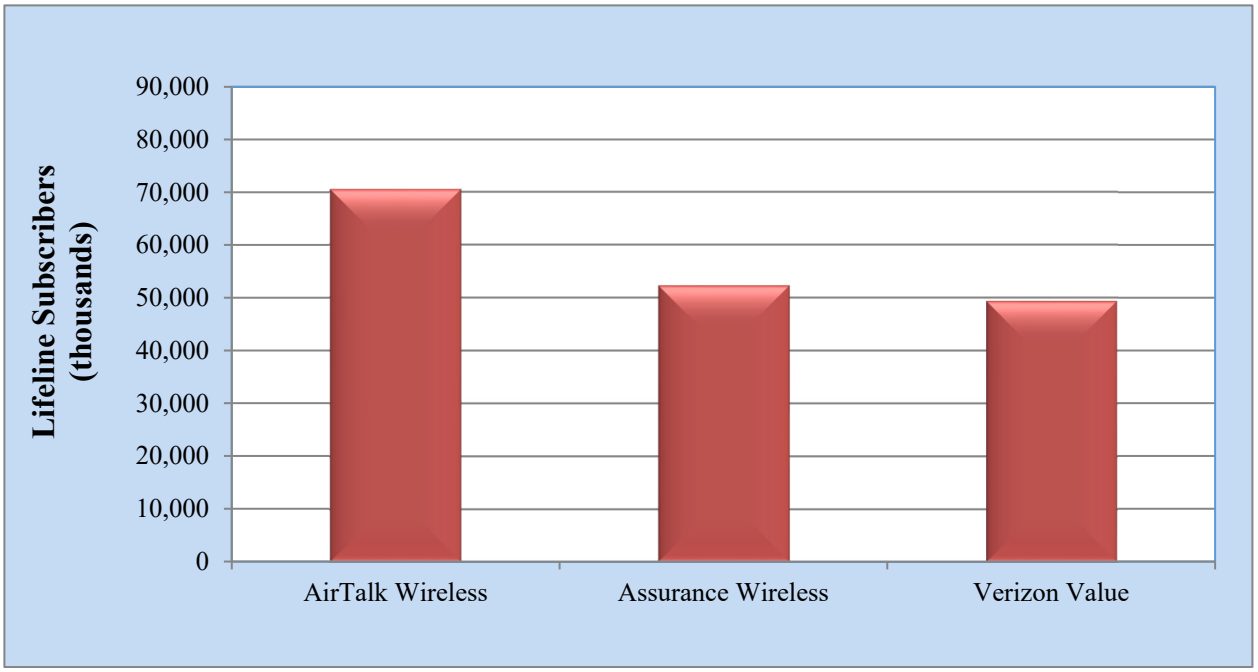
Source: USAC, June 2021 – 2025 (Lifeline subscribers adjusted for true-ups as of October 8, 2026.)
Industry Responses to 2026 FPSC Data Requests, June 2026.

The three ETCs with the most Lifeline subscribers in Florida are identified in Figure 4. For the last twenty years, Assurance Wireless and Verizon Value have been the dominant providers of Lifeline service in Florida. In the 2023-2024 reporting period, they represented more than 97 percent of the Florida Lifeline market. However, during the last two reporting periods their combined market share went down to 43 percent in 2025 and 35 percent in 2026.

Both carriers have experienced significant declines in subscribership since 2024. Assurance Wireless has lost 55 percent of its Lifeline customers, leaving it with 52,253 customers in Florida. By comparison, Verizon Value lost 45 percent of its Lifeline customers, leaving it with 49,297 customers in Florida. Last year, Global Connections was the dominant Lifeline provider in Florida. This year, Global Connections was overtaken by AirTalk Wireless as the carrier with

the most Lifeline subscribers. Both Global Connections and AirTalk Wireless represent new wireless ETCs that have provided consumers with competitive options.

Figure 4
Top Three Florida Lifeline ETCs



Source: Industry Responses to 2026 FPSC Data Requests

Table 5 compares the number of households enrolled in Lifeline with the estimated number of Lifeline eligible households based upon SNAP participation. Using SNAP participation as a proxy for the number of Lifeline eligible households suggests there are significant growth opportunities for Lifeline enrollment. However, it should be noted if a customer's preferred carrier is not an ETC, they may be less likely to participate in the program if it requires switching providers. This is especially true when a customer is required to pay an early contract termination fee to make such a switch.

Table 5
Lifeline Participation Rate in Eligible Florida Households

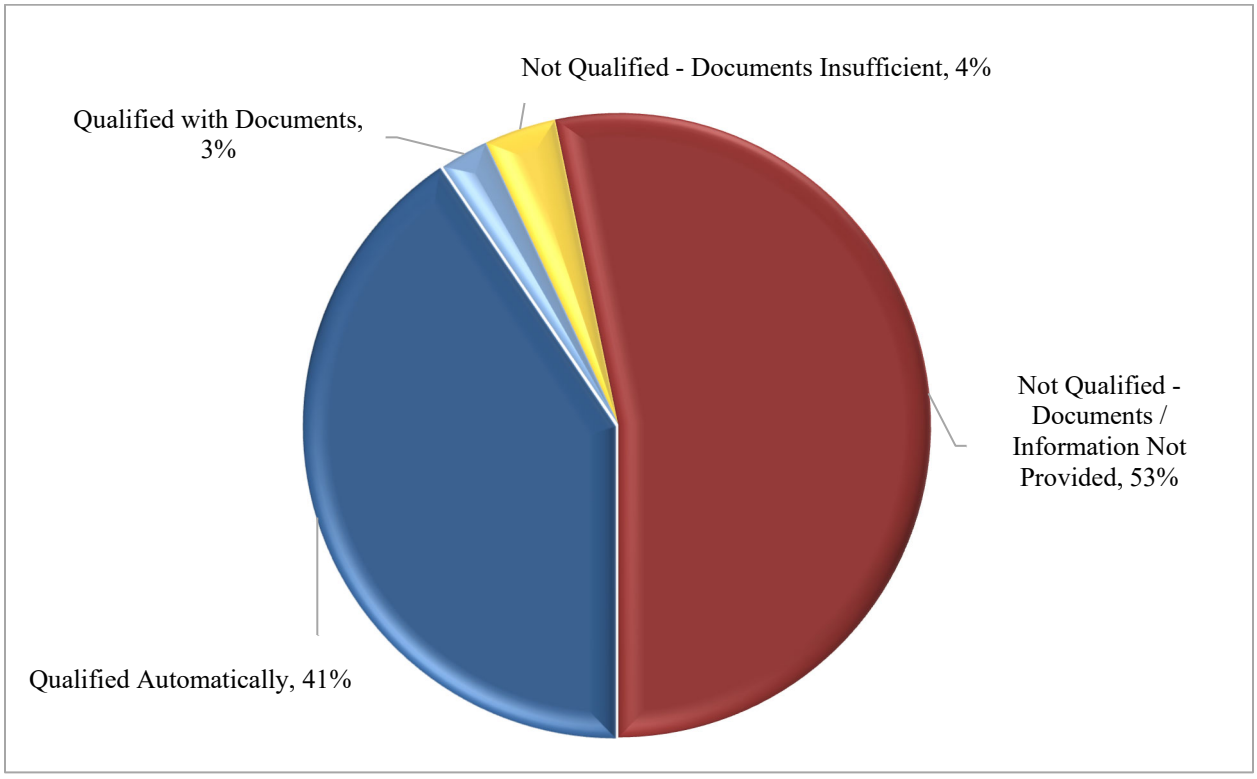
Year	Lifeline Enrollment	Eligible Households	Percent Participation
June 2022	300,285	1,590,216	18.88%
June 2023	300,229	1,658,694	18.10%
June 2024	212,244	1,661,381	12.78%
June 2025	332,887	1,672,792	19.90%
June 2026	288,923	1,293,203	22.34%

Source: Florida DCF, Access Florida: Standard Data Tables

During the 2025–2026 reporting period, the number of Lifeline eligible households decreased by 379,589 as measured by SNAP eligibility.[47] Policy changes enacted from last year significantly reduced the number of Florida household eligible for food assistance.[48] While the number of eligible households decreased by 22 percent, the Lifeline participation rate increased by almost 3 percent over the last reporting period.

During the 2025–2026 reporting period, the National Verifier received 929,199 applications from Florida.[49] Figure 5 illustrates that 44 percent of all applications qualified for Lifeline. Most of these applications, 41 percent, were approved by USAC automatically by verifying consumers eligibility through databases of qualifying programs. In Florida, these databases include those managed by DCF and other federal agencies. Among the 57 percent of applications that were not approved, 53 percent did not provide needed documents or information to support their applications within 45 days.

Figure 5
National Verifier Qualification Results in Florida



Source: USAC Lifeline Program Data (2025-2026 reporting period)

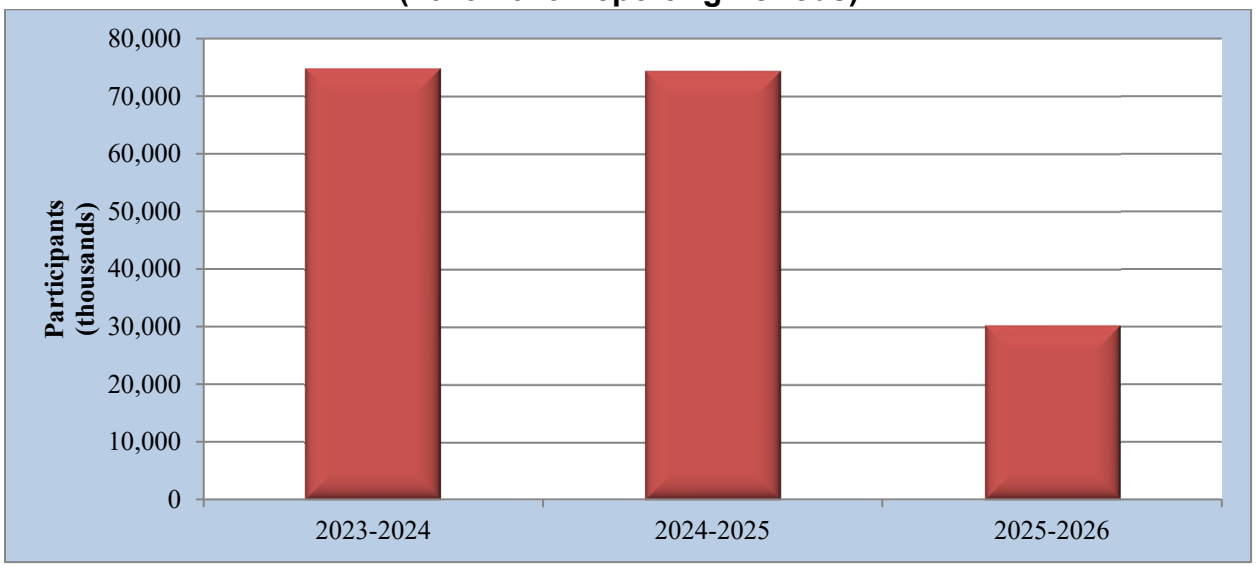
[47] Florida DCF, Access Florida: Standard Data Reports by Caseload, https://www.myflfamilies.com/services/public-assistance/additional-resources-and-services/ess-standard, accessed on September 2, 2026.
[48] Specific changes include: expanding work mandates, narrowing dependent exemptions, eliminating automatic protections for various groups, and restrictions on immigrant participation. Budget Reconciliation Act of 2025.
[49] USAC, Program Data, https://www.usac.org/lifeline/resources/program-data/, accessed on September 9, 2026.

B. Transitional Lifeline

Transitioning from the Lifeline program usually occurs when a customer's socio-economic status has improved, thus advancing them beyond the qualifying eligibility criteria. As required by Section 364.105, F.S., customers who no longer qualify for Lifeline are eligible to receive a 30 percent discount on the residential basic local service rate for one year. For example, a former Lifeline customer with a $25 phone bill would receive a $7.50 monthly discount for one year.

Figure 65 represents the average monthly number of Transitional Lifeline customers of Florida ETCs. During the reporting period, the average number of monthly customers receiving the Transitional Lifeline benefit was 30,309, which represents a significant decrease over the previous period.

Figure 6
Average Monthly Transitional Lifeline Participants
(2023-2026 Reporting Periods)



Source: Industry Responses to FPSC Data Requests (2023-2026)

Rather than offer a transitional discount, to comply with Section 364.105, F.S., Verizon Value offers its former Lifeline customers a 30 percent discount on the customer's chosen prepaid wireless service rates for at least one-year after termination of their Lifeline benefits. Verizon Value does not track Transitional Lifeline customers participating in this manner and, therefore, is not included in Figure 6.

Appendix A
2026 Federal Poverty Guidelines (FPG)

Persons in Family/Household	Annual Income at FPG	Annual Income at 135% of FPG	Monthly Income at 135% of FPG
1	$15,960	$21,546	$1,795.50
2	21,640	29,214	2,434.50
3	27,320	36,882	3,073.50
4	33,000	44,550	3,712.50
5	38,680	52,218	4,351.50
6	44,360	59,886	4,990.50
7	50,040	67,554	5,629.50
8	55,720	75,222	6,268.50

Source: Department of Health and Human Services, Annual Update of the Department of Health and Human Service Poverty Guidelines. Federal Register Notice, released January 17, 2025, https://www.federalregister.gov/documents/2026/01/15/2026-00755/annual-update-of-the-hhs-poverty-guidelines, accessed on September 3, 2026.

Appendix B
Agency, Organization, and Business Lifeline Partners

Florida Lifeline Partners	
1000 Friends of Florida, Inc.	Coalition of Florida Farmworker Organizations, Inc.
A Caring Hand Home Care	Communities In Schools Foster Grandparent Program
AARP–Florida Chapter	Florida Lifeline Partners
Ability Housing of Northeast Florida	Community Action Program Committee, Inc.
ACCESS Florida Community Network Partners	Community Legal Services
Advance Senior Solutions, Inc.	Communities In Schools Foster Grandparent Program
Agency for Health Care Administration	Community Legal Services
Agency for Persons with Disabilities	Community Partnership Group
Aging & Disability Resource Center of Broward Co.	Corporation to Develop Communities of Tampa, Inc.
Aging Matters in Brevard County	Deaf and Hard of Hearing Services of Florida, Inc.
Aging True Community Senior Services	Deaf & Hard of Hearing Services of NW Florida, Inc.
Aging With Dignity	Disability Rights Florida
Aging Solutions, Inc.	Elder Options
Alliance for Aging, Inc.	Elder Source
America's Second Harvest of the Big Bend, Inc.	Faith Radio Station and other Florida radio stations
Area Agencies on Aging	Federal Social Security Admin - Tallahassee District
ASPIRE Health Partners	Feeding South Florida
Big Bend 2-1-1 and other 2-1-1 Agencies	First Quality Home Care
Boley Centers, Inc.	Florida Alliance for Information and Referral Services
Braille and Talking Book Library	Florida Assisted Living Association
Brain Injury Association of Florida, Inc.	Florida Association for Community Action
Bridges at Riviera Beach	Florida Association of Community Health Centers
Bridgeway Center, Inc.	Florida Association of Counties
Broward County Elderly & Veterans Services Division	Florida Association of County Human Service Admin
Bureau of Indian Affairs Programs	Florida Association of the Deaf, Inc.
Capital Area Community Action Agency, Inc.	Florida Association of Food Banks
CARES of Florida	Florida Association of Housing & Redevelopment Ofcl.
Carrfour Supportive Housing	Florida Coalition for Children
Catholic Charities of Central Florida	Florida Coalition for the Homeless
Center for Hearing and Communication	Florida Council on Aging
Centers for Drug Free Living	Florida Deaf Services Centers Association
Centers for Independent Living	Florida Department of Business & Professional Reg.
Central Florida Community Action Agency	Florida Department of Children and Families
City and County Consumer Assistance Departments	Florida Department of Economic Opportunity
City and County Consumer Assistance Departments	Florida Department of Education
City and County Housing Authorities	Florida Department of Elder Affairs
City and County Social Programs	Florida Department of Revenue

Florida Lifeline Partners (continued)	
Florida Department of Veterans' Affairs	Monroe County Community Support Services
Florida Elder Care Services	Monroe County Social Services
Florida Highway Safety and Motor Vehicles	NAACP (Florida Associations)
Florida Hospital Association	National Church Residences
Florida Housing Authorities	North Miami Foundation for Senior Citizens' Ser., Inc.
Florida Housing Coalition	Nursing Homes Administrators
Florida Housing Finance Corporation	Nu-Hope of Highlands County
Florida League of Cities, Inc.	One-Stop Career Centers
Florida Low Income Housing Associates	Osceola County Corrections Department
Florida Nurses Association	Palm Beach Community Action Agency
Florida Office of Public Counsel	Refuge House of the Big Bend
Florida Ombudsman Program	Second Harvest of the Big Bend
Florida Public Libraries	Seminole County Community Development
Florida Public School Districts	Senior Connection Center, Inc.
Florida Rural Legal Services, Inc.	Senior Friendship Centers
Florida Schools for the Deaf and Blind	Senior Medicare Patrol
Florida Senior Medicare Patrol	Senior Resource Alliance
Florida Senior Program	Senior Solutions
Florida Telecommunications Relay, Inc.	Seniors First
Florida Voters League	SHINE Program
Gateway Community Outreach	South East American Council, Inc.
Good News Outreach	Suwannee River Economic Council
Goodwill Industries of Central Florida	Tallahassee Memorial Hospital
Habitat for Humanity – Florida	Tallahassee Urban League
HANDS of Central Florida	Tampa Vet Center
Hemophilia Foundation of Greater Florida	The Shepherd's Center of Orange Park
Hillsborough County Community Action Program	Three Rivers Legal Services, Inc.
Hispanic Office for Local Assistance	U.S. Department of Housing and Urban Development
HOPE Community Center	United Home Care Services
HOPE Connection	United Way of Florida
HOPE Partnership	Urban Jacksonville
League for the Hard of Hearing	Urban Leagues of Florida
Leon County School Board	Volusia County Community Services
Little Havana Activities and Nutrition Centers	Wakulla County Senior Citizens Council
Living Stones Native Circle	Walton County Council on Aging
Marion Senior Services	Washington County Council on Aging
Miccosukee Tribe of Indians of Florida	We Care-Jacksonville
Mid-Florida Housing Partnership, Inc.	

Appendix C
Wireless Lifeline Providers and Networks Used

ETC	Network(s) Used
Air Voice Wireless	AT&T
American Broadband and Telecom.	T-Mobile
Amerimex Comm.	AT&T and T-Mobile
Assurance Wireless	T-Mobile
Boomerang Wireless	T-Mobile
DISH Wireless	AT&T and T-Mobile
Global Connection	T-Mobile
i-Wireless	T-Mobile
TAG Mobility	AT&T
Telrite Corp.	AT&T
TruConnect Comm.	T-Mobile and Verizon
Verizon Value f/k/a TracFone	Verizon

Appendix D
Lifeline Enrollment and Year-to-Year Growth Rate

Technology	ETC (Parent)	June 2023	June 2024	2024 Growth Rate	June 2025	2025 Growth Rate	June 2026	2026 Growth Rate
Wireless	Air Voice Wireless (HTH Communications)	N/A	N/A	N/A	53,699	N/A	70,459	31%
	American Broadband & Telecommunications	N/A	N/A	N/A	3,746	N/A	4,192	12%
	Amerimex Comm.	N/A	N/A	N/A	733	N/A	92	-87%
	Assurance Wireless (T Mobile)	169,309	116,807	-31%	78,349	-33%	52,253	-33%
	Boomerang Wireless	N/A	N/A	N/A	0	N/A	35	N/A
	DISH Wireless	N/A	N/A	N/A	25,140	N/A	28,693	14%
	Florida TerraCom	N/A	N/A	N/A	0	0%	0	N/A
	Global Connection	N/A	N/A	N/A	78,682	N/A	20,269	-74%
	IM Telecom	N/A	N/A	N/A	0	N/A	0	N/A
	i-Wireless	2,271	2,705	19%	2,232	-17%	1,716	-23%
	TAG Mobility (HTH Communications)	N/A	N/A	N/A	9,158	N/A	44,216	383%
	Telrite Corp.	N/A	N//A	N/A	5,393	N/A	1,201	-78%
	TruConnect Comm.	N/A	N/A	N/A	8,013	N/A	14,053	75%
	Verizon Value f/k/a TracFone	123,926	89,548	-28%	65,266	-27%.	49,297	-24%

Source: FPSC Data Requests
Brand names used by wireless ETCs can be located in Chapter III.

Lifeline Enrollment and Year-to-Year Growth Rate (continued)

Technology	ETC (Parent)	June 2023	June 2024	2024 Growth Rate	June 2025	2025 Growth Rate	June 2026	2026 Growth Rate
Wireline	Bright House Networks / Spectrum (Charter)	0	0	N/A	1	N/A	6	500%
	CenturyLink (Lumen)	1,844	1,259	-32%	822	-35%	508	-38%
	Conexon Connect	0*	18	100%	65	261%	123	89%
	Consolidated Comm.	163	121	-26%	69	-43%	50	-28%
	Frontier Florida (Verizon)	1,102	592	-46%	751	27%	831	11%
	Frontier of the South* (Verizon)	32	18	-44%	9	-50%	10	11%
	Integrated Path Comm.	N/A	N/A	N/A	0	N/A	299	N/A
	ITS Fiber / Blue Stream Fiber	54	37	-31%	17	-54%	12	-29%
	Knology / WOW!	43	71	65%	79	11%	80	1%
	NEFCOM	131	109	-17%	85	-22%	66	-22%
	Phone Club	138	95	-31%	48	-49%	34	-29%
	Quincy Telephone / TDS Telecom	68	51	-25%	33	-35%	25	-24%
	Smart City	6	2	-67%	2	0%	1	-50%
	Windstream / Kenetic	1,142	810	-29%	494	-39%	401	-19%
Satellite	Viasat	0	0	N/A	1	N/A	1	0%
Fixed Wireless	Mediacom	N/A	0	N/A	0	N/A	0	N/A
Total		300,299	212,243	-29%	332,887	57%	288,923	-13%

Source: FPSC Lifeline Data Request

*Frontier of the South has relinquished its ETC designation.

Appendix E
Lifeline Subscription by Service Type (June 2025)

Technology	ETC (Parent)	Voice	Broadband	Bundled
Wireless	Air Voice Wireless (HTH Communications)	0%	0%	100%
	American Broadband & Telecom.	0%	0%	100%
	Amerimex Comm.	0%	20%	80%
	Assurance Wireless (T-Mobile)	0%	0%	100%
	Boomerang Wireless	0%	0%	100%
	DISH Wireless	0%	0%	100%
	Florida TerraCom*	0%	0%	0%
	Global Connection	0%	0%	100%
	IM Telecom*	0%	0%	0%
	i-Wireless	0%	0%	100%
	TAG Mobility (HTH Communications)	0%	0%	100%
	Telrite Corp.	0%	0%	100%
	TruConnect	0%	0%	100%
	Verizon Value f/k/a TracFone	0%	0%	100%

Source: FPSC Lifeline Data Request *Not currently offering Lifeline

Brand names used by wireless ETCs can be located in Chapter III.

Lifeline Subscription by Service Type (continued)

Technology	ETC (Parent)	Voice	Broadband	Bundled
Wireline	Bright House Networks / Spectrum (Charter)	0%	83%	17%
	CenturyLink (Lumen)	83%	9%	8%
	Conexon Connect	0%	93%	7%
	Consolidated Comm.	66%	6%	28%
	Frontier Florida	15%	73%	12%
	Frontier of the South*	40%	50%	10%
	Integrated Path Comm.	8%	25%	67%
	ITS Fiber / Blue Stream Fiber	8%	25	67%
	Knology /WOW!	0%	86%	14%
	NEFCOM	23	4	73%
	Phone Club	100%	0%	0%
	Quincy Telephone / TDS Telecom	20%	0%	80%
	Smart City	0%	100%	0%
	Windstream / Kenetic	7%	28%	65%
Satellite	Viasat	0%	100%	0%
Fixed Wireless	Mediacom	0%	0%	0%
Total		0.23%	0.33%	99.44%

Source: FPSC Lifeline Data Request

*Frontier of the South has relinquished its ETC designation.

Attachment 2

State of Florida

Public Service Commission

CAPITAL CIRCLE OFFICE CENTER ● 2540 SHUMARD OAK BOULEVARD
TALLAHASSEE, FLORIDA 32399-0850

-M-E-M-O-R-A-N-D-U-M-

DATE: November 8, 2026

TO: Braulio L. Baez, Executive Director

FROM: Office of Industry Development & Market Analysis (Long) CH

RE: Draft of the 2026 Regulatory Assessment Fee Report

CRITICAL INFORMATION: ACTION IS NEEDED - Please place on the November 17, 2026 Internal Affairs. Commission approval of draft report is sought. The 2025 Report is due to the Governor, the President of the Senate, and the Speaker of the House of Representatives, by January 15, 2027.

Pursuant to Section 364.336(3), Florida Statutes, the Commission must annually report to the Governor, the President of the Senate, and the Speaker of the House of Representatives, providing a detailed description of its efforts to reduce the regulatory assessment fee for telecommunications companies, including a detailed description of the regulatory activities that are no longer required; the commensurate reduction in costs associated with this reduction in regulation; the regulatory activities that continue to be required under this chapter; and the costs associated with those regulatory activities. The report is due by January 15, 2027.

The draft report includes a staff-written synopsis of what actions the Commission has taken to comply with the statutory requirements. Staff is requesting approval of the draft report.

Attachment

cc: Mark Futrell, Deputy Executive Director, Technical
Apryl Lynn, Deputy Executive Director, Administrative

DRAFT

REPORT ON THE EFFORTS OF THE FLORIDA PUBLIC SERVICE COMMISSION TO REDUCE THE REGULATORY ASSESSMENT FEE FOR TELECOMMUNICATIONS COMPANIES

As of December 2026

REPORT ON THE EFFORTS OF THE FLORIDA PUBLIC SERVICE COMMISSION TO REDUCE THE REGULATORY ASSESSMENT FEE FOR TELECOMMUNICATIONS COMPANIES

As of December 2026

Office of Industry Development and Market Analysis

Introduction

During the 2011 Legislative Session, House Bill CS/CS/HB 1231, the "Regulatory Reform Act" (Act), was passed and signed into law by the Governor, effective July 1, 2011. Under the Act, the Legislature eliminated most of the Florida Public Service Commission's (FPSC's or Commission's) retail oversight authority for the telecommunications wireline companies, yet maintained the FPSC's authority over wholesale intercarrier issues. The FPSC was required to reduce its regulatory assessment fees (RAFs) charged to wireline telecommunications companies to reflect the concurrent reduction in FPSC workload. Section 364.336(3), Florida Statutes, requires:

> By January 15, 2012, and annually thereafter, the commission must report to the Governor, the President of the Senate, and the Speaker of the House of Representatives, providing a detailed description of its efforts to reduce the regulatory assessment fee for telecommunications companies, including a detailed description of the regulatory activities that are no longer required; the commensurate reduction in costs associated with this reduction in regulation; the regulatory activities that continue to be required under this chapter; and the costs associated with those regulatory activities.

As a result of this Act, the FPSC reduced its RAF rates 20%, from 0.0020 to 0.0016 of companies' gross operating revenues derived from intrastate business. This change became retroactively effective July 1, 2011. Florida telecommunications statutes have remained essentially unchanged since 2011. The FPSC has introduced numerous measures to streamline its telecommunications-related activities since that time, and continues to look for ways to streamline its remaining responsibilities.

Regulatory Activities That Are No Longer Required

The Act eliminated most of the retail regulation of local exchange telecommunications services by the FPSC, including the elimination of rate caps on all retail telecommunications services, elimination of telecommunications-related consumer protection and assistance duties of the FPSC, and elimination of the FPSC's remaining oversight of telecommunications service quality. The Act also reformed the FPSC's certification processes, authority over intercarrier matters, and other general revisions.

Consistent with the reduced authority of the FPSC from the Act, the FPSC ceased the following activities:

- Resolving non-basic retail consumer billing complaints.

- Addressing slamming or cramming complaints from consumers. The FPSC continues to address slamming complaints that are reported by carriers under the Commission's wholesale authority.

- Publishing and distributing materials informing consumers on billing-related matters or informative materials relating to the competitive telecommunications market.

- Designating wireless eligible telecommunications carriers (ETCs) in Florida for the federal universal service fund. Any wireless carrier seeking ETC status in Florida would now have to petition the Federal Communications Commission (FCC) for that authority.

- Performing service evaluations on carriers or investigating and resolving service-related consumer complaints, except as they may relate to Lifeline service, Telephone Relay Service, and payphones.

- Allowing incumbent local exchange carriers (ILECs) to petition for recovery of storm-damage-related costs and expenses.

- Reviewing non-access service tariff filings for content, form, or format. It is the carrier's choice whether to file its rate schedules with the FPSC or publicly publish the schedules elsewhere, such as the companies' websites.

Regulatory Activities That Continue To Be Required

The FPSC regulates 283 telecommunications companies in some way as of October 13, 2025. Following the Act, the Commission retained authority and responsibility in the following areas for telecommunications companies:

- Resolving intercarrier disputes involving interpretations and implementation of sections of the intercarrier agreements.

- Processing arbitrations of intercarrier agreements when the companies cannot negotiate all the terms of the agreement and request the FPSC to resolve issues the companies define.

- Reviewing interconnection agreements filed with the FPSC in accordance with federal requirements.

- Resolving cases involving area code relief, number conservation plans, number resource reclamation, local number portability, and other numbering issues.

- Analyzing information for and producing several statutorily required reports: the *Annual Report on* the *Status of the Telecommunications Access System Act of 1991*, the *Annual Report on Lifeline Assistance*, the *Report on the Status of Competition in the Telecommunications Industry*, and the following *Report on the Efforts of the Florida Public Service Commission to Reduce the Regulatory Assessment Fee for Telecommunications Companies.*

- Maintaining oversight of the Florida Telecommunications Relay Service.
- Maintaining oversight of the Lifeline Program and monitoring ETCs.
- Issuing certificates of authority for telecommunications companies to operate in Florida, including evaluating the applicant's technical, financial, and managerial capability to provide service.
- Resolving consumer complaints relating to Lifeline, Relay Service, and payphones.
- Publishing network access tariff information for all incumbent local carriers.
- Publishing other tariff/rate schedule information for any certificated company if the company so decides.
- Publishing and distributing informative materials relating to the Lifeline Program and conducting related consumer outreach.
- Monitoring and/or participating in federal proceedings where the state's consumers may be affected and conveying the FPSC's policy positions.

New Regulatory Activities

During the 2021 Legislative Session, Senate Bill CS/SB 1944 was passed and signed into law by the Governor, effective July 1, 2021. The bill created Section 366.94(8), F.S., requiring the FPSC to regulate and enforce rates, charges, terms, and conditions for pole attachments, which were regulated by the FCC at the time. Section 366.02(7), F.S., defines "pole attachment" as "any attachment by a public utility, local exchange carrier, communications services provider, broadband provider, or cable television operator to a pole, duct, conduit, or right-of-way owned or controlled by a pole owner." Pursuant to Section 366.94(8)(e), F.S., the Commission shall hear and resolve complaints concerning rates, charges, terms, conditions, voluntary agreements, or any denial of access relative to pole attachments. Such complaints will likely involve local exchange carriers and other communications services providers. The Commission adopted procedural rules to implement this new authority on June 8, 2022. The Commission subsequently certified to the FCC pursuant to 47 U.S.C. § 224(c)(2) that the Commission now regulates the rates, terms, and conditions of pole attachments in Florida.

Senate Bill CS/SB 1944 also created Section 366.94(9), F.S., requiring the FPSC to regulate the safety, vegetation management, repair, replacement, maintenance, relocation, emergency response, and storm restoration requirements for certain poles owned by communications services providers. The Commission adopted rules to implement this new authority on May 1,

2022. Sections 366.94(8) and (9), F.S., represent an expansion of the FPSC's regulation of telecommunications companies in Florida.

During the 2024 Legislative Session, Senate Bill CS/SB 478 was passed and signed into law by the Governor, effective April 15, 2024. The bill amended Section 364.10, F.S., expanding the FPSC's jurisdiction specifically to grant ETC designation to wireless carriers for the purpose of providing Lifeline service.

Savings

The FPSC has been pursuing cost savings and efforts to streamline regulatory processes for well over a decade. The origin of these streamlining efforts is not limited to the emergence and evolution of competition in the telecommunications industry. In fiscal year 1999/2000, the FPSC had 401 full time positions. That number was reduced over the years, leading to a total of 264 full time positions for the 2026/2027 fiscal year, a total reduction of approximately 34 percent. Many of these reductions came as a result of projected workload reductions in the telecommunications area.

As previously discussed, effective July 2011, the FPSC reduced the telecommunications RAF rate from 0.0020 to 0.0016 of the gross operating revenues derived from intrastate business. In addition, all local telephone service providers now pay $600 as the minimum fee instead of varying rates based upon the service offered.[1] At the current 0.0016 rate, carriers will pay this minimum fee up to $375,000 in gross intrastate operating revenues. The reduced RAF rate was determined assuming reduced responsibilities, projecting staff hours on continuing telecommunications workload, and projecting telecommunications company revenues. As they have for several years, revenues subject to RAFs from telecommunications companies regulated by the FPSC continued to decline in 2026 as traditional wireline revenues are replaced by unregulated (VoIP/broadband) services.

Efforts to Reduce Costs

As previously stated, the FPSC has a long history of seeking cost savings and streamlining regulatory processes. With specific regard to the implementation of the Act, the FPSC initially undertook three new processes. First was the RAF rate reduction previously discussed. Second, the FPSC assessed the number of staff equivalents required to perform the duties associated with the deregulation measures in the Act. Based upon time sheet information, twelve positions were eliminated effective July 1, 2011. These positions reflected the elimination of service requirements, processing of most telecommunications customer complaints, long distance carrier activities, a reduction in price schedule maintenance, and a reduction in consumer information and outreach.

[1] Previously, the minimum fee ranged from $600 to $1,000, depending on the type of service offered. Payphone operators continue to pay a minimum fee of $100.

Third, the FPSC retained the National Regulatory Research Institute (NRRI) in May 2011, to review the FPSC's organization structure and work flow processes to determine if the FPSC should implement any additional changes in the telecommunications area. NRRI reviewed the agency operating procedures, organizational charts, and workload. Key telecommunications staff were interviewed and most telecommunications direct staff were given a survey to complete. NRRI studied the Act and the resulting changes to the FPSC's responsibility. The telecommunications-direct staff of the FPSC was then compared to that of other states with respect to statutory authority and number of technical staff assigned. NRRI concluded that the structure of the FPSC's telecommunications group was appropriate and compared favorably to those in other states.

NRRI found that the size of the telecommunications group was correct, but made a few suggestions where the FPSC could add more streamlining or cost reduction measures. The FPSC implemented NRRI's recommendations, including:

- The FPSC further shifted responsibilities to the administrative staff for the competition report's document control and relay data collection functions.

- The FPSC simplified the review process, analysis of data, and reduced the length of the competition report.

- The FPSC encouraged and trained companies to submit tariffs and service schedules online.

In subsequent years, the FPSC has implemented many additional efficiency measures. In 2011, the FPSC had 115 telecommunications-related rules. Through consolidation, revision, and elimination, there are now 22 active telecommunications-related rules.

In 2013, the FPSC implemented agency-wide electronic filing and submission policies that will substantially reduce the number of paper documents at the agency. Coincidentally with the agency-wide policy, the telecommunications group began updating its online tariff filing procedures and converting its existing tariff documents to digital format. All official copies of telecommunications tariffs, price lists, and service schedules are now available on the agency's website, as are all tariff updates. This development allows greater access to both consumers and companies, and reduces costs associated with record requests. Additionally, the FPSC continues the process of eliminating all obsolete or redundant paper archives of companies' rates and schedules.

Additionally, the telecommunications staff has become very flexible and able to perform a wide variety of functions. It has conducted periodic internal cross training on its remaining responsibilities, through both scheduled office-wide training sessions and temporary transfers of job duties. It has also developed comprehensive written Standard Operating Procedures for its functions. As staff become familiar with each other's duties, the requisite training time will be reduced should the need arise to further consolidate or transfer functions.

During 2012, the technical staff responsible for continuing statutory mandates were consolidated and established as a stand-alone unit within the agency to maximize efficiency and minimize supervisory needs. Then, in 2017, as further efficiency measures and staff changes were implemented, the FPSC merged its telecommunications staff with another office to streamline its processes further. Some administrative and management functions were consolidated, creating more savings for the agency. Other efficiency-related activity has included the transfer of call testing for Relay Service from FPSC staff to the relay provider, streamlined telecommunications certification and certificate transfer processes, and further transfers of duties to administrative staff.

In fulfilling its remaining telecommunications regulatory responsibilities, the Commission continually seeks to increase efficiency and cost savings. For example, the Lifeline Promotion Process connects customers who apply for assistance programs with the Florida Department of Children and Families (DCF), which make the customer eligible for Lifeline with ETCs that can provide the Lifeline discount. When that process does not result in a connection, FPSC staff sends the customer instructions on how to apply for Lifeline using the National Verifier. Between January and November 2025, the FPSC sent 14,113 such letters to eligible households. In comparison, during the same period in 2024, the FPSC mailed 53,807 letters, with a total of 59,353 sent throughout last year. This significant decrease is attributed to FPSC staff working with ETCs to assume more responsibility for sending letters to prospective customers, and working with DCF to update its list of companies offering Lifeline for applicants to select. These changes are estimated to have saved the agency approximately $30 thousand in 2025.

Summary

The FPSC has proactively responded to the changes in its statutory authority as a result of the Act. The agency has assessed the appropriate staffing levels for the telecommunications staff, and will continue to monitor the workload and staffing needs. The FPSC hired NRRI in 2011 to audit the FPSC's telecommunications program to determine if additional changes needed to be made. The audit results reflected favorably upon the program, and the FPSC has implemented NRRI's suggestions. The FPSC has reviewed its telecommunications rules and eliminated unnecessary or obsolete regulations. The agency continues to seek ways to economize its resources while maintaining a high quality work product for all industries under the FPSC's authority, including telecommunications.

Attachment 3

State of Florida

Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD
TALLAHASSEE, FLORIDA 32399-0850

-M-E-M-O-R-A-N-D-U-M-

DATE: November 4, 2026

TO: Braulio L. Baez, Executive Director

FROM: Segundo Sanchez, Engineering Specialist II, Division of Engineering SS MR
Phillip O. Ellis, Public Utilities Supervisor, Division of Engineering POE LK

RE: Draft Review of the 2026 Ten-Year Site Plans of Florida's Electric Utilities

CRITICAL INFORMATION: Place on November 17, 2026 Internal Affairs Agenda. Approval by the Commission is required by December 31, 2026.

Pursuant to Section 186.801, Florida Statues, electric utilities are required to submit to the Commission a Ten-Year Site Plan which shall estimate a utility's power-generating needs and the general location of its proposed power plant sites. The Commission is required to make a preliminary study of each plan and classify it as "suitable" or "unsuitable" within nine months after receipt of the proposed plan. Electric utility plans were filed on April 1, 2026. Staff seeks approval of the attached draft report that includes a statewide assessment, and an analysis and recommended classification of each plan.

Please contact me or Phillip Ellis if you have any questions or need additional information in reference to the attached document.

SS:pz

Attachment

cc: Adria E. Harper, General Counsel
Mark Futrell, Deputy Executive Director – Technical
Apryl McKinnon, Deputy Executive Director – Administrative

REVIEW OF THE

2026 TEN-YEAR SITE PLANS

OF FLORIDA'S ELECTRIC UTILITIES

FINAL DRAFT 11/04/26

FLORIDA PUBLIC SERVICE COMMISSION

NOVEMBER 2026

Table of Contents

List of Figures ..... **iii**
List of Tables ..... **v**
List of TYSP Utilities vii
Unit Type, Fuel, and Other Abbreviations vii
Executive Summary **1**
Review of the 2026 TYSPs 2
Conclusion 8
Introduction **9**
Statutory Authority 9
Structure of the Commission's Review 10
Conclusion 11
Statewide Perspective **13**
Load Forecasting **15**
Electric Customer Composition 15
Growth Projections 15
Peak Demand 17
Electric Vehicles 19
Data Centers 20
Demand-Side Renewables 21
Forecast Methodology 22
Accuracy of Retail Energy Sales Forecast 23
Load Management 26
Forecast Load & Peak Demand 27
Generation Resources **31**
Generation by Type 31
Renewables 31
Nuclear 35
Fossil Fuels 35
Energy Storage 36
Fuel Diversity 37
Modernizations and Improvements 39
Impact of State and Federal Regulations 40
Projected Generation Resources 40
Power Plant Siting Act 41
Transmission 42
Reliability 44

Utility Perspectives..... 49
Florida Power & Light Company (FPL)..... 51
Duke Energy Florida, LLC (DEF)..... 59
Tampa Electric Company (TECO)..... 67
Florida Municipal Power Agency (FMPA)..... 73
Gainesville Regional Utilities (GRU)..... 79
JEA..... 85
Lakeland Electric (LAK)..... 91
Orlando Utilities Commission (OUC)..... 97
Seminole Electric Cooperative (SEC)..... 103
City of Tallahassee Utilities (TAL)..... 109

List of Figures

Figure 1: State of Florida - Growth in Customers and Sales 3
Figure 2: State of Florida - Current and Projected Installed Capacity 4
Figure 3: State of Florida - Electricity Generation Sources 5
Figure 4: State of Florida - Projected Reserve Margin by Season 8
Figure 5: TYSP Utilities - Comparison of Reporting Electric Utility Sales 10
Figure 6: State of Florida - Electric Customer Composition in 2025 15
Figure 7: State of Florida - Growth in Customers and Sales 16
Figure 8: TYSP Utilities - Example Daily Load Curves 18
Figure 9: TYSP Utilities - Daily Peak Demand (2025 Actual) 19
Figure 10: State of Florida - Historic & Forecast Seasonal Peak Demand & Annual Energy 28
Figure 11: State of Florida - Current and Projected Renewables 32
Figure 12: TYSP Utilities - Planned Solar Installations 33
Figure 13: FPL - 2024 Summer Peak Day Hourly Dispatch 34
Figure 14: State of Florida - Electric Utility Installed Traditional Capacity by Decade 36
Figure 15: State of Florida - Natural Gas Generation 37
Figure 16: State of Florida - Historic and Forecast Generation by Fuel Type 38
Figure 17: TYSP Utilities - Weighted Average Fuel Price of Reporting Electric Utilities 39
Figure 18: State of Florida - Current and Projected Installed Capacity 41
Figure 19: State of Florida - Projected Reserve Margin by Season 45
Figure 20: State of Florida - Projected Summer Reserve Margin without Solar 46
Figure 21: FPL Growth 51
Figure 22: FPL Demand and Energy Forecasts 54
Figure 23: FPL Reserve Margin Forecast 58
Figure 24: DEF Growth 59
Figure 25: DEF Demand and Energy Forecasts 61
Figure 26: DEF Reserve Margin Forecast 65
Figure 27: TECO Growth 67
Figure 28: TECO Demand and Energy Forecasts 69
Figure 29: TECO Reserve Margin Forecast 72
Figure 30: FMPA Growth 73
Figure 31: FMPA Demand and Energy Forecasts 75
Figure 32: FMPA Reserve Margin Forecast 77
Figure 33: GRU Growth 79
Figure 34: GRU Demand and Energy Forecasts 81
Figure 35: GRU Reserve Margin Forecast 84
Figure 36: JEA Growth 85
Figure 37: JEA Demand and Energy Forecasts 87
Figure 38: JEA Reserve Margin Forecast 90
Figure 39: LAK Growth 91
Figure 40: LAK Demand and Energy Forecasts 93
Figure 41: LAK Reserve Margin Forecast 95
Figure 42: OUC Growth 97
Figure 43: OUC Demand and Energy Forecasts 99
Figure 44: OUC Reserve Margin Forecast 101
Figure 45: SEC Growth 103

Figure 46: SEC Demand and Energy Forecasts 105
Figure 47: SEC Reserve Margin Forecast 108
Figure 48: TAL Growth 109
Figure 49: TAL Demand and Energy Forecasts 111
Figure 50: TAL Reserve Margin Forecast 113

List of Tables

Table 1: TYSP Utilities - Electric Vehicle Projections 20
Table 2: TYSP Utilities - Projected Large Load Data Centers and System Impacts..... 21
Table 3: State of Florida – Demand-Side Renewable Growth 22
Table 4: TYSP Utilities - Accuracy of Retail Energy Sales Forecasts 24
Table 5: TYSP Utilities - Accuracy of Retail Energy Sales Forecasts - Annual Analysis..... 25
Table 6: State of Florida - Renewable Energy Generation 32
Table 7: TYSP Utilities - New Gas Generation and Power Plant Siting Act Requirements 42
Table 8: State of Florida - Planned Transmission Lines..... 44
Table 9: FRCC Loss of Load Probability Study Results 47
Table 10: FPL's Projected Large Load Data Centers 53
Table 11: FPL Generation Resource Changes 56
Table 12: FPL Energy Generation by Fuel Type..... 57
Table 13: DEF Generation Resource Changes 63
Table 14: DEF Energy Generation by Fuel Type 64
Table 15: TECO Generation Resource Changes 70
Table 16: TECO Energy Generation by Fuel Type 71
Table 17: FMPA Energy Generation by Fuel Type..... 76
Table 18: GRU Generation Resource Changes 82
Table 19: GRU Energy Generation by Fuel Type 83
Table 20: JEA Generation Resource Changes 88
Table 21: JEA Energy Generation by Fuel Type..... 89
Table 22: LAK Energy Generation by Fuel Type 94
Table 23: OUC Energy Generation by Fuel Type 100
Table 24: SEC Generation Resource Changes..... 106
Table 25: SEC Energy Generation by Fuel Type 107
Table 26: TAL Energy Generation by Fuel Type..... 112

List of TYSP Utilities

Name	Abbreviation
Investor-Owned Electric Utilities	
Florida Power & Light Company	FPL
Duke Energy Florida, LLC	DEF
Tampa Electric Company	TECO
Municipal Electric Utilities	
Florida Municipal Power Agency	FMPA
Gainesville Regional Utilities	GRU
JEA	JEA
Lakeland Electric	LAK
Orlando Utilities Commission	OUC
City of Tallahassee Utilities	TAL
Rural Electric Cooperatives	
Seminole Electric Cooperative	SEC

Unit Type, Fuel, and Other Abbreviations

Reference	Name	Abbreviation
Unit Type	Battery Storage	BAT
	Combined Cycle	CC
	Combustion Turbine	CT
	Hydroelectric	HY
	Internal Combustion	IC
	Photovoltaic	PV
	Steam Turbine	ST
Fuel Type	Bituminous Coal	BIT
	Distillate Fuel Oil	DFO
	Landfill Gas	LFG
	Natural Gas	NG
	Nuclear	NUC
Other	Ten Year Site Plan	TYSP

Executive Summary

Integrated resource planning (IRP) is a utility process that includes a cost-effective combination of demand-side resources and supply-side resources. While each utility has slightly different approaches to IRP, some things are consistent across the industry. Each utility must update its load forecast assumptions based on Florida Public Service Commission (Commission) decisions in various dockets, such as demand-side management goals. Changes in government mandates, such as appliance efficiency standards, building codes, and environmental requirements must also be considered. Other updates involve input assumptions like demographics, financial parameters, generating unit operating characteristics, and fuel costs which are more fluid and do not require prior approval by the Commission. Each utility then conducts a reliability analysis to determine when resources may be needed to meet expected load. Next, an initial screening of demand-side and supply-side resources is performed to find candidates that meet the expected resource need. The demand-side and supply-side resources are combined in various scenarios to decide which combination meets the need most cost-effectively. After the completion of all these components, utility management reviews the results of the varying analyses and the utility's TYSP is produced as the culmination of the IRP process. Commission Rules also require the utilities to provide aggregate data which provides an overview of the State of Florida electric grid.

The Commission's annual review of utility TYSPs is non-binding in accordance with Section 186.801(2), Florida Statutes (F.S.), but it does provide state, regional, and local agencies advance notice of proposed power plants and transmission facilities. Any concerns identified during the review of the utilities' TYSPs may be addressed by the Commission at a formal public hearing, such as a power plant need determination proceeding. While Florida Statutes and Commission Rules do not specifically define IRP, they do provide a solid framework for flexible, cost-effective utility resource planning. In this way, the Commission fulfills its oversight and regulatory responsibilities while leaving day-to-day planning and operations to utility management.

Pursuant to Section 186.801, F.S., each generating electric utility must submit to the Commission a TYSP which estimates the utility's power generating needs and the general locations of its proposed power plant sites over a 10-year planning horizon. The TYSPs of Florida's electric utilities summarize the results of each utility's IRP process and identifies proposed power plants and transmission facilities. The Commission is required to perform a preliminary study of each plan and classify each one as either "suitable" or "unsuitable." This document represents the review of the 2026 TYSPs for Florida's electric utilities, as filed by 10 reporting utilities.[1]

All findings of the Commission are made available to the Florida Department of Environmental Protection for its consideration at any subsequent certification proceeding pursuant to the Florida

[1] Investor-owned utilities filing 2026 TYSPs include Florida Power & Light Company, Duke Energy Florida, LLC, and Tampa Electric Company. Municipal utilities filing 2026 TYSPs include Florida Municipal Power Agency, Gainesville Regional Utilities, JEA, Lakeland Electric, Orlando Utilities Commission, and City of Tallahassee Utilities. Seminole Electric Cooperative also filed a 2026 TYSP.

Electrical Power Plant Siting Act or the Florida Electric Transmission Line Siting Act.[2] In addition, this document is sent to the Florida Department of Agriculture and Consumer Services pursuant to Section 377.703(2)(e), F.S., which requires the Commission provide a report on electricity and natural gas forecasts.

Review of the 2026 TYSPs

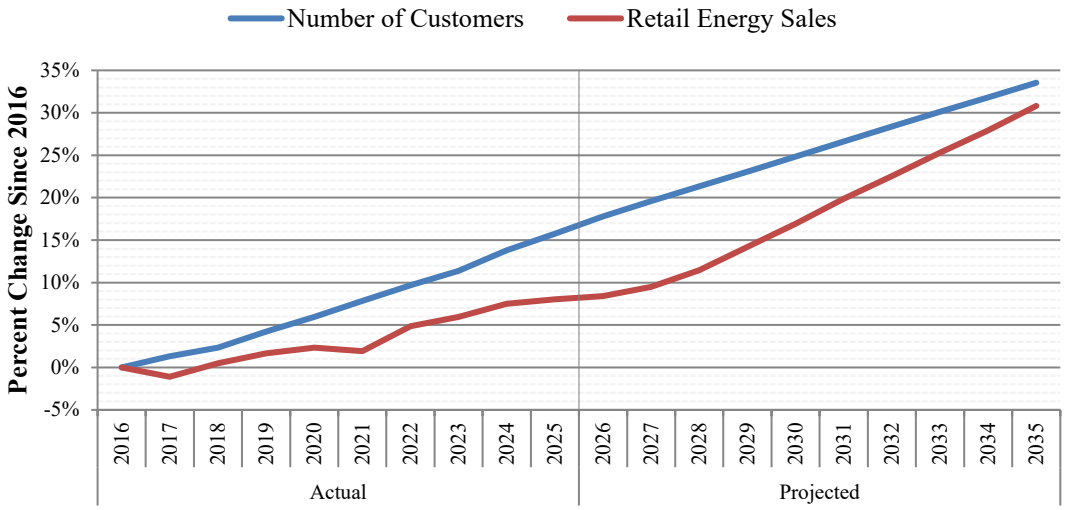
The Commission has divided this review into two portions: (1) a Statewide Perspective, which covers the whole of Florida; and (2) Utility Perspectives, which address each of the reporting utilities. From a statewide perspective, the Commission has reviewed the implications of the combined trends of Florida's electric utilities regarding load forecasting, load management, generation resources, and reliability.

Load Forecasting

Forecasting customer energy needs or load is a fundamental component of electric utility planning. To maintain an adequate and reliable system, utilities must project and prepare for changes in overall electricity consumption patterns. These patterns are affected by the number and type of customers, and factors that impact customer usage including weather, economic conditions, housing size, building codes, appliance efficiency standards, new technologies, and demand-side management. Florida's utilities use well-known and tested methodologies for preparing customer, energy, and peak demand forecasts. Figure 1 provides the historical and forecasted trends in customer growth and retail energy sales. Normalized weather trends were used to forecast 2026 through 2035 energy sales, which start slightly above the actual 2025 level and increase annually at 2.1 percent on average.

[2] The Florida Electrical Power Plant Siting Act is set forth in Sections 403.501 through 403.518, F.S. Pursuant to Section 403.519, F.S., the Commission is the exclusive forum for the determination of need for an electrical power plant. The Florida Electric Transmission Line Siting Act is set forth in Sections 403.52 through 403.5365, F.S. Pursuant to Section 403.537, F.S., the Commission is the sole forum for the determination of need for a transmission line.

Figure 1: State of Florida - Growth in Customers and Sales



Source: FRCC 2026 Regional Load and Resource Plan

Data Centers

Florida utilities currently serve approximately 65 small data centers, none of which have raised reliability concerns due to their demand generally being individually below 10 MW. However, utilities are receiving increased interest from large data center developers with hundreds of MW each, creating the potential for significant future electric load growth. Recently enacted Section 366.043, F.S., defines a large load customer as a customer with an anticipated monthly peak load of 50 MW or more, which would include these large data centers. While some utilities have incorporated anticipated large data center developments into their load forecasts, others have received inquiries without sufficient firm commitments to include substantial new loads in their forecasts. Notably, while SEC included one large load customer addition in its 2026 TYSP, it has since been cancelled, and an adjustment will be made in its 2027 TYSP filing to reflect the cancellation. The methodology used to decide whether to include large load customers varies between utilities, with some reliant upon particular agreements while others use a probabilistic approach. The Commission will continue to monitor how large load customers are included and impact utility forecasts in future TYSPs.

Large data centers may require significant investments in generation and transmission interconnection infrastructure due to their high electricity demand and unique locations. Accordingly, the TYSP utilities are evaluating the potential impacts of data center-driven load growth, including measures to protect existing customers from the risks of potentially stranded costs associated with new or upgraded facilities constructed to serve large data centers.

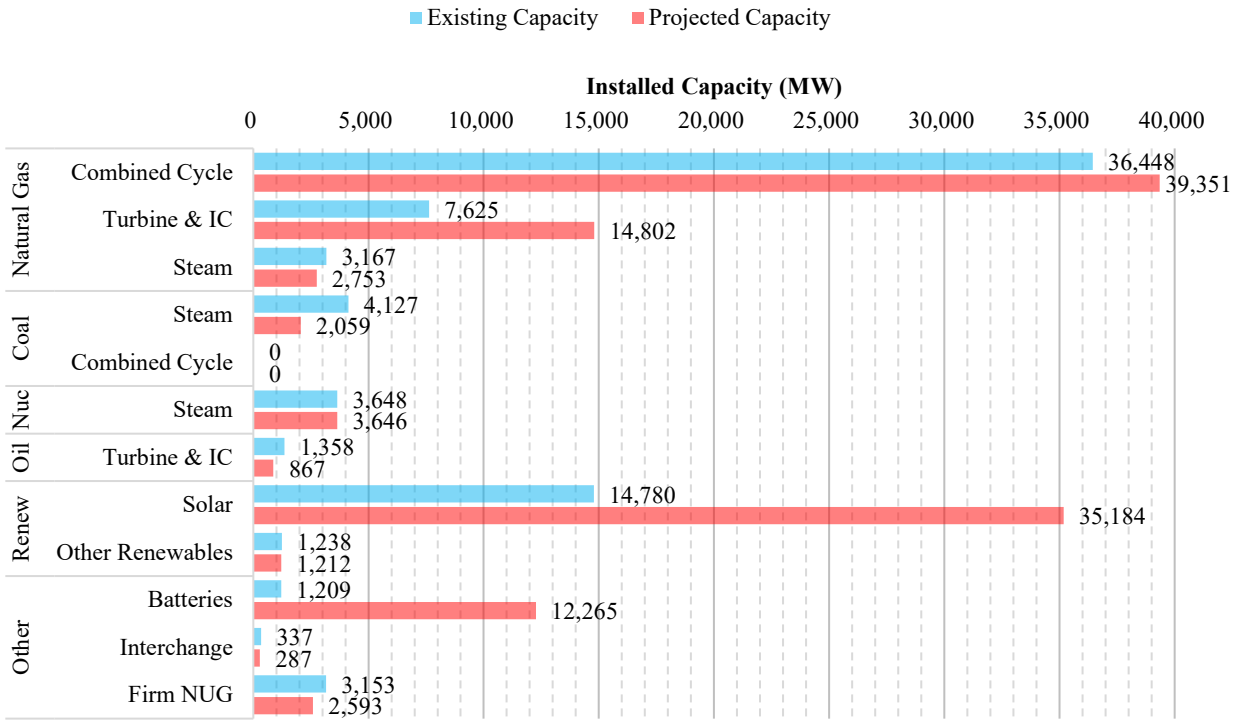
Demand Side Renewables

Florida's electric customers, pursuant to Section 366.91, F.S., have the opportunity to generate their own energy to offset their usage through demand-side renewable energy resources. As of the end of 2025, 319,068 customer installations with a total capacity of 3,150 megawatts (MW) were installed statewide, with the vast majority being solar photovoltaic systems.

Generation Resources

Florida's electric utilities have historically relied upon several different fuel types to serve customer load. Numerous factors, including swings in fuel prices, availability, environmental concerns, and other factors have resulted in a variety of fuels powering Florida's electric grid. Natural gas combined cycle generation is and will remain the single largest source of capacity, with simple cycle and internal combustion gas-fired units approximately doubling over the planning period to maintain their place as the third largest capacity resource. The largest nameplate generation additions are in solar generation and energy storage, which will become the second and fourth largest capacity resources by the end of the planning period. Figure 2 illustrates the current and projected mix of generation resources at the end of 2025 and 2035.[3]

Figure 2: State of Florida - Current and Projected Installed Capacity



Source: FRCC 2026 Regional Load and Resource Plan and TYSP Utilities' Data Responses

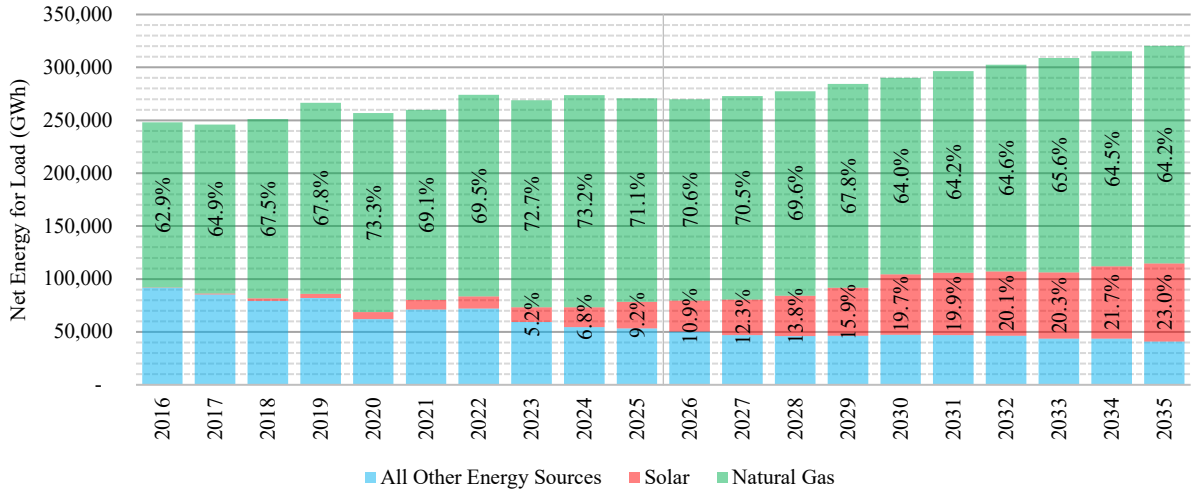
The primary purpose of this review is to provide information regarding proposed electric power plants for local, regional, and state agencies to assist in the certification process. There are two planned units that require a determination of need from the Commission pursuant to Section 403.519, F.S. These units are a pair of 559 MW natural gas-fired combined cycles planned by SEC, with in-service dates in 2032 and 2035. The Commission anticipates a petition for these units no later than 2028 and 2031, respectively.

[3] The installed capacity values include net metering installations, including 3,143.7 MW of solar and 6.3 MW of other renewable capacity.

Fossil Fuels

Generating capacity within Florida is anticipated to grow to meet the increase in customer demand, with an approximate net increase of 7,104 MW of traditional generation over the planning horizon and with natural gas plant additions offset by coal and oil retirements. This is a significant increase from the 2025 TYSPs projections, which was 1,715 MW and is associated with an increase in net firm summer peak demand. Natural gas electric generation, as a percent of Net Energy for Load (NEL), is expected to decline from 71.1 percent in 2025 to 64.2 percent over the planning horizon. Figure 3 illustrates the use of natural gas as a generating fuel for electricity production in Florida compared to solar and all other energy sources combined. The total energy produced by solar generation is projected to exceed all other sources combined, excluding natural gas, by 2030. Solar generation previously exceeded all other renewables combined in 2019, and coal in 2023.

Figure 3: State of Florida - Electricity Generation Sources



Source: FRCC 2017-2026 Regional Load and Resource Plans

Nuclear

Florida's electric industry could experience significant future load growth from the expansion of large data centers, or hyperscalers, potentially requiring substantial investments in new generation and transmission infrastructure. Utilities are actively evaluating the impacts of this growth while also monitoring emerging technologies, including small modular reactors (SMRs), that could shape Florida's future energy landscape.

FPL is actively engaged in advanced nuclear development and plans to begin early site permitting in 2026–2027 for a potential SMR adjacent to an existing nuclear facility, although any resulting unit would be beyond the current 10-year planning period. FPL is also monitoring initiatives by the U.S. Department of Energy and Nuclear Regulatory Commission while recognizing the current costs and uncertainties associated with SMR development. Other TYSP Utilities are similarly monitoring SMRs, citing their long lead times, permitting requirements, and costs.

In the 2026 TYSPs, nuclear electric generation, as a percent of NEL, is expected to decline from 11.3 percent in 2025 to 9.4 percent over the planning horizon. Nationally, the 2026 Annual Energy Outlook projects relatively flat nuclear capacity, with nuclear generation declining from approximately 17 percent of total generation in 2025 to 12 to 15 percent by 2050. As data center demand and emerging generation technologies continue to develop, the Commission will monitor their impacts on resource planning and incorporate material changes into future electric utility TYSPs.

Renewables

Renewable resources continue to expand in Florida, with approximately 16,018 MW of renewable generating capacity currently in Florida. The majority of installed renewable capacity is represented by solar photovoltaic (PV) generation which makes up approximately 92 percent of Florida's existing renewables. Florida's total renewable resources are expected to increase by approximately 20,378 MW over the 10-year planning period, excluding any potential demand-side renewable energy additions. Solar PV accounts for all of this increase.

While solar makes notable contributions to NEL, it is not considered a firm resource and contributes only a portion of its capacity during the period of system peaks. Generally, solar contributes toward summer peaks and no, or minimal, contribution to winter peaks. As the amount of solar generation in a utility system grows, this value is reduced as the net solar system peak is shifted further into the evening, when solar generation declines, increasing the need for non-solar generation to start or ramp up production. As a result, existing solar is considered firm towards summer peaks for approximately 34.9 percent of its capacity, while planned solar is considered firm for only 11.6 percent of its capacity.

Energy Storage

While the first 1.5 MW pilot battery storage facility entered service in 2016, a total of 1,209 MW of battery storage was installed by 2025, and an additional 11,056 MW will enter service by 2035. Battery storage is a unique resource in that it can contribute to firm capacity and offers a fast ramp rate; however, it has a limited duration and requires charging from the grid, becoming load rather than generation. Battery storage can be charged by any generation resource. Given these characteristics, for reliability planning purposes, only 1,203 MW of existing battery storage and 8,568 MW of planned battery storage is considered firm for summer peaks. The Commission will continue to monitor technological developments in renewable generation and energy storage to cost-effectively address the state's fuel diversity, reducing the dependence on fossil fuels, while still maintaining adequate resources to provide for customer loads.

Environmental Regulations

Florida's electric utilities must navigate an evolving array of state and federal environmental regulations that could affect existing and planned generation resources. Recent Federal Environmental Protection Agency (EPA) actions have altered the federal greenhouse gas (GHG) regulatory landscape, including proposed repeals of GHG standards for fossil-fuel-fired power plants and the February 2026 rescission of the 2009 GHG Endangerment Finding. Most Florida utilities do not incorporate carbon dioxide (CO_2) compliance costs into resource planning and report no material impacts from current GHG regulations, while FPL includes projected costs beginning in 2036. Utilities remain subject to regulatory uncertainty regarding GHG and some,

such as FPL and JEA, have incorporated GHG compliance considerations into their generation planning. Solar PV and battery storage also may reduce fleet-wide GHG emissions and potential exposure to future environmental regulations.

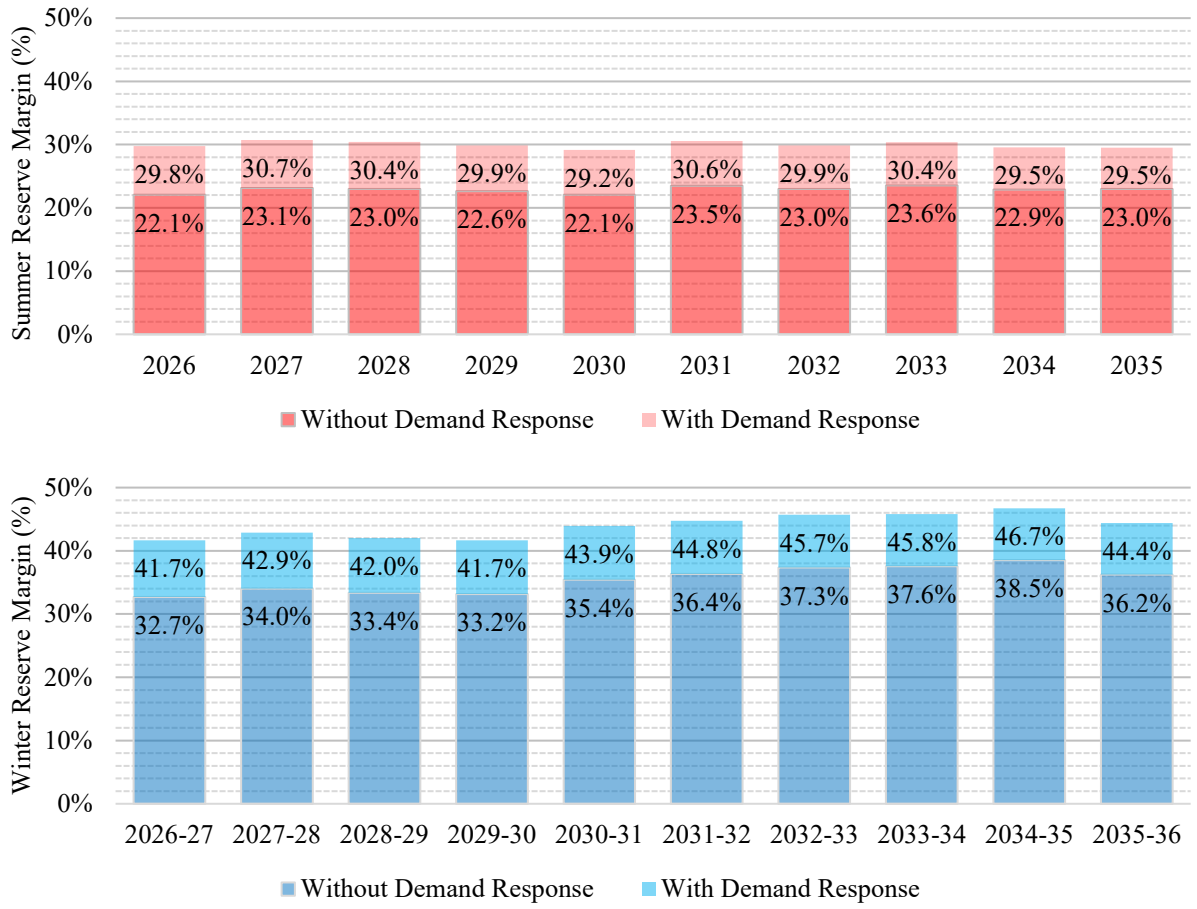
Throughout 2025 and into early 2026, several proposals were issued that may impact Florida's energy and environmental compliance landscape. On September 16, 2025, the EPA proposed amendments to the GHG Reporting Program that would remove reporting obligations for most source categories and suspend them until 2034. On February 12, 2026, the EPA finalized rescission of the 2009 GHG Endangerment Finding and repeal of federal GHG vehicle emission standards. On February 19, 2026, the EPA finalized the repeal of the 2024 Mercury and Air Toxics Standards (MATS) amendments, which required lower emissions for mercury and other hazardous air pollutants, returning standards to 2012 levels. Further environmental regulations include a proposal to revise the technology-based effluent limitations guidelines and standards (ELGs) promulgated in the 2024 "Supplemental Effluent Limitations Guidelines and Standards for the Steam Electric Power Generating Point Source Category" (2024 ELG) and revisions, which are final, to certain provisions of the 2024 oil and natural gas methane rules.

Recent FERC actions also affected Florida's regulatory and planning environment. These actions included streamlined permitting for natural-gas infrastructure, and approval of new grid reliability standards. FERC's 2025–2026 Winter Energy Market and Reliability Assessment confirmed that Florida has sufficient generation resources to meet winter demand under normal conditions. Overall, while the regulatory environment remains dynamic, Florida's utilities generally do not anticipate material generation curtailments, retirements, or reliability impacts from environmental regulations during their planning periods. The Commission will continue to monitor these developments and incorporate material impacts into future TYSPs.

Reliability

Florida's electric utilities are expected to have enough generating assets available at the time of peak demand to meet forecasted demand. On a statewide basis, generating capacity is projected to be no less than 29 percent higher than the forecasted summer net firm peak demand, and 41 percent higher than the forecasted winter net firm peak demand. Without activating load management resources like demand response programs, including interruptible and curtailable load, the state would still have more reserves of more than 22 percent during summer peak and 32 percent during winter peak. Figure 4 provides the annual values over the planning horizon with and without activating demand response for each season.

Figure 4: State of Florida - Projected Reserve Margin by Season



Source: FRCC 2026 Regional Load and Resource Plan - Form 10

Conclusion

The Commission has reviewed the 2026 TYSPs of Florida's electric utilities and finds that the projections of load growth appear reasonable. The reporting utilities have identified sufficient additional generation facilities to maintain an adequate supply of electricity. The Commission will continue to monitor the impact of current and proposed state and federal regulations, electric vehicle adoption, the state's dependence on natural gas for electricity production, and emerging trends such as large load customers and potential new nuclear generation.

Based on its review, the Commission finds the 2026 TYSPs to be suitable for planning purposes. Since the plans are not a binding plan of action for electric utilities, the Commission's classification of these plans as "suitable" or "unsuitable" does not constitute a finding or determination in any docketed matter(s) before the Commission.

Introduction

The TYSPs of Florida's electric utilities are the culmination of an integrated resource plan which is designed to give state, regional, and local agencies advance notice of proposed power plants and transmission facilities. The Commission receives comments from these agencies regarding any issues with which they may have concerns. The TYSPs are planning documents that contain tentative data that is subject to change by the utilities upon written notification to the Commission.

For any new proposed power plants and transmission facilities, certification proceedings under the Florida Electrical Power Plant Siting Act, Sections 403.501 through 403.518, F.S., or the Florida Electric Transmission Line Siting Act, Sections 403.52 through 403.5365, F.S., will include more detailed information than is provided in the TYSPs. The Commission is the exclusive forum for determination of need for electrical power plants, pursuant to Section 403.519, F.S., and for transmission lines, pursuant to Section 403.537, F.S. The TYSPs are not intended to be comprehensive, and therefore may not have sufficient information to allow regional planning councils, water management districts, and other reviewing state, regional, and local agencies to evaluate site-specific issues within their respective jurisdictions. Other regulatory processes may require the electric utilities to provide additional information as needed.

Statutory Authority

Section 186.801, F.S., requires that all major generating electric utilities submit a TYSP to the Commission at least every two years. Based on these filings, the Commission performs a preliminary study of each TYSP and makes a non-binding determination as to whether the plan is suitable or unsuitable. The results of the Commission's study are contained in this report and are forwarded to the Florida Department of Environmental Protection for use in subsequent proceedings. In addition, Section 377.703(2)(e), F.S., requires the Commission to collect and analyze energy forecasts, specifically for electricity and natural gas, and forward this information to the Department of Agriculture and Consumer Services. The Commission has adopted Rules 25-22.070 through 25-22.072, Florida Administrative Code (F.A.C.), in order to fulfill these statutory requirements and provide a solid framework for flexible, cost-effective utility resource planning. In this way, the Commission fulfills its oversight and regulatory responsibilities while leaving day-to-day planning and operations to utility management.

Applicable Utilities

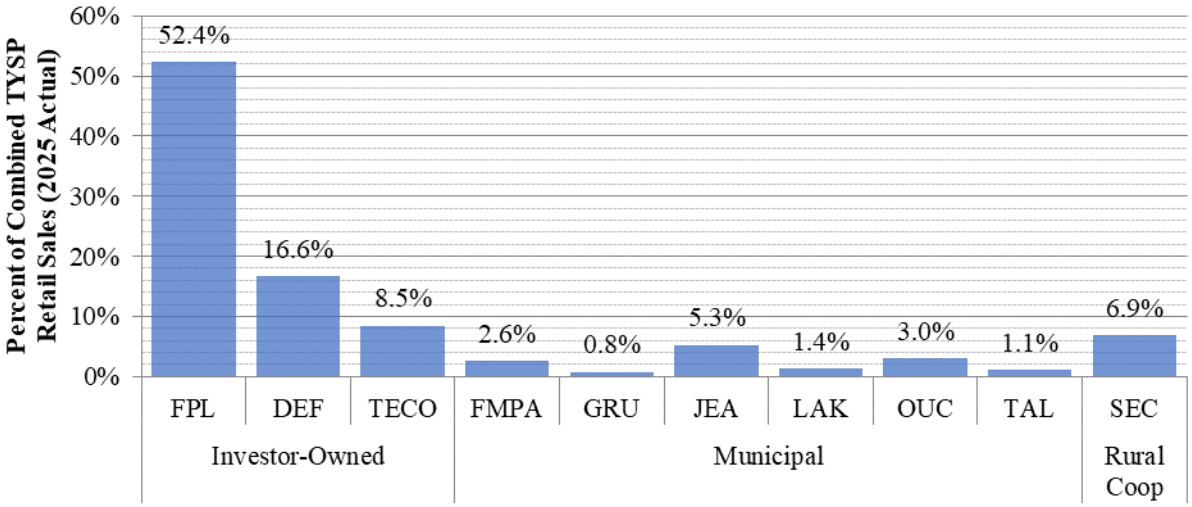
Florida is served by 57 electric utilities, including 4 investor-owned utilities, 35 municipal utilities, and 18 rural electric cooperatives. Pursuant to Rule 25-22.071(1), F.A.C., only electric utilities with an existing generating capacity above 250 MW or a planned unit with a capacity of 75 MW or greater are required to file a TYSP with the Commission every year.

In 2026, 10 utilities met these requirements and filed a TYSP, including 3 investor-owned utilities, 6 municipal utilities, and 1 rural electric cooperative. The investor-owned utilities, in order of size, are Florida Power & Light Company (FPL), Duke Energy Florida, LLC (DEF), and Tampa Electric Company (TECO). The municipal utilities, in alphabetical order, are Florida Municipal Power Agency (FMPA), Gainesville Regional Utilities (GRU), JEA (formerly Jacksonville Electric Authority), Lakeland Electric (LAK), Orlando Utilities Commission (OUC), and City of

Tallahassee Utilities (TAL). The sole rural electric cooperative filing a 2026 TYSP is Seminole Electric Cooperative (SEC). Collectively, these utilities are referred to as the TYSP Utilities.

Figure 5 illustrates the comparative size of the TYSP Utilities in terms of each utility's percentage share of the combined TYSP Utilities' retail energy sales in 2025. Collectively, the reporting investor-owned utilities account for 77.5 percent of statewide retail energy sales, while the municipal and cooperative utilities make up approximately 21.1 percent of the statewide retail energy sales. The remainder is associated with non-reporting entities due to their limited size.

Figure 5: TYSP Utilities - Comparison of Reporting Electric Utility Sales



Source: FRCC 2026 Regional Load and Resource Plan and 2026 TYSPs

Required Content

The Commission requires each reporting utility to provide information on a variety of topics as required by Section 186.801(2) F.S. Schedules describe the utility's existing generation fleet, customer composition, demand and energy forecasts, fuel requirements, reserve margins, changes to existing capacity, and proposed power plants and transmission lines. The utilities also provide a narrative documenting the methodologies used to forecast customer demand and the identification of resources to meet that demand over the 10-year planning period. This information, supplemented by additional data requests, provides the basis of the Commission's review.

Structure of the Commission's Review

The Commission's review is divided into multiple sections. The Statewide Perspective provides an overview of Florida as a whole, including discussions of load forecasting and generation resources, including their associated components topics such as forecast methodology, load management, fuel diversity, and reliability. The Utility Perspectives provides more focus, discussing the various issues facing each electric utility and its unique situation. Comments collected from various review agencies, local governments, and other organizations are included in Appendix A.

Conclusion

Based on its review, the Commission finds all of reporting utilities' 2026 TYSPs to be suitable for planning purposes. During its review, the Commission has determined that the projections for load growth appear reasonable and that the reporting utilities have identified sufficient generation facilities to maintain an adequate supply of electricity.

The Commission notes that the TYSPs are non-binding, and a classification of suitable does not constitute a finding or determination in any docketed matter before the Commission, nor an approval of all planning assumptions contained within the TYSPs.

Statewide Perspective

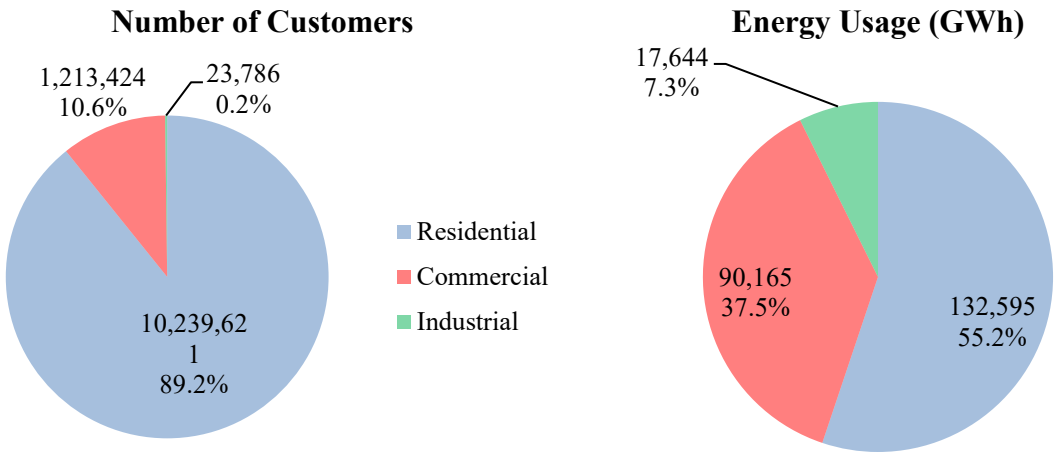
Load Forecasting

Forecasting customer energy needs or load is a fundamental component of electric utility planning. To maintain an adequate and reliable system, utilities must project and prepare for changes in overall electricity consumption patterns. These patterns are affected by the number and type of customers, and factors that impact customer usage including weather, economic conditions, housing size, building codes, appliance efficiency standards, new technologies, and demand-side management. Florida's utilities use well-known and tested methodologies for preparing customer, energy, and peak demand forecasts.

Electric Customer Composition

Utility companies categorize their customers by residential, commercial, and industrial classes. As illustrated in Figure 6, residential customers account for 89.2 percent of the total, followed by commercial (10.6 percent) and industrial (0.2 percent) customers. Commercial and industrial customers make up a sizeable percentage of energy sales due to their higher energy usage per customer. Residential customers in Florida make up the largest portion of retail energy sales. Florida's residential customers accounted for 55.2 percent of retail energy sales in 2025, compared to a national average of approximately 37.3 percent in 2024.[4]

Figure 6: State of Florida - Electric Customer Composition in 2025



Source: FRCC 2026 Regional Load and Resource Plan

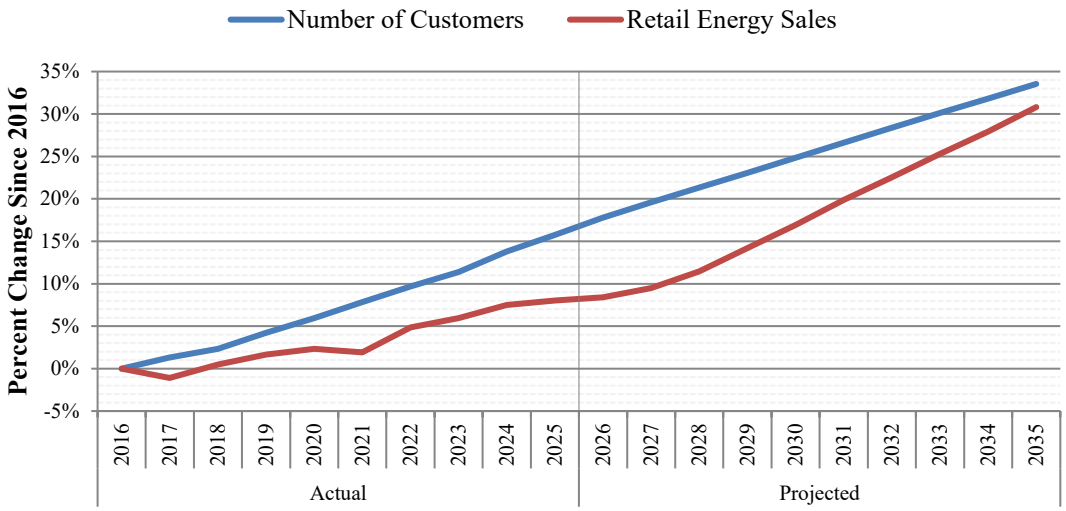
Growth Projections

For the next 10-year period, Florida's weather normalized retail energy sales are projected to grow at 2.1 percent per year, compared to the 0.9 percent actual annual increase experienced during the 2016-2025 period. The number of Florida's electric utility customers is anticipated to grow at an

[4] U.S. Energy Information Administration – Electric Power Annual, Table 2.2, Sales to Ultimate Customers, released October 16, 2025.

average annual rate of about 1.4 percent for the next 10-year period, compared to the 1.6 percent actual annual increase experienced during the last decade. These trends are shown in Figure 7.

Figure 7: State of Florida - Growth in Customers and Sales



Source: FRCC 2026 Regional Load and Resource Plan

As shown in Figure 7, Florida utilities' total retail energy sales reached a historical peak in 2025 surpassing the most recent peak that was reached in 2024. Compared to 2024, the statewide total retail energy grew a half percent in 2025. The chief contributors to this growth in retail energy sales include the continued growth in the number of retail customers and weather conditions. In 2025, FPL's total customers increased by 1.7 percent, which is lower than the 2.0 percent increase in 2024. However, this 1.7 percent increase in customers is still higher than the long-term historical average and reflects continued growth to FPL's service territory. Additionally, DEF's customer growth is determined by factors such as population growth, population migration, and the retirement demographic. DEF reported that housing market issues such as affordability, mortgage rates, and job growth have always applied a significant influence on customer growth dynamics. The Utility noted that more recent site plans reflect a return to the long-term trend of population migration into Florida; and, commercial customer growth typically tracks residential growth, due to its role of supplying needed services to the residential customer group.

Florida utilities' total retail energy sales are projected to continuously grow for the next 10 years. This sales growth is driven by an anticipated growth in customers and business activity, the expected increased level of adoption of electric vehicles, and the addition of large load customers such as data centers especially after 2028.

The projected retail energy sales trend reflects the product of the utilities' forecasted number of customers and forecasted energy usage per customer (UPC). The key factor affecting utilities' number of customers is population growth. The key factors affecting utilities' average UPC includes weather variability, economic conditions, new technologies, and changes in customer behavior or operations; hence, the corresponding information is utilized to develop the forecast

models for projecting the future growth of usage per customer. The projected growth rate of retail energy sales is impacted by these underlying key factors.

With respect to the UPC projection over the current forecast period, most TYSP utilities reported a downward trend due to advancements in technologies for energy efficiency, renewable generation, and alternative energy sources. However, some utilities, such as FPL and DEF, are expecting that increased residential at-home electric vehicle charging and the impact of anticipated energy-intensive commercial/industrial customers will mitigate this downward pressure to a certain extent. FPL also forecasted its industrial UPC to increase significantly supported by the addition of large load customers expected to enter the system in 2028.

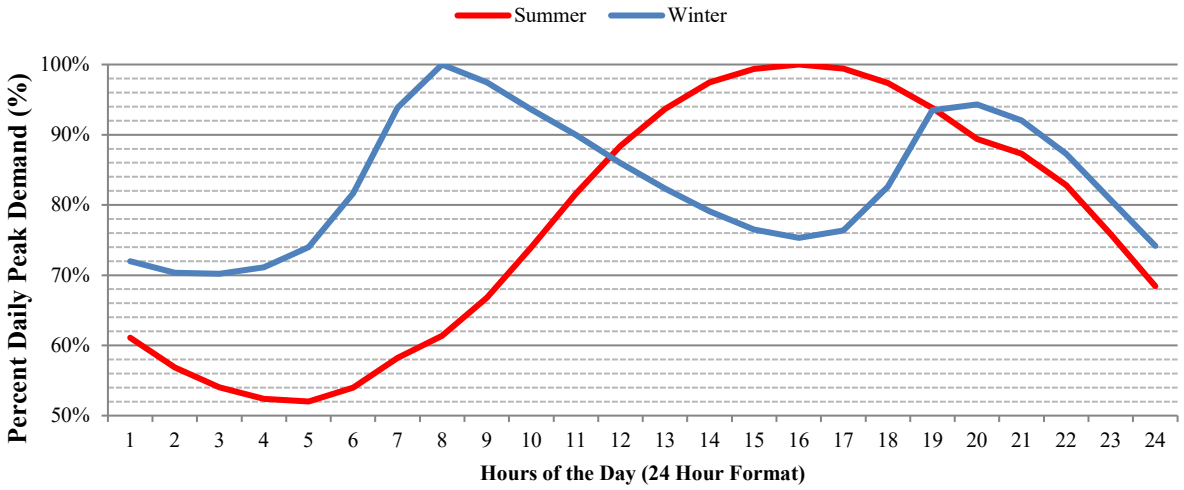
Peak Demand

The aggregation of each individual customer's electric consumption must be met at all times by Florida's electric utilities to ensure reliable service. The time at which customers demand the most energy simultaneously is referred to as peak demand. While retail energy sales dictate the amount of fuel consumed by the electric utilities to deliver energy, peak demand determines the amount of generating capacity required to deliver that energy at a single moment in time. As a result of the high contribution of residential customers to NEL, Florida's utilities are influenced more by trends in residential energy usage, which tend to be associated with weather conditions.

Florida's unique climate plays an important role in electric utility planning. While most of Florida's utilities experience their peak demand during summer months, Florida's residential customers rely more upon electricity for heating than the national average, with only a small portion using alternate fuels such as natural gas or oil for home heating needs. Even with the low frequency of heating days required, such reliance can impact winter peak demand.

Seasonal weather patterns are therefore a primary factor, with peak demands calculated separately for the summer and winter periods annually, based on increased usage to meet home cooling (summer) and heating (winter) demand. Figure 8 illustrates a daily load curve for a typical day for each season. In summer, air-conditioning needs increase throughout the day, climbing steadily until a peak is reached in the late afternoon and then declining into the evening. In winter, electric heat and electric water heating produce a higher base level of usage, with a spike in the morning and an additional spike in the evening.

Figure 8: TYSP Utilities - Example Daily Load Curves

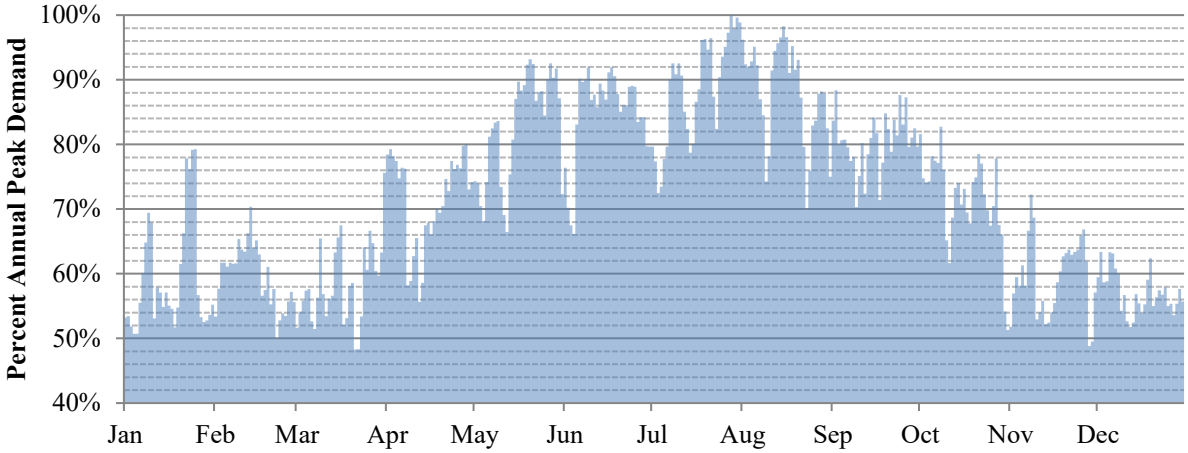


Source: TYSP Utilities' Data Responses

Florida is typically a summer-peaking state, meaning that the summer peak demand generally exceeds winter peak demand, and therefore controls the amount of generation required. Higher temperatures in summer also reduce the efficiency of generation, with high water temperatures reducing the quality of cooling provided and can sometimes limit the quantity as units may be required to operate at reduced power or go offline based on environmental permits. Conversely, in winter, utilities can take advantage of lower ambient air and water temperatures to produce more electricity from a power plant.

As daily load varies, so do seasonal loads. Figure 9 shows the 2025 daily peak demand as a percentage of the annual peak demand for the reporting investor-owned utilities combined. Typically, winter peaks are short events while summer demand tends to stay at near annual peak levels for longer periods. The periods between seasonal peaks are referred to as shoulder months, in which the utilities take advantage of lower demand to perform maintenance without impacting their ability to meet daily peak demand.

Figure 9: TYSP Utilities - Daily Peak Demand (2025 Actual)



Source: 2026 TYSP Utilities' Data Responses (Investor-Owned Utilities Only)

Florida's utilities assume normalized weather in forecasts of peak demand. During operation of their systems, they continuously monitor short-term weather patterns. Utilities adjust maintenance schedules to ensure the highest unit availability during the utility's projected peak demand, bringing units back online if necessary or delaying maintenance until after a weather system has passed.

Electric Vehicles

The reporting TYSP Utilities estimate approximately 696,650 plug-in EVs will be operating in Florida by the end of 2026, which represents approximately 3.6 percent of registered automobiles, heavy trucks, and buses, an increase from 3.05 percent in 2025. TYSP Utilities' projections of EV ownership, public charging stations, and impacts to their electric grid are summarized in Table 1. Florida's electric utilities continue to anticipate growth in the EV market; however, projected growth has moderated in recent years due to factors such as affordability pressures, economic uncertainty, and the repeal of EV purchase incentives.[5] EV ownership is now projected to increase to 3.5 million EVs and 187,000 EV charging stations operating within the reporting utilities' electric service territories by the end of 2035, down from last year's estimate of 4.4 million EVs and 267,000 EV charging stations by 2034. The projected EV charging station amounts listed in Table 1 include both normal and "quick-charge" public charging stations.[6] EV annual energy consumption is expected to increase from 0.9 percent of retail energy sales in 2026 to 4.7 percent by 2035. In terms of seasonal peak demand, EVs have a greater impact upon summer peak than winter, this is expected to increase from 1.0 percent of net firm summer peak demand in 2026 to 4.8 percent by 2035.

[5] The federal New Clean Vehicle Credit (IRC § 30D) was terminated under the One Big Beautiful Bill Act, effective for vehicles acquired after September 30, 2025. *One Big Beautiful Bill Act*, Pub. L. No. 119-21, § 70502, 139 Stat. 72 (2025).

[6] "Quick-charge" public EV charging stations are those that require a service drop greater than 240 volts and/or use three-phase power.

Table 1: TYSP Utilities - Electric Vehicle Projections

Year	EVs	EV Charging Stations	Grid Impacts		
			Annual Energy	Summer Peak	Winter Peak
	(-)	(-)	(GWh)	(MW)	(MW)
2026	696,650	39,845	2,499	522.7	267.3
2027	868,788	49,894	3,211	664.6	340.3
2028	1,068,035	61,539	4,043	806.4	367.6
2029	1,300,862	75,066	5,024	996.8	455.9
2030	1,575,854	90,947	6,196	1,225.6	573.5
2031	1,892,487	109,301	7,627	1,508.8	706.2
2032	2,249,987	125,309	9,281	1,836.2	853.2
2033	2,639,562	146,274	11,013	2,180.8	1,011.1
2034	3,057,711	167,991	12,880	2,554.1	1,178.9
2035	3,518,471	187,359	14,924	2,976.3	1,362.0

Source: TYSP Utilities' Data Responses

To prepare and accommodate for the increase in EV ownership, several utilities now offer programs or tariffs applicable to EV customers. While the nature of these programs/tariffs vary among utilities, many include Time-of-Use rates, rebates on certain charging station installations, and programs designed to increase general outreach, education, and awareness of the EV market. The Commission will continue to closely monitor the status of the EV industry to ensure it is prepared to address any regulatory issues related to the future energy and demand impacts of EVs in Florida.

Data Centers

Many TYSP utilities reported that they have received inquiries from potential new large load data centers that require hundreds of MW each. Table 2 shows the projected number of large load data centers, and their load impacts included in the 2026 TYSPs. In terms of peak demand, large data centers have a greater impact upon summer peak than winter, and this is expected to represent 4.9 percent of net firm summer peak demand by 2035. Only two TYSP Utilities, FPL and SEC, have included the potential data center-related load requirements in their respective TYSPs. However, SEC notes that its one projected data center project, totaling 162 MW of summer peak demand by 2035, has been cancelled.

Table 2: TYSP Utilities - Projected Large Load Data Centers and System Impacts

Year	No. of Data Centers	Grid Impacts		
		Annual Energy	Summer Peak	Winter Peak
	(-)	(GWh)	(MW)	(MW)
2026	-	-	-	-
2027	-	-	-	-
2028	2	1,520	248	25
2029	3	4,968	695	395
2030	3	8,049	1,100	724
2031	3	11,314	1,526	1,073
2032	3	14,138	1,898	1,369
2033	3	16,899	2,270	1,664
2034	3	19,691	2,642	1,960
2035	3	22,483	3,014	2,255

Source: 2026 TYSP Utilities' Data Responses

Florida TYSP utilities identified concerns regarding this level of large-load growth which include: (1) the timing and certainty of when individual projects will materialize; (2) the need to plan and construct incremental generation and transmission infrastructure to reliably serve these loads; and (3) ensuring that the costs to serve large-load customers are appropriately assigned. FPL, specifically, indicated that it is addressing these issues through ongoing customer engagement, system impact and interconnection studies, and integration of expected large-load additions into its long-term resource planning processes.

Large data centers are unique types of energy consumption sources due to their significant and constant load requirements and the potential for high costs to extend service to them. Many of the potential issues associated with serving such customers will be directly related to the size and scope of the specific data center project in question. Any necessary system upgrades to accommodate incremental load, along with the deployment of generation resources to safely and reliably serve existing and new load, are also important concerns that must be addressed. Florida utilities recognize the associated substantial increase in load to serve such customers, and to the extent such loads materialize, they will require significant new infrastructure in both generation and transmission. As such, the TYSP utilities are actively assessing the potential impact of load growth driven by the advent of large data centers, including protections to their existing customers from the risks associated with potential stranded costs incurred to install new or upgraded facilities to serve a new large data center.

Demand-Side Renewables

Under Rule 25-6.065, F.A.C., investor-owned utilities (IOUs) must offer net metering for renewable generation systems up to 2 MW, allowing customers to offset energy usage and reducing utility-served energy and, in some cases, peak demand. Florida's customer-sited or demand-side renewable generation, primarily behind-the-meter rooftop solar PV, continues to grow and is an increasingly important consideration in utility load forecasting. As of the end of 2025, more than 319,068 demand-side systems totaling approximately 3,150 MW were installed statewide, with nearly all consisting of solar; non-solar systems account for only 27 installations totaling 6.3 MW.

Table 3 summarizes the growth of demand-side renewable generation interconnections.

Table 3: State of Florida – Demand-Side Renewable Growth

Year	2019	2020	2021	2022	2023	2024	2025
Number of Installations	59,508	90,552	130,947	189,952	249,521	292,284	319,068
Installed Capacity (MW)	514	835	1,177	1,780	2,351	2,801	3,150

Source: 2019-2025 Net Metering Reports

For the 2026–2035 planning period, utilities generally incorporate demand-side generation as a reduction to forecasted net energy for load and peak demand, although methodologies vary. FPL uses Wood Mackenzie solar market data and NREL's PVWatts Calculator to forecast solar growth and its impacts on energy and seasonal peak demand, while DEF, TECO, SEC, GRU, FMPA, LAK, and TAL use combinations of historical data, adoption trends, EIA forecasts, and net-metering data. OUC uses NREL adoption curves, projecting an average annual growth rate of 8.1 percent, while JEA uses a more detailed hourly model incorporating rooftop solar and paired battery storage. SEC projects incremental demand-side solar generation to increase from 167 GWh in 2026 to 1,154 GWh in 2035, and FMPA projects demand-side generation units to grow from approximately 7,400 to 12,000 by 2035. Overall, the continued growth of demand-side renewable generation, particularly rooftop solar, is becoming an increasingly significant factor in Florida's load forecasts, with utilities differing in their treatment of peak demand, energy storage, and the level of detail used to model future adoption.

Forecast Methodology

Load forecasting is an essential requirement of all electric utility companies for purposes of system planning. In order for utilities to reliably and cost-effectively serve their respective customers, they must be able to accurately determine their energy and demand requirements. Thus, the load forecast function facilitates the ongoing balance between system demand and system supply.

Load forecasting can be divided into three types depending on the forecasting horizon: short, medium and long-term. Short-term load forecasting denotes forecast horizons of up to one week ahead. Medium-term load forecasting ranges from one week to one year ahead. Long-term load forecasting typically targets forecast horizons of one to 10 years, and sometimes up to several decades. Long-term load forecasting provides the essential load requirement data that a utility must have in order to effectively modify its system of generation, transmission, and distribution assets. Load forecasts directly impact the timing, type, and location of expansions, replacements, and retirements. Hence, the load forecast function plays a vital role in an electric utility's system planning and, in Florida, serves as the foundation of a utility's TYSP.

Florida's electric utilities perform long-term forecasts of peak demand and annual energy sales using various forecasting models, including econometric and end-use models, and other forecasting techniques such as surveys. In the development of econometric models, the utilities use historical data sets including dependent variables (e.g., winter and summer peak demand per customer, residential energy use per customer, etc.) and independent variables (e.g., peak day

minimum temperature, real personal income, heating degree days and cooling degree days, etc.) to infer relationships between the two types of variables. These historical relationships, combined with available forecasts of the independent variables and the utilities' forecasts of customers, are then used to forecast the peak demand and energy sales. For some customer classes, such as industrial customers, surveys may be conducted to determine the customers' specific expectations for their own future electricity consumption.

Forecasting models for energy sales are prepared by revenue class (e.g., residential, small and large commercial, small and large industrial, etc.). Commonly, the results of the models must be adjusted to consider exogenous impacts, such as the impact of the recent growth in electric vehicles and distributed generation. The forecasting models for energy sales must also consider demand-side management.

Another type of forecasting model, sometimes used to project energy use in conjunction with econometric models, is an "end-use model." These models can capture trends in appliance and equipment saturation and efficiency, as well as building size and thermal efficiency, on customers' energy use. If such end use models are not used, the econometric models for energy often include an index comprised of efficiency standards for air conditioning, heating, and appliances, as well as construction codes for recently built homes and commercial buildings.

Florida's electric utilities rely upon data which is sourced from public and private entities for historic and forecast values of specific independent variables used in econometric modeling. Public resources such as the University of Florida's Bureau of Economic and Business Research, which provides county-level data on population growth, and the U.S. Department of Commerce's Bureau of Labor Statistics, which publishes the Consumer Price Index, are utilized along with private forecasts for economic growth from macroeconomic experts, such as Moody's Analytics. By combining historic and forecast macroeconomic data with customer and climate data, Florida's electric utilities project future load conditions.

Historically, the various forecast models and techniques used by Florida's electric utilities are commonly used throughout the industry, and each utility has developed its own individualized approach to project load. The models have relied upon dependent and independent variable data to project energy sales and demand amounts that exist within a probabilistic range. The resulting forecasts allow each electric utility to evaluate its individual needs for new generation, transmission, and distribution resources to meet customers' current and future needs reliably and affordably. Again, for the 2026 TYSPs, Florida's electric utilities used these same types of models and techniques to prepare their forecasts.

Accuracy of Retail Energy Sales Forecast

For each reporting electric utility, the Commission reviewed the historic forecast accuracy of past retail energy sales forecasts. The standard methodology for our review involves comparing actual retail energy sales for a given year to energy sales forecasts made three, four, and five years prior. For example, the actual 2025 retail energy sales were compared to the forecasts made in 2020, 2021, and 2022. The resulting differences, expressed as a percentage error rate, are used to determine each utility's historic forecast accuracy by applying a five-year rolling average. An average error with a negative value indicates an under-forecast, while a positive value represents

an over-forecast. An absolute average error provides an indication of the total magnitude of error, regardless of the tendency to under or over forecast. For the 2026 TYSPs, determining the accuracy of the five-year rolling average forecasts involves comparing the actual retail energy sales for the period 2016 through 2025 to forecasts made between 2007 and 2021. These are summarized in Table 4.

Table 4: TYSP Utilities - Accuracy of Retail Energy Sales Forecasts
(Five-Year Rolling Average) *

TYSP Year	Five-Year Analysis Period	Forecast Years Analyzed	Forecast Error (%)	
			Average	Absolute Average
2017	2016 - 2012	2012 - 2007	9.1%	9.1%
2018	2017 - 2013	2013 - 2008	6.0%	6.0%
2019	2018 - 2014	2014 - 2009	3.5%	3.5%
2020	2019 - 2015	2015 - 2010	2.1%	2.3%
2021	2020 - 2016	2016 - 2011	1.6%	2.0%
2022	2021 - 2017	2017 - 2012	1.0%	1.6%
2023	2022 - 2018	2018 - 2013	(0.1%)	1.4%
2024	2023 - 2019	2019 - 2014	(1.0%)	1.6%
2025	2024 - 2020	2020 - 2015	(1.8%)	2.0%
2026	2025 - 2021	2021 - 2016	(2.3%)	2.4%

Source: 2007-2026 TYSPs
* Inputs used include utilities' revisions to the corresponding prior TYSP-reported actual and/or projected data.

To verify whether more recent forecasts lowered the error rates, an additional analysis was conducted to determine, with more detail, the source of high error rates in terms of forecast timing. Table 5 provides the error rates for forecasts made between one to six years prior, along with the three-year average and absolute average error rates for the forecasting period of a three to five-year period that was also used in the analysis in Table 4.

As displayed in Table 5, the utilities' retail energy sales forecasts show large positive error rates during the recession-impacted period 2012 through 2015. Starting in 2015, the error rates have declined considerably; and the error rates calculated based on recent years' TYSPs continue to show lower forecast error rates, compared to the peak value of the error rates related to 2012-2014 sales forecasts. Most of the last five years' four-year ahead, three-year ahead, two-year ahead and one-year ahead forecasts all bear negative error rates (under-forecasts). Additionally, the last four years' six-year ahead and five-year ahead forecasts all render negative error rates as well. Note that all the 2023-, 2024- and 2025-related forecasts made between two to six years prior show relatively higher negative error rates. This is due to the respective annual retail energy sales achieved which is largely attributable to the very hot weather Florida experienced in the recent years.

Table 5: TYSP Utilities - Accuracy of Retail Energy Sales Forecasts - Annual Analysis
(Analysis of Annual and Three-Year Average of Three- to Five- Prior Years) *

Year	Annual Forecast Error Rate (%)						3-5 Year Error (%)	
	Years Prior						Average	Absolute Average
	6	5	4	3	2	1		
2012	26.4%	26.1%	23.2%	8.6%	4.0%	3.8%	19.3%	19.3%
2013	28.6%	26.3%	10.0%	6.0%	5.6%	3.0%	14.1%	14.1%
2014	27.2%	9.7%	6.0%	5.6%	2.7%	2.1%	7.1%	7.1%
2015	7.2%	3.5%	3.1%	0.9%	(0.1%)	(1.3%)	2.5%	2.5%
2016	4.2%	4.3%	2.2%	1.1%	0.1%	(1.1%)	2.5%	2.5%
2017	6.9%	4.8%	3.5%	2.4%	1.5%	(0.2%)	3.6%	3.6%
2018	4.2%	2.7%	1.6%	0.6%	(1.3%)	(1.2%)	1.6%	1.6%
2019	2.8%	1.9%	0.8%	(1.4%)	(1.4%)	(2.0%)	0.4%	1.3%
2020	2.4%	1.3%	(1.0%)	(1.1%)	(1.9%)	(1.2%)	(0.3%)	1.1%
2021	2.6%	0.4%	0.0%	(0.8%)	(0.1%)	0.0%	(0.2%)	0.4%
2022	(1.6%)	(1.9%)	(2.9%)	(2.2%)	(2.1%)	(3.1%)	(2.3%)	2.3%
2023	(2.1%)	(3.3%)	(2.7%)	(2.5%)	(3.2%)	(2.6%)	(2.8%)	2.8%
2024	(3.9%)	(3.3%)	(3.1%)	(3.7%)	(3.2%)	(3.2%)	(3.4%)	3.4%
2025	(2.9%)	(2.7%)	(3.2%)	(2.6%)	(2.3%)	(1.3%)	(2.9%)	2.9%

Source: 2006-2026 TYSPs
* Inputs used include utilities' revisions to the corresponding prior TYSP-reported actual and/or projected sales data.

Barring any unforeseen economic crises or atypical weather patterns, average forecasted energy sales error rates in the next few years are likely to be more reflective of the error rates shown for 2016 through 2025 in Table 5. However, all the major global and domestic events (e.g. the Russia-Ukraine war, intense conflicts in the Middle East, significant changes in tariffs on foreign countries, supply chain issues, potential factors such as recession, increases in inflation rates, pandemic, etc.), individually or collectively, could inflict damage to the US economy. As such, there remains uncertainty as to what the economic impacts of such events will be going forward.

Further, as discussed earlier, new and emerging technologies may also have an impact on the accuracy of a utility's long-term forecast. DEF indicated that the most significant non-weather impact on its load and demand, which is the broader saturation of self-generation, particularly solar PV, is only beginning to be felt. DEF stated this impact is reflected more in the forecast than the historic trend data. Impacts of demand-side renewables have been modest thus far, but the trend of increasing adoption indicates that there will be significant and growing impacts especially to the annual energy sales in the near future. Similarly, the utility also pointed out that impact from Plug-in Electric Vehicles (PEVs) and data centers is reflected more in the future data than that in the historic trend data for the same reasons. The utility explained that forecast accuracy impacts are more likely to be associated with changes in the timing and magnitude of large, discrete loads (such as data center additions or expansions) or changes in the pace of PEV adoption.

Therefore, the actual retail energy sales of the next few years could be different from what Florida utilities projected in 2025 and prior years. Consequently, the average forecasted energy sales error

rates in the next few years may deviate from the relatively lower levels recorded since 2016. That possible deviation is the case because of the compounding effects of emerging technologies, self generation, political and international trade challenges, major regional conflicts worldwide, and global health issues in addition to the standard sources of forecasting error such as weather and the national economy.

Load Management

Florida's electric utilities also consider how the efficiency of customer energy consumption changes over the planning period. Changes in government mandates, such as building codes and appliance efficiency standards, reduce the amount of energy consumption for new construction and electric equipment. Electric customers, through the power of choice, can elect to engage in behaviors that decrease peak load or annual energy usage. Examples include turning off lights and fans in unoccupied rooms, increasing thermostat settings during the summer, and purchasing appliances that exceed efficiency standards. While a certain portion of customers will engage in these activities without incentives due to economic, aesthetic, or environmental concerns, other customers may lack information or require additional incentives. Demand-Side Management (DSM) programs represent an area where Florida's electric utilities can empower and educate its customers to make choices that reduce peak load and annual energy consumption.

Florida Energy Efficiency and Conservation Act (FEECA)

In 1980, the Florida Legislature passed the Florida Energy Efficiency and Conservation Act (FEECA), which is codified in Sections 366.80 through 366.83, F.S., and Section 403.519, F.S. Under FEECA, the Commission is required to set appropriate goals for increasing the efficiency of energy consumption and increasing the development of demand-side renewable energy systems for electric utilities of a certain size, known as the FEECA Utilities.[7] Of the TYSP Utilities, these include the three investor-owned electric utilities, FPL, DEF, TECO, and two municipal electric utilities, JEA and OUC, and together represent approximately 86 percent of 2025 retail electric sales reported in the state. The FEECA Utilities offer DSM programs for residential, commercial, and industrial customers. Energy audit programs are designed to provide an overview of customer energy usage and to evaluate conservation opportunities, including behavioral changes, low-cost measures customers can undertake themselves, and participation in utility-sponsored DSM programs.

In 2024, the Commission held a hearing and established goals for each of the FEECA Utilities for the period 2025 through 2034. In 2025, the Commission reviewed and approved DSM Plans for each FEECA electric utility designed to meet its goals. The Commission is scheduled to have its next goalsetting proceeding no later than 2029 for the period 2030 through 2039.

DSM Programs

DSM programs are generally divided into three categories: interruptible load, load management, and energy efficiency. The first two are considered dispatchable, and are collectively known as demand response, meaning that the utility can call upon them during a period of peak demand or other reliability concerns, but otherwise they are not utilized. In contrast, energy efficiency

[7] FEECA also applies to Florida Public Utilities Company (FPUC), a non-generating investor-owned electric utility. As FPUC purchases power from other generating entities and does not own or operate its own generation resources, it is not required to file a TYSP.

measures are considered passive and are always working to reduce customer demand and energy consumption.

Interruptible load is achieved through the use of agreements with large commercial/industrial customers to allow the utility to interrupt the customer's load, reducing the generation required to meet system demand. Interrupted customers may use back-up generation to fill their energy needs or cease operation until the interruption has passed. A subtype of interruptible load is curtailable load, which allows the utility to interrupt only a portion of the customer's load. In exchange for the ability to interrupt these customers, the utility offers a discounted rate for energy or other credits which are paid for by all ratepayers.

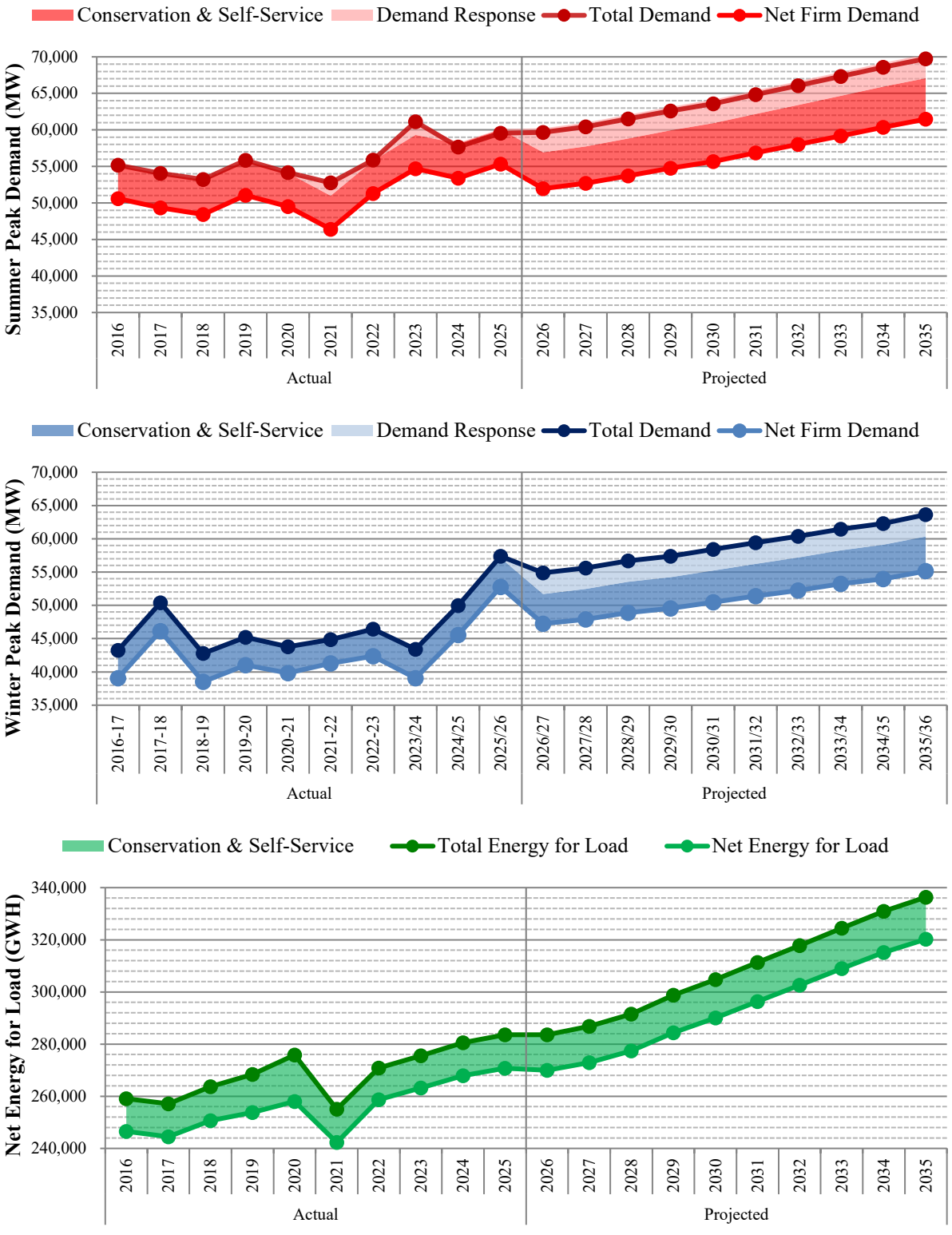
Load management is similar to interruptible load but focuses on smaller customers and targets individual appliances. The utility installs a device on an electric appliance, such as a water heater or air conditioner, which allows for remote deactivation for a short period of time. Load management activations tend to have less advanced notice than those for interruptible customers but tend to be activated only for short periods and are cycled through groups of customers to reduce the impact to any single customer. Due to the focus on specific appliances, certain appliances would be more appropriate for addressing certain seasonal demands. For example, load management programs targeting air conditioning units would be more effective to reduce a summer peak, while water heaters are more effective for reducing a winter peak. As of 2026, the total amount of demand response resources available for reduction of peak load is 3,283 MW for summer peak and 3,048 MW for winter peak. Demand response is anticipated to decrease only marginally to approximately 3,270 MW for summer peak and increase to approximately 3,168 MW for winter peak by 2035. Residential load management is anticipated to decline slightly, while interruptible load is level and commercial/industrial demand response has a slight increase.

Energy efficiency or conservation measures also have an impact on peak demand, and due to their passive nature do not require activation by the utility. Conservation measures include improvements in a home or business' building envelope to reduce heating or cooling needs, or the installation of more efficient appliances. By installing additional insulation, energy-efficient windows or window films, and high efficiency appliances, customers can reduce both peak demand and annual energy consumption, resulting in lower energy bills. DSM programs work in conjunction with building codes and appliance efficiency standards to increase energy savings above the minimum required by local, state, or federal regulations. As of December 31, 2025, energy efficiency is responsible for peak load reductions of 4,746 MW for summer peak and 4,468 MW for winter peak. Energy efficiency is anticipated to increase to approximately 5,605 MW for summer peak and 5,195 MW for winter peak by 2035.

Forecast Load & Peak Demand

The historic and forecasted seasonal peak demand and annual energy consumption values for Florida are illustrated in Figure 10. The forecasts shown below are based upon normalized weather conditions, while the historic demand and energy values represent the actual impact of weather conditions on Florida's electric customers. Florida relies heavily upon both air conditioning in the summer and electric heating in the winter, so both seasons experience a great deal of variability due to severe weather conditions.

Figure 10: State of Florida - Historic & Forecast Seasonal Peak Demand & Annual Energy



Source: FRCC 2026 Regional Load and Resource Plan

DSM, including demand response and energy efficiency, along with self-service generation, is included in each graph appearing in Figure 10 for seasonal peak demand and annual energy for load. The total demand or total energy for load represents what otherwise would need to be served if not for the impact of these programs and self-service generators. The net firm demand is used as a planning number for the calculation of generating reserves and determination of generation needs for Florida's electric utilities.

Demand response is included in Figure 10 in two different ways based upon the time period considered. For historic values of seasonal demand, the actual rates of demand response activation are shown, not the full amount of demand response that was available at the time. Overall, demand response has only been partially activated, as sufficient generation resources were available during the annual peak. Residential load management has been utilized to a limited extent during peak periods, with even less interruptible load being activated.

For forecast values of seasonal demand, it is assumed that all demand response resources will be activated during peak. The assumption of all demand response being activated reduces generation planning need. Based on future operating conditions, if an electric utility has sufficient generating capacity and it is economical to serve all customers loads, demand response would likely be inactive or only partially activated.

The forecasts also reflect differences among utilities in how anticipated large load customers are incorporated into their load forecasts. Some utilities have included expected large load customers in their forecasts, while others have not included such customers due to the uncertainty regarding the timing, size, or likelihood of the associated load materializing during the forecast period. Under section 366.043(2)(d), F.S., a large load customer is a customer with an anticipated monthly peak load of 50 MW or more, calculated as the highest average load over a 15-minute interval at a single location. Consequently, differences in how utilities account for anticipated large load customers should be considered when comparing individual utility load forecasts and evaluating changes in statewide demand.

As previously discussed, Florida is normally a summer-peaking state and has been for the past 10 years. This trend is anticipated to continue, with the next 10 forecasted years all anticipated to be summer peaking. Based upon current forecasts using normalized weather data, Florida's electric utilities anticipate a gradual increase in both summer and winter net firm demand during the planning period.

Generation Resources

Florida's electric utilities have historically relied upon several different fuel types to serve customer load. Before the oil embargo, Florida used oil-fired generation as its primary source of electricity until the increase in oil prices made this undesirable. Since that time, Florida's electric utilities have sought a variety of other fuel sources to diversify the state's generation fleet and more reliably and cost-effectively serve customers. Numerous factors, including swings in fuel prices, availability, environmental concerns, and other factors have resulted in a variety of fuels powering Florida's electric grid. Solid fuels, such as coal and nuclear, increased during the shift away from oil-fired generation, and more recently natural gas has emerged as the dominant fuel type in Florida. Renewable resources continue to expand within Florida, the majority being represented by solar PV generation, but also include sources such as waste heat and solid waste. Renewables are expected to exceed all other generation sources except for natural gas by 2030.

Generation by Type

Fossil fuel generation provides a constant supply of generation but requires usage of solid fuels which are affected by fuel prices. Nuclear capacity serves as an alternative to natural gas fueled generation, but the necessary facilities are capital-intensive and require long lead times to construct. Renewable generation provide power without the use of fossil fuels, which must be imported into the state. However, solar generation is not considered a firm resource and contributes only a portion of its capacity during the period of system peaks. Generally, solar contributes toward summer peaks and no, or minimal, contribution to winter peaks. As the amount of solar generation in a utility system grows, this value is reduced as the net solar system peak is shifted further into the evening, when solar generation declines, increasing the need for non-solar generation to start or ramp up production. Energy storage is a unique resource in that it can contribute to firm capacity and offers a fast ramp rate; however, it has a limited duration and requires charging from the grid, becoming load rather than generation.

Renewables

Renewable energy is an increasing share of generation within the state, primarily displacing natural gas consumption. Table 6 provides a breakdown of each TYSP Utility's actual 2025 and projected 2035 generation from renewables, in gigawatt-hours (GWh) and as a percentage of NEL. Renewable energy as a percentage of NEL is expected to increase from 10.1 percent in 2025 to 23.7 percent in 2035. On a statewide level, solar generation will account for 23.0 percent of NEL in 2035.

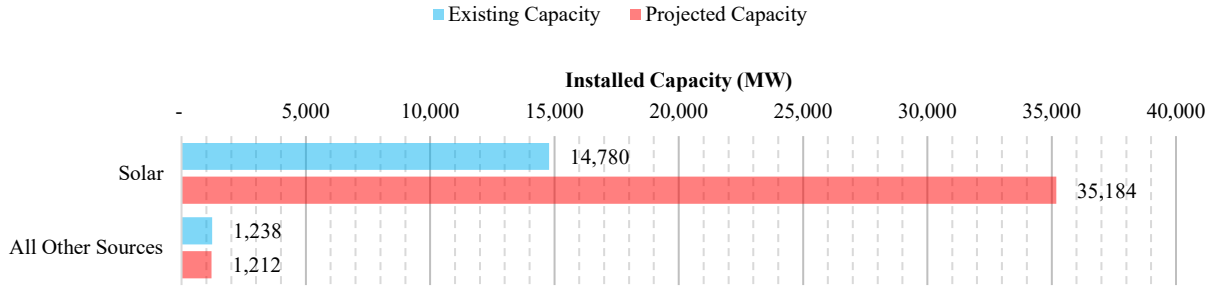
Table 6: State of Florida - Renewable Energy Generation

Utility	2025 Actual			2035 Projected		
	NEL	Renewables		NEL	Renewables	
	GWh	GWh	%	GWh	GWh	% NEL
FPL	147,260	17,617	12.0%	180,677	47,798	26.5%
DEF	43,580	3,659	8.4%	46,632	14,780	31.7%
TECO	21,798	2,419	11.1%	23,619	5,436	23.0%
FMPA	7,804	290	3.7%	7,197	339	4.7%
GRU	1,910	453	23.7%	2,028	350	17.3%
JEA	13,479	536	4.0%	15,219	364	2.4%
LAK	3,531	30	0.8%	3,918	204	5.2%
OUC	8,222	588	7.2%	9,556	4,356	45.6%
TAL	2,877	108	3.8%	2,998	103	3.4%
SEC	17,778	932	5.2%	24,543	700	2.9%
STATE	270,665	27,311	10.1%	320,229	75,741	23.7%

Source: FRCC 2026 Regional Load and Resource Plan and TYSP Utilities' Data Responses

Currently, renewable energy facilities provide approximately 16,018 MW of firm and non-firm generation capacity, which represents 21.1 percent of Florida's overall generation capacity of 75,881 MW in 2025. This value includes existing demand-side renewable resources with net metering agreements, totaling 3,150 MW, discussed earlier. Florida's total renewable resources are expected to increase by an estimated 20,378 MW over the 10-year planning period, a decrease from last year's estimated 26,228 MW projection, excluding solar degradation. Solar generation, primarily utility-owned, is the sole renewable type projected to increase over the planning horizon, with non-solar renewables decreasing by 26 MW due to retirements or expired contracts. Solar generation is anticipated to more than double over the 10-year period, with a net total of 20,404 MW to be installed, consisting of 18,265 MW of utility-owned solar and 2,138 MW of contracted solar. Figure 11 summarizes the existing and projected renewable capacity by generation type.

Figure 11: State of Florida - Current and Projected Renewables



Source: FRCC 2026 Regional Load and Resource Plan and TYSP Utilities' Data Responses

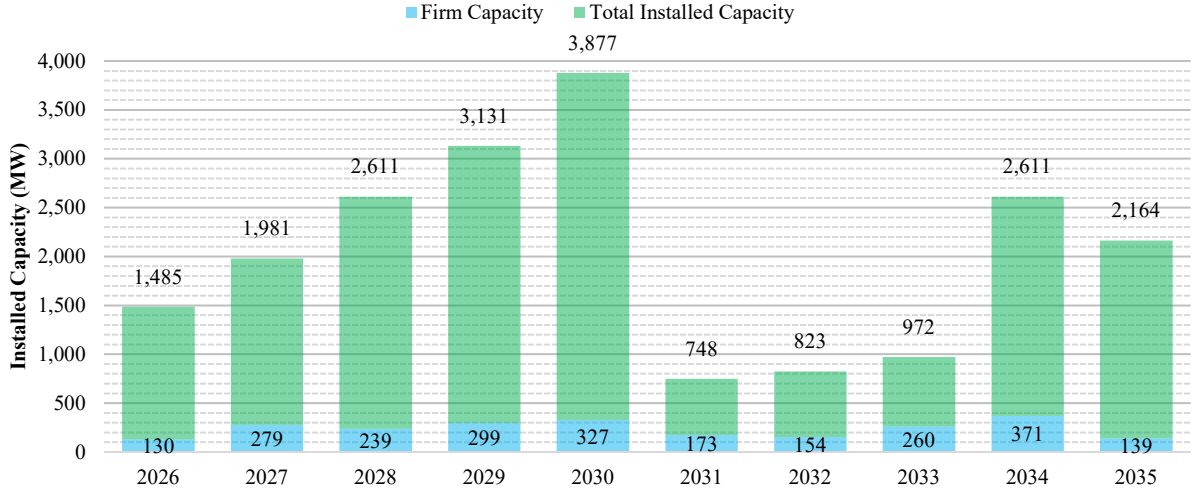
Renewable Capacity and Peak Contribution

Of the total existing renewable capacity, only approximately 5,545 MW of existing renewable generation is considered firm, based on either operational characteristics or contractual agreement. Firm renewable generation can be relied on to serve customers and can contribute toward the deferral of new fossil fuel power plants. Changes in timing of peak demand may influence the firm contributions of renewable resources such as solar and wind. The firm contribution of solar varies by utility, with some having a set percentage value for all projects over the planning period, and others having a declining value as projects are added. Solar generation contributes approximately 5,157 MW to this total, based upon the coincidence of solar generation and summer peak demand, or about 35 percent of its installed capacity. Of the 1,238 MW of non-solar generation, only 388 MW is treated as firm because of contractual commitments.

The remaining renewable generation can generate energy on an as-available basis or for internal use (self-service). As-available energy is considered non-firm and cannot be counted on for reliability purposes; however, it can contribute to the avoidance of burning fossil fuels in existing generators. Self-service generation reduces demand on Florida's utilities.

As the number of solar installations increases in the state, the difference in how solar operates compared with traditional generation will become increasing important to the grid. While solar generation is covered under the Florida Electrical Power Plant Siting Act, all future solar projects are below the 75 MW threshold, and therefore are not required to seek approval from the Commission prior to construction. Figure 12 provides an overview of the additional solar capacity generation planned within the next 10 years, as well as the amount considered firm for summer reserve margin planning. A total of 2,370 MW of solar additions are considered firm for summer peak, or about 11.6 percent of the total projected to be installed.

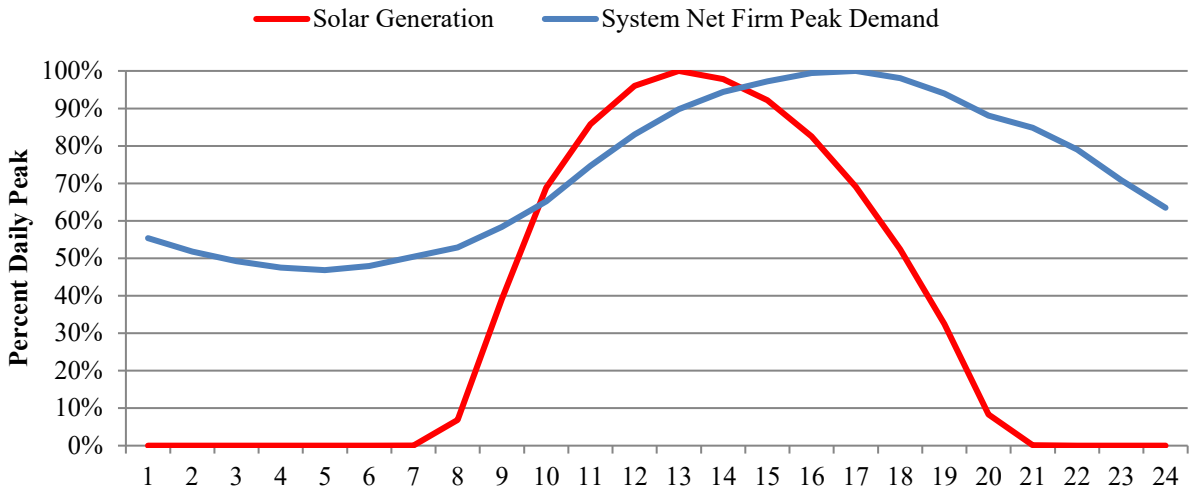
Figure 12: TYSP Utilities - Planned Solar Installations



Source: FRCC 2026 Regional Load and Resource Plan and TYSP Utilities' Data Responses

As solar generation cannot be dispatched on demand, it is produced based on conditions at the plant site, which are influenced by variations in daylight hours, cloud cover, and other environmental factors. The peak hours for production of a solar facility are closer to noon, whereas the peak in system demand tends to be in the early evening in summer and early morning in winter. Figure 13 illustrates this with example data from FPL's 2023 TYSP hourly dispatch model for their 2024 summer peak day. While solar generation peaks at 1:00 pm, the net firm system demand peaks at 5:00 pm when solar generation is only at 69 percent of its daily peak. By 6:00 p.m., demand remains high, at 98 percent of its daily peak, while solar generation falls to 52 percent. Energy storage and other technologies to shift load, such as DSM programs or demand response, can be used to offset these characteristics.

Figure 13: FPL - 2024 Summer Peak Day Hourly Dispatch



Source: 2023 FPL Data Responses

Non-Utility Owned Renewable Generation

Approximately 1,609 MW, or 10 percent, of Florida's existing renewable capacity comes from non-utility generators such as cogeneration facilities and renewable energy power plants with a capacity no greater than 80 MW (collectively referred to as Qualifying Facilities or QFs). In 1978, the U.S. Congress enacted the Public Utility Regulatory Policies Act (PURPA), which requires utilities to purchase electricity from QFs at the utility's full avoided cost. These costs are defined in Section 366.051, F.S., which provides, in part, that:

> A utility's "full avoided costs" are the incremental costs to the utility of the electric energy or capacity, or both, which, but for the purchase from cogenerators or small power producers, such utility would generate itself or purchase from another source.

If a renewable energy generator meets specified deliverability requirements, its capacity and energy output can be compensated under a firm contract. Rule 25-17.250, F.A.C., requires each investor-owned utility to establish a standard offer contract with timing and rate of payments based

on each fossil-fueled generating unit type identified in the utility's TYSP. In order to promote renewable energy generation, the Commission requires the investor-owned utilities to offer multiple options for capacity payments, including the options to receive early (prior to the in-service date of the avoided-unit) or levelized payments. The different payment options allow renewable energy providers the option to select the payment option that best fits their financing requirements and provides a basis from which negotiated contracts can be developed.

As previously discussed, large amounts of renewable energy are generated on an as-available basis. As-available energy is energy produced and sold by a renewable energy generator on an hour-by-hour basis for which contractual commitments as to the quantity and time of delivery are not required. As-available energy is purchased at a rate equal to the utility's hourly incremental system fuel cost, which reflects the highest fuel cost of generation each hour.

Nuclear

Nuclear capacity, while an alternative to natural gas-fired generation, is capital-intensive and requires a long lead time to construct. Florida has had three nuclear plants with five units total; two units each at Turkey Point and St. Lucie, both operated by FPL and still active, and a single now retired unit at Crystal River, formerly operated by DEF. In addition, several utilities jointly own or purchase capacity from nuclear units, including FMPA and OUC with FPL's St. Lucie Unit 2, and JEA from Vogtle Units 3 and 4 in Georgia.

Florida's electric utilities are taking varied approaches to existing and potential future nuclear resources, while evolving state and federal regulations may influence the timing and feasibility of advanced nuclear generation. FPL remains the most proactive, having received Nuclear Regulatory Commission Combined Operating Licenses in 2018 for potential Turkey Point Units 6 and 7, although their earliest possible in-service dates fall outside the current planning period for this report. FPL is also evaluating SMRs and plans to begin early site permitting by 2027 for a potential SMR adjacent to an existing nuclear facility, with any resulting unit likewise expected beyond the 10-year planning horizon. The remaining TYSP Utilities do not currently include any new nuclear development during the planning period but are monitoring the technology. The State of Florida is also proactively evaluating SMRs, including through a Commission feasibility report issued in March 2025 and related state efforts to clarify regulatory requirements for SMR deployment. The Commission will continue to monitor advancements in nuclear technology and changes to federal and state regulations and incorporate material impacts into future TYSPs.

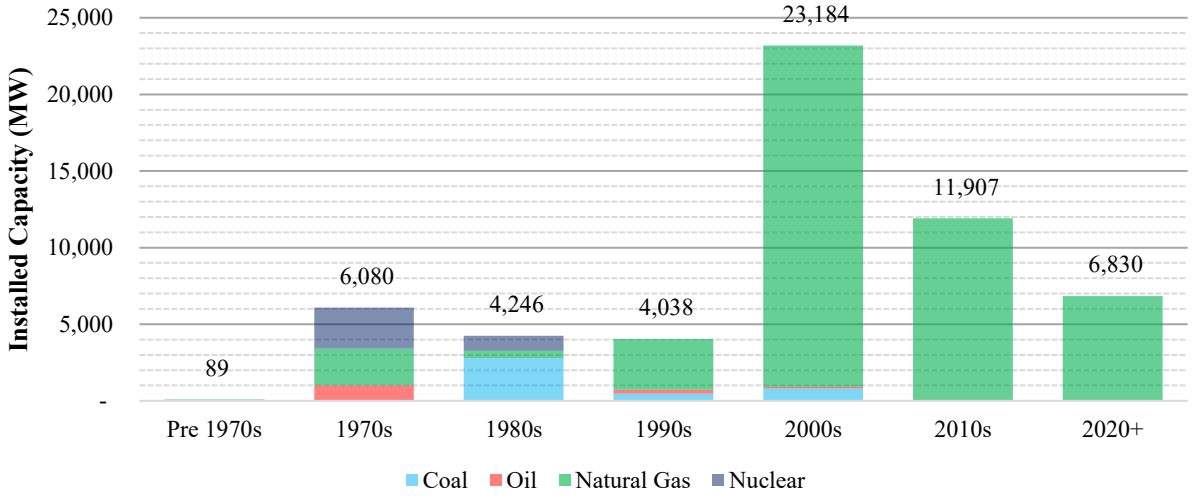
Fossil Fuels

While renewable generation increases its contribution to the state's generating capacity, most of the generation is projected to come from traditional sources, such as fossil-fueled steam and combustion turbine generators that have been added to Florida's electric grid over the last several decades. Due to forecasted increases in peak demand, further traditional resources are anticipated over the planning period.

Florida's generating fleet includes incremental new additions to a historic base fleet, with units retiring as they become uneconomical to operate or maintain. Currently, Florida's existing capacity ranges greatly in age and fuel type, and legacy investments continue. The weighted average age of Florida's traditional generating units is 23 years. While the original commercial in-service date

may be more than 50 years for some units, they are constantly maintained as necessary in order to ensure safe and reliable operation, including uprates from existing capacity, which may have been added after the original in-service date. Figure 14 illustrates the decade in which current operating generating capacity was originally added to the grid, with the largest additions occurring in the 2000s.[8]

Figure 14: State of Florida - Electric Utility Installed Traditional Capacity by Decade



Source: FRCC 2026 Regional Load and Resource Plan

Energy Storage

In addition to a number of electric grid-related applications, emerging energy storage technologies have the potential to considerably increase not only the firm capacity contributions from solar PV installations, but their overall functionality as well. Energy storage technologies that are currently under research include pumped hydropower, flywheels, compressed air, thermal storage, and battery storage. Of these technologies, battery storage is primarily planned and used by utility companies. Battery storage has been proposed for connection directly to the grid, behind the meter box (net metering) or integrated with a solar/PV unit. Battery storage technology has continued to advance, and the cost of storage is projected to continue to decline over the long-term, aided, in part, by continued tax credits from the Inflation Reduction Act.

Florida's utilities have engaged in small pilot programs to determine the best placement and usage for energy storage technologies, including behind the customer's meter, at distribution substations, and at generating facilities. Each use case has its own benefits, allowing customers to ride out outages (net metering), improving reliability and reducing line losses (distribution substations), or providing firm capacity to the grid (generating facilities). Currently, the TYSP Utilities have 1,209 MW of installed battery energy storage, with the single largest installation being FPL's 409 MW Manatee battery storage site. Battery storage is a unique resource in that it can contribute to firm

[8] The values for historic periods may vary from prior reports due to capacity uprates or derates of the generating units included in the age cohort, in addition to retirements.

capacity and offers a fast ramp rate, but it has a limited duration and requires charging from the grid, becoming a load to be served rather than generation serving load. Due to small inefficiencies in charging and discharging, batteries increase the total amount of energy that utilities must produce to serve customer load, affecting net load rather than net generation.

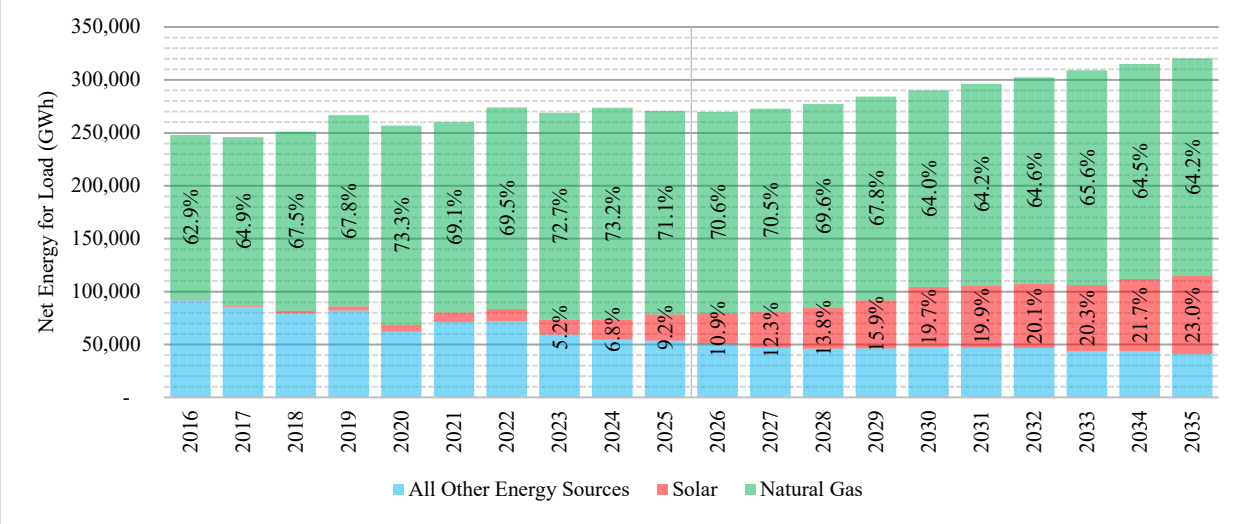
Over the next decade, utilities anticipate adding approximately 11,056 MW of energy storage, primarily directly on the transmission system or a specific power plant. While energy storage provides firming for intermittent solar facilities, grid connected batteries will not be restricted to charging from renewable sources. These units can be charged from any energy source during off-peak periods, including fossil fuel generation. To the extent solar generation is charging batteries it is also not offsetting fossil fuel generation that otherwise would be occurring on the grid during the same period. Some energy storage will be directly connected to a specific renewable power plant. Given these characteristics, for reliability planning purposes, 1,203 MW of existing battery storage and 8,568 MW for planned battery storage is considered firm for summer peaks.

Companies are continuing to explore different forms of energy storage even as they expand their construction of battery storage, such as storage with longer duration or superior ability to address operational needs. The Commission will continue to monitor technological developments in energy storage to cost-effectively address the state's fuel diversity, reducing the dependence on fossil fuels, while still maintaining adequate resources to provide for customer loads.

Fuel Diversity

Natural gas has risen to become the dominant fuel in Florida and since 2011 has generated more net energy for load than all other fuels combined. As Figure 15 illustrates, natural gas was the source of approximately 71.1 percent of electric energy consumed in Florida in 2025. Natural gas electric generation, as a percent of net energy for load, is anticipated to decline throughout the remainder of the planning period, offset by solar generation. Solar generation is anticipated to exceed all non-natural gas energy sources combined by 2030.

Figure 15: State of Florida - Natural Gas Generation

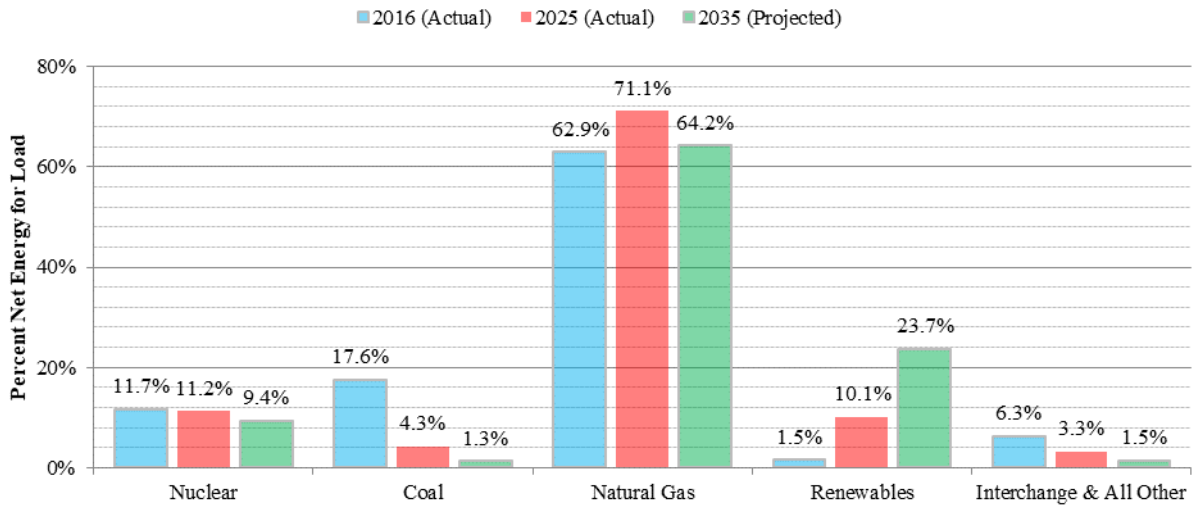


Source: FRCC 2016-2035 Regional Load and Resource Plans

Because a balanced fuel supply can enhance system reliability and mitigate the effects of volatility in fuel price fluctuations, it is important that utilities have a level of flexibility in their generation mix. Maintaining fuel diversity on Florida's system faces several difficulties. Existing coal units will require additional emissions control equipment leading to reduced output, or retirement if the emissions controls are uneconomic to install or operate. New solid fuel generating units such as nuclear and coal have long lead times and high capital costs. New coal units face challenges related to environmental compliance requirements, making it unlikely that they could be permitted without novel emissions control technologies.

Figure 16 shows Florida's historic and forecast percent net energy for load by fuel type for the actual years 2016 and 2025, and forecast year 2035. Nuclear generation is expected to remain steady throughout the planning period. Coal generation is expected to continue its downward trend well into the planning period. Natural gas has been the primary fuel used to meet the growth of energy consumption, but this trend is anticipated to slightly decrease during the planning period.

Figure 16: State of Florida - Historic and Forecast Generation by Fuel Type

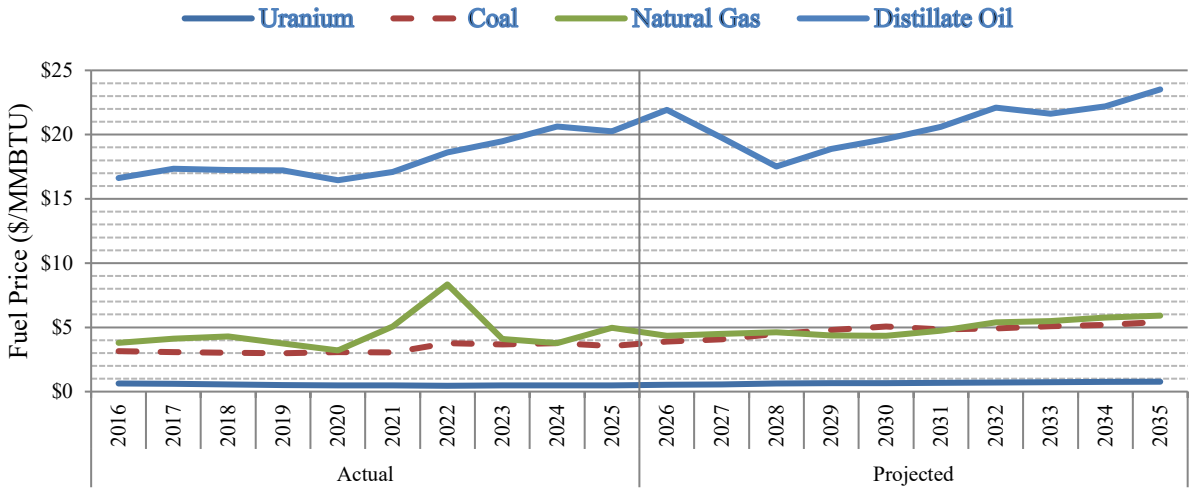


Source: FRCC 2016-2035 Regional Load and Resource Plan

Fuel Price Forecast

Fuel price is an important economic factor affecting the dispatch of the existing generating fleet and the selection of new generating units. In general, the capital cost of a fuel-based power plant is inversely proportional to the cost of the fuel used to generate electricity from that unit. The major fuels consumed by Florida's electric utilities are natural gas, coal, and uranium. Distillate oil also factors into Florida utilities' fuel mix, albeit minimally, when compared to historical levels. Figure 17 illustrates the weighted average fuel price history and forecasts for the reporting electric utilities.

Figure 17: TYSP Utilities - Weighted Average Fuel Price of Reporting Electric Utilities



Source: TYSP Utilities' Data Responses

As shown on Figure 17, the forecasted weighted average price per million British Thermal Units (MMBTUs) for natural gas, uranium, coal, and distillate oil are all expected to increase in nominal terms over the next 10 years. Natural gas is expected to increase from $4.36 per MMBTU in 2026 to $5.91 per MMBTU by 2035, while coal prices are also expected to increase from $3.91 per MMBTU in 2026 to $5.42 per MMBTU by 2035. Meanwhile uranium, the lowest price fuel type per MMBTU, is projected to increase from $0.53 per MMBTU in 2026 to $0.77 per MMBTU by 2035. Distillate oil remains the most expensive fuel, with forecasted prices ranging between $17.53 and $23.51 per MMBTU from 2026 through 2035. Its relatively high cost compared to other fuel sources helps explain why it is used primarily for backup and peaking purposes only.

While the prices above are provided on a thermal energy basis, the efficiency of the generating units plays an important factor. This is referred to as the heat rate of the generating unit, with a lower value meaning the unit can produce the same amount of electricity with less fuel. As steam units have a higher heat rate than combined cycle generation, this disfavors steam generation even if the fuel price might be lower.

Modernizations and Improvements

Modernizations involve removing existing generator units that may no longer be economical to operate, such as oil-fired steam units, and reusing the power plant site's transmission or fuel handling facilities with a new set of generating units. The modernization of existing plant sites allows for significant improvement in both performance and emissions, typically at a lower price than new construction at a greenfield site. Not all sites are candidates for modernization due to site layout and other concerns, and to minimize rate impacts, modernization of existing units should be considered along with new construction at greenfield sites.

Several utilities have converted oil-fired and coal-fired steam units to natural gas-fired combined cycle units or converted or upgraded them to run on natural gas for all or a majority of their fuel.

Within the current planning period, only OUC's conversion of Stanton Unit 2 is expected to be completed by April 2027.

Impact of State and Federal Regulations

Florida utilities continue to manage their generation portfolios amid changes in federal environmental regulations. The EPA proposed repealing GHG standards for fossil fuel-fired EGUs and, in February 2026, repealed the 2024 MATS amendments, reverting to the 2012 standards. The EPA also rescinded the 2009 GHG Endangerment Finding and repealed federal GHG emission standards for vehicles. In April 2026, revisions to oil and natural gas requirements provided additional flexibility related to methane emissions. These actions may reduce compliance burdens, although the evolving regulatory environment continues to create uncertainty regarding future GHG requirements and CO_2 compliance costs. Most utilities therefore are not currently including explicit CO_2 compliance costs in resource planning assumptions.

Impact on Existing Resources

Existing environmental requirements generally have not resulted in significant statewide reliability concerns, although certain generating units face site-specific compliance considerations. Most utilities expect to maintain their current generating resources through the planning period, with environmental requirements primarily resulting in targeted investments, operational changes, and ongoing monitoring rather than widespread curtailments or retirements. The most significant areas of regulatory activity involve air emissions, greenhouse gases, wastewater, cooling water systems, and coal ash management. Utilities are making facility specific upgrades and pursuing compliance measures where needed, while coal fired generation continues to decline through retirements, conversions, and reduced reliance on coal. The decline in coal generation has gradually reduced exposure to some environmental requirements.

Greenhouse gas regulation remains the largest area of uncertainty. Changes in federal requirements and ongoing regulatory and legal developments are making it difficult for utilities to determine the long-term costs and operational implications of future CO_2 compliance. As a result, most utilities are not currently including explicit CO_2 compliance costs in their resource planning assumptions. Overall, Florida's utilities are managing environmental requirements through incremental investments and changes to their generation portfolios, with no broad expectation that environmental regulations will materially affect electric reliability over the next decade.

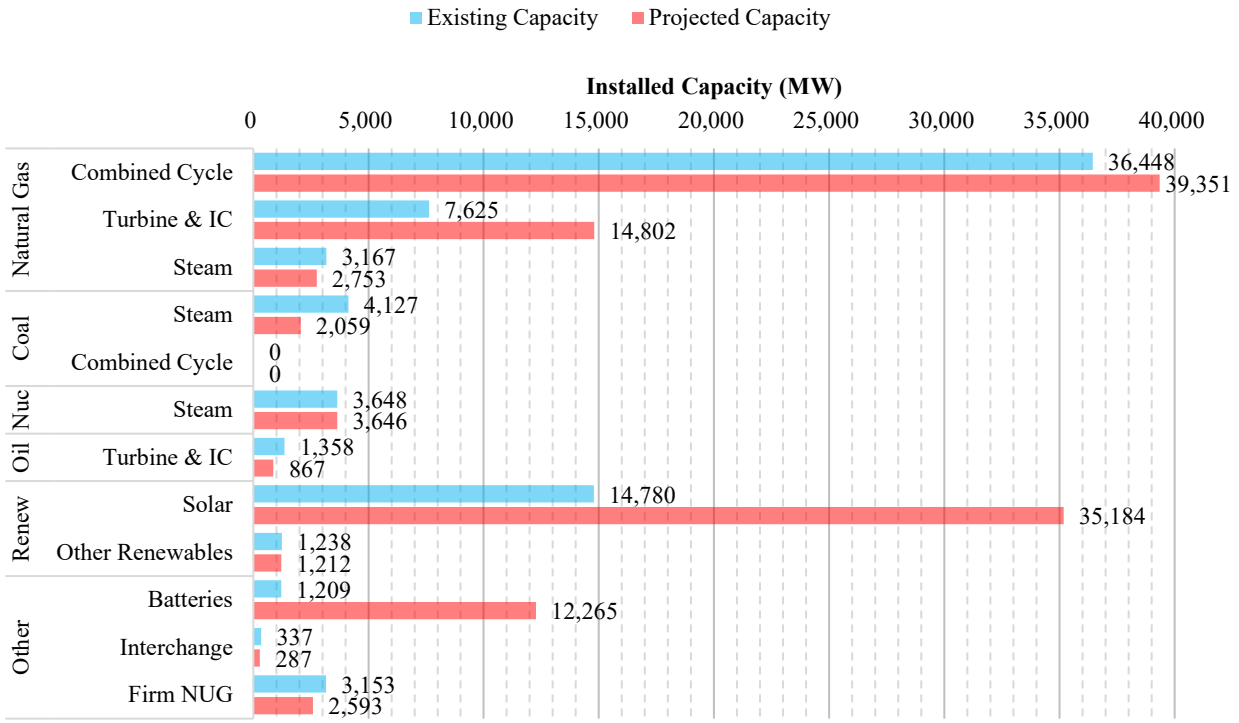
Projected Generation Resources

Current demand and energy forecasts continue to indicate that despite increased levels of conservation, energy efficiency, renewable generation, and existing traditional generation resources, the need for additional generating capacity still exists. While reductions in demand have been significant, the total demand for electricity is expected to increase, making the addition of traditional generating units necessary to satisfy reliability requirements and provide sufficient electric energy to Florida's consumers. Because any capacity addition has certain economic impacts based on the capital required for the project, and due to increasing environmental concerns relating to solid fuel-fired generating units, Florida's utilities must carefully weigh the factors involved in selecting a supply-side resource for future traditional generation projects.

In addition to traditional economic analyses, utilities also consider several strategic factors, such as fuel availability, generation mix, and environmental compliance prior to selecting a new supply-side resource. Limited supplies, access to water or rail delivery points, pipeline capacity, water supply and consumption, land area limitations, cost of environmental controls, and fluctuating fuel costs are all important considerations to the utilities' IRP process.

Figure 18 illustrates the present and future aggregate capacity mix, and incorporate all proposed additions, retirements, fuel switching, uprates and derates, and changes in operational or contract status contained in the reporting utilities' 2026 TYSPs and the FRCC's 2026 Regional Load and Resource Plan.

Figure 18: State of Florida - Current and Projected Installed Capacity



Source: FRCC 2026 Regional Load and Resource Plan and TYSP Utilities' Data Responses

Power Plant Siting Act

Any proposed steam or solar generating unit greater than 75 MW requires a certification under the Florida Electrical Power Plant Siting Act (PPSA), contained in Sections 403.501 through 403.518, F.S. The Commission has exclusive jurisdiction to determine the need for new electric power plants through Section 403.519, F.S. Upon receipt of a determination of need, the electric utility would then seek approval from the Florida Department of Environmental Protection, which addresses land use and environmental concerns. When all parties stipulate that there are no disputed issues of material fact or law involved, the applicant may request that the Secretary of the Florida Department of Environmental Protection approve or deny certification, pursuant to Sections 403.508(6)(a) and 403.509(1)(a), F.S. Otherwise, the Governor and Cabinet sitting as the

Siting Board ultimately must approve or deny the overall certification of a proposed line when there is a disputed issue of material fact or law, pursuant to Section 403.509(1)(b), F.S.

There are only two planned units subject to the PPSA within the current planning period that have not yet received a determination of need. These units are a pair of 559 MW natural gas-fired combined cycles planned by SEC, with in-service dates in 2032 and 2035. The Commission would anticipate a petition for these units no later than 2028 and 2031, respectively. Table 7 summarizes all planned gas generating units proposed by the 2026 TYSP Utilities that have been approved or must be approved under the PPSA, as well as those other new generating units that do not require approval pursuant to the PPSA. All planned solar facilities are below the 75 MW threshold for PPSA consideration.

Table 7: TYSP Utilities - New Gas Generation and Power Plant Siting Act Requirements

In-Service Year	Utility Name	Plant Name & Unit Number	Unit Type	Net Capacity (MW)	Notes
New Units with PSC Determination of Need					
2026	SEC	Shady Hills Energy Center Unit 1	CC	546	Docket No. 20170267-EI
2031	JEA	Advanced-Class 1x1 CC	CC	582	Docket No. 20260087-EM
			Subtotal	**1,128**	
New Units Requiring PPSA Approval					
2032	SEC	Unnamed CC 1	CC	559	
2035	SEC	Unnamed CC 2	CC	559	
			Subtotal	**1,118**	
New Units Not Requiring PPSA Approval					
2031	DEF	Undesignated CT 1 & 2	CT	436	2 Units
2031	TECO	Future CT 1	CT	223	
2032	FPL	4x0 Martin CT	CT	930	
2032	SEC	Unnamed CT 1	CT	345	
2032	SEC	Unnamed CT 2	CT	345	
2033	FPL	4x0 Martin CT	CT	930	
2034	DEF	Undesignated CT 3 & 4	CT	799	2 Units
2034	FPL	4x0 Martin CT	CT	930	
2035	TECO	Future CT 2	CT	223	
2035	FPL	2x0 Martin CT	CT	465	
2035	JEA	Advanced Class 1x0 CT 1	CT	374	
2035	JEA	Advanced Class 1x0 CT 2	CT	374	
			Subtotal	**6,374**	
			Total	**8,620**	

Source: 2026 TYSPs

Transmission

As generation capacity increases, the transmission system must grow accordingly to maintain the capability of delivering energy to end-users. The Commission has been given broad authority pursuant to Chapter 366, F.S., to require reliability within Florida's coordinated electric grid and to ensure the planning, development, and maintenance of adequate generation, transmission, and distribution facilities within the state.

The Commission is also monitoring new technologies and trends associated with transmission. The use of advanced conductors that are being designed to operate at higher temperatures with less sag compared to traditional conductors allows for higher current flow and increased transmission line capacity within existing rights-of-way. Using new sensors and control systems with real-time data allows the potential for dynamic line rating systems to assess and adjust the carrying capacity of transmission lines based on loading and weather conditions. Advanced power flow controllers that enable active control and optimization of power flow across the transmission network, potentially reduce congestion, improve system stability, and enhance the integration of renewable energy sources.

Transmission Line Siting Act

The Commission has authority over certain proposed transmission lines under the Florida Electric Transmission Line Siting Act (TLSA), contained in Sections 403.52 through 403.5365, F.S. To require certification under TLSA, a proposed transmission line must meet the following criteria: a nominal voltage rating of at least 230 kV, crossing a county line, and a length of at least 15 miles. Proposed lines in an existing corridor are also exempt from TLSA requirements, pursuant to Section 403.537, F.S. The Commission is the sole forum for determinations of the reliability need and the proposed starting and end points for lines requiring TLSA certification. The proposed corridor route [9]is subsequently determined by the Florida Department of Environmental Protection during the certification process. Much like with the PPSA, when all parties stipulate that there are no disputed issues of material fact or law involved, the applicant may request that the Secretary of the Florida Department of Environmental Protection approve or deny certification, pursuant to Sections 403.527(6)(a) and 403.529(1)(a), F.S. Otherwise, the Governor and Cabinet sitting as the Siting Board ultimately must approve or deny the overall certification of a proposed line when there is a disputed issue of material fact or law, pursuant to Section 403.529(1)(b), F.S.

Table 8 lists all proposed transmission lines in the 2026 TYSPs and the FRCC 2026 Regional Load and Resource Plan that require TLSA certification. In 2026, the Commission approved four TLSA projects for FPL, collectively referred to as the Andytown-Oasis Project. Only one utility, OUC, projected additional TLSA projects during the planning period in its TYSP, with petitions anticipated in 2030 and 2031. DEF filed notice of a TLSA project in September 2026, which will be addressed by the Commission in Docket No. 20260143-EI, *In re: Petition for determination of need for Avon Park to Vandolah transmission line in Highlands and Hardee Counties, by Duke Energy Florida, LLC.*

[9] The Commission's decision in this proceeding is currently under appeal.

Table 8: State of Florida - Planned Transmission Lines

Utility	Transmission Line	Line Length (Miles)	Nominal Voltage (kV)	Date Need Approved	Date TLSA Certified	In-Service Date
FPL	Sweatt to Whidden	79	230	05/2022	09/2022	06/2026
FPL	Oasis to Andytown	30	500	09/2026	Pending	12/2031
FPL	Oasis to Quarry	15	500	09/2026	Pending	12/2033
FPL	Quarry to Oasis	15	230	09/2026	Pending	12/2033
FPL	Levee to Oasis	15	230	09/2026	Pending	12/2033
DEF	DeLand West-Dona Vista	26.5	230	6/2025	1/2026	1/30/2026
DEF	Avon Park-Vandolah	33	230	TBD	Pending	TBD
TECO	TECO Lake Agnes to DEF Gifford	27.5	230	9/2007	2/2009	TBD
OUC	Source to St. Cloud West to Taft	>15	230	TBD	TBD	2033
OUC	Rocky Pond to Stanton	>15	230	TBD	TBD	2035

Source: 2026 TYSPs and FRCC 2026 Regional Load and Resource Plan

Reliability

Florida's electric utilities are expected to have enough generating assets available at the time of peak demand to meet forecasted customer demand. If utilities only had sufficient generating capacity to meet forecasted peak demand, then potential instabilities could occur if customer demand exceeds the forecast, or if generating units are unavailable due to maintenance or forced outages. To address these circumstances, utilities are required to maintain additional planned generating capacity above the forecasted customer demand.

Reserve Margin

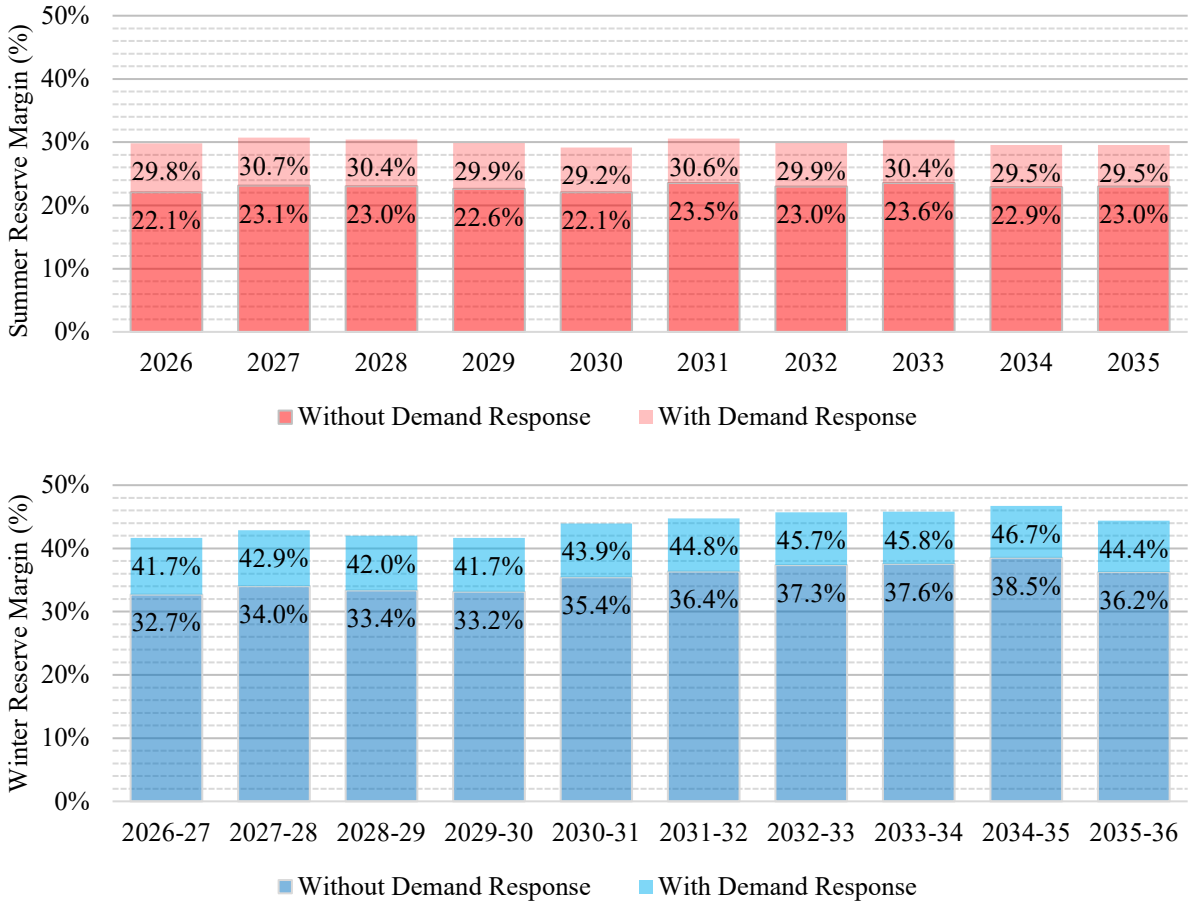
One reliability metric commonly used by the TYSP Utilities is a seasonal planning reserve margin. Each utility annually compares their forecasted seasonal peak demand after activation of demand response resources with the total amount of firm generation available at the seasonal peak hour. The difference between these values is the reserve margin, which is expressed in both megawatts and as a percentage of the net firm peak demand. Pursuant to Rule 25-6.035, F.A.C., electric utilities within Florida must maintain a minimum reserve margin of 15 percent for planning purposes, although certain utilities have elected to use a higher planning reserve margin, either on an annual or seasonal basis. The three largest reporting electric utilities, FPL, DEF, and TECO, are party to a stipulation approved by the Commission that utilizes a 20 percent reserve margin for planning.[10] As a whole, Florida typically has a lower summer reserve margin than winter, but individual utilities may be more impacted by winter peaks.

Regarding demand response, while participants receive discounted rates or credits paid for by all ratepayers regardless of activation, the concern exists that as activations increase, participation could decrease. While large interruptible customers typically have notice period requirements, small load management customers usually do not have an advanced notice requirement. Historically, activations of demand response have almost exclusively been of the smaller load management customers, and typically for off-peak periods. As illustrated in Figure 19, the

[10] Order No. PSC-99-2507-S-EU, issued December 22, 1999, in Docket No. 19981890-EU, *In re: Generic investigation into the aggregate electric utility reserve margins planned for Peninsular Florida*.

statewide seasonal reserve margin exceeds the FRCC's required 15 percent planning reserve margin in all years. Even without demand response, the statewide reserve margin is anticipated to remain 22.1 percent or above throughout the planning period. On average, demand response contributes 7.1 percent toward the summer reserve margin, and 8.5 percent toward the winter reserve margin.

Figure 19: State of Florida - Projected Reserve Margin by Season



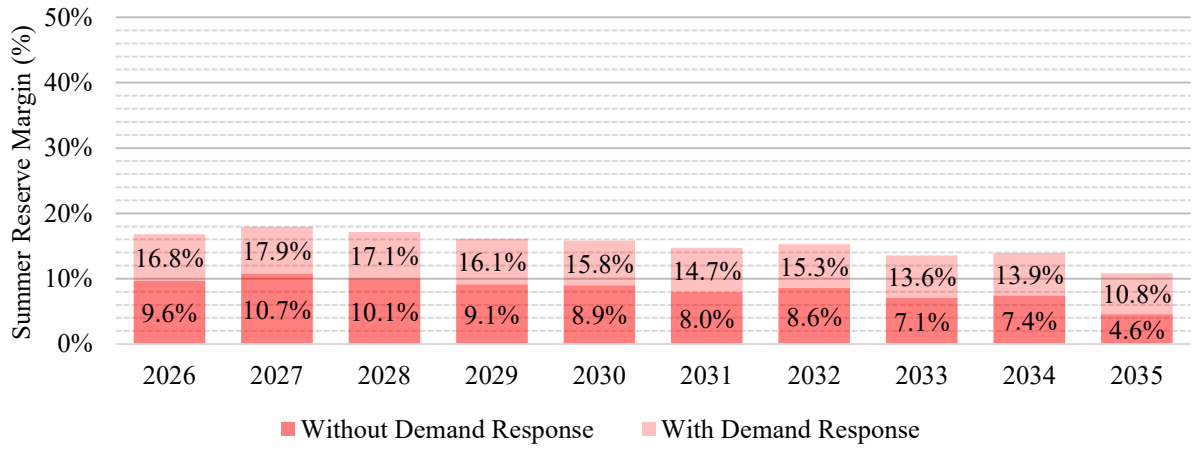
Source: FRCC 2026 Regional Load and Resource Plan - Form 10

Impact of Non-Firm Resources

As discussed above, the reserve margin calculation is based upon the hour of highest peak demand and compared to the available firm generation. With the increase in the amount of non-dispatchable generation, primarily solar, the highest peak hour may no longer represent the time of highest dispatchable generation need especially for the summer peak period. One potential approach to address this would be to evaluate a net-solar peak hour, treating solar as a reduction to load similar to demand response. Alternatively, the firm contribution of solar could be removed from the reserve margin analysis to determine the contribution only of dispatchable resources, such as demand response or traditional generation. On average, solar contributes approximately 12 percent towards the summer reserve margin over the planning period. As illustrated by Figure 20, even

without any contribution from solar at time of system peak, the statewide reserve margin would remain above the 15 percent threshold until 2031.

Figure 20: State of Florida - Projected Summer Reserve Margin without Solar



Source: FRCC 2026 Load & Resource Plan, 2026 TYSP Data Responses

Loss of Load Probability

In addition to reserve margin, Florida's utilities have used multiple indices to determine the reliability of their electric supplies. An additional metric is the Loss of Load Probability (LOLP), which is a probabilistic assessment of the duration of time electric customer demand will exceed electric supply and is measured in units of days per year. A maximum LOLP of no more than 0.1 days per year, or approximately 1 day of outage per 10 years is a frequently used metric. Between the two reliability indices, LOLP and reserve margin, the reserve margin requirement has typically been the controlling factor for the addition of capacity for several decades.

Similar to reserve margin, with an increase in non-dispatchable generation, a LOLP analysis that looks at all days or hours of the year provides additional information regarding the reliability of the system. Based on the 2026 Load and Resource Reliability Assessment Report, the FRCC details how it conducted a statewide LOLP analysis for the period 2026 through 2030 using a system planning model that considered all hours of the year, using probabilistic methods to simulate various weather and unit outages, producing several thousand scenarios, and performing sensitivities with no imports, no demand response activations, and high load conditions. Overall, in the base case and in each sensitivity the FRCC determined that the planned resources are more than adequate to meet the 0.1 LOLP requirement by at least three orders of magnitude in the base case, and two orders of magnitude for the highest sensitivity. The results of the scenarios are provided in Table 9.

Table 9: FRCC Loss of Load Probability Study Results

Year	Scenario Results (Days/Year)			
	Base Case	**No Availability of Imports**	**No Availability of Demand Response**	**High Load Case**
2026	0.0000299	0.0000524	0.0002835	0.0001320
2027	0.0000030	0.0000308	0.00001758	0.0001458
2028	0.0000615	0.0002506	0.0005417	0.0006854
2029	0.0000713	0.0000717	0.0005374	0.0008749
2030	0.0000885	0.0004383	0.0006053	0.0015899

Source: 2026 TYSP Workshop FRCC Studies and Reports

Utility Perspectives

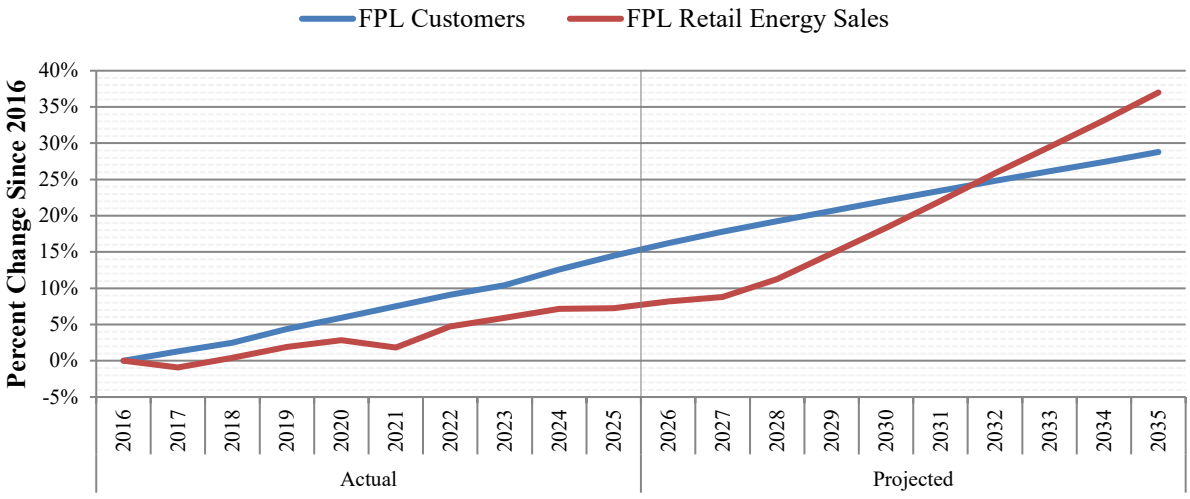
Florida Power & Light Company (FPL)

FPL is an investor-owned, and Florida's largest, electric utility. FPL's service territory previously was solely in the FRCC Region and consisted of South Florida and the east coast. FPL's parent company, NextEra Energy Inc., acquired Gulf Power Company (GPC) in January 2019. Resource planning is now being done for the single entity of FPL, with the former GPC territory referred to as FPL's Northwest Florida Division (FPL NWFL). As an investor-owned utility, FPL is subject to the regulatory authority of the Commission over all aspects of utility operations, including rates, reliability, and safety. Pursuant to Section 186.801(2), F.S., the Commission finds the FPL 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, FPL's service area had approximately 6,059,632 customers and annual retail energy sales of 129,471 GWh, accounting for approximately 53.2 percent of Florida's annual retail energy sales. The total number of customers and total retail energy sales grew by approximately 1.7 percent and 0.1 percent, respectively, in 2025. Figure 21 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that FPL filed in its 2026 TYSP.

Figure 21: FPL Growth



Source: 2026 TYSP

Over the past 10 years, FPL's customer base has increased by 14.5 percent, while retail energy sales have grown by approximately 7.2 percent. For the 2026 TYSP forecast horizon, customer growth is forecasted at 1.2 percent per year, with the residential and commercial classes accounting for most of the increase. Residential customers are expected to increase by approximately 1.2 percent annually, supported by continued but moderate growth and housing development trends. Commercial customers are projected to grow by approximately 0.9 percent per year, also reflecting steady but moderate economic activity. Industrial customer counts are forecasted to remain relatively flat, or 0.1 percent annually on average.

FPL's billed UPC across the residential and commercial classes reflect the combined long-term effects of energy efficiency improvements, evolving customer consumption patterns, and weather variability. Residential UPC declined by 1.7 percent in 2025. Commercial UPC declined by 0.6 percent in 2025. Industrial UPC increased by 2.8 percent in 2025, primarily attributable to changes in small general service industrial customer counts and use compared to the remainder of customers within this class that is more heavily weighted toward larger, more energy intensive operations.

In the forecast period, residential billed UPC is forecasted to increase at an average annual rate of approximately 0.5 percent, with initial modest declines being largely offset by continued electric vehicle adoption. Commercial billed UPC is forecasted to decline at an average annual rate of 0.7 percent, driven by continued improvements associated with electric conservation efforts. Industrial UPC is expected to increase at an annual average rate of approximately 21 percent, supported by the addition of large load customers forecasted to enter the system beginning in 2028.

For the current TYSP forecast horizon, FPL's total billed retail energy sales are projected to grow at an average annual rate of approximately 2.6 percent, with overall growth driven by a combination of steady underlying demand, continued Plug-in Electric Vehicle adoption, and large loads entering the system beginning in 2028.

Data Centers

FPL reported that it has had multiple discussions with potential large power users inquiring about service under the Utility's recently approved Large Load Contract Service (LLCS) rate schedules and tariffs. Based on these inquiries and discussions, FPL indicated that the Utility reasonably believes that there is a high probability for customers with significant load requirements to be served under the LLCS tariffs beginning in 2028. Further, FPL indicated that it estimates the total load (annual maximum MW) associated with these customers to grow to approximately 3 GW by 2035. This projection was included in the forecast used to support FPL's 2026 TYSP, which is informed by large load customer interest, including engineering studies, customer engagement, and other indicators consistent with a progression toward executed service agreements. Table 10 shows FPL's planned data centers.

The Utility noted that adding large amounts of demand and energy to the Utility's load forecast will result in new generation resources being added to its system and increased usage of its existing generation fleet to meet the need for increased energy. The Utility currently projects that it will be able to add sufficient generation capacity to meet any increases in load from data centers and will continue to evaluate prospective large load additions to ensure the reliability requirements are met. FPL also indicated that, from a transmission interconnection perspective, the Utility evaluates large-load customers on a site-specific basis to identify any required upgrades needed to reliably serve the facilities. These upgrades are identified through established planning and interconnection study processes and are coordinated with the customer's anticipated in-service date.

Table 10: FPL's Projected Large Load Data Centers

Year	No. of Data Centers	Grid Impacts		
		Annual Energy	Summer Peak	Winter Peak
	(-)	(GWh)	(MW)	(MW)
2026	-	-	-	-
2027	-	-	-	-
2028	2	1,520	248	25
2029	2	4,311	620	320
2030	2	7,103	992	616
2031	2	9,895	1,364	911
2032	2	12,719	1,736	1,207
2033	2	15,480	2,108	1,502
2034	2	18,272	2,480	1,798
2035	2	21,064	2,852	2,093

Source: Utility's Response Data Requests

Forecasted Load and Peak Demand

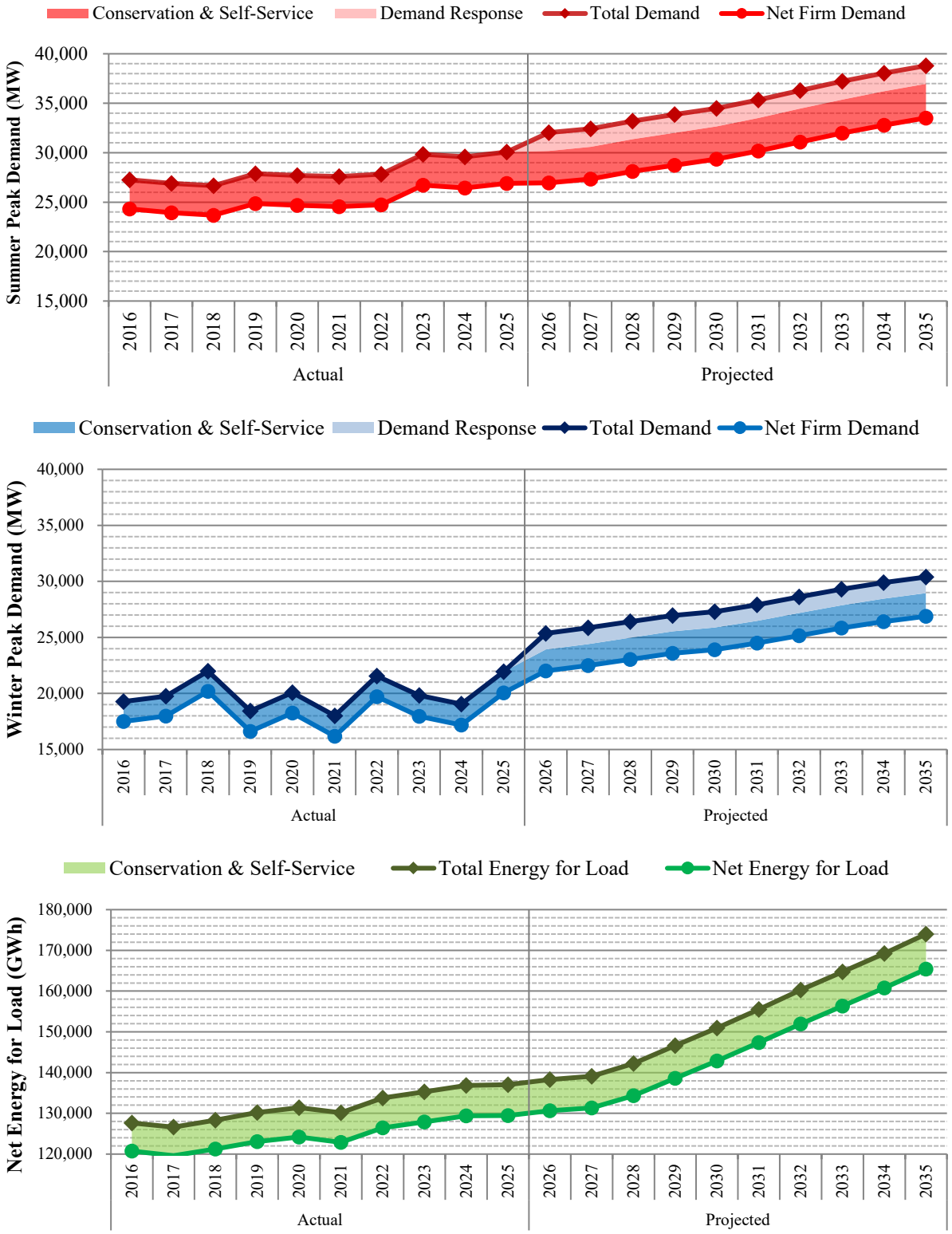
The three graphs in Figure 22 show FPL's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. FPL also included the impact of expected data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

As an investor-owned utility, FPL is subject to FEECA and currently offers energy efficiency and demand response programs to customers to reduce peak demand and annual energy consumption. The Commission reviewed and established energy conservation goals for FPL and approved FPL's 2025-2034 DSM Plan with modifications.[11]

On January 1, 2019, GPC became a subsidiary of NextEra Energy, Inc., FPL's parent company, and the systems were integrated into a single electric system, effective January 1, 2022. The three graphs in Figure 22 show FPL and GPC's combined seasonal peak demand, summer and winter, and net energy for load, for the historic years 2016 through 2021, and integrated FPL/GPC historical data for 2022 through 2025, and forecast data 2026 through 2035.

[11] See Order Nos. PSC-2024-0505-FOF-EG issued December 18, 2024, in Docket No. 20240012-EG, *In re: Commission review of numeric conservation goals (Florida Power & Light Company)* and PSC-2025-0292-PAA-EG issued July 29, 2025 in Docket No. 20250048-EG, *In re: Petition for approval of proposed demand-side management plan, by Florida Power & Light Company*.

Figure 22: FPL Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, FPL generating facilities provide approximately 32,601 MW of summer capacity. This includes 24,519 MW from fossil generation, 3,502 MW from nuclear, 3 MW of landfill gas, and firm contributions of 3,588 MW from solar and 991 MW from energy storage. FPL has 7,932 MW of nameplate solar capacity installed, but only counts an average of 45 percent as firm towards summer peak. FPL considers its energy storage capacity as firm capacity for summer. FPL operates two of its 819 MW natural gas-fired steam units as winter peaking units only and are not included in this total.

In addition to the Utility's capacity, FPL has multiple long-term purchased power contracts. These include two wind contracts for approximately 270 MW of nameplate capacity, which FPL counts as contributing 30 percent towards summer peak.

Projected Generation Resources

FPL's unit retirements and additions during the planning period are described in Table 11. FPL plans multiple additions within the planning period, totaling an approximate 23,695 MW of additional generation capacity, most of this resulting from planned solar facilities with a combined capacity of approximately 12,293 MW. Other planned facilities include the installation of four natural gas combustion turbine units within Martin County with a combined capacity of 3,276 MW, the inclusion of the 672 MW Vandolah plant starting in 2027, and multiple upgrades to existing natural gas combined cycle units. Their energy storage portfolio is anticipated to expand by an approximate 7,545 MW of energy storage throughout the forecast period.

Over the planning period, FPL plans to retire the Lansing Smith Unit 3A by the end of 2027, the Gulf Clean Energy Center Units 4 and 5 and Perdido Units 1 and 2 by the end of 2029, and Pea Ridge Units 1 through 3 by the end of 2031. Purchased power agreements with the Palm Beach Solid Waste Authority for 40 MW and 70 MW end in April 2032 and June 2034 respectively, and a contract for 3.5 MW from the Broward South Landfill facility ends starting 2027.

Table 11: FPL Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW) Sum	Firm Capacity (MW) Sum	Notes
Retiring Units					
2026	Lansing Smith Unit 3A	LO CT	32	32	
2030	Gulf Clean Energy Center 4 & 5	NG ST	150	150	
2030	Perdido 1 & 2	LFG IC	4	4	
2032	Pea Ridge 1-3	NG GT	12	12	
	Total Retirements		**198**	**198**	
New Units					
2026	Sited Solar Plants	PV	298	27	4 Sites
2026	Unsited Energy Storage	BA	1,420	1420	
2027	Sited Solar Plants	PV	1,192	53	16 Sites
2027	Unsited Energy Storage	BA	820	656	
2028	Sited Solar Plants	PV	1,490	79	20 Sites
2028	Unsited Solar Plant	PV	298	14	
2028	Unsited Energy Storage	BA	596	435	
2029	Sited Solar Plants	PV	596	34	
2029	Unsited Solar Plant	PV	1,788	92	
2029	Unsited Energy Storage	BA	596	370	
2030	Unsited Solar Plants	PV	2,980	152	
2030	Unsited Energy Storage	BA	596	310	
2031	Unsited Energy Storage	BA	1,192	620	
2032	4x0 Martin CT	NG CT	930	930	
2033	4x0 Martin CT	NG CT	930	930	
2033	Unsited Energy Storage	BA	596	250	
2034	4x0 Martin CT	NG CT	930	930	
2034	Unsited Solar Plants	PV	1,490	76	
2034	Unsited Energy Storage	BA	224	94	
2035	2x0 Martin CT	NG CT	465	465	
2035	Unsited Solar Plant	BA	1,565	80	
2035	Unsited Energy Storage	BA	820	316	
	Total New Units		**21,812**	**8,333**	
	Net Additions		**21,614**	**8,135**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 12 shows FPL's actual net energy for load by fuel type for 2025 and the projected fuel mix for 2035. FPL relies primarily upon natural gas for energy generation, making up 67.5 percent of net energy for load in 2025. FPL is projected to use natural gas for less than two thirds of its energy generation by 2035; however, natural gas will remain FPL's primary fuel source at approximately 57 percent, while renewables will account for 26.5 percent, followed by nuclear at 16.1 percent.

Table 12: FPL Energy Generation by Fuel Type

Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	99,427	**67.5%**	103,049	**57.0%**
Coal	479	**0.3%**	1,071	**0.6%**
Nuclear	29,384	**20.0%**	29,027	**16.1%**
Oil	56	**0.0%**	0	**0.0%**
Renewable	17,617	**12.0%**	47,798	**26.5%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	297	**0.2%**	(269)	**-0.1%**
Total	**147,260**		**180,677**	

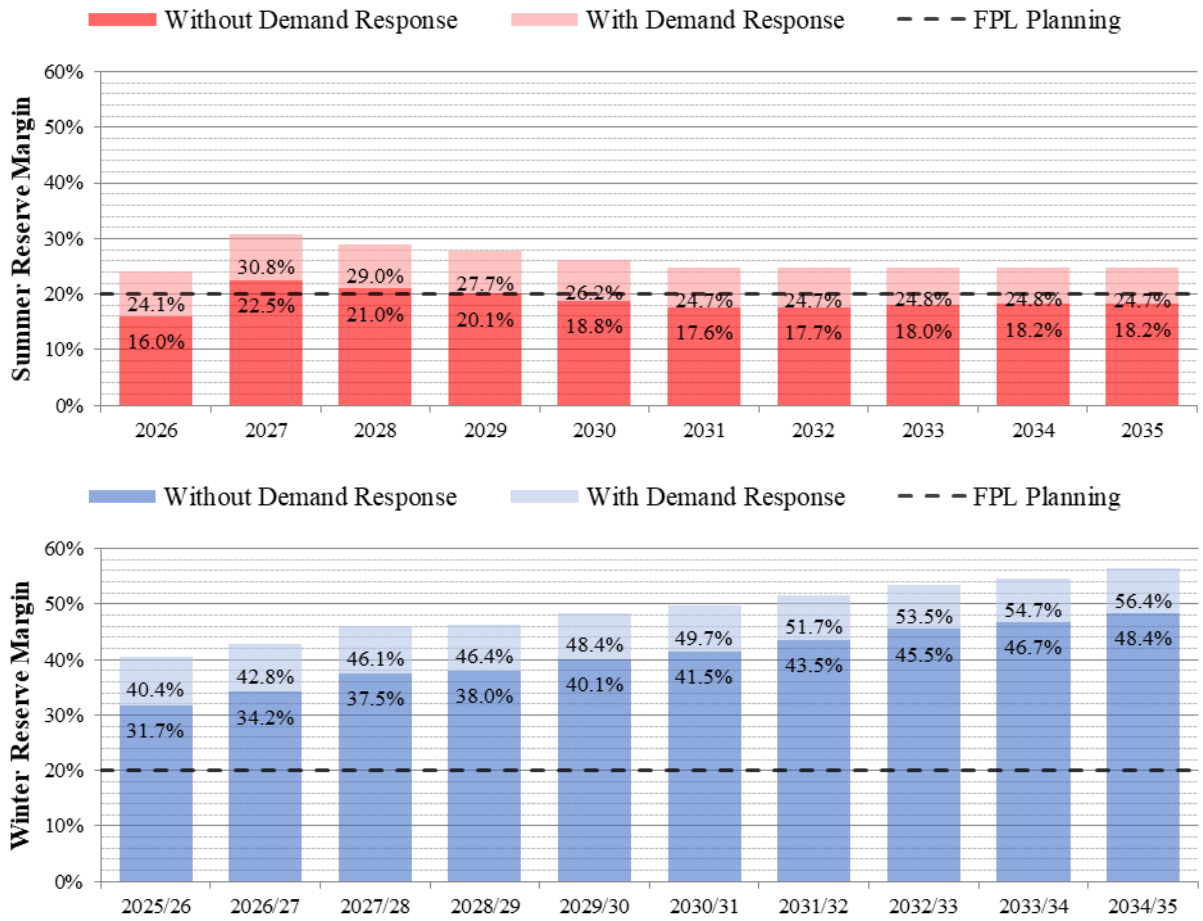
Source: 2026 TYSP

Reliability

Traditionally, FPL has used three methods for its reliability review. The three methods are a planning reserve margin, a generation-only planning reserve margin, and a LOLP. Since 1999, FPL has utilized a 20 percent planning reserve margin criterion based on a stipulation approved by the Commission. FPL also elects to maintain a generation-only planning reserve margin of 10 percent. The Commission has yet to approve the 10 percent generation-only planning criteria, and it has not been the controlling factor for any unit additions. Figure 23 displays the forecast planning reserve margin with and without the use of demand response. As shown, FPL's future generation needs are controlled by its summer peak.

For its reserve margin planning, FPL has considered only a portion of its solar facilities to be firm for seasonal peak planning purposes, primarily for summer. Of its 7,932 MW of existing utility-owned solar generation, it treats it as contributing 3,588 MW or 45 percent in summer, and 115 MW or 1.5 percent in winter. Planned solar generation additions of 18,265 MW are only considered firm for an additional 1,502 or 8.2 percent in summer, and 337 MW or 1.8 percent in winter.

Figure 23: FPL Reserve Margin Forecast



Source: 2026 TYSP

In addition to reserve margin, FPL uses LOLP, which is a probabilistic assessment of the duration of time electric customer demand will exceed electric supply and is measured in units of days per year. FPL uses a maximum LOLP of no more than 0.1 days per year, or approximately 1 day of outage per 10 years. Between the two reliability indices, LOLP and reserve margin, the reserve margin requirement has historically been the controlling factor for the addition of capacity.

FPL has shifted from its prior usage of a probabilistic model that evaluated daily peaks for the year to determine its LOLP value, to a new stochastic model to simulate various weather and unit outages, producing several hundred scenarios. FPL's 2026 TYSP only contained a summary of this methodology and did not provide a majority of the inputs or results. Using this analysis, FPL projected significant resource shortfalls primarily in off-peak periods and is the controlling factor in generation additions. The Commission will have an opportunity to review this methodology during a future proceeding.

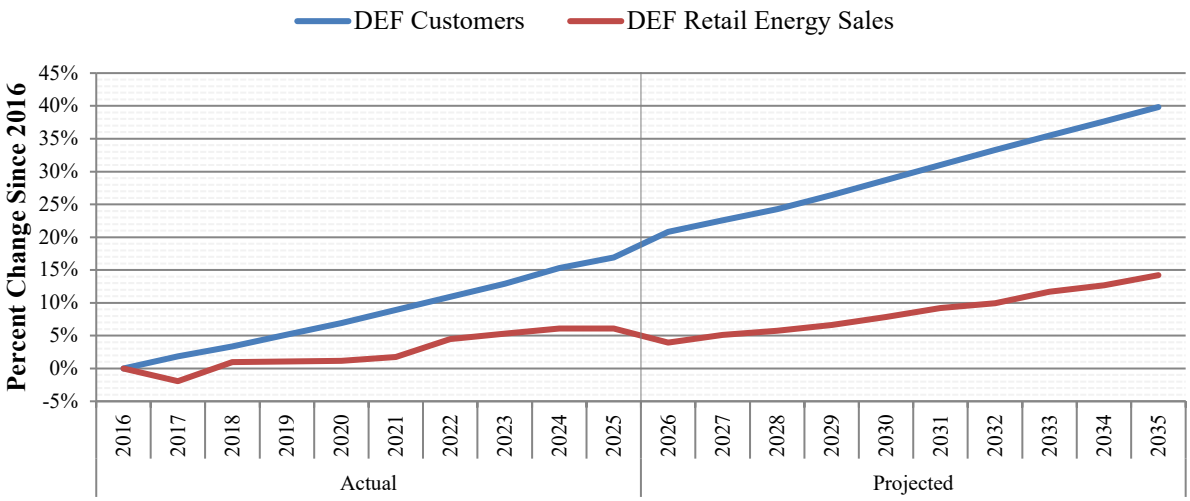
Duke Energy Florida, LLC (DEF)

DEF is an investor-owned utility and Florida's second largest electric utility. The Utility's service territory is within the FRCC region and is primarily located in central and west central Florida. As an investor-owned utility, the Commission has regulatory authority over all aspects of utility operations, including rates, reliability, and safety. Pursuant to Section 186.801(2), F.S., the Commission finds DEF's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, DEF had approximately 2,037,989 customers and annual retail energy sales of 41,140 GWh, accounting for approximately 16.9 percent of Florida's annual retail energy sales. DEF's total customers and total retail energy sales respectively grew approximately 1.4 percent and 0.02 percent in 2025. Over the past 10 years, DEF's customer base has increased by 16.9 percent, while retail energy sales have grown by 6.1 percent. Figure 24 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan DEF filed in its 2026 TYSP.

Figure 24: DEF Growth



Source: 2026 TYSP

Historically, DEF's customer growth has always been dominated by the residential and commercial customer classes. The Utility's customer growth trends are driven by broad economic and demographic factors such as population growth, migration, retirement, affordable housing, mortgage rates and job growth. More recent information reflects a return to the long-term trend of population migration into Florida. Commercial customer growth typically tracks residential growth since the commercial customer class is usually supplying needed services for the residential class.

DEF reported that the UPC of its residential and commercial accounts is driven primarily by fluctuations in price for electric service, end use appliance saturation, improved end use appliance efficiency, building codes, and changes in housing type/building size and space conditioning

equipment fuel type. Some residential and commercial accounts have reduced their utility requirements by installing solar panels behind their meter. The Utility indicated that more recently, the ability to self-generate also has begun to make an impact on UPC. A small percentage of industrial/commercial customers have chosen to install their own natural gas generation, reducing kWh consumption from the power grid. Not all recent trends in UPC are reflective of reductions to UPC. For example, DEF noted that the penetration of plug-in electric vehicles has grown, leading to an increase in residential use per customer, all else being equal.

For the 2026 TYSP forecast horizon, DEF's customer base is projected to grow at an average annual rate of approximately 1.6 percent, and its retail energy sales amount is projected to grow at an average annual rate of approximately 1.1 percent.

Data Centers

DEF has received inquiries from several potential new data center customers but stated that none of these inquiries have progressed to the level of commitment that would warrant inclusion in DEF's 2026 TYSP load forecast.

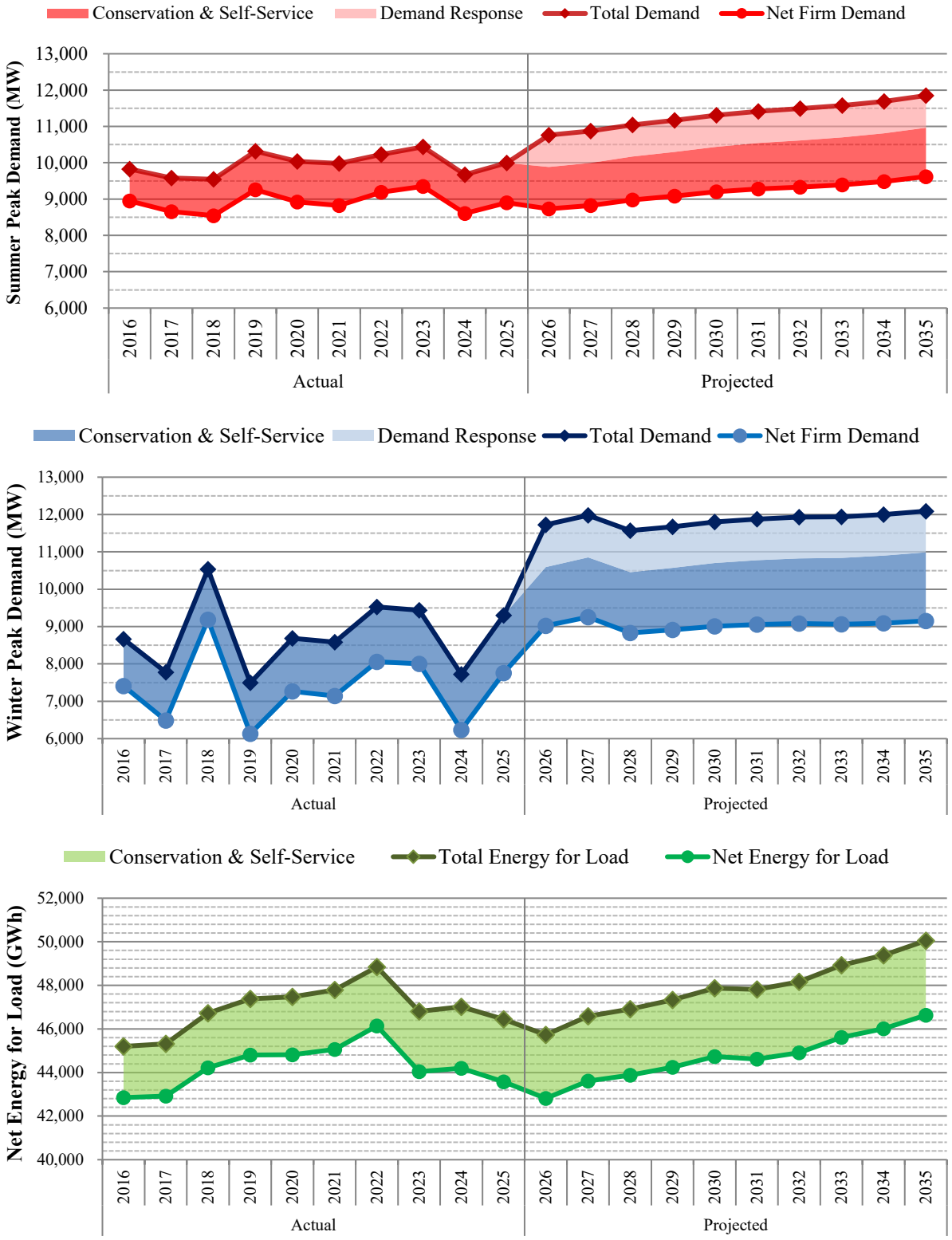
Forecasted Load and Peak Demand

The three graphs in Figure 25 show DEF's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. DEF did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

As an investor-owned utility, DEF is subject to FEECA, and currently offers energy efficiency and demand response programs to customers to reduce peak demand and annual energy consumption. The Commission reviewed and established energy conservation goals for DEF and approved DEF's 2025-2034 DSM Plan.[12]

[12] See Order Nos. PSC-2024-0429-FOF-EG, issued September 20, 2024, in Docket No. 20240013-EG, *In re: Commission review of numeric conservation goals (Duke Energy Florida, LLC)* and PSC-2025-0088-PAA-EG, issued March 24, 2025, in Docket No. 20240169-EG, *In re: Petition for approval of proposed demand-side management plan and demand-side management program standards, by Duke Energy Florida, LLC*

Figure 25: DEF Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, DEF generating facilities provide approximately 10,996 MW of summer capacity. This includes 10,132 MW from fossil generation and firm contribution of 864 MW from solar generation. DEF has 1,665 MW of nameplate solar capacity installed, but only counts an average of 52 percent as firm towards summer peak. In addition, DEF operates 50 MW of energy battery storage capacity.

Projected Generation Resources

DEF's unit retirements and additions during the planning period are described in Table 13. DEF plans a number of additions within the planning period including the installation of 67 new solar facilities totaling an approximate 5,017 MW of summer net capacity and 6 battery energy storage facilities with a combined total capacity of 1,400 MW.

A number of retirements are planned to begin with the retirement of the Bayboro Units 1, 2, and 4 by the end of 2026. Bartow Units P1 through P4, Debary Units P2 through P6, Intercession City Units P4 through P6, are also scheduled for retirement in 2034 alongside the coal-fired Crystal River Units 4 and 5.

Table 13: DEF Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW) Sum	Firm Capacity (MW) Sum	Notes
Retiring Units					
2026	Bayboro Units 1, 2, & 4	DFO CT	97	97	
2034	Bartow Units P1 & P3	DFO CT	82	82	
2034	Bartow Units P2 & P4	NG CT	86	86	
2034	Debary Units P2-P6	DFO CT	227	227	
2034	Intercession City P4-P6	DFO CT	138	138	
2034	Crystal River Units 4-5	BIT ST	1,422	1,422	
	Total Retirements		**2,052**	**2,052**	
New Units					
2026	Jumper Creek	PV	75	27	
2026	Bailey Mill	PV	75	26	
2027	Sited Solar	PV	374	131	5 Sites
2027	Powerline Energy Storage	BA	100	96	
2028	Bull Creek	PV	75	25	
2028	Wewahootee	PV	75	25	
2028	Unsited Solar	PV	375	113	5 Sites
2028	Bartow Energy Storage	BA	225	225	
2029	Unsited Solar	PV	449	117	6 Sites
2029	Co-located BESS	BA	100	96	
2030	Unsited Solar	PV	524	120	7 Sites
2030	Co-located BESS	BA	150	143	
2031	Unsited Solar	PV	599	120	8 Sites
2031	Undesignated CT P1-P2	NG GT	436	436	
2032	Unsited Solar	PV	599	100	8 Sites
2033	Unsited Solar	PV	599	95	8 Sites
2034	Unsited Solar	PV	599	93	8 Sites
2034	Co-located BESS	BA	525	469	
2034	Unsited Energy Storage	BA	300	255	
2034	Undesignated CT P3-P4	NG GT	799	799	
2035	Unsited Solar	PV	599	81	8 Sites
	Total New Units		**7,652**	**3,592**	
	Net Additions		**5,600**	**1,540**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 14 shows DEF's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. DEF relies primarily upon natural gas for energy generation, making up approximately 83.4 percent of net energy for load in 2025. DEF plans to increase renewable energy generation over the planning period, offsetting both natural gas and coal usage. DEF projects that renewable energy will provide 31.7 percent of its generation by 2035, which is the second highest percentage of renewable energy generation in 2035 of the TYSP Utilities. Natural gas would remain the primary fuel, at 68.3 percent in 2035.

Table 14: DEF Energy Generation by Fuel Type

Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	36,346	**83.4%**	31,850	**68.3%**
Coal	3,837	**8.8%**	0	**0.0%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	34	**0.1%**	1	**0.0%**
Renewable	3,659	**8.4%**	14,780	**31.7%**
Interchange	(665)	**-1.5%**	0	**0.0%**
NUG & Other	369	**0.8%**	0	**0.0%**
Total	**43,580**		**46,632**	

Source: 2026 TYSP and Data Responses

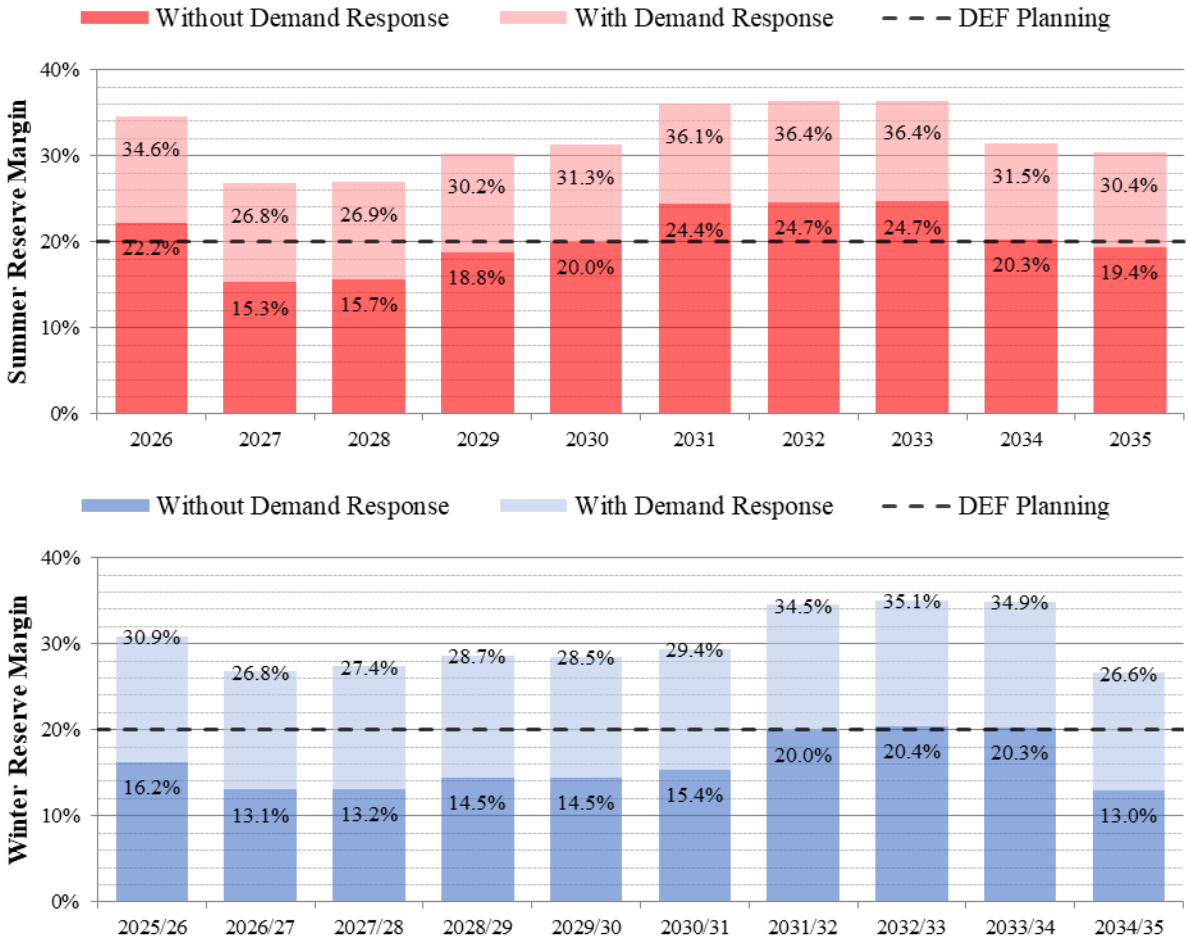
Reliability

Since 1999, DEF has utilized a 20 percent planning reserve margin criterion based on a stipulation approved by the Commission.[13] Figure 26 displays the forecast planning reserve margin for DEF through the planning period for both seasons, with and without the use of demand response. As shown in the figure, DEF's generation needs are mostly controlled by its summer peaking throughout the planning period.

As part of its evaluation of its system reliability, DEF also conducted an evaluation of the contribution of its existing and planned solar generation assets towards its seasonal peaks. The methodology selected by DEF, Effective Load Carrying Capacity (ELCC), determined that DEF's existing solar capacity has a reduced benefit for summer peaks than previously calculated, from 54.7 percent to 53.7 percent and that the facilities also contribute approximately 5 percent to the winter peak. The ELCC methodology also provides that as additional resources are added to the system, the net contribution will decrease, similar to observed trends in prior planning methodologies. DEF plans to perform future ELCC studies to account for new solar and battery additions. The Commission will have an opportunity to review this methodology during a future proceeding.

[13] Order No. PSC-99-2507-S-EU, issued December 22, 1999, in Docket No. 19981890-EU, *In re: Generic investigation into the aggregate electric utility reserve margins planned for Peninsular Florida.*

Figure 26: DEF Reserve Margin Forecast



Source: 2026 TYSP

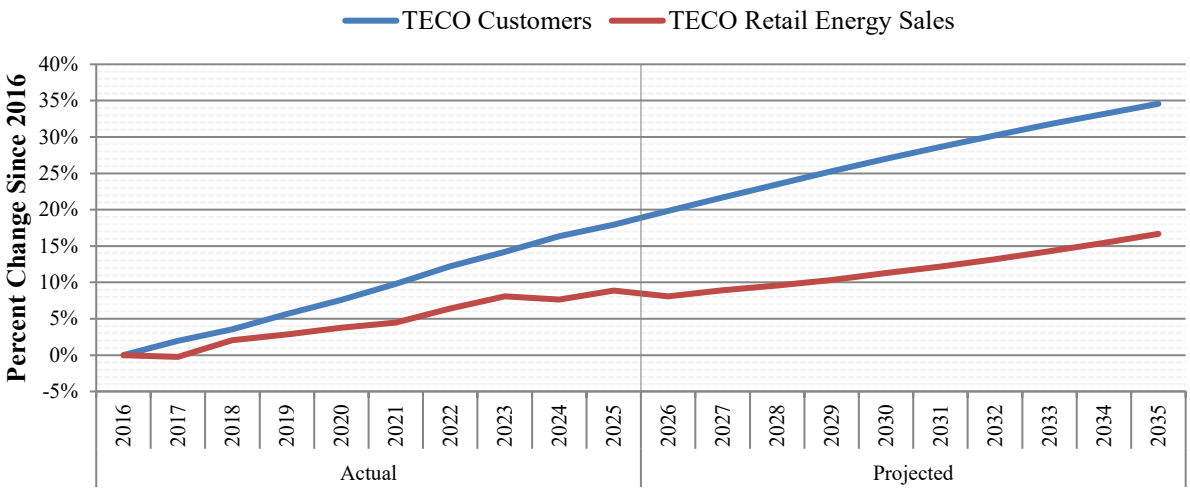
Tampa Electric Company (TECO)

TECO is an investor-owned utility and Florida's third largest electric utility. The Utility's service territory is within the FRCC region and consists primarily of the Tampa metropolitan area. As an investor-owned utility, the Commission has regulatory authority over all aspects of utility operations, including rates, reliability, and safety. Pursuant to Section 186.801(2), F.S., the Commission finds TECO's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, TECO had approximately 861,413 customers and annual retail energy sales of 20,943 GWh, accounting for approximately 8.6 percent of Florida's annual retail energy sales. Over the last 10 years, TECO's customer base has increased by approximately 17.9 percent, while retail energy sales have increased by approximately 8.9 percent. Figure 27 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan details that TECO filed as part of its 2026 TYSP.

Figure 27: TECO Growth



Source: 2026 TYSP

TECO's total customer growth in 2025 averaged approximately 1.4 percent with the residential class being the engine behind the growth. Over the next 10 years, total customer growth is expected to increase at an average rate of 1.3 percent annually.

TECO's residential UPC and commercial UPC growth rates were both slightly lower in 2025 than in 2024. The Utility's industrial UPC tends to be the most volatile primarily due to the phosphate sector, where mining activities and self-generation capabilities can vary significantly from month-to-month. Over the forecast horizon, TECO's residential UPC is expected to decline at an average annual rate of 0.4 percent. The primary drivers behind the decline in customer usage are increases in efficiencies for appliance, lighting, and new homes, conservation efforts, and changes in housing mix. The commercial UPC is expected to remain relatively flat, amounting to an annual average

reduction of about reducing 0.2 percent. The industrial UPC is expected to decrease slightly, by an annual average of 0.4 percent.

In 2025, TECO's retail energy sales were 1.2 percent higher than in 2024. For the next 10 years, the Utility's retail energy sales are projected to grow at an annual average rate of approximately 0.9 percent. This sales growth rate is below the projected customer growth rate of 1.3 percent primarily due to continued declines in UPC, as well as declines in the phosphate sector as the mining industry continues to move south and out of the Utility's service territory.

Data Centers

TECO's 2026 TYSP does not include projections of data center loads because the Utility has not received firm end-use customer commitments.

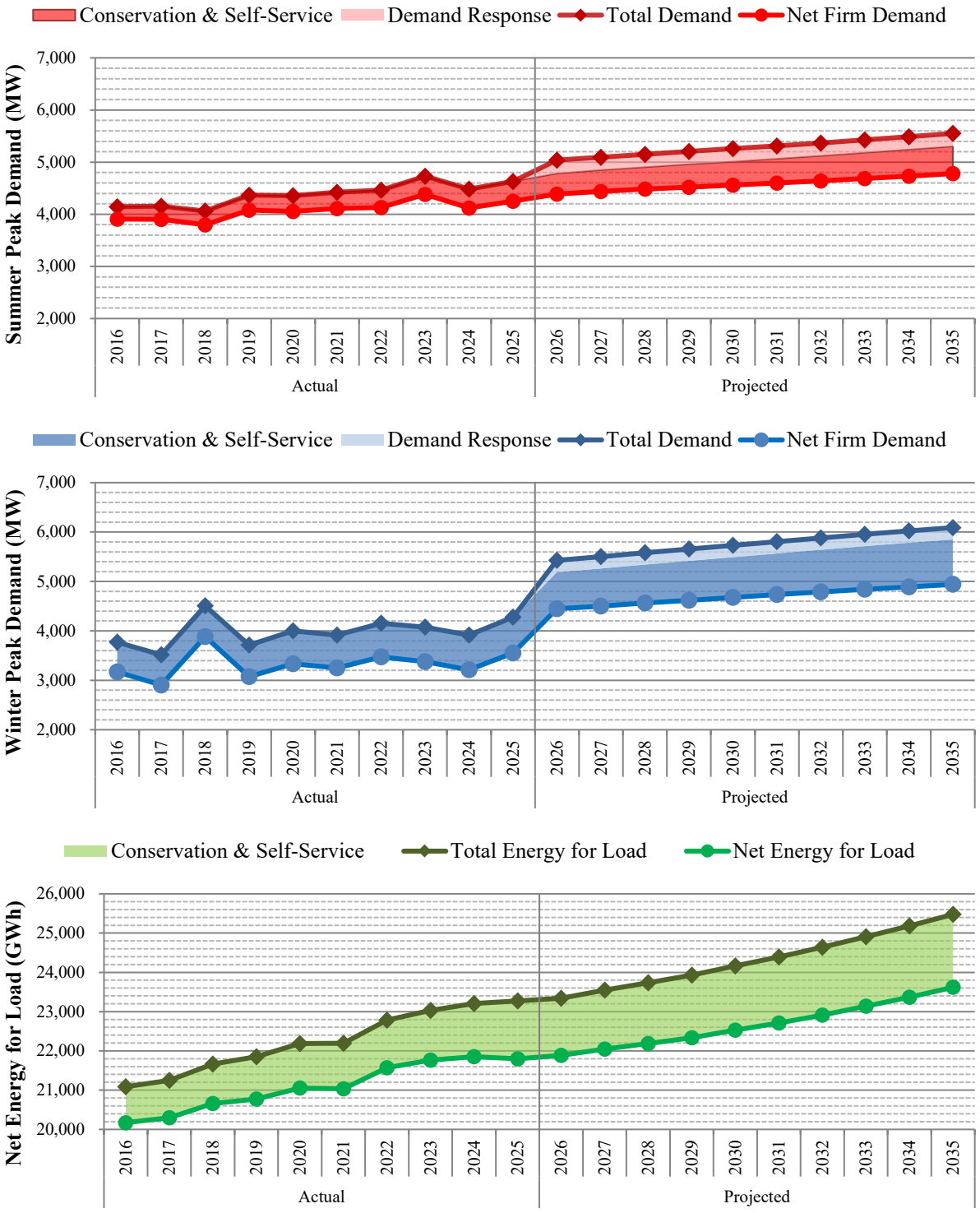
Forecasted Load and Peak Demand

The three graphs in Figure 28 show TECO's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. TECO did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

As an investor-owned utility, TECO is subject to FEECA and currently offers energy efficiency and demand response programs to customers to reduce peak demand and annual energy consumption. The Commission reviewed and established energy conservation goals for TECO and approved TECO's 2025-2034 DSM Plan.[14]

[14] See Order Nos. PSC-2024-0430-FOF-EG, issued September 20, 2024, in Docket No. 20240014-EG, *In re: Commission review of numeric conservation goals (Tampa Electric Company)* and PSC-2025-0093-PAA-EG, issued March 24, 2025, in Docket No. 20240163-EG, *In re: Petition for approval of proposed demand-side management plan and demand-side management program standards, by Tampa Electric Company*.

Figure 28: TECO Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, TECO generating facilities provide approximately 5,398 MW of summer capacity. This includes 4,779 MW from fossil generation and firm contributions of 514 MW firm from solar generation and 105 MW from energy storage. TECO has 1,424 MW of nameplate solar capacity solar installed, but only counts 36 percent towards summer peak. TECO considers its energy storage capacity as firm capacity for seasonal peak demand.

Projected Generation Resources

TECO's unit retirements and additions during the planning period are described in Table 15. TECO plans a number of additions within the planning period including the installation of approximately 1,424 MW additional solar generation as well as two natural gas combustion turbine facilities in early 2031 and 2035. TECO is not planning to retire any generating units and plans to upgrade Polk Unit 2 to be capable of being fueled by distillate oil by 2027. TECO anticipates the installation of an additional 115 MW of storage by the end of 2027.

Table 15: TECO Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW) Sum	Firm Capacity (MW) Sum	Notes
Retiring Units					
	None				
	Total Retirements		**0**	**0**	
New Units					
2026	Sited Solar	PV	241	11	4 Sites
2026	Bayside Battery Storage	BA	20	20	
2027	Sited Solar	PV	191	2.9	4 Sites
2027	Sited Energy Storage	BA	95	95	2 Sites
2028	Rising Sun Solar	PV	75	1.1	
2028	Unsited Solar	PV	149	2.2	2 Sites
2029	Unsited Solar	PV	149	1.5	2 Sites
2030	Unsited Solar	PV	149	1.5	2 Sites
2031	Future CT 1	NG CT	223		
2035	Future CT 2	NG CT	223		
	Total New Units		**1,515**	**135**	
	Net Additions		**1,515**	**135**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 16 shows TECO's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. Natural gas is used for the majority of TECO's energy generation, and accounts for approximately 80.2 percent of net energy for load in 2025 and is projected to account for approximately 75.8 percent in 2035. Renewables, primarily solar, are anticipated to increase from 11.1 percent in 2025 to 23 percent in 2035.

Table 16: TECO Energy Generation by Fuel Type

Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	17,472	**80.2%**	17,897	**75.8%**
Coal	39	**0.2%**	193	**0.8%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	7	**0.0%**	0	**0.0%**
Renewable	2,419	**11.1%**	5,436	**23.0%**
Interchange	270	**1.2%**	74	**0.3%**
Other	1,592	**7.3%**	19	**0.1%**
Total	**21,798**		**23,619**	

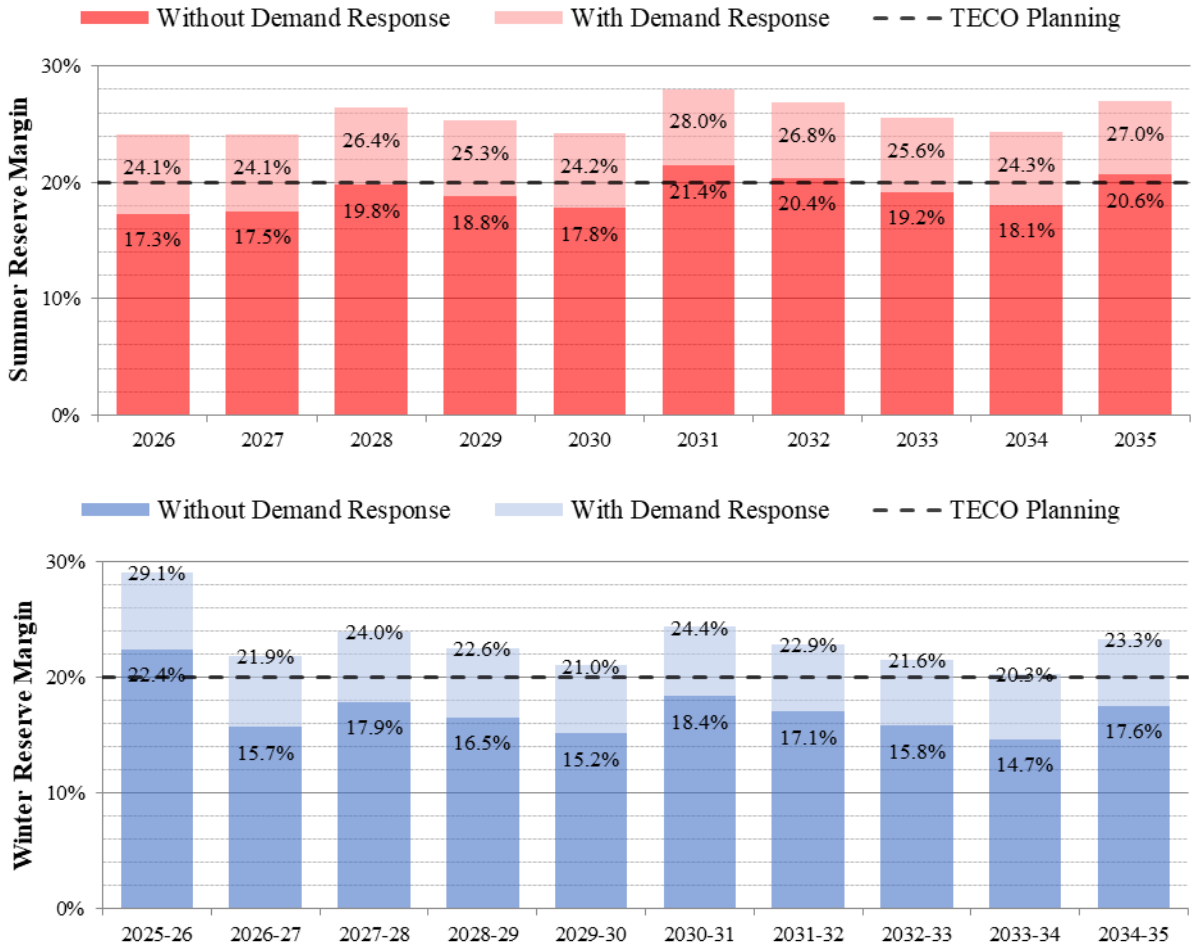
Source: 2026 TYSP and Data Responses

Reliability

Since 1999, TECO has utilized a 20 percent planning reserve margin criterion based on a stipulation approved by the Commission.[15] TECO also elects to maintain a minimum supply-side reserve margin of 7 percent. Figure 29 displays the forecast planning reserve margin for TECO through the planning period for both seasons, with and without the use of demand response. As shown in Figure 29, TECO's generation needs are being controlled by its winter peak. TECO's current and planned investments in solar generation contribute to this shift in planning because solar resources provide coincident capacity during the summer peak but not the winter peak. TECO's 7 percent supply-side only reserve margin is not the controlling factor for any planned unit additions.

[15] Order No. PSC-99-2507-S-EU, issued December 22, 1999, in Docket No. 19981890-EU, *In re: Generic investigation into the aggregate electric utility reserve margins planned for Peninsular Florida.*

Figure 29: TECO Reserve Margin Forecast



Source: 2026 TYSP

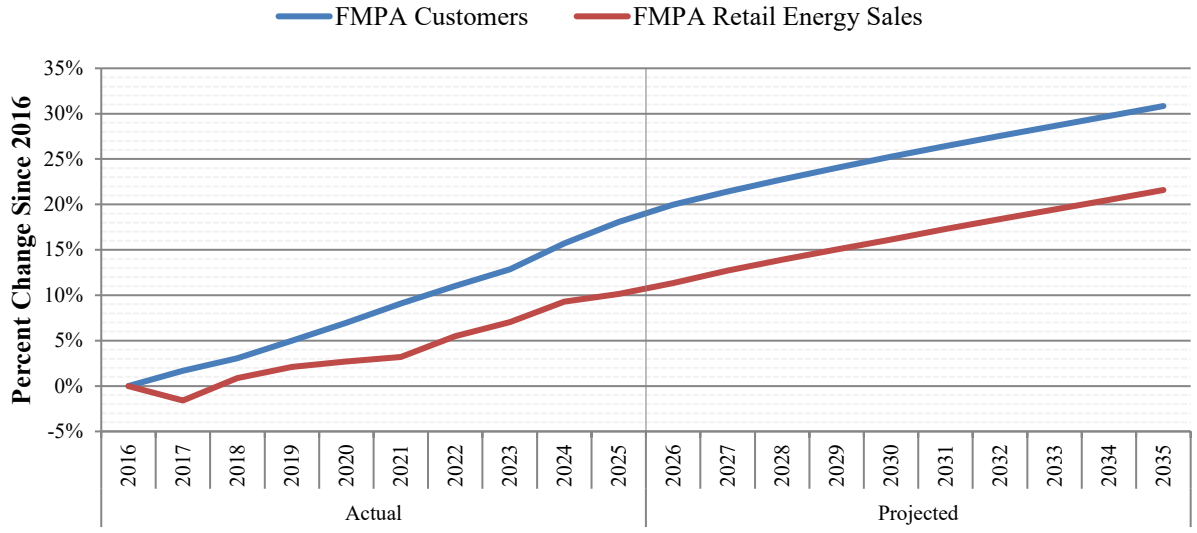
Florida Municipal Power Agency (FMPA)

FMPA is a governmental wholesale power company owned by several Florida municipal utilities throughout the state. Collectively, FMPA is Florida's seventh largest electric utility and third largest municipal electric utility. While FMPA has 33 member systems, only those members that are participants in the All-Requirements Power Supply Project (ARP) are addressed in the Utility's TYSP. FMPA is responsible for planning activities associated with ARP member systems. For a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds FMPA's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, FMPA had approximately 299,269 customers and annual retail energy sales of 6,302 GWh, accounting for approximately 2.6 percent of Florida's annual retail energy sales. Over the last 10 years, FMPA's customer base has increased by 18.1 percent, while energy sales have increased by 10.2 percent. For the current 10-year forecast horizon, FMPA is projecting an average annual growth rate of approximately 1.0 percent for its customer base, and approximately 1.0 percent average annual growth rate for energy sales as well. Figure 30 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that FMPA filed in its 2026 TYSP.

Figure 30: FMPA Growth



Source: 2026 TYSP

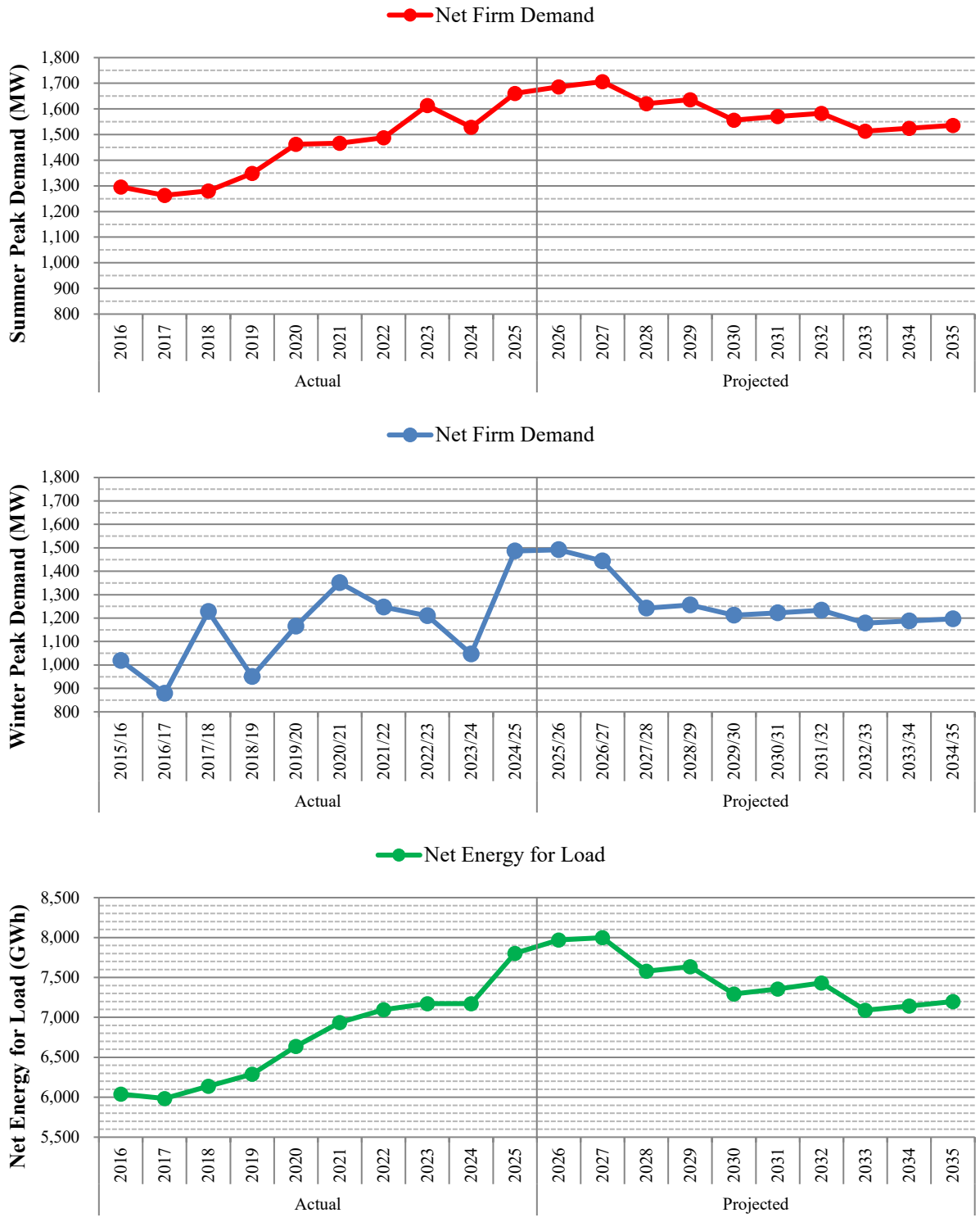
In 2025, FMPA's total customer growth averaged approximately 2.1 percent. It noticed strong customer count gains in certain areas of the ARP participant service territories where residential sector expansion is the primary driver.

FMPA's annual increase in energy sales was 0.8 percent in 2025, lower than the 2.1 percent increase recorded in 2024. The Utility explained that while total retail sales are significantly impacted by the growth in customer counts, they are also impacted by weather conditions, retail billing cycles and practices of the ARP Participants, among other factors. The calendar year 2025 exhibited lower cooling degree days than 2024 across much of the Florida peninsula, which reduced energy consumption for cooling load and therefore reduced the rate of growth in overall energy sales.

Forecasted Load and Peak Demand

The three graphs in Figure 31 show FMPA's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. As FMPA is a wholesale power company, it does not directly engage in energy efficiency or demand response programs. ARP member systems do offer demand-side management programs, the impacts of which are included in the Utility's forecasts which use data provided by the ARP members. FMPA did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

Figure 31: FMPA Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, FMPA generating facilities provide approximately 1,738 MW of summer capacity. This includes 1,689 MW from fossil generation and 49 MW from nuclear generation based on FMPA's full or partial ownership of units. The largest two units on FMPA's system are two natural gas-fired combined cycle units which provide 611 MW.

In addition to the Utility's capacity, FMPA has multiple long-term purchased power contracts. These include several solar contracts for 116 MW of nameplate capacity, which FMPA counts as contributing 40 percent towards summer peak.

Projected Generation Resources

FMPA has no plans for generating unit additions or retirements within the current planning period but anticipates upgrading the plant capacity of multiple existing units as well as decreased generation from the St. Lucie facility in 2027 and 2029 as a result of FMPA member purchased power contracts expiring.

Fuel Diversity

Table 17 shows FMPA's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. FMPA uses natural gas as its primary fuel, producing 80.5 percent of energy in 2025 and increasing to 89.9 percent of energy by 2035. FMPA projects to end energy generation from coal beginning in 2028 with the conversion of the Stanton Energy Center Unit 2 from coal to natural gas-fired generation. Overall, coal-generated energy is being replaced by a combination of increased natural gas, nuclear, and renewable energy sources.

Table 17: FMPA Energy Generation by Fuel Type

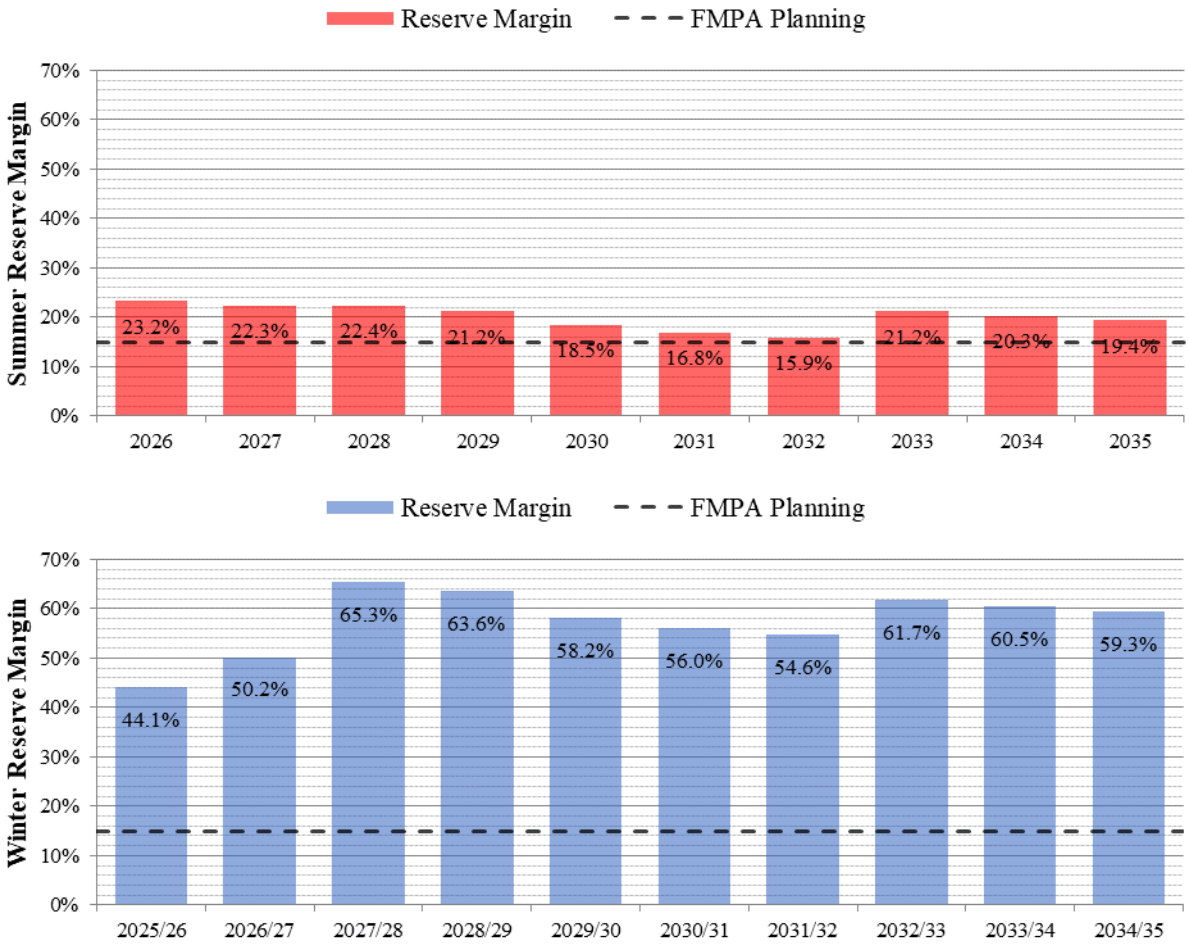
Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	6,281	**80.5%**	6,468	**89.9%**
Coal	814	**10.4%**	0	**0.0%**
Nuclear	411	**5.3%**	390	**5.4%**
Oil	7	**0.1%**	1	**0.0%**
Renewable	290	**3.7%**	339	**4.7%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	0	**0.0%**	0	**0.0%**
Total	**7,804**		**7,197**	

Source: 2026 TYSP and Data Responses

Reliability

FMPA utilizes a 15 percent planning reserve margin criterion. Figure 32 displays the forecast planning reserve margin for FMPA through the planning period for both seasons. As shown in the figure, FMPA's generation needs are controlled by its summer peak throughout the planning period.

Figure 32: FMPA Reserve Margin Forecast



Source: 2026 TYSP

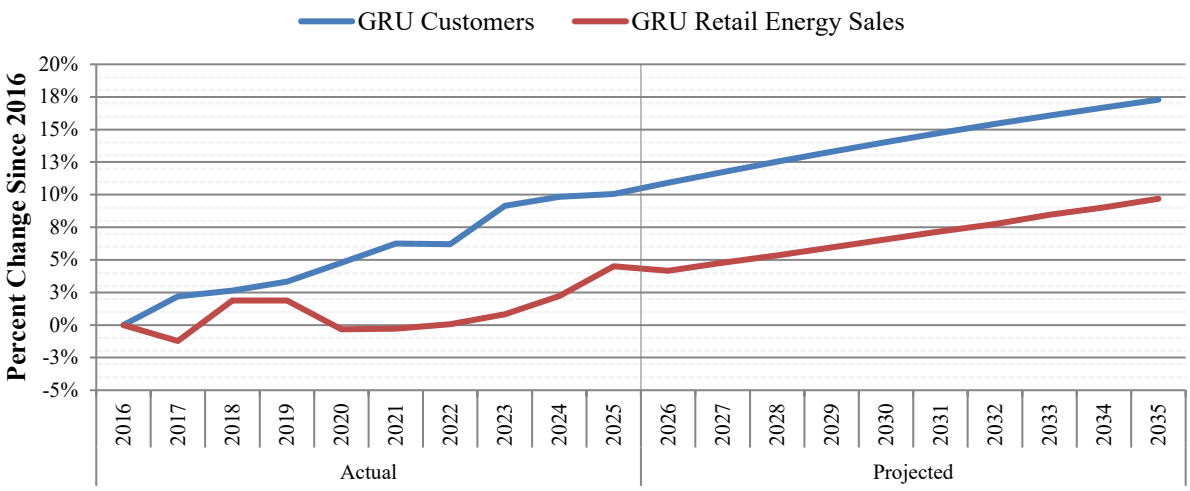
Gainesville Regional Utilities (GRU)

GRU is a municipal utility and the smallest electric utility by sales required to file a TYSP. The Utility's service territory is within the FRCC region and consists of the City of Gainesville and its surrounding area. GRU also provides wholesale power to the City of Alachua and Clay Electric Cooperative. As a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds GRU's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, GRU had approximately 104,730 customers and annual retail energy sales of 1,877 GWh, accounting for approximately 0.8 percent of Florida's annual retail energy sales. In the same year, the Utility's total customer growth and total retail sales growth were approximately 0.2 percent and 2.2 percent, respectively. Figure 33 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that GRU filed in its 2026 TYSP.

Figure 33: GRU Growth



Source: 2026 TYSP

The annual growth in retail sales from 2024 to 2025 (2.2 percent) was primarily due to changes in weather-related heating and air conditioning loads. Weather-related factors that contributed to stronger-than-average energy sales in 2025 include a 3 percent increase in the heating degree days (from 2024) as well as a 5 percent increase in cooling degree days (from 2024). The Utility noted that year-to-year variation in energy sales due to varying weather conditions is not uncommon. Over the past 10 years, GRU has experienced changes in year-to-year energy sales from positive 3 percent to negative 2 percent.

For the current 10-year forecast horizon, GRU's number of customers and retail energy sales will both grow at nearly the same annual average rate of approximately 0.6 percent.

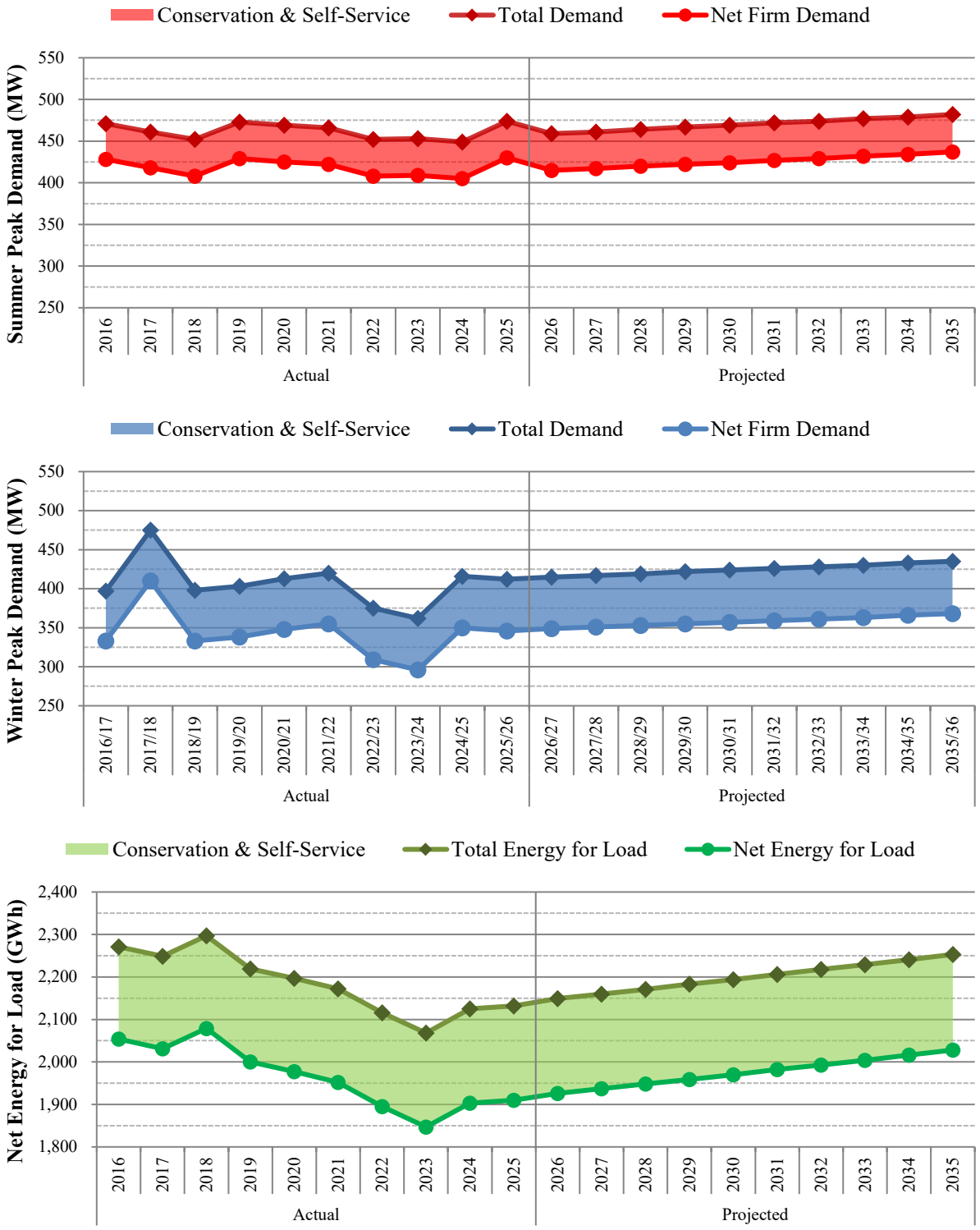
Over the last 10 years, GRU's customer base has increased by approximately 10.1 percent with an average annual growth rate of 1.1 percent, while retail energy sales have increased by approximately 4.5 percent with an average annual growth rate of 0.5 percent.

GRU's residential usage per customer declined by an average of 0.2 percent per year over the past 10 years. It is expected to increase by 0.1 percent per year over the next 10 years, driven by continued adoption of electric vehicles that charge at customer residences. The Utility's non-residential usage per customer declined by an average of 0.6 percent per year over the past 10 years. It is forecasted to decline more slowly at an average annual rate of 0.1 percent per year over the next 10 years.

Forecasted Load and Peak Demand

The three graphs in Figure 34 show GRU's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. GRU engages in multiple energy efficiency programs to reduce customer peak demand and annual energy for load. GRU did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

Figure 34: GRU Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, GRU generating facilities provide approximately 642 MW of summer capacity, including 105 MW of biomass-fired steam generation. GRU's largest generating unit is a natural gas-fired steam unit, with a capacity of 232 MW. GRU does not currently have any long-term purchased power contracts.

Projected Generation Resources

GRU's unit retirements and additions during the planning period are described in Table 18. GRU has no current plans to add any generation facilities and plans to retire the Deerhaven plant's combustion turbine Units GT01 and GT02 and the steam turbine Units FS01 and FS02. GRU notes that the remaining useful life of these units are currently being evaluated and the retirement dates may be deferred.

Table 18: GRU Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW) Sum	Firm Capacity (MW) Sum	Notes
Retiring Units					
2032	Deerhaven FS01	NG ST	76		
2036	Deerhaven FS02	NG ST	232		
2031	Deerhaven GT01	NG GT	18		
2031	Deerhaven GT02	NG GT	18		
Total Retirements			**344**		
New Units					
	None				
Total New Units			**0**	**0**	
Net Additions			**(344)**	**0**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 19 shows GRU's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. GRU relies primarily upon natural gas for energy generation, making up 72.6 percent of net energy for load in 2025. By 2035, natural gas will remain GRU's primary fuel source at 76.5 percent, while renewables will account for 17.3 percent. Coal generation is anticipated to end by 2035 with the planned retirement of Deerhaven Unit FS02, GRU's only remaining unit capable of burning coal.

Table 19: GRU Energy Generation by Fuel Type

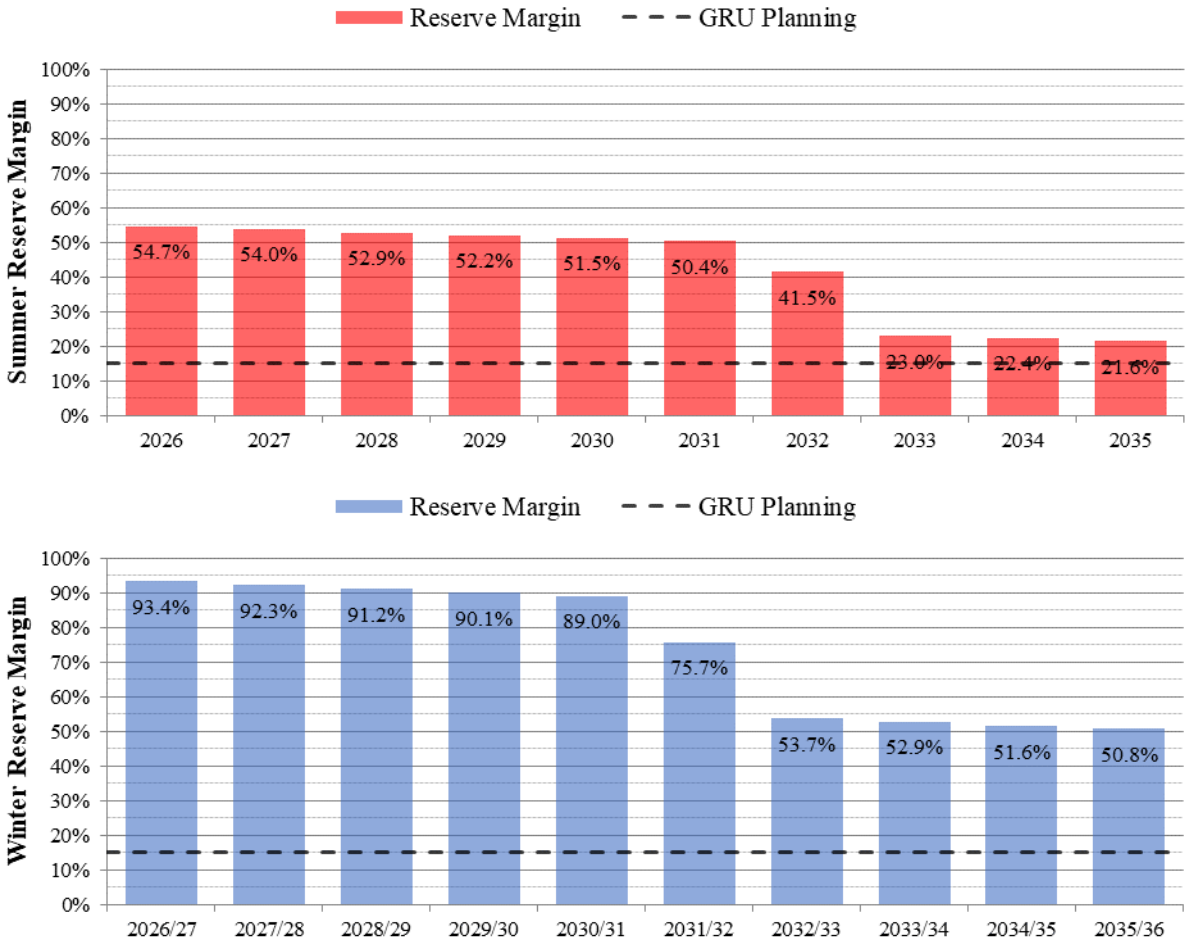
Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	1,387	**72.6%**	1,551	**76.5%**
Coal	13	**0.7%**	0	**0.0%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	9	**0.5%**	0	**0.0%**
Renewable	453	**23.7%**	350	**17.3%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	48	**2.5%**	127	**6.3%**
Total	**1,910**		**2,028**	

Source: 2026 TYSP and Data Responses

Reliability

GRU utilizes a 15 percent planning reserve margin criterion for seasonal peak demand. Figure 35 displays the forecast planning reserve margin for GRU through the planning period for both seasons. As shown in Figure 35, GRU's generation needs are controlled by its summer peak throughout the planning period.

Figure 35: GRU Reserve Margin Forecast



Source: 2026 TYSP

JEA

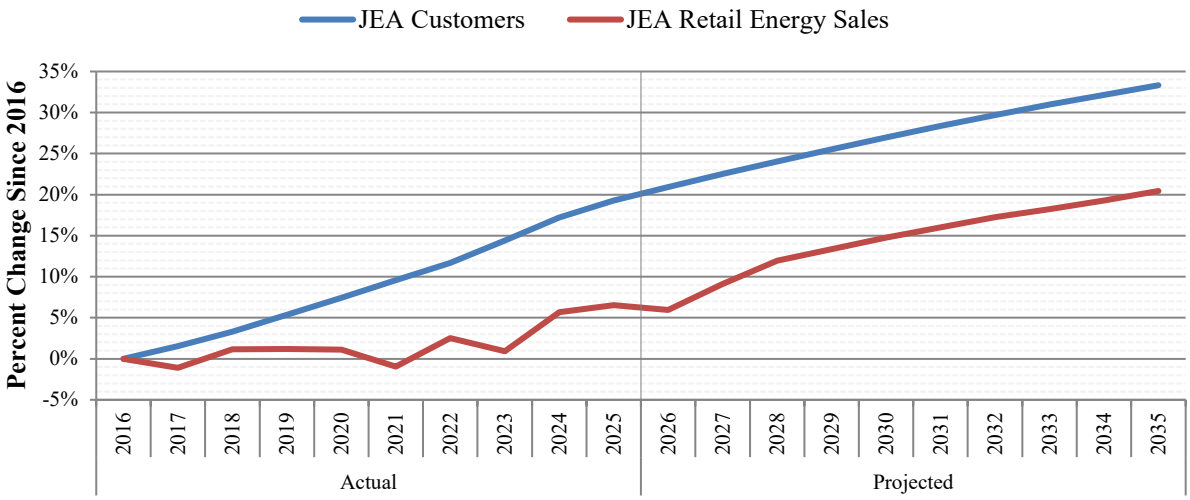
JEA, formerly known as Jacksonville Electric Authority, is Florida's largest municipal utility and fifth largest electric utility. JEA's service territory is within the FRCC region and includes all of Duval County as well as portions of Clay and St. Johns Counties. As a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds JEA's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, JEA had approximately 536,862 customers and annual retail energy sales of 12,980 GWh, accounting for approximately 5.3 percent of Florida's annual retail energy sales. Over the last 10 years, JEA's customer base has increased by approximately 19.3 percent, while retail energy sales have increased by approximately 6.5 percent.

For the next 10 years, JEA's customer forecast increases at an average annual rate of 1.1 percent; and its retail energy sales increases at an average annual rate of 1.4 percent. Figure 36 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that JEA filed in its 2026 TYSP.

Figure 36: JEA Growth



Source: 2026 TYSP

From 2016-2025, JEA's residential UPC decreased by approximately 0.6 percent per year on average. The Utility indicated that the Utility-funded demand-side management programs continue to be a contributor to the decrease in residential UPC. The other contributing factors include customer behavioral changes, increased electric rates, and more multifamily housing constructions, and the 2023 SEER rating standards that mandated more efficient new air conditioners.

For the 2026 TYSP forecast horizon, JEA expects that residential UPC will stay flat with an average annual growth rate of 0.2 percent, primarily driven by the forecasted increase in plug-in electric vehicle adoption. The Utility forecasts PEV total energy to grow at an average annual growth rate of 34.86 percent over the planning period. This upward pressure from PEV adoption outpaces the combined downward pressure from continued JEA funding of demand-side management programs, customer-sited renewables and distributed energy resources, shrinking household size, increased electric rates, and mandated more efficient new air conditioners. The Utility also projected its commercial UPC will decrease by 1.1 percent per year, and industrial UPC will decrease by 0.1 percent per year.

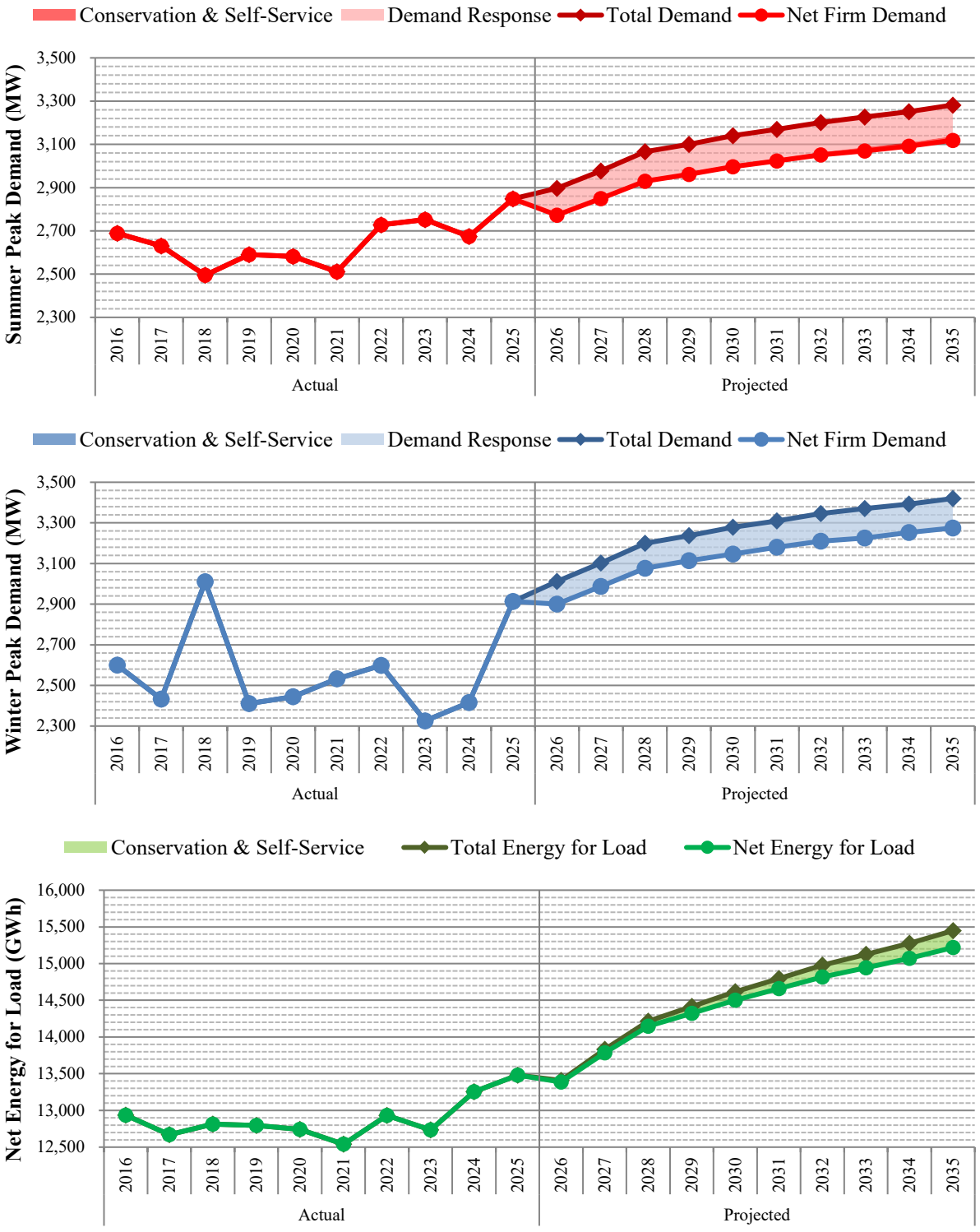
Forecasted Load and Peak Demand

The three graphs in Figure 37 show JEA's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. JEA included the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

Even though JEA is a municipal utility, it is subject to FEECA and currently offers energy efficiency and demand response programs to customers to reduce peak demand and annual energy consumption. The Commission reviewed and established energy conservation goals for JEA and approved JEA's 2025-2034 DSM Plan.[16]

[16] See Order Nos. PSC-2024-0432-FOF-EG, issued September 20, 2024, in Docket No. 20240016-EG, *In re: Commission review of numeric conservation goals (JEA)* and PSC-2025-0094-PAA-EG, issued March 24, 2025, in Docket No. 20240167-EG, *In re: Petition for approval of demand-side management plan, by JEA*.

Figure 37: JEA Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, JEA generating facilities provide approximately 2,782 MW of summer capacity, exclusively from fossil generation. JEA's system includes approximately 1,110 MW of steam-fired generation associated with three generating units, including a pair of petcoke, coal, and biomass-fired units and a dual fuel gas/oil unit.

In addition to the Utility's capacity, JEA has multiple long-term purchased power contracts. The most notable is purchase from the Municipal Electric Authority of Georgia for 206 MW of nuclear capacity from Vogtle Units 3 and 4. This results in JEA having the second highest nuclear capacity in the state, only surpassed by FPL. Among its several fossil and renewable PPAs, JEA also has multiple solar contracts for a total of 389 MW of nameplate capacity, which JEA counts as contributing 20 percent towards summer peak.

Projected Generation Resources

JEA's unit retirements and additions during the planning period are described in Table 20. JEA plans for the addition of three facilities within the planning period, including a new natural gas-fired combined cycle unit in 2031 and a pair of two natural gas-fired combustion turbine units in 2035. JEA recently received a determination of need for the 2031 combined cycle unit in Docket No. 20260087-EM. JEA also plans to retire the Northside Unit 3 in early 2035 after commercial operation of the combined cycle unit.

Table 20: JEA Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW)	Firm Capacity (MW)	Notes
			Sum	Sum	
Retiring Units					
2035	Northside Unit 3	NG ST	524		
		Total Retirements	**524**	**0**	
New Units					
2031	Advanced 1x1 CC	NG CC	582		Docket No. 20260086-EM
2035	Advanced 1x0 CT	NG GT	374		
2035	Advanced 1x0 CT	NG GT	374		
		Total New Units	**1,330**	**0**	
		Net Additions	**806**	**0**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 21 shows JEA's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. Natural gas is the dominant fuel source for JEA in 2025 and is projected to remain so in 2035 with purchases from other utilities, through the Interchange, being JEA's second most utilized energy source. The nuclear energy generation is also sourced through interchange, associated with JEA's contract for a portion of Vogtle Units 3 and 4. JEA anticipates reducing its

reliance on non-nuclear interchange, reducing from 18.7 percent in 2025 to 6.7 percent in 2035, primarily offset by an increase in natural gas.

Table 21: JEA Energy Generation by Fuel Type

Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	7,427	**55.1%**	10,433	**68.6%**
Coal	1,334	**9.9%**	1,413	**9.3%**
Nuclear	1,613	**12.0%**	1,765	**11.6%**
Oil	20	**0.1%**	0	**0.0%**
Renewable	564	**4.2%**	594	**3.9%**
Interchange	2,521	**18.7%**	1,014	**6.7%**
NUG & Other	0	**0.0%**	0	**0.0%**
Total	**13,479**		**15,219**	

Source: 2026 TYSP and Data Responses

Reliability

JEA utilizes a 15 percent planning reserve margin criterion for seasonal peak demand. Figure 38 displays the forecast planning reserve margin for JEA through the planning period for both seasons, with and without the use of demand response.

Figure 38: JEA Reserve Margin Forecast



Source: 2026 TYSP

Lakeland Electric (LAK)

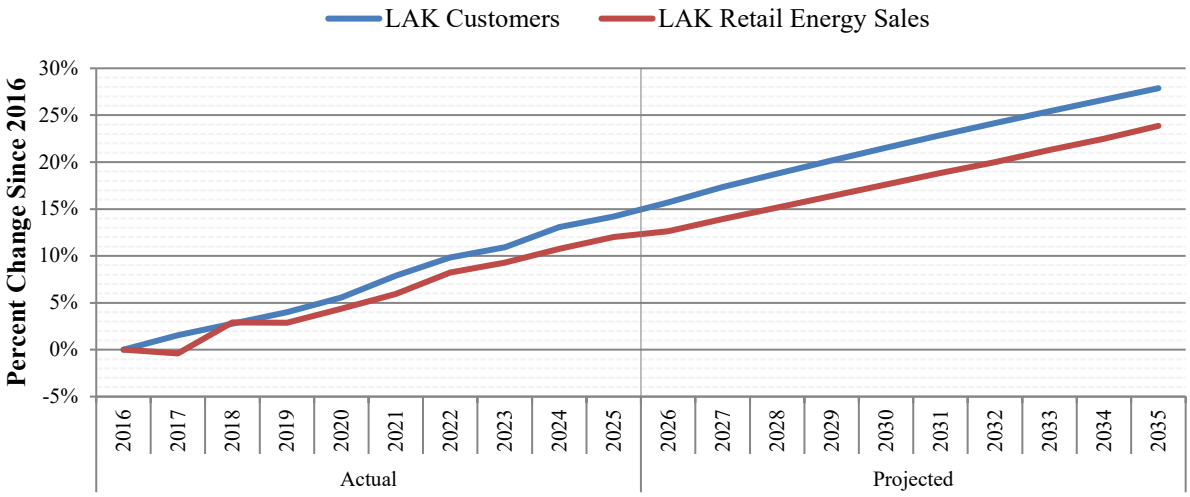
LAK is a municipal utility and the state's third smallest electric utility required to file a TYSP. The Utility's service territory is within the FRCC region and consists of the City of Lakeland and surrounding areas. As a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds LAK's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, LAK had approximately 145,224 customers and annual retail energy sales of 3,394 GWh, accounting for approximately 1.4 percent of Florida's annual retail energy sales. In the same year, the Utility's total customer growth and total retail sales growth were approximately 1.1 percent and 1.0 percent, respectively. Over the last 10 years, LAK's customer base has increased by 14.2 percent, while retail energy sales have grown by 12.0 percent approximately.

For the next 10 years, LAK's customer forecast increases at an average annual rate of 1.2 percent; and its retail energy sales increases at an average annual rate of 1.1 percent. Figure 39 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that LAK filed in its 2026 TYSP.

Figure 39: LAK Growth



Source: 2026 TYSP

LAK's residential and commercial customer growth has been driven primarily by sustained population increases and continued economic development within the service territory. The City of Lakeland has been recognized as one of the fastest-growing areas in the nation, contributing to steady residential expansion and corresponding commercial development. The Utility's industrial customer growth has been more moderate, reflecting the stability of existing facilities and measured industrial expansion within the region.

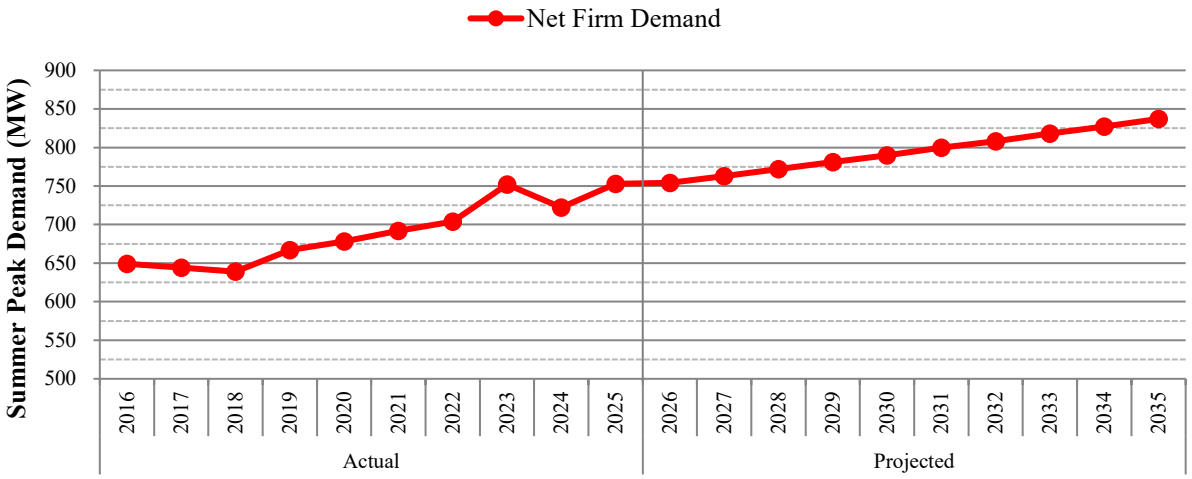
LAK noted that its residential UPC has remained relatively stable over the last 10 years, with modest variation attributable primarily to weather conditions and customer usage patterns. Commercial and industrial UPC has shown slight moderate reduction compared to the 10-year average, reflecting operational efficiencies, economic conditions, and energy management improvements within those sectors.

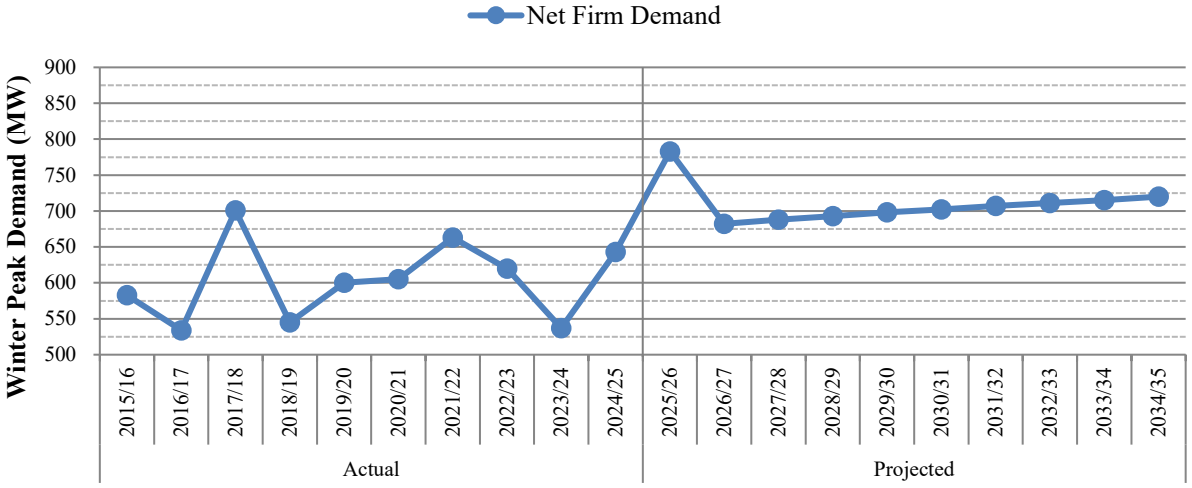
For the forecast horizon, residential UPC is projected to remain relatively stable, as incremental electrification (e.g., electric vehicles or electric heating) is largely offset by continued improvements in appliance efficiency and building standards. Commercial UPC reflects stable business activity and operating patterns. Industrial UPC remains high due to the energy-intensive nature of industrial operations. However, growth of industrial UPC is assumed to be stable, consistent with production forecasts and the absence of major process changes.

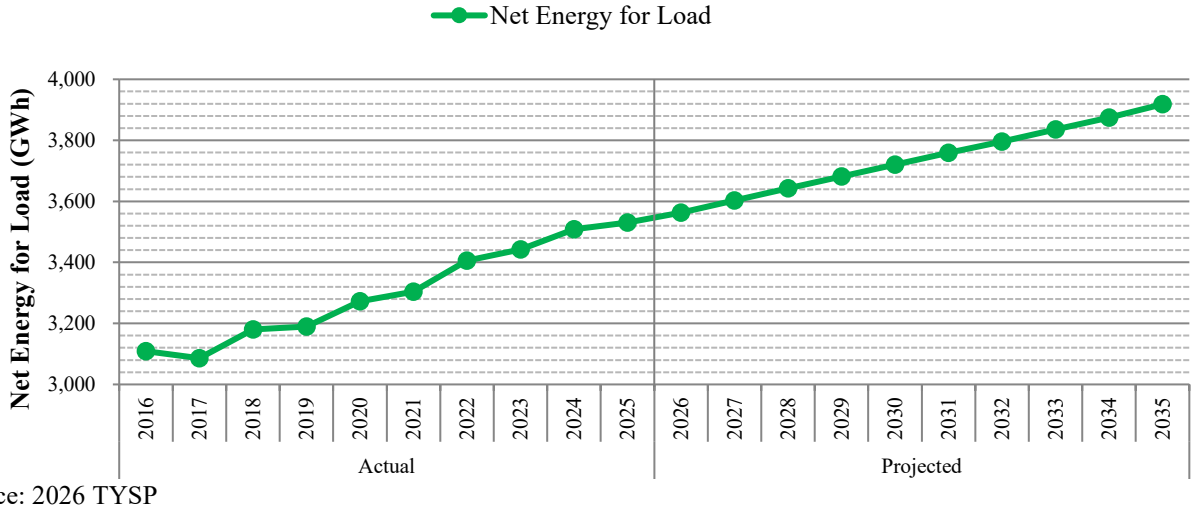
Forecasted Load and Peak Demand

The three graphs in Figure 40 show LAK's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. LAK is not subject to FEECA but offers energy efficiency programs that reduce seasonal peak and annual energy consumption. LAK included the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

Figure 40: LAK Demand and Energy Forecasts







Source: 2026 TYSP

Generation Resources

Currently, LAK generating facilities provide approximately 778 MW of summer capacity, exclusively from fossil generation. Approximately half of LAK's capacity is from a single natural gas-fired combined cycle unit, with a capacity of 352 MW.

In addition to the Utility's capacity, LAK has multiple long-term purchased power contracts. These include five solar contracts for a total of 14.4 MW of nameplate capacity, which LAK counts as contributing 50 percent towards summer peak.

Projected Generation Resources

LAK plans no unit additions or retirements during the planning period. However, LAK has recently entered into a purchased power agreement for a 74.8 MW solar facility and assumes a 50 percent contribution to summer peak.

Fuel Diversity

Table 22 shows LAK's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. LAK uses natural gas as its primary fuel type for energy, 68.3 percent in 2025, with purchases (listed in the NUG & Other category) representing 30.8 percent net energy for load, and the remaining 0.8 percent from renewables. By 2035, natural gas is expected to be reduced to 66.3 percent, offset by purchases and renewables, which would represent 28.5 and 5.2 percent, respectively. LAK, in the actual and projected period, is the utility most reliant upon energy purchases.

Table 22: LAK Energy Generation by Fuel Type

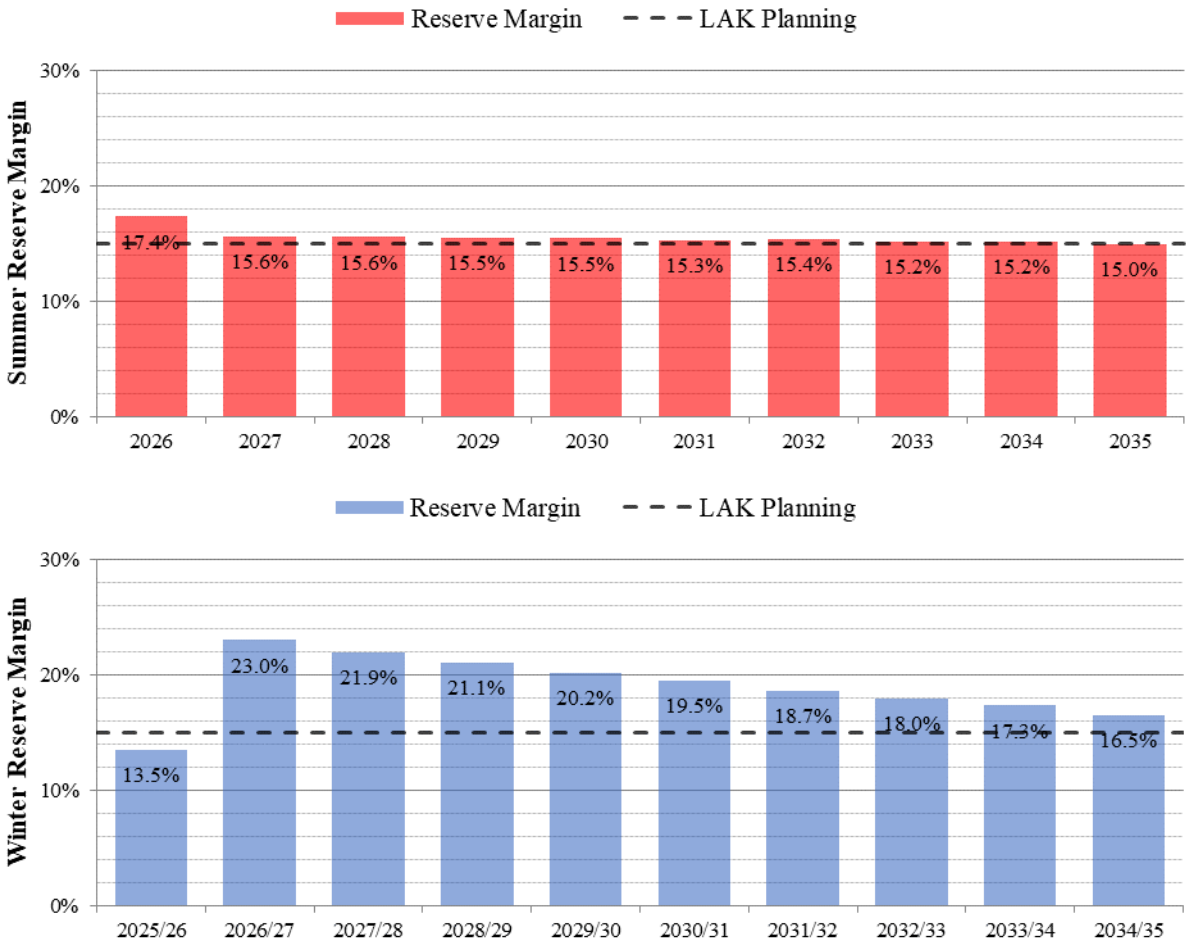
Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	2,413	**68.3%**	2,596	**66.3%**
Coal	0	**0.0%**	0	**0.0%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	1	**0.0%**	0	**0.0%**
Renewable	30	**0.8%**	204	**5.2%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	1,087	**30.8%**	1,118	**28.5%**
Total	**3,531**		**3,918**	

Source: 2026 TYSP and Data Responses

Reliability

LAK utilizes a 15 percent planning reserve margin criterion for seasonal peak demand. Figure 41 displays the forecast planning reserve margin for LAK through the planning period for both seasons. LAK does not offer demand response programs currently. As illustrated by Figure 41, summer peak demand is the controlling factor for reliability planning for almost all years of the planning period.

Figure 41: LAK Reserve Margin Forecast



Source: 2026 TYSP

Orlando Utilities Commission (OUC)

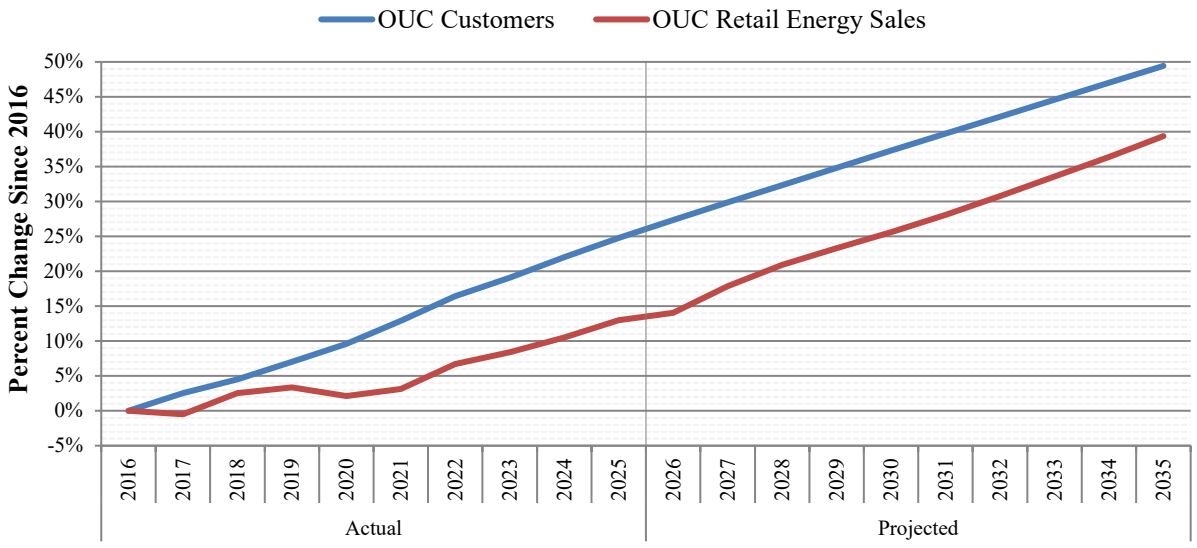
OUC is a municipal utility and Florida's sixth largest electric utility and second largest municipal utility. The Utility's service territory is within the FRCC region and primarily consists of the Orlando metropolitan area. As a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds OUC's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, OUC had approximately 288,492 customers and annual retail energy sales of 7,459 GWh, accounting for approximately 3.1 percent of Florida's annual retail energy sales. Over the last 10 years, OUC's customer base has increased by 24.8 percent, while its retail energy sales have increased by approximately 13.0 percent.

Figure 42 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that OUC filed in its 2026 TYSP.

Figure 42: OUC Growth



Source: 2026 TYSP

OUC acknowledged that over the past 10 years, its UPC has declined at a negative 0.6 percent average annual rate, for the residential customer segment, increased at an average annual growth rate of 1 percent for the commercial customer segment, and increased at an average annual growth rate of 2.1 percent for the industrial customer segment. For the next 10 years, OUC's residential UPC is expected to grow 1.3 percent annually. The main driver of this increase is the projected adoption of electric vehicles. The Utility's commercial UPC is expected to grow 0.5 percent annually. This growth is primarily due to the addition of larger commercial customers than

historically. The Utility's industrial UPC is forecast to increase at an average annual growth rate of 0.9 percent.

Over the forecast horizon, OUC is projecting growth in the number of customers at an average annual rate of 1.8 percent, and growth in retail energy sales at an average annual rate of approximately 2.2 percent. The Utility indicates that this projected increase is driven by large commercial expansions and residential electric vehicle adoption.

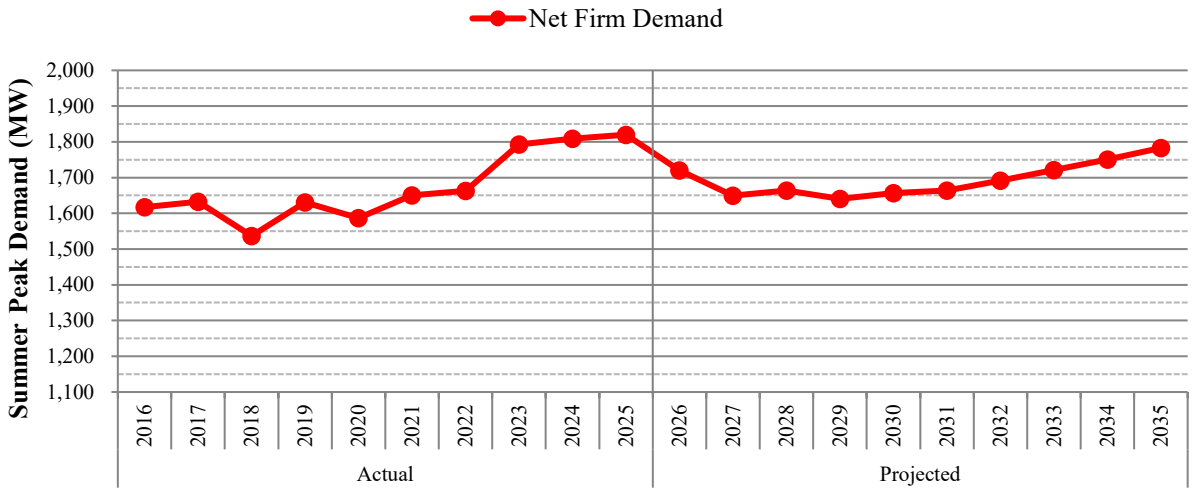
Forecasted Load and Peak Demand

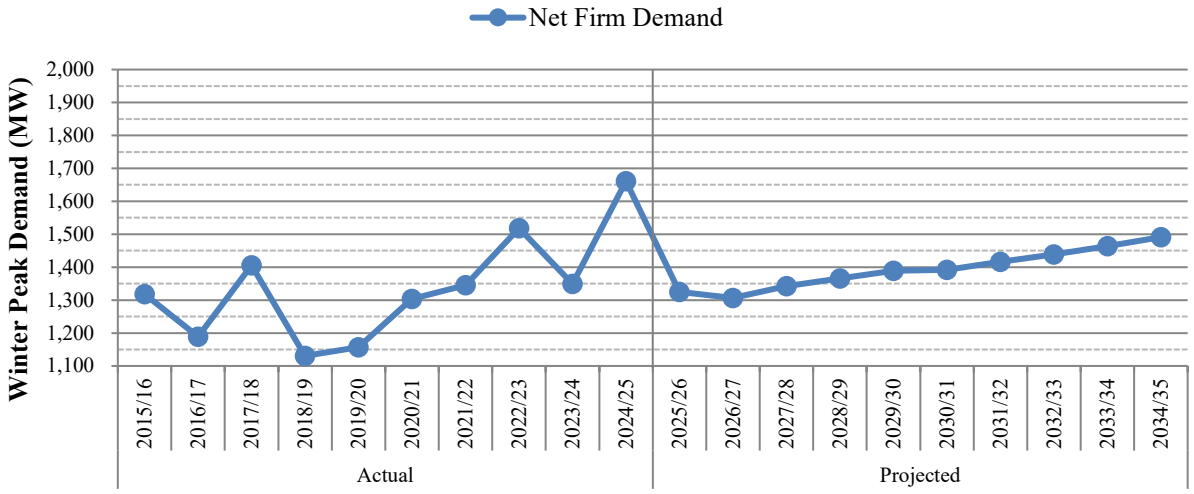
The three graphs in Figure 43 show OUC's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. OUC did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

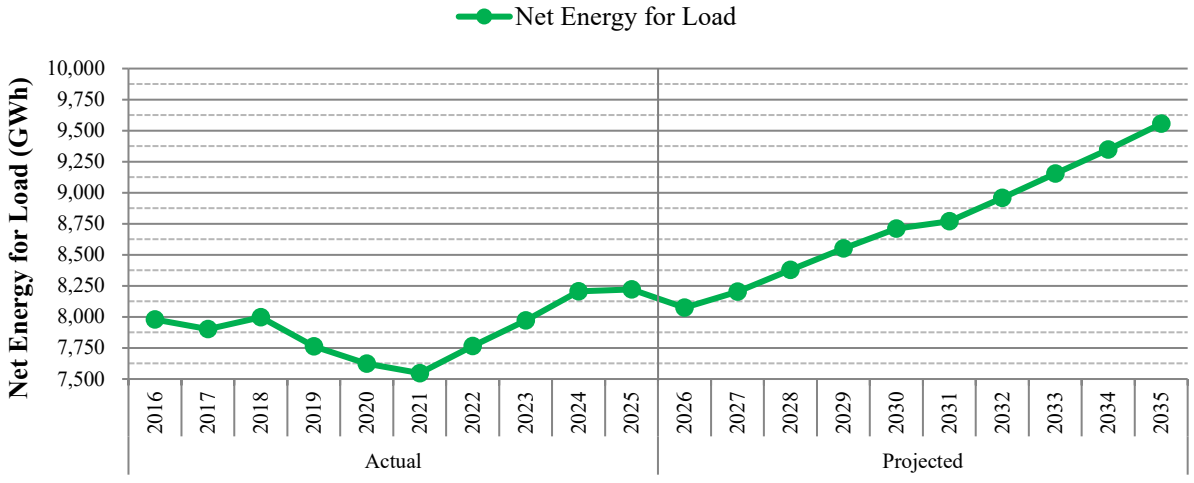
While a municipal utility, OUC is subject to FEECA and currently offers energy efficiency programs to customers to reduce peak demand and annual energy consumption. The Commission reviewed and approved OUC's 2025-2034 DSM plans.[17]

[17] See Order Nos. PSC-2024-0433A-FOF-EG, issued September 24, 2024, in Docket No. 20240017-EG, *In re: Commission review of numeric conservation goals (Orlando Utilities Commission)* and PSC-2025-0086-PAA-EG, issued March 24, 2025, in Docket No. 20240166, *In re: Petition for approval of 2025 demand-side management plan, by Orlando Utilities Commission.*

Figure 43: OUC Demand and Energy Forecasts







Source: 2026 TYSP

Generation Resources

Currently, OUC's generating facilities provide approximately 1,868 MW of summer capacity. This includes 1,808 MW from fossil generation and 60 MW from nuclear generation based on OUC's full or partial ownership of the units. This includes a pair of coal-fired steam units providing 663 MW and a pair of natural gas-fired combined cycle units providing 476 MW. OUC also operates 4 MW of energy storage.

In addition to the Utility's capacity, OUC has multiple long-term purchased power contracts. These include six solar contracts for a total of 272 MW of nameplate capacity, which OUC counts as contributing 50 percent towards summer peak, and three LFG contracts for 19 MW, which are treated as firm resources.

Projected Generation Resources

OUC plans no unit additions or retirements during the planning period. However, OUC plans several modifications to its system which impact its firm capacity. OUC plans on system upgrades to allow Osceola Generating Station Unit 2, a 157 MW natural gas-fired combustion turbine, to provide its full capacity during system peaks. OUC also plans on converting Stanton Unit 2 from coal-fired to natural gas-fired in 2027. Last, OUC include in its TYSP placing Stanton Unit 1 into an extended cold shutdown beginning in 2026, which would remove its 453 MW of capacity from OUC's planning.

Fuel Diversity

Table 23 shows OUC's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. In 2025, approximately 61.5 percent of OUC's net energy for load was met with natural gas, while coal, the second most-used fuel, met approximately 25.6 percent of the demand. By 2035, OUC anticipates reducing natural gas use to 49.1 percent, making it the only utility to use natural gas for less than half of its energy generation.

Table 23: OUC Energy Generation by Fuel Type

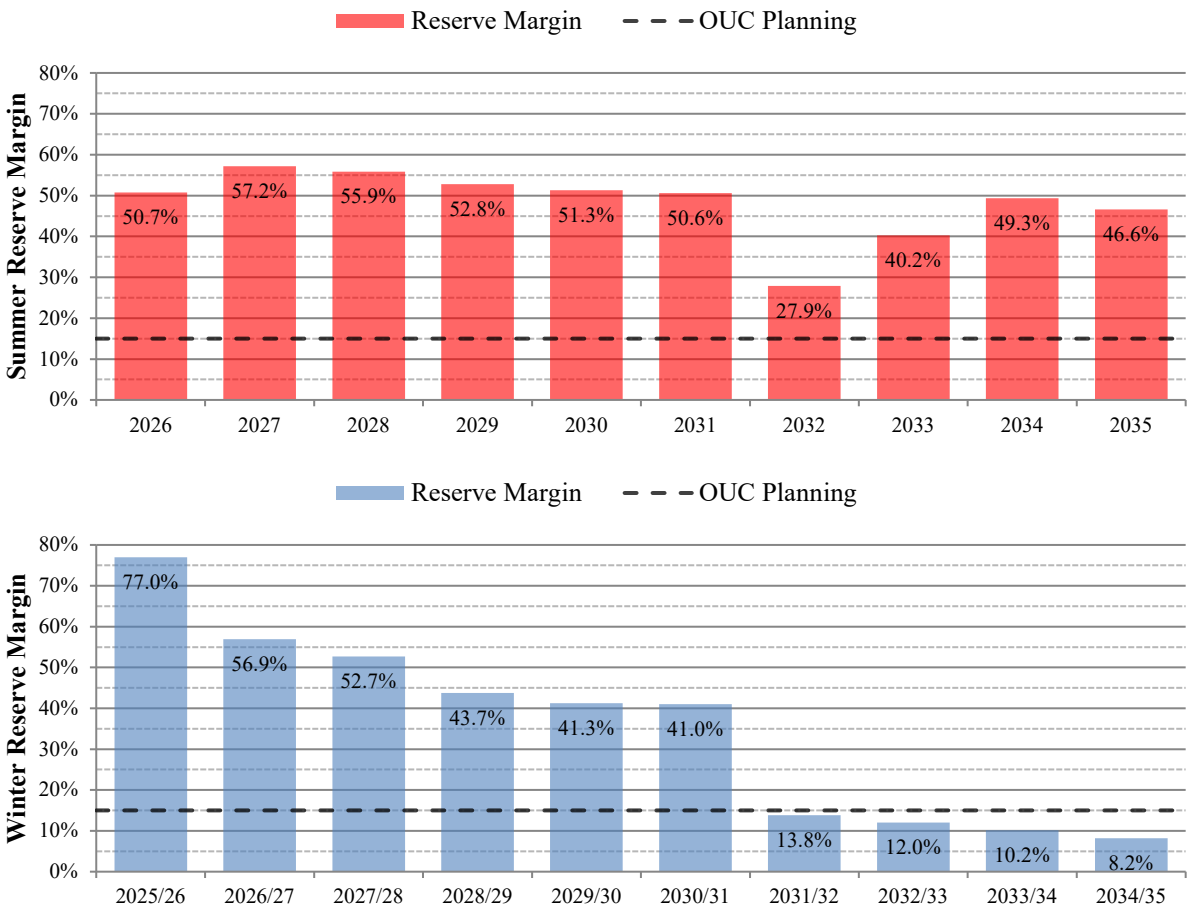
Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	5,059	**61.5%**	4,696	**49.1%**
Coal	2,105	**25.6%**	0	**0.0%**
Nuclear	469	**5.7%**	503	**5.3%**
Oil	1	**0.0%**	0	**0.0%**
Renewable	588	**7.2%**	4,356	**45.6%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	0	**0.0%**	0	**0.0%**
Total	**8,222**		**9,556**	

Source: 2026 TYSP and Data Responses

Reliability

OUC utilizes a 15 percent planning reserve margin criterion for seasonal peak demand. Figure 44 displays the forecast planning reserve margin for OUC through the planning period for both seasons, including the impact of DSM programs. As shown in Figure 44, OUC's generation needs are controlled by its summer peak demand.

Figure 44: OUC Reserve Margin Forecast



Source: 2026 TYSP

Seminole Electric Cooperative (SEC)

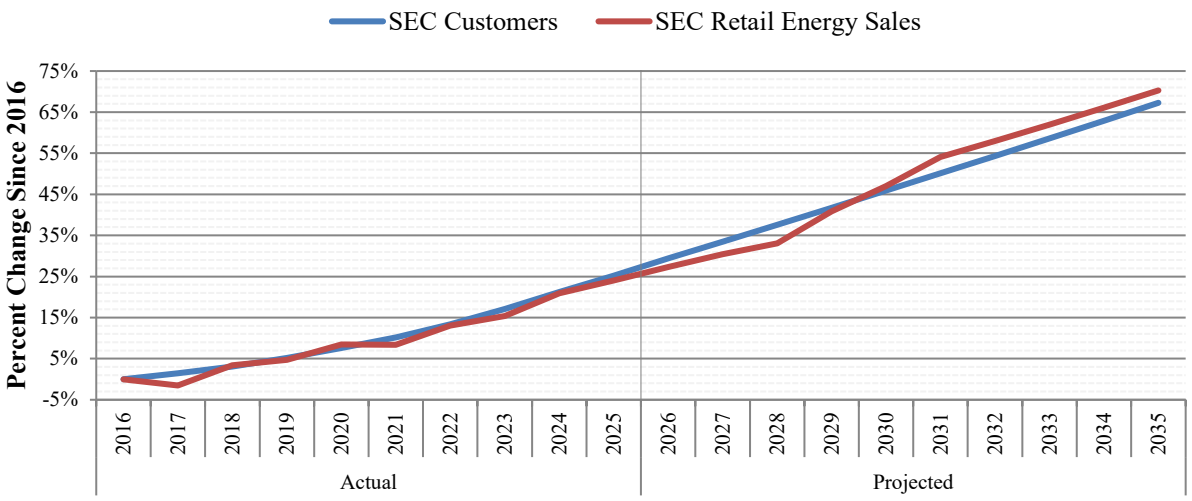
SEC is a generation and transmission rural electric cooperative that serves its member distribution cooperatives and is collectively Florida's fourth largest utility. SEC's generation and member cooperatives are within the FRCC region, with member cooperatives located in central and north Florida. As a rural electric cooperative, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds SEC's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, SEC member cooperatives had approximately 956,128 customers and annual retail energy sales of 17,078 GWh, accounting for approximately 7.0 percent of Florida's annual retail energy sales. Over the last 10 years, SEC's customer base has increased by 25.2 percent, while its retail energy sales have increased by approximately 24.0 percent.

Figure 45 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that SEC filed in its 2026 TYSP.

Figure 45: SEC Growth



Source: 2026 TYSP

SEC's average UPC has remained constant over the past 10 years, with the residential sector increasing by 0.04 percent and the commercial sector decreasing by 0.6 percent annually on average. For the next 10 years, the Utility is expected its residential customer UPC showing a flat to decreasing trend with an annual growth rate of negative 0.7 percent in average; and its commercial customer UPC showing an increasing trend with an annual growth rate of 2.3 percent on average.

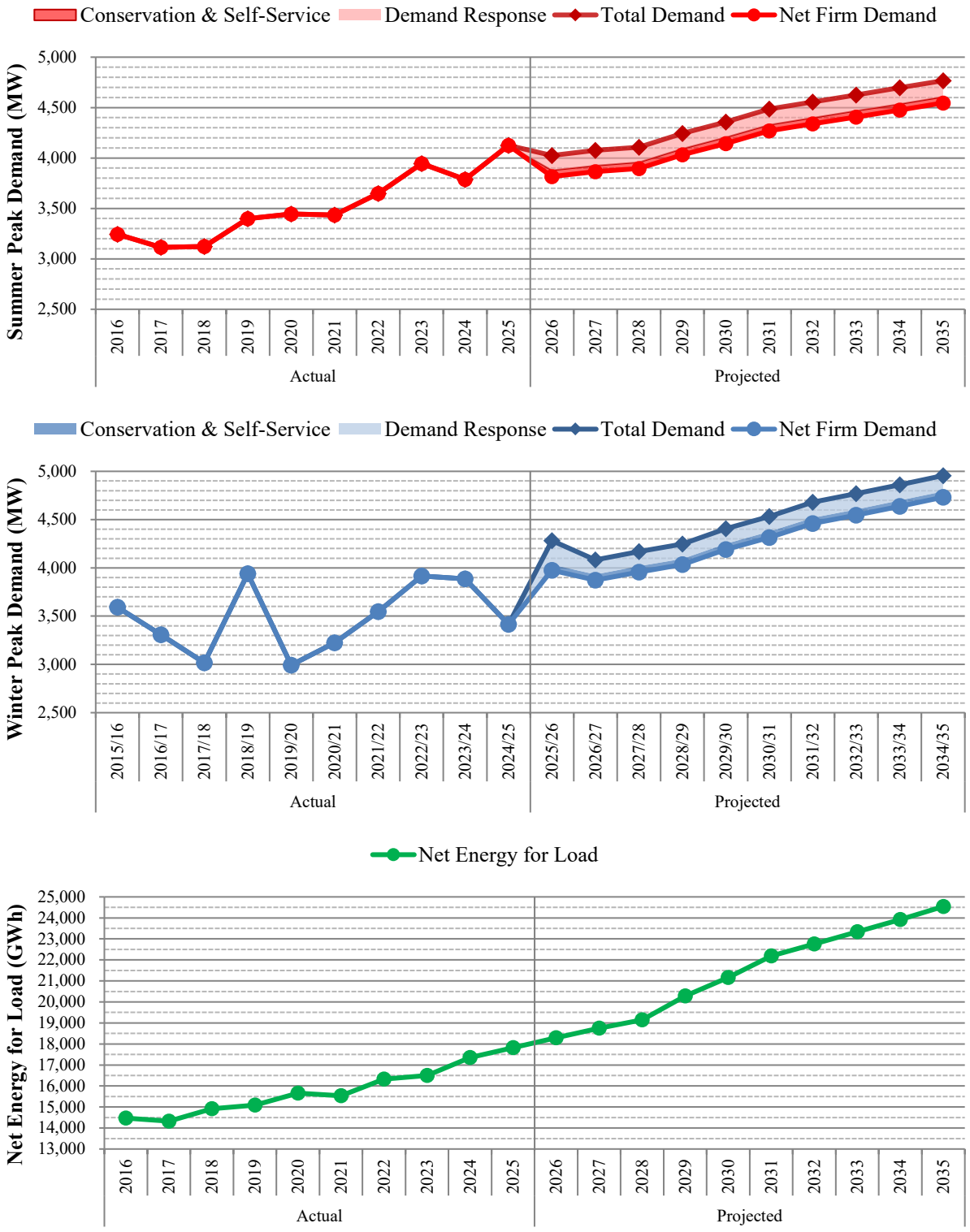
Over the current 10-year forecast horizon, SEC is projecting an average annual growth rate in its customer base of 2.9 percent. The Utility indicated that population growth in SEC's territory is sensitive to national economic and demographic factors that influence population migration from other states and metropolitan areas within Florida. Historically, consumer growth in the Member systems has grown at a faster rate than the State of Florida as a whole and this trend is expected to continue. The leading indicators for load growth are Florida's expanding economy and net migration prospects into the state. SEC's projected average annual growth rate in retail energy sales is 3.3 percent.

Forecasted Load and Peak Demand

The three graphs in Figure 46 show SEC's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. As SEC is a generation and transmission company, it does not directly engage in energy efficiency or demand response programs. Member cooperatives do offer DSM programs, the impacts of which are included in the Utility's load forecasts which are the aggregate of SEC member provided forecasts.

SEC included the impact of one expected large load customer in the development of its seasonal peak demand and energy forecasts, with an anticipated impact of 75 MW and 657 GWh beginning in 2029, increasing to 162 MW and 1,419 GWh by 2031. However, recently SEC stated that this one large load customer addition was part of a project that has since been canceled. SEC will make an adjustment to its 2027 TYSP filing to reflect this cancellation.

Figure 46: SEC Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, SEC generating facilities provide approximately 2,989 MW of summer capacity. This includes 2,988 MW from fossil generation and 1 MW partial contribution from solar. SEC currently has 2 MW nameplate solar generation installed, but only counts 40 percent as contributing towards summer peak. A majority of SEC capacity is associated with two natural gas-fired combined cycle units, which provide 1,631 MW. SEC also has 634 MW of coal-fired steam generation.

In addition to the Utility's capacity, SEC has multiple long-term purchased power contracts. These include approximately four solar contracts for a total of 300 MW of nameplate capacity, which SEC counts as contributing 40 percent towards summer peak.

Projected Generation Resources

SEC's unit retirements and additions during the planning period are described in Table 24. SEC plans for the completion of the Shady Hills Energy Center, a 547 MW natural gas-fired combined cycle facility in 2026. SEC also plans for the addition of two combustion turbine units and two combined cycle units, totaling approximately 2,006 MW of capacity, and two energy storage units 150 MW, to meet reserve requirement obligations. However, SEC states it has not yet determined if this requirement will be met by construction of the unnamed facilities, future acquisitions, or purchased power agreements.

Table 24: SEC Generation Resource Changes

Year	Plant Name & Unit Number	Unit Type	Net Capacity (MW) Sum	Firm Capacity (MW) Sum	Notes
Retiring Units					
	None				
	Total Retirements		**0**	**0**	
New Units					
2026	Shady Hills Energy Center Unit 1	NG CC	547		
2032	Unnamed CC	NG CC	559		
2032	Unnamed CT	NG CT	345		
2032	Unnamed CT	NG CT	345		
2033	Unnamed Battery	BA	75		
2035	Unnamed Battery	BA	75		
2035	Unnamed CC	NG CC	559		
	Total New Units		**2,505**	**0**	
	Net Additions		**2,505**	**0**	

Source: 2026 TYSP and 2026 FRCC Load & Resource Plan

Fuel Diversity

Table 25 shows SEC's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. In 2025, natural gas was SEC's primary fuel, at 61.2 percent, with purchases making

up approximately 15 percent, the second highest in the state. During the planning period, SEC is projected to increase its self-generation, primarily of natural gas, offsetting these purchases and coal generation. By 2035, natural gas will represent approximately 90.3 percent of SEC's fuel usage while purchases decrease to an approximate 0.9 percent.

Table 25: SEC Energy Generation by Fuel Type

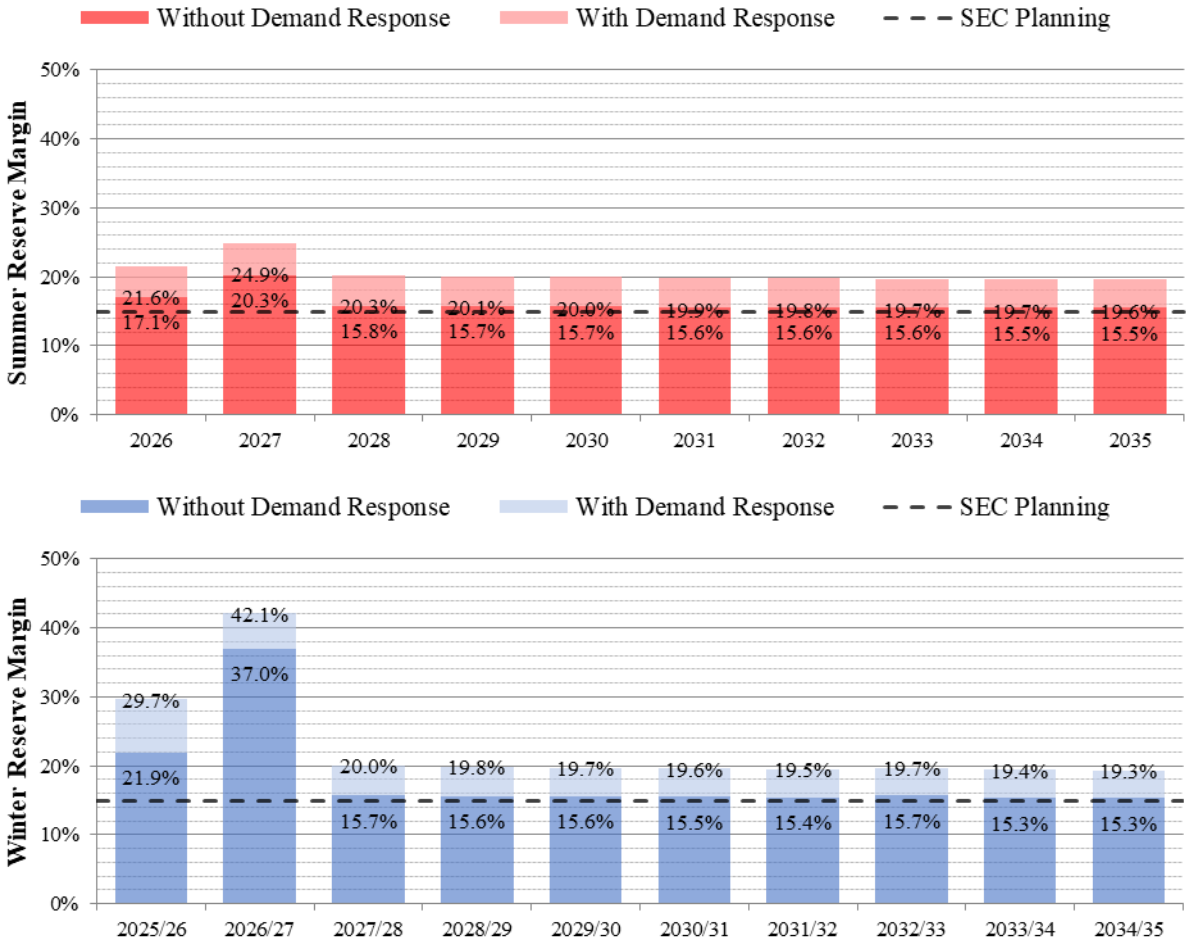
Fuel Type	Net Energy for Load			
	2025		2035	
		%	GWh	%
Natural Gas	10,889	**61.2%**	22,164	**90.3%**
Coal	2,918	**16.4%**	1,448	**5.9%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	12	**0.1%**	6	**0.0%**
Renewable	932	**5.2%**	700	**2.9%**
Interchange	366	**2.1%**	0	**0.0%**
NUG & Other	2,661	**15.0%**	225	**0.9%**
Total	**17,778**		**24,543**	

Source: 2026 TYSP and Data Responses

Reliability

SEC utilizes a 15 percent planning reserve margin criterion for seasonal peak demand. Figure 47 displays the forecast planning reserve margin for SEC through the planning period for both seasons, with and without the use of demand response. Member cooperatives allow SEC to coordinate demand response resources to maintain reliability. As shown in Figure 47, SEC's generation needs are determined by winter peak demand more often than summer peak demand during the planning period.

Figure 47: SEC Reserve Margin Forecast



Source: 2026 TYSP

City of Tallahassee Utilities (TAL)

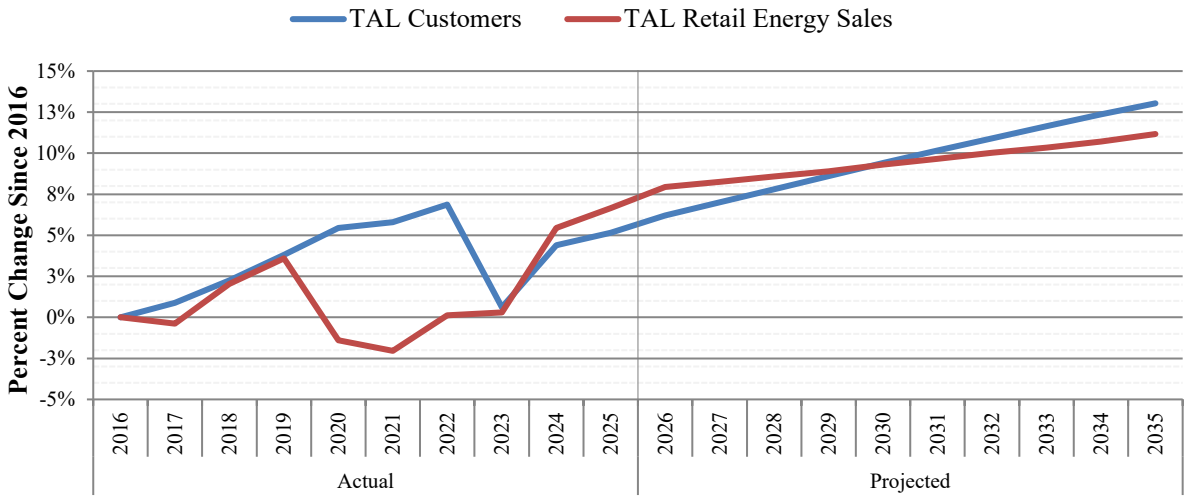
TAL is a municipal utility and the second smallest electric utility by sales that files a TYSP. The Utility's service territory is within the FRCC region and primarily consists of the City of Tallahassee and surrounding areas. As a municipal utility, the Commission's regulatory authority is limited to safety, rate structure, territorial boundaries, bulk power supply, operations, and planning. Pursuant to Section 186.801(2), F.S., the Commission finds TAL's 2026 TYSP suitable for planning purposes.

Load Forecasting

In 2025, TAL had approximately 125,146 customers and annual retail energy sales of 2,820 GWh, or approximately 1.2 percent of Florida's annual retail energy sales. Over the last 10 years, TAL's customer base has increased by approximately 5.2 percent, while retail energy sales have increased by approximately 6.7 percent.

For the next 10 years, TAL projected an average annual growth rate in its customer base of approximately 0.7 percent. The Utility continues to see new growth in single-family and multi-family housing in its service territory. TAL's total sales are projected to increase approximately 0.3 percent per year, in line with the average growth of the previous decade. Figure 48 illustrates historic and prospective forecasted growth rates in customers and retail energy sales for the resource plan that TAL filed in its 2026 TYSP.

Figure 48: TAL Growth



Source: 2026 TYSP

TAL implemented new customer billing software in 2023 which changed the methodology of accounting for customer types and consolidated some service points. The resulting data anomaly shows an increase in average residential consumption and a decrease in average commercial consumption as well as an overall reduction in service points. TAL noted that the calculation of the Utility's customer number growth is complicated by the software system change in 2022-2023

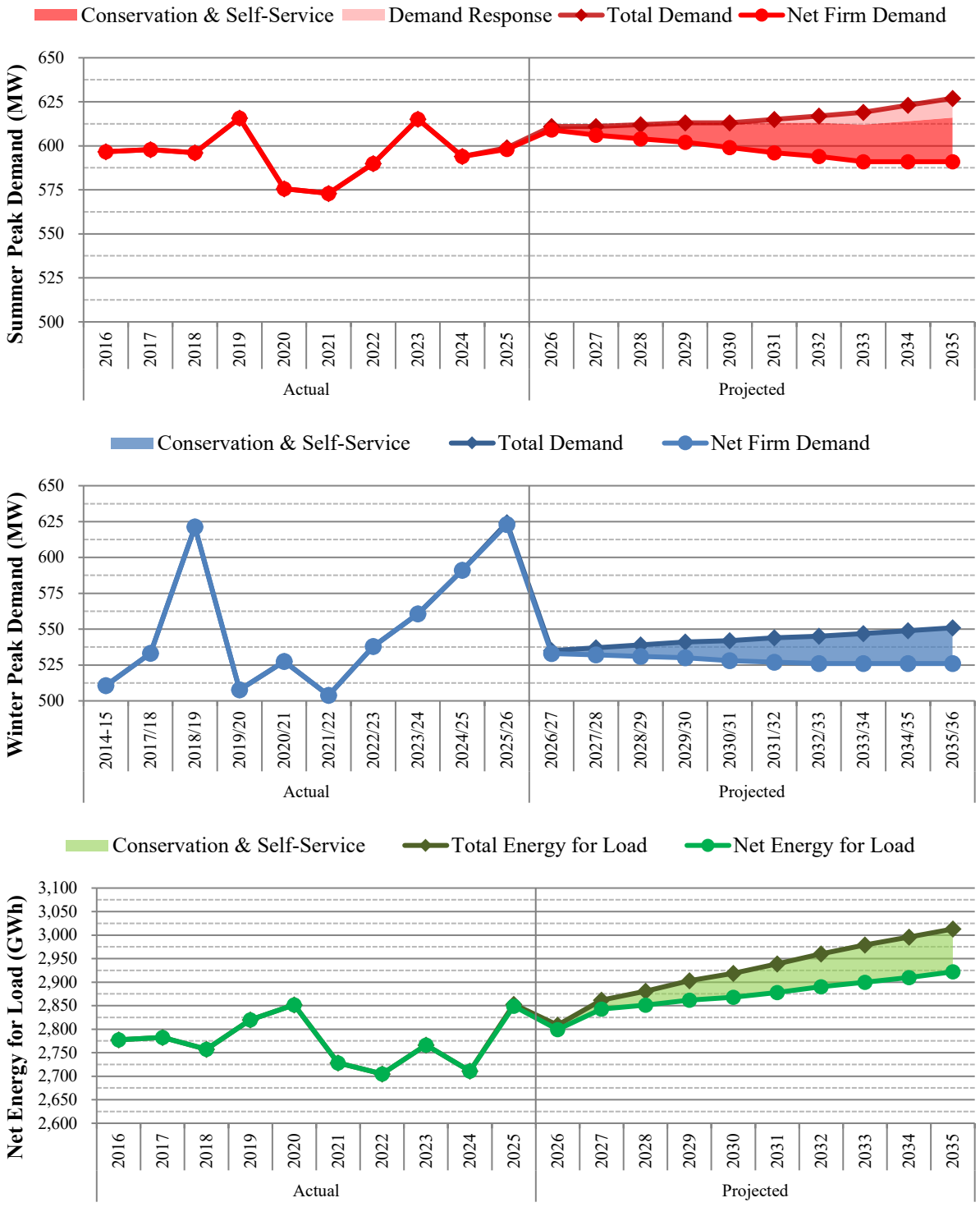
that altered the customer count methodology and reset the service points lower based on synthesizing accounts with multiple meters for the same address, for all service types. Excluding the software changeover from the data results in a 1.2 percent annual growth average for residential customers and 0.8 percent for commercial customers, though the past two years of commercial growth have been stronger than the COVID influenced period.

TAL reported that its residential UPC in the historic period only had minor year-over-year fluctuations, likely due to weather. As with customer counts, the software change and resulting customer count consolidation created an anomalous impact to the UPC data. In the 2022-2023 software changeover period, UPC increased due to having a smaller customer count for the same sales area, but the average consumption for the pre- and post- 2022-2023 changeover period show no changes. However, the Utility also noted that its measurement of commercial UPC in the historic period was impacted by the software change raising the average UPC by approximately 8 percent in a single reporting year. This created an anomaly in the UPC trend as measured before and after the changeover period. The period 2016-2022 shows decreasing average commercial consumption, declining at 1.5 percent per year; however, in recent years (2024-2025), the commercial UPC is growing about 1.5 percent per year. The software changeout and weather alone do not explain these trends; higher-use customers added to the system are impacting the UPC metric. TAL cited several key accounts in the past few years impacting the trend, including the new FSU Business School, DC Fast Charging stations, and Amazon fulfillment centers.

Forecasted Load and Peak Demand

The three graphs in Figure 49 show TAL's seasonal peak demand and net energy for load for the historic years of 2016 through 2025 and forecast years 2026 through 2035. These graphs include the impact of DSM, and for future years assume that all available demand response resources will be activated during the seasonal peak. While not a FEECA Utility, TAL offers energy efficiency and demand response programs to customers to reduce peak demand and annual energy consumption. Currently, TAL only offers demand response programs that target appliances contributing to summer peak, and therefore have no effect upon winter peak. TAL did not include the impact of data center-related large load customers in the development of its seasonal peak demand and energy forecasts.

Figure 49: TAL Demand and Energy Forecasts



Source: 2026 TYSP

Generation Resources

Currently, TAL generating facilities provide approximately 737 MW of summer capacity. This includes 725 MW from fossil generation and 12 MW partial contribution from solar. While TAL reports its solar generation as native, these are the result of long term purchased power contracts. TAL currently has 62 MW nameplate solar capacity installed, but only counts 20 percent as contributing towards summer peak. A majority of TAL generation capacity is associated with two natural gas-fired combined cycle units, which provide 522 MW.

Projected Generation Resources

TAL has no planned unit additions or retirements during the planning period.

Fuel Diversity

Table 26 shows TAL's actual net energy for load by fuel type as of 2025 and the projected fuel mix for 2035. TAL relies almost exclusively on natural gas for its generation, excluding some purchases from other utilities and qualifying facilities. In 2025, TAL produced more energy than required for its native load and was a net exporter by approximately 9.7 percent, primarily of off-peak power during shoulder months due to its generation's operating characteristics. Natural gas is anticipated to remain the primary fuel source on the system and TAL will continue to be a net exporter of energy throughout the period.

Table 26: TAL Energy Generation by Fuel Type

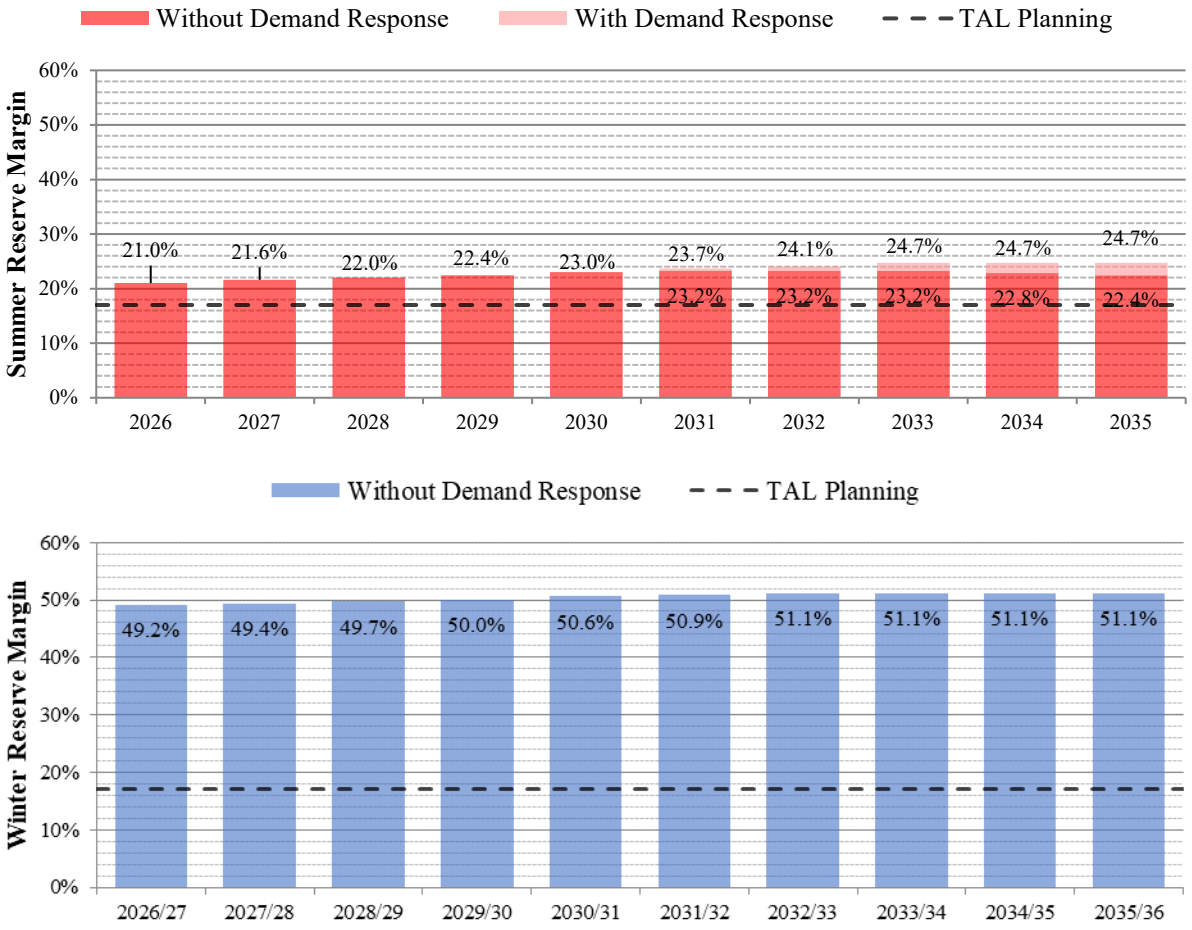
Fuel Type	Net Energy for Load			
	2025		2035	
	GWh	%	GWh	%
Natural Gas	3045	**105.8%**	3,036	**101.3%**
Coal	0	**0.0%**	0	**0.0%**
Nuclear	0	**0.0%**	0	**0.0%**
Oil	4	**0.1%**	0	**0.0%**
Renewable	108	**3.8%**	103	**3.4%**
Interchange	0	**0.0%**	0	**0.0%**
NUG & Other	(280)	**-9.7%**	(141)	**-4.7%**
Total	**2,877**		**2,998**	

Source: 2026 TYSP and Data Responses

Reliability

TAL utilizes a 17 percent planning reserve margin criterion for seasonal peak demand. Figure 50 displays the forecast planning reserve margin for TAL through the planning period for both seasons, with and without the use of demand response. As discussed above, TAL only offers demand response programs applicable to the summer peak, which it begins including in its resource planning beginning in 2031. As shown in Figure 50, TAL's generation needs are controlled by its summer peak throughout the planning period.

Figure 50: TAL Reserve Margin Forecast



Source: 2026 TYSP

Attachment 4

Annual Status Report on Storm Protection Plan Activities of Florida Investor-Owned Utilities

As Required by Section 366.96(10), Florida Statutes





NOVEMBER 2026

Table of Contents

List of Tables iii
Acronyms v
Executive Summary 1
Section 1 – Background 5
Section 2 - Summary of Filings 7
Section 3 - Duke Energy Florida, LLC Program Descriptions 9
Section 4 - Florida Power & Light Program Descriptions 15
Section 5 - Florida Public Utilities Company Program Descriptions 19
Section 6 - Tampa Electric Company Program Descriptions 23
Section 7 - Appendix 27

List of Tables

Table A Summary of SPPCRC Costs 2
Table B Summary of Total Bill Impacts (in dollars) 3
Table 3-1 DEF's SPP Projects Planned & Completed for 2025–2026 (SPPCRC Only)..... 12
Table 3-2 DEF's Actual and Projected Bill Impacts (in dollars)..... 13
Table 4-1 FPL's SPP Projects Planned & Completed for 2025–2026 (SPPCRC Only) 16
Table 4-2 FPL's Actual and Projected Bill Impacts (in dollars) 17
Table 5-1 FPUC's SPP Projects Planned & Completed for 2025–2026 (SPPCRC Only) 20
Table 5-2 FPUC's Actual and Projected Bill Impacts (in dollars) 21
Table 6-1 TECO's SPP Projects Planned & Completed for 2025–2026 (SPPCRC Only)..... 25
Table 6-2 TECO's Actual and Projected Bill Impacts (in dollars)..... 26
Table 7-1 Summary of Total SPPCRC Costs (Millions)..... 27
Table 7-2 Summary of SPP Bill Impacts (Residential $/1,000 kWh) 27

Acronyms

DEF	Duke Energy Florida, LLC
EWL	Extreme Wind Loading
F.A.C.	Florida Administrative Code
FPL	Florida Power & Light Company
FPUC	Florida Public Utilities Company
F.S.	Florida Statutes
GULF	Gulf Power Company
IOU	Investor-Owned Electric Utility
NESC	National Electric Safety Code
OPC	Office of Public Counsel
SPP	Storm Protection Plan
SPPCRC	Storm Protection Plan Cost Recovery Clause
TECO	Tampa Electric Company

Executive Summary

In 2019, the Florida Legislature passed Senate Bill 796 to enact Section 366.96, Florida Statues (F.S.), entitled "Storm Protection Plan Cost Recovery." Section 366.96, F.S., requires each investor-owned electric utility (IOU) to file a transmission and distribution Storm Protection Plan (SPP) that covers the immediate 10-year planning period. The plans are required to be filed with the Florida Public Service Commission (the Commission or FPSC) at least every three years and must explain the systematic approach the utility will follow to achieve the objectives of reducing restoration costs and outage times associated with extreme weather events and enhancing reliability. Pursuant to Section 366.96(7), F.S., the Commission shall conduct an annual proceeding to determine the utility's prudently incurred SPP costs. In addition, Section 366.96(10), F.S., requires that the Commission submit an annual report to the Governor, President of the Senate, and Speaker of the House of Representatives, on the status of the utility's storm protection activities and costs, which is the purpose of this report.

This report is a summary of information provided pursuant to Rule 25-6.030(4), Florida Administrative Code (F.A.C.), which includes:

- Planned and completed SPP programs and projects in the previous year.
- Actual costs and rate impacts associated with completed SPP activities compared to the Projected costs and rate impacts for the same activities.
- Projected costs and rate impacts associated with SPP programs and projects planned for the next year.

Sections 3 through 6 of this report summarize the information required pursuant to Section 366.96(10), F.S., for Duke Energy Florida, LLC (DEF), Florida Power & Light Company (FPL), Florida Public Utilities Company (FPUC), and Tampa Electric Company (TECO). A majority of these SPP programs are a continuation of the utility's previously approved Storm Hardening Plan[1] and SPP.[2]

Section 366.96(7), F.S., requires the FPSC to conduct an annual proceeding to determine the utility's prudently incurred transmission and distribution storm protection plan costs and allow the utility to recover such costs through a charge separate and apart from its base rates, to be referred to as the storm protection plan cost recovery clause (SPPCRC). Prior to enactment of Section 366.96, F.S., costs to strengthen or harden an IOU's transmission and distribution infrastructure to withstand extreme wind events were recovered through base rates. The FPSC changes base rates infrequently but conducts an evidentiary proceeding or rate case, upon petition by an IOU or if the earnings of the IOU indicate that existing base rates may no longer be fair, just, reasonable, or compensatory. Examples of costs recovered by base rates include new power plants such as solar facilities, modifications to existing power plants, transmission and distribution facilities, and other costs to maintain these facilities and operate the utility.

[1]Docket No. 20180144-EI (FPL), Docket No. 20180145-EI (TECO), Docket No. 20180146-EI (DEF), Docket No. 20180147-EI (Gulf) and Docket No. 20180148-EI (FPUC), *In re: Review of 2019-2021 storm hardening plan.*
[2]For the 2025 data: Docket No. 20220048-EI (TECO), Docket No. 20220049-EI (FPUC), Docket No. 20220050-EI (DEF), and Docket No. 20220051-EI (FPL), *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C.*; For the 2026 data: Docket No. 20250014-EI (FPL), Docket No. 20250015-EI (DEF), Docket No. 20250016-EI (TECO), and Docket No. 20250017-EI (FPUC), *In re: Review of 2026-2035 Storm Protection Plan, pursuant to Rule 25-6.030, F.A.C.*

Beginning in 2020, the FPSC holds an annual evidentiary hearing for the SPPCRC that features a review of projected costs and a true-up of actual costs to establish SPPCRC factors or rates charged to customers. This recurring, self-correcting process balances cost over-recoveries and under-recoveries to more closely reflect actual costs in any given period.

Section 366.96(8), F.S., requires that costs recovered through the SPPCRC may not include costs recovered through an IOU's base rates. Throughout 2020 and 2021, the Commission approved various Settlement Agreements and Stipulations that moved existing storm protection costs from base rates to the SPPCRC. Today, more than 95 percent of the utilities' storm protection costs are being recovered through the SPPCRC. As part of its implementation of the SPPCRC for each IOU, the FPSC ensures that the SPPCRC rates or factors do not include costs recovered through base rates.

Because the majority of storm protection costs have now transitioned to the SPPCRC, this report will deemphasize the base rate component of such costs. Going forward, this will provide a clearer summary of the impacts resulting from the legislative changes. Table A provides a summary of each IOU's reported Projected and actual total storm protection plan expenditures collected through the SPPCRC. Table B is a summary of each utility's reported Projected and actual total bill impacts for a typical residential customer resulting from the approved SPPCRC factor. For reference purposes, only the initial year 2020 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Section 7 includes summary tables of the actual SPPCRC costs, and bill impacts for each company since inception of the SPPs.

Table A
Summary of SPPCRC Costs

Utility	2020[1] Actual (Millions)	2025 Projected (Millions)	2025 Actual (Millions)	2026 Projected (Millions)
Duke Energy Florida, LLC	$239.3	$850.5	$865.9	$774.5
Florida Power & Light/ Gulf Power Company	$1,037.2 $36.6	$1,571.7	$1,629.2	$1,264.6
Florida Public Utilities Company[2]	-	$24.3	$24.2	$22.1
Tampa Electric Company	$36.9	$211.1	$220.7	$194.3
Totals	**$1,350.0**	**$2,657.6**	**$2,740.0**	**$2,255.5**

Note 1: The 2020 Actual amounts are from the Company's 2020 SPP Annual reports.

Note 2: The Commission granted a motion to defer FPUC's 2020 SPP filing and refrain from participating in the SPPCRC proceeding due to circumstances affecting the utility as a result of Hurricane Michael in 2020. FPUC's first SPP was approved, with modifications, at the October 4, 2022, Commission Conference.

Table B
Summary of Total Bill Impacts (in dollars)

Utility	2020[1] Actual Residential Bill Impact ($/1,000 kWh)	2025[3] Projected Residential Bill Impact ($/1,000 kWh)	2025[3] Actual Residential Bill Impact ($/1,000 kWh)	2026 Projected Residential Bill Impact ($/1,000 kWh)
Duke Energy Florida, LLC	$2.05	$8.01	$8.01	$9.36
Florida Power & Light/ Gulf Power Company	$1.29 $0.98	$8.10	$8.10	$9.95
Florida Public Utilities Company[2]	-	$9.97	$9.97	$16.56
Tampa Electric Company	$1.03	$8.38	$8.38	$7.17

Note 1: The 2020 Actual amounts are from the Company's 2020 SPP Annual reports.

Note 2: The Commission granted a motion to defer FPUC's 2020 SPP filing and refrain from participating in the SPPCRC proceeding due to circumstances affecting the utility as a result of Hurricane Michael in 2020. FPUC's first SPP was approved, with modifications, at the October 4, 2022, Commission Conference.

Note 3: The Projected and actual bill impacts for 2025 are identical because any additional costs incurred during 2025 are reflected in the subsequent year's SPPCRC factor.

Section 1 – Background

In order to implement the new statute, the Commission staff held two rule development workshops, on June 25, 2019, and August 20, 2019, to obtain stakeholder comments on the draft rules. Representatives from each IOU, Florida Retail Federation, Florida Industrial Power Users Group, and the Office of Public Counsel (OPC) participated at the workshops and submitted post-workshop comments. Additionally, representatives from Florida Electric Cooperatives Association, Inc., and Florida Municipal Electric Association submitted post-workshop comments.

The Commission proposed the adoption of Rules 25-6.030, F.A.C, Storm Protection Plan, and 25-6.031, F.A.C., Storm Protection Plan Cost Recovery Clause, at its October 3, 2019, Commission Conference.[3] However, the rules were challenged and an administrative hearing was held on December 20, 2019, at the Department of Administrative Hearings.[4] The Administrative Law Judge issued a final order on January 21, 2020, deeming the rules as valid and the rules became effective on February 18, 2020.

On January 15, 2025, DEF, FPL, FPUC, and TECO each filed their 2026 - 2035 SPPs.[5] The Commission approved the SPPs, with modifications, during the technical hearing on May 20, 2025.[6] This report reflects data from the most recent SPPs and annual status report updates.[7]

Pursuant to Section 366.96(8), F.S., and Rule 25-6.031, F.A.C., SPP costs that are being recovered through the SPPCRC cannot be recovered through base rates or any other cost recovery method. SPP costs that are being recovered through the SPPCRC are evaluated by the Commission on an annual basis via the SPPCRC docket. The most recent SPPCRC docket was opened on January 5, 2026, and the Commission approved several stipulations on September 30, 2026, which established SPPCRC factors for 2027.[8]

[3]Docket No. 20190131-EU, *In re: Proposed adoption of Rule 25-6.030, F.A.C., Storm Protection Plan and Rule 25-6.031, F.A.C., Storm Protection Plan Cost Recovery Clause.*

[4]Case No. 19-006137RP, *In re: Petitioner and Intervenor had standing to challenge the proposed rules, but the evidence showed that the proposed rules are not invalid exercises of delegated legislative authority.*

[5]For the 2026 data: Docket No. 20250014-EI (FPL), Docket No. 20250015-EI (DEF), Docket No. 20250016-EI (TECO) and Docket No. 20250017-EI (FPUC), *In re: Review of 2026-2035 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C.*

[6]Order Nos. PSC-2025-0218-FOF-EI, PSC-2025-0217-FOF-EI, PSC-2025-0219-FOF-EI, and PSC-2025-0216-FOF-EI.

[7]For the 2025 data: Docket No. 20220051-EI (FPL), Docket No. 20220050-EI (DEF), Docket No. 20220048-EI (TECO), and Docket No. 20220049-EI (FPUC), *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C.*

[8]Docket No. 20260010-EI, *In re: Storm Protection Plan Cost Recovery Clause.*

Section 2 - Summary of Filings

DEF, FPL, FPUC, and TECO timely filed their annual status reports regarding their SPP programs.[9] As required by Section 366.96(10), F.S., these status reports include:

- A description of all planned and completed SPP programs and projects in 2025.
- Actual costs and rate impacts associated with completed SPP activities compared to the Projected costs and rate impacts for the same activities.
- Projected costs and rate impacts associated with SPP programs and projects planned for 2026.

Each section below contains a brief description of each utility's SPP programs. A majority of these programs are a continuation of the utility's SPP previously approved by the Commission. The tables contained within each section summarize the information required pursuant to Section 366.96(10), F.S. Additional details of the programs are also contained in each utility's annual status report and its filings in the annual SPPCRC proceeding.

[9] https://www.psc.state.fl.us/storm-protection-plans.

Section 3 - Duke Energy Florida, LLC Program Descriptions

Below are DEF's current programs. Further details of the programs are in DEF's SPP[10] or its annual SPP report.[11]

Distribution Self-Optimizing Grid

This program utilizes automated switching which allows most circuits to be restored from alternate sources. The program has connectivity projects that create tie points between circuits and adds segmentation such that the distribution circuits have much smaller line segments, thus reducing the number of customers that are affected by outages.

Distribution Pole Replacements and Inspections

DEF inspects wood distribution poles on an average eight-year cycle to determine the extent of pole decay and any associated loss of strength. The information gathered from the inspections is used to determine if the pole needs to be replaced or if treatment and reinforcement will extend the life of the pole. DEF completes a loading analysis on poles with joint-use attachments on its system on an average eight-year cycle.

Distribution Feeder Hardening

This program will enable the feeder backbone to better withstand extreme weather events. This includes strengthening or replacing structures, updating basic insulation levels and conductors to current standards, relocating difficult to access facilities, and incorporates the Company's pole inspection and replacement activities. All new structures will meet the National Electric Safety Code (NESC) 250C extreme wind load (EWL) standard.

Distribution Lateral Hardening (Overhead and Underground)

This program will enable branch lines to better withstand extreme weather events. The Lateral Hardening Program includes undergrounding of the laterals that are most prone to damage during extreme weather events and are in inaccessible locations, and overhead hardening of those laterals less prone to damage. Laterals will also be relocated to accessible locations, where practical.

Distribution Underground Flood Mitigation

This program will harden existing underground facilities in locations that are prone to storm surge during extreme weather events. This involves the installation of specialized stainless-steel equipment, submersible connections, and concrete pads with increased mass.

Distribution Vegetation Management

The program consists of routine maintenance trimming, hazard tree removal, herbicide applications, vine removal, customer requested work, and right-of-way brush mowing where applicable. DEF trims its feeders on an average three-year cycle and trims its laterals on an average five-year cycle.

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[10]For the 2025 data: Docket No. 20220050-EI (DEF), *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Duke Energy Florida, LLC.* For the 2026 data: Docket No. 20250015-EI, *In re: Review of 2026-2035 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Duke Energy Florida, LLC.*

[11]Florida PSC.

Transmission Structure and Drone Inspections

The transmission system's inspection activities include all types of structures, line hardware, guying, and anchoring systems. Ground-line inspections determine the extent of pole decay and any associated loss of strength. The wood transmission poles are inspected on a four-year cycle and the transmission non-wooden poles and towers are inspected on a six-year cycle. Drone inspections provide high-resolution imagery for structure, hardware and insulation vulnerabilities that otherwise would be difficult to see.

Transmission Pole Replacements

This program's activities are based on the results of the inspections of wood transmission poles. This activity upgrades wood poles to non-wood material such as steel or concrete. Other related hardware upgrades will occur simultaneously, such as insulators, crossarms, switches, and guys.

Transmission Tower Upgrades

This program focuses on the replacement of tower types that failed during extreme weather events as well as lattice towers identified during inspection results and cathodic protection data. It will prioritize towers based on inspection data and enhanced weather modeling.

Transmission Overhead Ground Wire

This program targets lines to improve lightning protection. The program prioritizes the replacement of deteriorated overhead ground wires by targeting lines with frequent lightning events, outage histories, structure design types, overhead ground wire materials, and inspection results.

Transmission GOAB Automation

The Gang Operated Air Break (GOAB) line switch automation project is an initiative that will upgrade switch locations with modern switches enabled with remote-control capabilities. The GOAB upgrades increase the number of remote-control switches to support faster isolation of trouble spots on the transmission system and more rapid restoration following line faults.

Transmission Cathodic Protection

This program mitigates active ground level corrosion on the steel lattice tower system. The Cathodic Protection program includes the installation of passive cathodic protection systems, comprised of anodes on each leg of the lattice towers. The anodes serve as sacrificial assets that corrode in place of the structural steel, preventing loss of structure strength due to corrosion.

Transmission Insulator Upgrades

The Insulator Upgrade subprogram is targeting insulators which show pin erosion 'penciling' of the connections between the insulators. The replacement insulators utilize a more uniform matrix than porcelain, with a design change that includes a zinc sleeve to mitigate the pin erosion for a better mechanical connection. The implementation of the improved design in the bell and connection is to reduce the effects of penciling over time, ultimately mitigating failure during extreme weather events, and minimizing outage events.

Transmission Substation Flood Mitigation

The Substation Flood Mitigation program, using flood plain and storm surge data, includes a systematic review and prioritization of substations at risk of flooding to determine the proper mitigation solution. The mitigation solutions may include elevating or modifying equipment or relocating substations altogether. As shown in Table 3-1, there has been no spending regarding this program in 2023 or 2024.

Transmission Substation Hardening

The replacement of oil circuit breakers with state-of-the-art breakers will result in the transmission system being able to more effectively and consistently isolate faults, reclose after momentary interruptions, and improve the customer experience through fewer interruptions. The replacement of electro-mechanical relays with electronic relays is designed to provide rapid communication capabilities and microprocessor technology, which enables a quicker recovery from events. Relay upgrades will be matched with breaker replacements.

Transmission Vegetation Management

DEF's Transmission vegetation management program focuses on ensuring the safe and reliable operation of the transmission system by minimizing vegetation-related interruptions and adequate conductor-to-vegetation clearances. The program consists of planned threat and condition-based work, hazard tree mitigation, and floor management (herbicide, mowing, and hand cutting).

Table 3-1 provides a list of the projects and activities planned and completed for 2025, and the projects and activities planned for 2026. In addition, the table includes a comparison of the Projected and actual costs of the projects and activities for 2025 and the Projected costs for 2026.

Table 3-1
DEF's SPP Projects Planned & Completed for 2025–2026
(SPPCRC Only)

Program name	Projects/ Activities Planned for 2025	Projected Cost for 2025 (Millions)	Projects/ Activities Completed in 2025	Actual Cost for 2025 (Millions)	Projects/ Activities Planned for 2026	Projected Cost for 2026 (Millions)
Dist. Self-Optimizing Grid	911	$107.2	769	$105.2	946	$116.6
Dist. Feeder Hardening	124	$159.6	204	$225.9	119	$118.5
Dist. Feeder Hardening Pole Replacements (poles)	3,319	$ 36.2	781	$ 8.4	1,592	$ 15.6
Dist. Feeder Hardening Pole Inspections (poles)	31,264	$ 1.0	37,883	$ 1.8	23,156	$ 1.0
Dist. Lateral Hardening-Overhead	111	$112.5	202	$115.2	107	$ 75.0
Dist. Lateral Hardening Pole Replacements (poles)	5,802	$ 47.6	5,447	$ 45.6	6,356	$ 38.7
Dist. Lateral Hardening Pole Inspections (poles)	99,260	$ 3.1	90,368	$ 3.5	92,616	$ 2.6
Dist. Lateral Hardening-Underground (circuits)	66	$116.4	134	$ 95.6	97	$124.3
Dist. Underground Flood Mitigation	4	$ 2.8	10	$ 2.1	6	$ 2.0
Dist. Vegetation Management (miles)	4,599	$ 51.3	4,537	$ 52.7	4,540	$ 52.1
Trans. Pole/Tower Inspections/Drone Inspections	12,971	$ 0.6	13,320	$ 0.5	10,500	$ 0.7
Trans. Pole Replacements (poles)	1,853	$121.7	2,124	$135.0	1,929	$121.5
Trans. Tower Upgrades (# of locations)	2	$ 20.2	8	$ 19.8	5	$ 30.9
Trans. Overhead Ground Wire (# of locations)	13	$ 20.3	41	$ 13.3	15	$ 18.3
Trans. GOAB Automation (# of locations)	6	$ 6.6	36	$ 4.2	6	$ 5.5
Trans. Cathodic Protection (# of locations)	8	$ 2.5	11	$ 2.6	13	$ 2.5
Trans. Insulator Upgrades	0	$ 0.0	0	$ 0.0	640	$ 5.9
Trans. Substation Hardening	33	$ 17.2	30	$ 11.4	24	$ 15.6
Trans. Substation Flood Mitigation	1	$ 0.5	0	$ 0.0	1	$ 2.2
Trans. Vegetation Management (miles)	648	$ 22.9	677	$ 23.2	977	$ 25.1
Totals		**$850.5**		**$865.9**		**$774.5**

Source: DEF's 2025 SPP Annual Report and responses to staff's data requests.
Note: Trans. = Transmission; Dist. = Distribution.

Table 3-2 provides the typical residential customer's bill impact for the implementation of DEF's SPP programs. These values represent the total costs of DEF's SPP activities recovered through the SPPCRC. For reference purposes, only the initial year 2020 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Table 3-2
DEF's Actual and Projected Bill Impacts (in dollars)

2020[1] Actual		2025 Projected[2]		2025 Actual[2]		2026 Projected	
Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)
$239.3	$2.05	$850.5	$8.01	$865.9	$8.01	$774.5	$9.36

Source: DEF's 2025 SPP Annual Report, responses to staff's data requests, and Docket Nos. 20240010-EI and 20250010-EI.
Note 1: The 2020 Actual amounts are from the Company's 2020 SPP Annual Report.
Note 2: The Projected and actual bill impacts for 2025 are identical because any additional costs incurred during 2025 are reflected in the subsequent year's SPPCRC factor.

Section 4 - Florida Power & Light Program Descriptions

Gulf Power Company (Gulf) was merged with FPL in 2021 and 2022; and the utilities were consolidated for ratemaking purposes as FPL. Below are FPL's current programs. Further details of the programs are in FPL's SPP[12] or in its annual SPP report.[13]

Distribution Inspection

This program includes an eight-year pole inspection cycle for all distribution poles throughout its service area. In addition, joint use poles are inspected as part of the Distribution Inspection Program.

Transmission Inspection

This program ensures that wood, steel, and concrete transmission structures are visually inspected on an annual basis. Transmission circuits and substations will be inspected on a six-year cycle. Climbing or bucket truck inspections on wood structures will be on a six-year cycle and climbing or bucket truck inspections on steel and concrete structures will be on a ten-year cycle.

Distribution Feeder Hardening

FPL hardens feeders throughout its service area, considering historical reliability performance, restoration difficulties, ongoing/upcoming projects, and geographic locations. This includes FPL's initiative of design and construction practices to meet the NESC EWL criteria.

Distribution Lateral Hardening

FPL originally started this program as a pilot program in 2018 and has continued the program as part of its SPP. This program targets certain overhead laterals, which were impacted by recent storms and have a history of vegetation-related outages and other reliability issues, for conversion from overhead to underground.

Transmission Hardening

This program replaces all wood transmission structures with steel or concrete structures. As of year-end 2025, 97 percent of FPL's transmission structures are steel or concrete with approximately 2,929 wood transmission structures remaining in the Northwest Florida service area.

Distribution Vegetation Management

To maintain current cycles, FPL plans to inspect and maintain, on average, approximately 17,500 miles of feeders and laterals, which is consistent with historically recorded miles. This program includes a three-year average vegetation maintenance cycle for feeders, mid-cycle targeted vegetation maintenance cycle for certain feeders, six-year average vegetation maintenance cycle for laterals, and continued customer education through FPL's "Right Tree, Right Place" initiative.

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[12] For the 2025 data: Docket No. 20220051-EI, *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Power & Light Company.* For the 2026 data: Docket No. 20250014-EI (FPL), *In re: Review of 2026-2035 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Power & Light Company.*

[13] Florida PSC.

Transmission Vegetation Management

FPL plans to inspect and maintain, on average, approximately 9,500 miles of its transmission lines annually, which is comparable to the historically maintained miles. This program includes inspecting the rights-of-way of transmission infrastructure, documenting vegetation inspection results and findings, and prescribing and executing a work plan.

Substation Storm Surge/Flood Mitigation

The Substation Storm Surge/Flood Mitigation program is a continuing program, first established in FPL's 2020 SPP. Damage to substations that are susceptible to storm surge and flooding during extreme weather events can be prevented and/or mitigated by raising the equipment at certain substations above flood level and constructing flood protection walls around other substations.

Table 4-1 provides a list of the projects and activities planned and completed by FPL for 2025 and the projects and activities planned for 2026. In addition, the table includes a comparison of the Projected and actual costs of the projects and activities for 2025 and the Projected costs for 2026.

Table 4-1
FPL's SPP Projects Planned & Completed for 2025–2026
(SPPCRC Only)

Program Name	Projects/ Activities Planned for 2025	Projected Cost for 2025 (Millions)	Projects/ Activities Completed in 2025	Actual Cost for 2025 (Millions)	Projects/ Activities Planned for 2026	Projected Cost for 2026 (Millions)
Dist. Inspection (poles)	180,000	$ 42.5	193,199	$ 42.5	180,000	$ 50.1
Trans. Inspections	84,000	$ 49.8	84,056	$ 61.3	84,200	$ 52.1
Dist. Feeder Hardening	194	$ 623.7	192	$ 681.9	275	$ 301.6
Dist. Lateral Hardening	1,298	$ 687.1	1,402	$ 684.4	1,099	$ 686.9
Trans. Hardening	347	$ 24.2	244	$ 16.3	312	$ 26.8
Dist. Vegetation Management (miles)	18,041	$ 120.4	18,597	$ 116.7	18,055	$ 121.7
Trans. Vegetation Management (miles)	9,410	$ 15.4	9,610	$ 17.6	9,457	$ 16.8
Substation Storm Surge/Flood Mitigation	2	$ 8.5	1	$ 8.6	1	$ 8.5
Totals	**N/A**	**$1,571.7**	**N/A**	**$1,629.2**	**N/A**	**$1,264.6**

Source: FPL's 2025 SPP Annual Report and responses to staff's data requests.
Note: Trans. = Transmission; Dist. = Distribution.

Table 4-2 provides the typical residential customer's bill impact for the implementation of FPL's SPP programs. These values represent the total costs of FPL's SPP activities which are recovered through the SPPCRC. For reference purposes, only the initial year 2020 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Table 4-2
FPL's Actual and Projected Bill Impacts (in dollars)

	2020[1] Actual		2025 Projected[2]		2025 Actual[2]		2026 Projected	
	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)
FPL	$1,037.2	$1.29	$1,571.7	$8.10	$1,629.2	$8.10	$1,264.6	$9.95
Gulf	$36.6	$0.98						

Source: FPL's 2025 SPP Annual Report, responses to staff's data requests, and Docket Nos. 20240010-EI and 20250010-EI.
Note 1: The 2020 Actual amounts are from the Company's 2020 SPP Annual Reports.
Note 2: The Projected and actual bill impacts for 2025 are identical because any additional costs incurred during 2025 are reflected in the subsequent year's SPPCRC factor.

Section 5 - Florida Public Utilities Company Program Descriptions

Below are FPUC's current programs. Further details of the programs are in FPUC's SPP[14] or its annual SPP report.[15]

Distribution Overhead Feeder Hardening

FPUC will analyze its feeders, leveraging specialized software, to ensure the feeder is adhering to NESC 250C EWL standards. If applicable, upgrades could include upgrading the class of the pole or adding intermediate poles.

Distribution Overhead Lateral Hardening

FPUC will analyze its overhead laterals, leveraging specialized software, to ensure the feeder is adhering to NESC 250C EWL standards. If applicable, upgrades could include upgrading the class of the pole or adding intermediate poles.

Distribution Overhead Lateral Undergrounding

This program addresses the systematic undergrounding or relocation and undergrounding of the single-phase overhead laterals. Many of these laterals are located in heavily vegetated areas, environmentally sensitive areas, or in areas where upgrading the overhead laterals to NESC EWL standards is not practical or consistent with industry design standards.

Distribution Pole Inspections and Replacement

All of FPUC's distribution poles are on an eight-year inspection cycle. Distribution poles are inspected by visual inspection techniques, sound and bores, and excavations with treatments. The poles are replaced using the NESC EWL standards.

Transmission and Distribution Vegetation Management

This program includes a new four-year cycle on the feeders and laterals, increased participation with local governments to address overall reliability due to tree related outages, and information made available to customers regarding the maintenance and placement of trees. The transmission lines are also on a four-year cycle, as parts of the transmission system run along the same rights-of-way as the distribution system. The transmission system is monitored on an annual basis in order to address any conditions that may impact the reliability of the system.

Transmission Inspection and Hardening

FPUC's transmission structures are on a six-year detailed inspection cycle. The most recent inspection was conducted in 2024. FPUC's substation equipment is inspected annually. FPUC's 138kV transmission system includes concrete poles, steel poles, and steel towers. Its 69kV transmission system consists of 146 concrete poles and 71 wood poles. As necessary, wood poles will be replaced with concrete poles that meet NESC standards.

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[14]For the 2025 data: Docket No. 20220049-EI, *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Public Utilities Company.* For the 2026 data: Docket No. 20250017-EI (FPUC), *In re: Review of 2026-2035 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Florida Public Utilities Company.*

[15]Florida PSC.

Table 5-1 provides a list of the projects and activities planned and completed by FPUC for 2025 and the projects and activities planned for 2026. In addition, the table includes a comparison of the Projected and actual costs of the projects and activities for 2025 and the Projected costs for 2026.

Table 5-1
FPUC's SPP Projects Planned & Completed for 2025–2026
(SPPCRC Only)

Program Name	Projects/ Activities Planned for 2025	Projected Cost for 2025 (Millions)	Projects/ Activities Completed in 2025	Actual Cost for 2025 (Millions)	Projects/ Activities Planned for 2026	Projected Cost for 2026 (Millions)
Dist. OH Feeder Hardening	14	$7.35	14	$9.43	13	$6.44
Dist. OH Lateral Hardening	68	$5.94	89	$3.02	71	$3.19
Dist. OH Lateral Hardening UG	27	$6.23	49	$6.04	38	$6.47
Dist. Pole Inspection & Replacement (poles)	3,136	$0.72	4,479	$1.27	4,002	$1.33
Trans & Dist. Vegetation Management (miles)	205.2	$2.44	156.68	$2.19	205.24	$2.42
Trans. Inspection & Hardening	12	$1.59	12	$2.23	12	$2.24
SPP Program Management	N/A	$0.00	N/A	$0.00	N/A	$0.00
Totals		**$ 24.3**		**$ 24.2**		**$ 22.1**

Source: FPUC's 2025 SPP Annual Report and responses to staff's data requests.
Note: Trans. = Transmission; Dist. = Distribution; OH = Overhead; UG = Undergrounding.

Table 5-2 provides the typical residential customer's bill impact for the implementation of FPUC's SPP programs. These values represent the total costs of FPUC's SPP activities recovered through the SPPCRC. For reference purposes, only the initial year 2022 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Table 5-2
FPUC's Actual and Projected Bill Impacts (in dollars)

	2023[1] Actual		2025 Projected[2]		2025 Actual[2]		2026 Projected	
	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)
FPUC	$8.81	$2.20	$24.3	$9.97	$24.2	$9.97	$22.1	$16.56

Source: FPUC's 2025 SPP Annual Report, responses to staff's data requests, and Docket Nos. 20240010-EI and 20250010-EI.
Note 1: The Commission granted a motion to defer FPUC's 2020 SPP filing and refrain from participating in the SPPCRC proceeding due to circumstances affecting the utility as a result of Hurricane Michael in 2020. FPUC's first SPP was approved, with modifications, at the October 4, 2022, Commission Conference.
Note 2: The Projected and actual bill impacts for 2025 are identical because any additional costs incurred during 2025 are reflected in the subsequent year's SPPCRC factor.

Section 6 - Tampa Electric Company Program Descriptions

Below are TECO's current programs. Further details of the programs are in TECO's SPP[16] or in its annual SPP report.[17]

Distribution Lateral Undergrounding

TECO's Distribution Lateral Undergrounding program is a program that strategically undergrounds existing overhead laterals. The primary factor in prioritizing laterals to be underground is based on reliability performance during extreme weather events.

Distribution and Transmission Vegetation Management

TECO's distribution and transmission vegetation management activities are both addressed in this program. TECO's distribution tree trimming program includes circuit tree trimming activities, mid-cycle trimming activities, customer requested work, and work orders associated with circuit improvement processes. TECO's distribution system is on a four-year cycle and the transmission system is on a two- or three-year cycle depending on voltage level.

Transmission Asset Upgrades

TECO plans to replace its remaining wood transmission poles with non-wood material by the end of its initial 2022-2031 SPP. This is a continuation of TECO's existing storm hardening pole replacement program, which includes replacing poles based on preventative, corrective or project-driven assessments.

Substation Extreme Weather Hardening

Hardening existing substations to minimize outages, reduce restoration times and enhance emergency response during extreme weather events is a program included in TECO's SPP. TECO identified 12 substation hardening projects for 2026, with seven planned for completion and the remaining five involving carry-over work or pre-work on future projects.

Distribution Overhead Feeder Hardening

TECO's distribution system will be hardened to withstand increased wind-loading and harsh environmental conditions associated with extreme weather events by increasing the resiliency and sectionalizing capabilities of the system.

Distribution Storm Surge Hardening

This program was approved in TECO's 2026-2035 SPP. The program will begin in 2026. Under the program, TECO will upgrade live front switchgear in flood zones to submersible or water-resistant units and replace the secondary bushings on pad-mounted transformers with insulated, water-resistant components. These upgrades are expected to provide more resilient underground

[16]For the 2025 data: Docket No. 20220048-EI, *In re: Review of Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company.* For the 2026 data: Docket No. 20250016-EI (TECO), *In re: Review of 2026-2035 Storm Protection Plan pursuant to Rule 25-6.030, F.A.C., Tampa Electric Company.*
[17]Florida PSC.

infrastructure that can better withstand water intrusion and reduce the need for costly replacements during storm restoration, which should reduce restoration costs and outage times.

Distribution and Transmission Infrastructure Inspections

TECO's distribution wood pole inspections and transmission structure inspections, and the joint use pole attachment audit are combined into one program. The wood distribution pole inspections are on an eight-year cycle program consisting of visual inspections, sound and bore inspections, and excavations at least 18 inches below ground line. The transmission structure inspections include a range of inspections from ground to aerial infrared patrols with a range of cycles from annual to eight years. The joint use pole attachment audit is a comprehensive loading analysis to ensure TECO's poles with joint use attachments are not overloaded and meet the NESC standards. This audit will be performed every four to five years. Will ask if substation inspections are included and ask for a summary.

Table 6-1 provides a list of the projects and activities planned and completed for 2025 and the projects and activities planned for 2026. In addition, the table includes a comparison of the Projected and actual costs of the projects and activities for 2025 and the Projected costs for 2026. The table identifies the costs recovered through the SPPCRC.

Table 6-1
TECO's SPP Projects Planned & Completed for 2025–2026
(SPPCRC Only)

Program Name	Projects/ Activities Planned for 2025	Projected Cost for 2025 (Millions)	Projects/ Activities Completed in 2025	Actual Cost for 2025 (Millions)	Projects/ Activities Planned for 2026	Projected Cost for 2026 (Millions)
Dist. Lateral Undergrounding[1]	202	$134.9	121	$131.0	60	$108.0
Dist. Vegetation Management (miles)	3,234	$ 29.2	3,133	$ 25.3	3,398	$ 25.1
Trans. Vegetation Management (miles)	530	$ 4.1	530	$ 3.8	541	$ 3.9
Trans. Asset Upgrades (poles)	471	$ 15.7	532	$ 23.1	420	$ 18.1
Substation Extreme Weather Hardening	2	$ 3.0	2	$ 3.7	12	$ 9.4
Dist. Overhead Feeder Hardening[2]	31	$ 20.9	25	$ 30.8	1,800	$ 26.4
Dist. Infrastructure Inspections (pole and structures)	35,625	$ 1.4	38,951	$ 1.4	35,625	$ 1.5
Trans. Infrastructure Inspections (poles and structures)	161	$ 0.4	52	$ 0.4	149	$ 0.4
Substation Infrastructure Inspections (poles/structures)	938	$ 0.2	868	$ 0.2	980	$ 0.2
Dist. Storm Surge Hardening (phases/flood zones)	0	$ 0.0	0	$ 0.0	1	$ 0.2
SPP Planning & Common	N/A	$ 1.3	N/A	$ 1.0	N/A	$ 1.1
Totals		**$ 211.1**		**$ 220.7**		**$ 194.3**

Source: TECO's 2025 SPP Annual Report and responses to staff's data requests.

Note: Trans. = Transmission; Dist. = Distribution.

Note 1: The number of Projects/Activities were measured in projects; however, beginning in 2026, the Projects/Activities will be measured in miles.

Note 2: The number of Projects/Activities were measured in projects; however, beginning in 2026, the Projects/Activities will be measured in poles.

Table 6-2 provides the typical residential customer's bill impact for the implementation of TECO's SPP programs. These values represent the total costs of TECO's SPP activities recovered through the SPPCRC. For reference purposes, only the initial year 2020 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Table 6-2
TECO's Actual and Projected Bill Impacts (in dollars)

2020[1] Actual		2025 Projected[2]		2025 Actual[2]		2026 Projected	
Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)	Total Costs (Millions)	Residential Bill Impact ($/1,000 kWh)
$36.9	$1.03	$211.1	$8.38	$220.7	$8.38	$194.3	$7.17

Source: TECO's 2025 SPP Annual Report, responses to staff's data requests, and Docket Nos. 20240010-EI and 20250010-EI.

Note 1: The 2020 Actual amounts are from the Company's 2020 SPP Annual Reports.

Note 2: The Projected and actual bill impacts for 2025 are identical because any additional costs incurred during 2025 are reflected in the subsequent year's SPPCRC factor.

Section 7 - Appendix

Table 7-1 provides the actual costs for each company's SPP for 2020-2025 and, the projected cost for 2026. Table 7-2 provides the typical residential customer's bill impact for the implementation of each company's SPP programs for 2020-2025 and, the projected bill impact for 2026. For Table 7-2, only the initial year 2020 contains a base rate component because this was prior to any additional SPP activities or transition of such costs.

Table 7-1
Summary of Total SPPCRC Costs (Millions)

Year	DEF	FPL	FPUC[1]	Gulf[2]	TECO	Total
2020	$239.3	$1,037.2	-	$36.6	$36.9	$1,350.0
2021	$343.5	$1,149.5	$0.0	$96.3	$115.1	$1,704.4
2022	$416.5	$1,292.4	$1.7	-	$202.4	$1,912.3
2023	$684.2	$1,374.6	$8.8	-	$208.9	$2,280.9
2024	$698.7	$1,549.0	$19.2	-	$203.2	$2,470.2
2025	$865.9	$1,629.2	$24.2	-	$220.7	$2,740.0
2026[3]	$774.5	$1,264.6	$22.1	-	$194.3	$2,255.5

Source: The Company's 2020-2025 SPP Annual Reports.

Note 1: The Commission granted a motion to defer FPUC's 2020 SPP filing and refrain from participating in the SPPCRC proceeding due to circumstances affecting the utility as a result of Hurricane Michael in 2020. FPUC's first SPP was approved, with modifications, at the October 4, 2022, Commission Conference.

Note 2: Gulf was merged with FPL in 2021 and in 2022, the utilities were consolidated for ratemaking purposes into FPL.

Note 3: 2026 are the projected costs.

Table 7-2
Summary of SPP Bill Impacts (Residential $/1,000 kWh)

Year	DEF	FPL	FPUC[1]	Gulf[2]	TECO
2020	$2.05	$1.29	-	$0.98	$1.03
2021	$0.31	$0.42	-	$0.37	$2.39
2022	$3.00	$2.14	$0.84	-	$3.29
2023	$4.14	$3.82	$2.50	-	$3.73
2024	$5.10	$5.57	$4.32	-	$6.58
2025	$8.01	$8.10	$9.97	-	$8.38
2026[3]	$9.36	$9.95	$16.56	-	$7.17

Source: The Company's 2020-2025 SPP Annual Reports, SPPCRC Dockets, and responses to staff's data requests.

Note 1: The Commission granted a motion to defer FPUC's 2020 SPP filing and refrain from participating in the SPPCRC proceeding due to circumstances affecting the utility as a result of Hurricane Michael in 2020. FPUC's first SPP was approved, with modifications, at the October 4, 2022, Commission Conference.

Note 2: Gulf was merged with FPL in 2021 and 2022, the utilities were consolidated for ratemaking purposes into FPL.

Note 3: 2026 are the projected bill impacts.

Attachment 5

FEECA



ANNUAL REPORT ON

Activities Pursuant TO THE Florida Energy AND Efficiency Conservation Act

As required by Sections 366.82(10), and 377.703(2)(f), and 553.975, Florida Statutes

DECEMBER 2026

Florida Public Service Commission

Annual Report on Activities Pursuant to The Florida Energy Efficiency and Conservation Act

As Required by Sections 366.82(10), 377.703(2)(f), and 553.975, Florida Statutes

December 2026

Table of Contents

Tables and Figures ..... **iii**

List of Acronyms ..... **iv**

Executive Summary **1**
Purpose 1
Report Layout 2
2024 Goalsetting Proceedings 2
2025 Achievements and Related Program Costs 3
Conclusion 4

Section 1. Florida Energy Efficiency and Conservation Act **5**
1.1 FEECA History and Implementation 5
1.2 FEECA's Influence on the Florida Energy Market 6
1.3 Recovery of Conservation Expenditures 9

Section 2. DSM Goalsetting **11**
2.1 DSM Program Cost-Effectiveness and Energy Savings 11
2.2 2024 DSM Goalsetting Proceedings for Peoples Gas 14
2.3 Impact of Outside Factors on FEECA Utility DSM Programs 15

Section 3. FEECA Utilities' Goal Achievements **19**
3.1 Assessing Goal Achievement 19
3.2 Information on Energy Audit Programs 22
3.3 Low-Income Programs 25
3.4 Investor-Owned Utility Research and Development Programs 27

Section 4. Conservation Cost Recovery **29**
4.1 Electric IOU Cost Recovery 29
4.2 Natural Gas Cost Recovery 31

Section 5. Educating Florida's Consumers on Conservation **35**
5.1 Commission Consumer Education Outreach 35

Appendix A. 2025 FEECA Utility Conservation Programs **41**

Appendix B. 2025 FEECA Utility Conservation Program Descriptions **45**

Tables and Figures

Tables

1. Energy Sales by Florida's Electric FEECA Utilities (2025) 6
2. Florida's Electric Customers by Class and Consumption (2025) **7**
3. Statewide Cumulative Demand and Energy Savings (1980-2025)..... 9
4. Summary of Electric Cost-Effectiveness Methodologies 11
5. Cumulative Commission-Approved Electric DSM Goals (2025-2034)……13
6. Commission-Approved DSM Goals for PGS (2025-2034)……...15
7. Electric DSM Goals Compared to Annual Achievements (2025) 21
8. Natural Gas DSM Goals Compared to Annual Achievements (2025) 22
9. Residential Energy Audits by Type (2025) 23
10. Commercial / Industrial Energy Audits by Type (2025) 24
11. DSM Expenditures Recovered by IOUs (2016-2025) 29
12. Residential Energy Conservation Cost Recovery Factors (2027)..... 31
13. DSM Expenditures Recovered by LDCs (2016-2025) 31
14. Residential Natural Gas Conservation Cost Recovery Factors (2027) 33

Figures

1. Typical Florida Daily Electric Load Shapes 7
2. Demand-Side Renewable Energy Systems 14
3. DSM Expenditures Recovered by Electric IOUs (2016-2025)..... 30
4. DSM Expenditures Recovered by LDCs (2016-2025) 32

List of Acronyms

C/I	Commercial and Industrial (Customers)
Commission or FPSC	Florida Public Service Commission
COVID-19	Coronavirus Disease of 2019
CUC	Chesapeake Utilities Corporation
DEF	Duke Energy Florida, LLC
DOE	U.S. Department of Energy
DSM	Demand-Side Management
ECCR	Energy Conservation Cost Recovery
EV	Electric Vehicle
F.A.C.	Florida Administrative Code
FCG	Florida City Gas
FEECA	Florida Energy Efficiency and Conservation Act
FLBC	Florida Building Code
FPL	Florida Power & Light Company
FPUC	Florida Public Utilities Company
FRCC	Florida Reliability Coordinating Council
F.S.	Florida Statutes
GPR	Gross Power Rating
GRIM	Gas Rate Impact Measure Test
Gulf	Gulf Power Company
GWh	Gigawatt-Hour
HVAC	Heating, Ventilation, and Air Conditioning
IGC	Indiantown Gas Company
IOU	Investor-Owned Utility
JEA	Formerly known as Jacksonville Electric Authority
kWh	Kilowatt-Hour
LDC	Natural Gas Local Distribution Company
MMBtu	One Million British Thermal Units
MW	Megawatt
MWh	Megawatt-Hour
NGCCR	Natural Gas Conservation Cost Recovery
OUC	Orlando Utilities Commission
O&M	Operations and Maintenance
PV	Photovoltaic
PGS	Peoples Gas System
RIM	Rate Impact Measure Test
SGS	Sebring Gas System
SJNG	St. Joe Natural Gas
TECO	Tampa Electric Company
TRC	Total Resource Cost Test

Executive Summary

Purpose

Reducing the growth of Florida's peak electric demand and energy consumption became a statutory objective in 1980, with the enactment of Sections 366.80 through 366.83, and Section 403.519, Florida Statutes (F.S.), collectively known and cited as the Florida Energy Efficiency and Conservation Act (FEECA).[1] FEECA emphasizes four key areas: reducing the growth rates of weather-sensitive peak demand and electricity usage, increasing the efficiency of the production and use of electricity and natural gas, encouraging demand-side renewable energy systems, and conserving expensive resources, particularly petroleum fuels. Sections 366.82(2) and 366.82(6), F.S., require the Florida Public Service Commission (FPSC or Commission) to establish goals for the FEECA utilities and review the goals every five years, at minimum. The utilities are required to develop cost-effective demand-side management (DSM) plans that meet those goals and submit them to the Commission for approval.

Energy conservation and DSM in Florida are accomplished through a multi-pronged approach that includes energy efficiency requirements in building codes for new construction, federal appliance efficiency standards, utility programs, and energy education efforts. Utility programs, which are paid for by all customers, are aimed at increasing efficiency levels above building codes and appliance efficiency standards.

The Commission is required by Section 366.82(10), F.S., to provide an annual report to the Florida Legislature and the Governor by March 1 summarizing the adopted goals and the progress made toward achieving those goals. Similarly, Section 377.703(2)(f), F.S., requires the Commission to file information on electricity and natural gas energy conservation programs with the Department of Agriculture and Consumer Services. This report reviews the 2025 annual goal results for each of the FEECA utilities and fulfills these statutory obligations.

The six electric utilities and single natural gas utility subject to FEECA in 2025 are listed below in order of sales:

Electric Investor-Owned Utilities
• Florida Power & Light Company (FPL) • Duke Energy Florida, LLC (DEF) • Tampa Electric Company (TECO) • Florida Public Utilities Company (FPUC)

Municipal Electric Utilities
• JEA • Orlando Utilities Commission (OUC)

Investor-Owned Natural Gas Local Distribution Company (LDC)
• Peoples Gas System (PGS)

[1]For purposes of this report, "FEECA utilities" refers to those utilities subject to a subset of the FEECA statutes, specifically, Section 366.80 through 366.83, F.S., meeting the thresholds set forth on Section 366.82(1)(a), F.S.

The Commission regulates the rates and conservation cost recovery of the four electric IOUs and the single FEECA natural gas LDC. The Commission does not regulate the rates or conservation program costs of the two municipal electric utilities for which it sets DSM goals.

Report Layout

This report presents the FEECA utilities' progress towards achieving the Commission-established goals and the Commission's efforts in overseeing these conservation initiatives. This report details these efforts through the following five sections and appendices:

- Section 1 provides a brief history of FEECA and a description of existing tools for increasing conservation throughout the State of Florida.
- Section 2 discusses the DSM goalsetting process and the most recent Commission-established goals set for the FEECA utilities.
- Section 3 reviews the utilities' goal achievements, and information on energy audit, low-income, and research and development programs.
- Section 4 provides an overview of the associated 2025 DSM program costs recovered through the Energy Conservation Cost Recovery (ECCR) Clause (as applies to electric IOUs) and Natural Gas Conservation Cost Recovery (NGCCR) Clause (as applies to LDCs).
- Section 5 discusses methods the Commission has used to educate consumers about conservation during the prior period, including a list of related websites.
- Appendices A and B provide a list of the 2025 conservation programs offered by FEECA Utilities and a description of each program's purpose.

2024 Goalsetting Proceedings

In January 2024, the Commission initiated the 2024 DSM proceedings for FEECA utilities to establish energy and demand reduction goals for the electric utilities and therm reduction goals for PGS for the 2025 through 2034 time period.[2] For the FEECA electric utilities, Rule 25-17.0021(1), F.A.C., sets forth that the Commission will initiate a proceeding at least once every five years to establish goals over a ten-year period.

PGS is the only natural gas utility that meets the therm sales threshold for establishing conservation goals under FEECA.[3] In the 2024 PGS goalsetting proceeding, PGS estimated its goals for 2025 through 2034 based upon the same Commission-approved DSM programs that

[2]See Docket Nos. 20240012-EG through 20240017-EG and Docket No. 20240018-GU, Commission review of numeric conservation goals (for electric FEECA utilities FPL, DEF, TECO, FPUC, JEA, OUC, and Docket No. 20240018-GU for PGS). For administrative efficiency, staff uses the same DSM goalsetting review cycle for the electric and gas FEECA utilities.

[3]Section 366.82, F.S., provides that a natural gas utility is subject to FEECA requirements if a utility's annual retail sales volume is equal to or greater than 100 million therms.

were approved in the 2019 goalsetting proceeding. PGS utilized the Participants and GRIM cost effectiveness tests to calculate its goals.[4]

In September 2024, the Commission approved the numeric conservation goals to be applicable beginning in 2025 for DEF, TECO, FPUC, JEA, and OUC.[5] In December 2024, the Commission approved the numeric conservation goals for FPL.[6] The Commission approved the 2025 – 2034 goals for PGS in Order No. PSC-2024-0280-PAA-GU, issued on July 30, 2024.[7]

The numeric goals are based on estimated energy and demand savings from individual DSM measures that passed the Rate Impact Measure (RIM) and Participants cost-effectiveness tests. These tests are used to ensure that all ratepayers benefit from energy efficiency programs due to downward pressure on electric rates.

Section 366.82(2), F.S., also requires that the Commission adopt goals for increasing the development of demand-side renewable energy systems. The Commission recognized in its 2024 goalsetting review, that Rule 25-6.065, F.A.C., Interconnection and Net Metering of Customer-Owned Renewable Generation, adopted in 2008, offered an effective means to encourage the development of demand-side renewable energy in the state. Goalsetting processes for all FEECA utilities are further discussed in Section 2.

2025 Achievements and Related Program Costs

Florida utilities have been successful in reducing the growth rates of winter and summer peak electric demand and reducing annual energy consumption. Through 2025, statewide totals reflect that summer peak demand has been reduced by 7,705 MW, winter peak demand has been reduced by 7,652 MW, and annual energy consumption has been reduced by 11,573 GWh.[8] During 2025, the electric FEECA utilities offered 84 residential and commercial programs which focused on demand reduction and energy conservation (see Appendices A and B). In addition, FEECA electric utilities performed over 222,000 residential and commercial energy audits in 2025, as shown in Section 3.2. Each FEECA utility's achievements toward the 2025 Commission-approved goals are detailed in Section 3.1.

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[4]Rule 25-17.009, F.A.C., requires natural gas utilities that seek to recover costs for conservation programs to file the cost-effectiveness test results of the Participants test and the GRIM test.

[5]See Order No. PSC-2024-0429-FOF-EG, issued September 20, 2024, in Docket No. 20240013-EG, *In re: Commission review of numeric conservation goals (Duke Energy Florida, LLC)*; Order No. PSC-2024-0430-FOF-EG; issued September 20, 2024, in Docket No. 20240014-EG, *In re: Commission review of numeric conservation goals (Tampa Electric Company);* Order No. PSC-2024-0431-FOF-EG; issued September 20, 2024, in Docket No. 20240015-EG, *In re: Commission review of numeric conservation goals (Florida Public Utilities Company);* Order No. PSC-2024-0432-FOF-EG, issued September 20, 2024, in Docket No. 20240016-EG, *In re: Commission review of numeric conservation goals (JEA)*; and Order No. PSC-2024-0433-FOF-EG, issued September 20, 2024, in Docket No. 20240017-EG, *In re: Approving numeric conservation goals (Orlando Utilities Commission).*

[6]See Order No. PSC-2024-0505-FOF-EG, issued December 18, 2024, in Docket No. 20240012-EG, *In re: Commission review of numeric conservation goals (Florida Power & Light Company).*

[7]Order No. PSC-2024-0280-PAA-GU, issued July 30, 2024, in Docket No. 20240018-EG, *In re: Commission review of numeric conservation goals (Peoples Gas System.)*

[8]FRCC's *2026 Load & Resource Plan* (pp. 70-72). The demand and energy savings from FEECA utility DSM programs are included in these statewide FRCC totals.

The Commission has authority, by statute, to allow investor-owned utilities to recover costs related to conservation.[9] The Commission has implemented this authority for electric IOUs through the ECCR clause since 1980. For 2025, Florida's investor-owned electric utilities recovered approximately $341.2 million in conservation program expenditures, and the investor-owned natural gas utilities recovered about $40.4 million in conservation program expenditures.

Conclusion

Conservation in Florida is prompted by customer actions to conserve energy, federal appliance efficiency standards, state building codes for new construction, and utility-sponsored DSM programs. Customers can save energy and reduce their bills through behavioral changes and by investing in energy efficient homes, appliances, and equipment. Federal appliance efficiency standards have become more stringent over time, thus increasing the baseline energy efficiency of new appliances and heating, ventilation, and air conditioning (HVAC) equipment available to Florida's consumers. Likewise, changes in the Florida Building Code (FLBC) have resulted in more energy efficient homes. Florida's electric and natural gas utilities also encourage conservation by offering energy audits, customer education, rebates on energy efficient equipment and building envelope improvements, and demand response programs.

Utilities design DSM programs to encourage the installation of appliances and equipment that exceeds levels set by current building codes and minimum efficiency standards. More stringent efficiency standards and building codes, as well as customer actions to implement efficiency outside of utility programs, reduce the potential incremental demand and energy savings available from utility-sponsored DSM programs. The level of realized savings from utility programs is dependent upon voluntary participation and, in some cases, changes in customer behavior.

Because all customers pay for the utility conservation programs as a portion of their monthly utility bills, the Commission focuses on ensuring that all customers benefit from utility-sponsored DSM programs. The Commission also encourages customers to use energy efficiently through its customer education efforts. Overall, reducing Florida's demand and energy usage for electric customers and therm usage for natural gas customers relies on customer education and participation in utility DSM programs, along with each individual's efforts to save electricity.

Conservation and renewable energy will continue to play an important role in Florida's energy future. The Commission is continuing its efforts to encourage cost-effective conservation that defers the need for new electric-generating capacity and reduces the use of fossil fuels. These initiatives support a balanced mix of resources that reliably and cost-effectively meet the needs of Florida's ratepayers.

[9]Section 366.05(1), F.S.

Section 1. Florida Energy Efficiency and Conservation Act

1.1 FEECA History and Implementation

FEECA emphasizes four key areas: reducing the growth rates of weather-sensitive peak demand and electricity usage, increasing the efficiency of electricity and natural gas production and use, encouraging demand-side renewable energy systems, and conserving expensive resources, particularly petroleum fuels. Pursuant to FEECA, the Commission is required to establish appropriate goals and the FEECA utilities must develop DSM programs to meet those goals.

Upon enactment in 1980, all electric utilities in Florida were subject to FEECA. In 1989, changes were made to the law limiting the requirement to electric utilities with more than 500 gigawatt-hours (GWh) of annual retail sales. At that time, 12 Florida utilities met this threshold requirement and their combined sales accounted for 94 percent of Florida's retail electricity sales. An additional change to the law encouraged cogeneration projects.

In 1996, the Florida Legislature raised the minimum retail sales threshold for municipal and cooperative electric utilities to 2,000 GWh. Retail sales for these utilities were fixed as of July 1, 1993, and two municipal utilities met the threshold of the amended statute: JEA and OUC. In addition to these two utilities, all four Florida investor-owned electric utilities must comply with FEECA regardless of sales levels. No rural electric cooperatives met the retail sales threshold of the amended statute.

FEECA also includes natural gas utilities whose annual retail sales volume is equal to or greater than 100 million therms. PGS is the only natural gas utility that meets the therm sales threshold for conservation goals under FEECA, and thus has its own Commission-approved DSM goals.

The statute also allows the Commission to provide appropriate financial rewards and penalties to the utilities over which it has rate-setting authority. The Commission also has the authority to allow an IOU to receive an additional return on equity of up to 50 basis points for exceeding 20 percent of its annual load growth through energy efficiency and conservation measures. To date, the Commission has not awarded financial rewards or assessed penalties for any of the IOUs through FEECA. The Commission does not have rate-setting authority over JEA and OUC and therefore cannot assess financial penalties or provide financial rewards under its authority.

Table 1 lists the six electric FEECA utilities' 2025 retail electricity sales and the percentage of total statewide electricity sales by each utility. The table also includes the total energy sales for all non-FEECA utilities. Currently, the six electric utilities that are subject to FEECA account for approximately 83.2 percent of all Florida energy sales.

Table 1
Energy Sales by Florida's Electric FEECA Utilities (2025)

Florida's Electric FEECA Utilities	Energy Sales (GWh)	Percent of Total Energy Sales
Florida Power & Light Company	129,471	50.7%
Duke Energy Florida, LLC	41,139	16.1%
Tampa Electric Company	20,943	8.2%
JEA	12,980	5.1%
Orlando Utilities Commission	7,465	2.9%
Florida Public Utilities Company	655	0.3%
Electric FEECA Utilities' Total	**212,685**	83.2%
Non-FEECA Utilities' Total	42,823	16.8%
Total Statewide Energy Sales	**255,508**	**100.0%**

Source: FPSC's *Statistics of the Florida Electric Utility Industry* (Table 26), published October 2026.

Sections 366.82(2) and 366.82(6), F.S., require the Commission to set goals at least every five years for the utilities subject to FEECA. The Commission sets electric goals with respect to summer and winter electric-peak demand and annual energy savings over a ten-year period, with a re-evaluation every five years. Once goals are established, the electric FEECA utilities must submit DSM plans containing programs intended to meet the goals for Commission approval.

In 2008, the Florida Legislature amended the FEECA statute, placing upon the Commission additional responsibilities when adopting conservation goals. These responsibilities included the consideration of the benefits and costs to program participants and ratepayers as a whole, as well as the need for energy efficiency incentives for customers and utilities. The Commission must also consider any costs imposed by state and federal regulations on greenhouse gas emissions.

1.2 FEECA's Influence on the Florida Energy Market

FEECA's mission is important to Florida's overall energy market. Florida's total electric consumption ranks among the highest in the country due to its sizeable population and climate-induced demand for cooling. When compared to the rest of the country, Florida's energy market is unique. The distinction is largely due to the state's climate, the high proportion of residential customers to total customers, and the significant reliance on electricity for heating and cooling.

NOTE TO REVIEWERS: Yellow shaded text in this DRAFT file means "waiting to update." Shading is featured on pp. 7, 31 and 33, and will be removed when the updates are completed.
Florida is typically a summer-peaking state, since the summer peak demand generally exceeds winter peak demand. On a typical summer day, the statewide demand for electricity can increase significantly over a span of hours.[10] Additionally, 88.6 percent of Florida's electricity customers are residential and consume 54.1 percent of the electrical energy produced. In contrast, nationally, residential customers account for 34.7 percent of total electric sales, while commercial customers represent 38.6 percent of electric consumption, and industrial customers

[10]FPSC's *Review of the 2025 Ten-Year Site Plans of Florida's Electric Utilities*, published December 2026.

represent 26.4 percent.[11] Table 2 shows the makeup of Florida's electric customers by class and consumption.

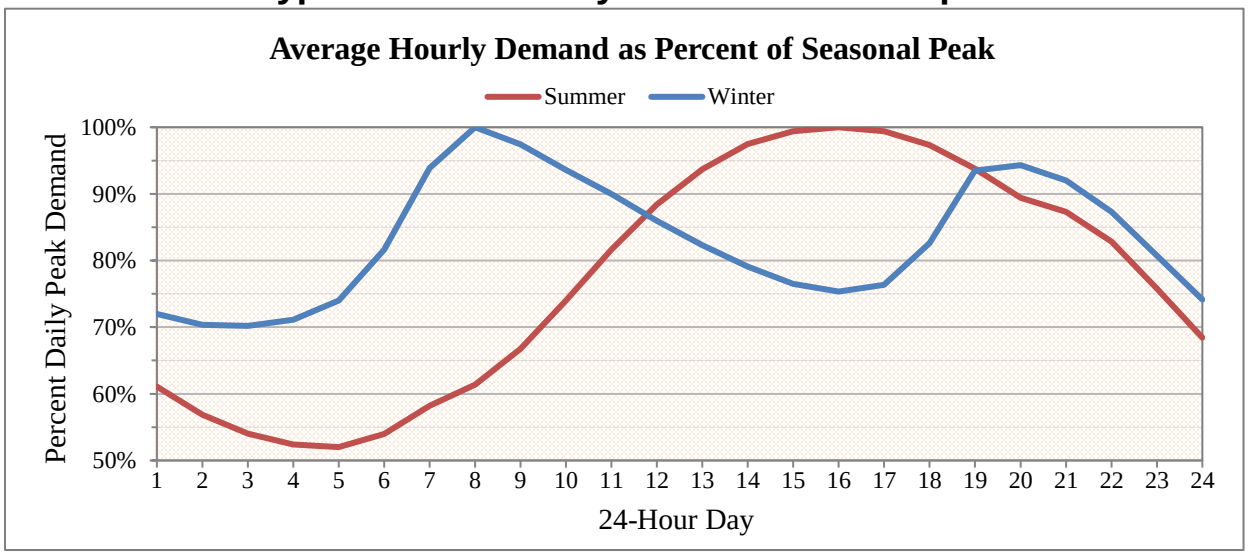
Table 2
Florida's Electric Customers by Class and Consumption (2025)

Customer Class	Number of Customers	Percent of Customers	Energy Sales (GWh)	Percent of Sales
Residential	10,668,268	88.6%	138,320	54.1%
Commercial	1,269,195	10.5%	94,280	36.9%
Industrial	21,374	0.2%	16,659	6.5%
Other*	76,228	0.6%	6,249	2.4%
Total	12,035,065	100.0%	255,509	100.0%

*Street and highway lighting, sales to public authorities, and interdepartmental sales.
Source: FPSC's *Statistics of the Florida Electric Utility Industry* (Tables 26 and 33), published October 2026.

Figure 1 shows the daily electric load curves for typical Florida summer and winter day. In the summer, air conditioning demand starts to increase in the morning and peaks in the early evening; a pattern which aligns with the sun's heating of buildings. In comparison, the winter load curve has two peaks—the largest in mid-morning, followed by a smaller peak in the late evening—which correspond to heating loads.

Figure 1
Typical Florida Daily Electric Load Shapes



Source: FPSC's *Review of 2025 Ten-Year Site Plans of Florida's Electric Utilities*, published December 2026.

[11]National data as reported for 2025 by the U.S. Energy Information Administration in Annual Electric Utility Data – EIA-861 data files (2025): https:/www.eia.gov/electricity/sales_revenue_price/

Residential load patterns shift rapidly and have high peak-to-trough variation. In contrast, commercial or industrial loads demonstrate more consistency throughout the 24-hour day and experience fewer spikes in demand.

Utilities dispatch additional generating capacity throughout the day in order to follow the customer load patterns. Peaking generating units, which are dispatched during high demand periods of the day, are less fuel-efficient than baseload or intermediate generating units. Utility DSM programs play a role in reducing energy usage and shifting peak demand, thus reducing the need to dispatch fuel-inefficient generating units.[12] Over time, the need for additional generating capacity has increased in Florida, largely due to population growth. In addition to providing fuel savings at existing generating units, utility-sponsored DSM programs and individual consumer conservation efforts can avoid or defer the need for new electric generating capacity.

Utility-sponsored DSM programs are funded by all ratepayers. Therefore, in order to meet FEECA requirements, the Commission and utilities must ensure that the DSM programs created to reap the benefits of reduced fuel usage and deferred generating capacity are cost-effective, i.e. less costly than generation. The Commission's methodologies to determine the cost-effectiveness of demand-side management programs are explained in detail in Section 2.1.

Since its enactment, implementation of FEECA has been successful in reducing the growth rate of weather-sensitive electric peak demands, and in conserving expensive resources. These savings have avoided or deferred the need for new generating capacity and offset the use of existing generating units, resulting in savings of fuel, as well as variable operations and maintenance (O&M) costs. In 2025, FEECA utility DSM programs continued contributing to the reduction of statewide energy needs and deferred the need for new generating capacity. Table 3 details statewide cumulative savings for summer peak demand, winter peak demand, and overall energy consumption through 2025, as reported in the Florida Reliability Coordinating Council's (FRCC) 2025 Regional Load & Resource Plan.[13] In 2025, the FEECA DSM programs contributed annual energy savings of 255.6 GWh, which is enough electricity to power approximately 25,458 homes for a year.[14]

[12]Electric generating units are typically categorized as baseload, intermediate, or peaking. Aside from planned and forced outages, baseload units are scheduled to operate continuously. Intermediate units generate power to follow load for periods of time, but are not planned to operate nonstop. Peaking units supplement baseload and intermediate power, operating during high-demand, or peak periods.

[13]The cumulative MW savings for summer peak demand and winter peak demand shown in Table 3 reflect the maximum capability of demand response programs.

[14]This estimate is based on an average annual household energy use of 10,040 kWh for Florida in 2025 as reported by the U.S. Energy Information Administration in Annual Utility Data – EIA-861 Data Files (2025): https:/www.eia.gov/electricity/sales_revenue_price/

Table 3
Statewide Cumulative Demand and Energy Savings (1980-2026)

Type	Achieved Reduction
Summer Peak Demand	7,705 MW
Winter Peak Demand	7,652 MW
Annual Energy Reduction	11,573 GWh

Source: Florida Reliability Coordinating Council's *2026 Regional Load & Resource Plan* (pp. 70-72).

In 2025, the electric FEECA utilities offered 84 programs for residential, commercial, and industrial customers (see Appendices A and B). Programs focus on either reducing energy use at a given moment, which shifts/reduces demand, or toward reducing overall energy consumption over a period of time. Utility-sponsored DSM programs are an important means of achieving demand and energy savings and these programs are designed to encourage customer conservation efforts.

Additionally, residential energy audits, required by Section 366.82(11), F.S., serve as an avenue to identify and evaluate conservation opportunities for customers, including their potential participation in utility-sponsored DSM and conservation programs. Energy audits also educate customers about behavioral changes and energy efficiency investments they can make outside of utility-sponsored DSM programs. During 2025, FEECA electric utilities performed 216,691 residential audits. Though FEECA does not require commercial energy audits, FEECA electric utilities also performed 6,306 commercial energy audits in 2025. Additional information about these results is presented in Section 3.

1.3 Recovery of Conservation Expenditures

The IOUs are allowed by Commission Rule 25-17.015, F.A.C., to recover reasonable expenses for DSM programs through the ECCR clause. Such expenses may include administrative costs, equipment, and incentive payments. Before petitioning the Commission to recover costs through the ECCR clause, a utility must provide data on DSM program cost-effectiveness. Utilities must have Commission approval for any new programs or program modifications prior to seeking cost recovery.

Commission Rule 25-17.015, F.A.C., also permits natural gas LDCs to seek recovery for costs related to Commission-approved conservation programs. While PGS is the only natural gas utility subject to FEECA, the other Florida LDCs offer Commission-approved DSM programs without a specific therm savings goal. Natural gas conservation programs have historically focused on providing rebates to residential customers that support the replacement of less efficient appliances with new, energy-efficient gas appliances. However, several LDCs have expanded their rebate programs to commercial customers.[15]

On an annual basis, the Commission conducts financial audits of DSM program expenses that are included in the electric IOUs' and LDCs' cost recovery requests. A full evidentiary hearing is

[15]Order No. PSC-14-0039-PAA-EG, issued January 14, 2014, in Docket No. 130167-EG, *In re: Petition for approval of natural gas energy conservation programs for commercial customers, by Associated Gas Distributors of Florida.*

held to determine the cost recovery factors to be applied to customer bills in the following year. The Commission-approved 2027 conservation cost recovery factors are discussed further in Section 4.

Section 2. DSM Goalsetting

2.1 DSM Program Cost-Effectiveness and Energy Savings

Section 366.81, F.S., emphasizes that it is critical to utilize cost-effective conservation. This statutory provision is codified in Rule 25-17.008, F.A.C., for electric utilities and Rule 25-17.009, F.A.C., for natural gas LDCs. The rules identify the cost-effectiveness methodologies to be used and require that utilities provide cost and benefit information to the Commission when requesting to add a program or make changes or additions to an existing program.

The Commission requires that electric utilities measure cost-effectiveness from three perspectives, the program participant, the utility's ratepayers, and society's overall cost for energy services. The Participants test, the Rate Impact Measure (RIM) test, and the Total Resource Cost (TRC) test capture these viewpoints. The electric FEECA utilities are required to provide the results of all three tests when seeking to add a new program or make changes to an existing program.

Similarly, Rule 25-17.009, F.A.C., requires natural gas LDCs to provide the results of the Participants test and Gas Rate Impact Measure Test (GRIM). The GRIM test is a modified version of the RIM test, specific to gas utilities. Natural gas LDCs are also required to provide the results of these tests when seeking to add a new program or modify an existing program.

Table 4 summarizes the costs and benefits considered in the three Commission-approved electric cost-effectiveness methodologies for electric utilities.

Table 4
Summary of Electric Cost-Effectiveness Methodologies

	Participants	RIM	TRC
Benefits			
Bill Reduction	X		
Incentives Received	X		
Avoided Generation (Capital and O&M)		X	X
Avoided Transmission (Capital and O&M)		X	X
Fuel savings		X	X
Costs			
Program Costs		X	X
Incentives Paid		X	
Lost Revenues		X	
Participant's Costs (Capital and O&M)	X		X

Participants Test

The Participants test analyzes costs and benefits from a program participant's point of view, rather than the impact on the utility and other ratepayers not participating in the program. The

Participants test includes the up-front costs customers pay for equipment and costs to maintain this equipment. Benefits considered in the test include the incentives paid by utilities to the customers and the reduction in customer bills. Failure to demonstrate cost-effectiveness under this test would infer that rational customers would not elect to participate in this program.

Rate Impact Measure (RIM) Test

The RIM test is designed to ensure that all ratepayers, not just the program's participants, will benefit from a proposed DSM program. The RIM test includes the costs associated with incentive payments to participating customers and decreased revenues to the utility. DSM programs can reduce utility revenues due to reduced kilowatt-hour (kWh) sales and reduced demand. The decreased utility revenues typically are recovered from the general body of ratepayers at the time of a rate case. A DSM program that passes the RIM test ensures that all customer rates are the same or lower than rates would be without the DSM program.

Total Resource Cost (TRC) Test

The TRC test measures the overall economic efficiency of a DSM program from a social perspective. This test measures the net costs of a DSM program based on its total costs, including both the participants' and the utility's costs. Unlike the RIM test, customer incentives and decreased utility revenues are not included as costs in the TRC test. Instead, these factors are treated as transfer payments among ratepayers. Moreover, if appropriate, certain external costs and benefits such as environmental impacts may be taken into account. Because incentives and foregone revenues are not treated as "costs," electric rates for all customers tend to be higher for programs implemented solely using the TRC test to judge cost-effectiveness.

Ensuring Cost-Effectiveness

Ensuring utility-sponsored DSM programs remain cost-effective benefits the general body of electric ratepayers. These programs can reduce costs to ratepayers by postponing capital expenditures such as future power plant construction, and reducing current electrical generation costs, including fuel and variable O&M costs. DSM programs can also benefit customers by improving reliability.

When an IOU determines that a DSM program is no longer cost-effective, the utility should petition the Commission for modification or discontinuation of the program. In many instances, programs may need to be modified due to the adoption of a more stringent appliance efficiency standard or building code. In contrast, if new efficiency measures become available that are cost-effective, the utility may petition the Commission for approval of a new program.

2024 Electric DSM Goalsetting Proceeding

In January 2024, dockets were opened for the 2024 DSM goalsetting proceeding to establish goals for the 2025 through 2034 time period.[16] In September 2024, the Commission approved the numeric conservation goals to be applicable beginning in 2025 for DEF, TECO, FPUC, JEA, and OUC.[17] In December 2024, the Commission approved the numeric conservation goals for FPL.[18]

[16]See Docket Nos. 20240012-EG through 20240017-EG, Commission review of numeric conservation goals (for FPL, DEF, TECO, FPUC, JEA, and OUC).

[17]See Order No. PSC-2024-0429-FOF-EG, issued September 20, 2024, in Docket No. 20240013-EG, *In re: Commission review of numeric conservation goals (Duke Energy Florida, LLC)*; Order No. PSC-2024-0430-FOF-

The cumulative goals for the entire 10-year period are shown in Table 5 for informational purposes.

Table 5
Cumulative Commission-Approved DSM Goals (2025-2034)

Electric Utility	Summer Demand Reduction Goals (MW)	Winter Demand Reduction Goals (MW)	Annual Energy Reduction Goals (GWh)
FPL	454.7	336.6	1,010.5
DEF	300.0	373.0	582.0
TECO	150.0	198.8	434.1
FPUC	0.9	1.8	6.1
OUC	7.8	7.1	55.5
JEA	19.9	17.9	101.4
Total	**933.3**	**935.2**	**2,189.6**

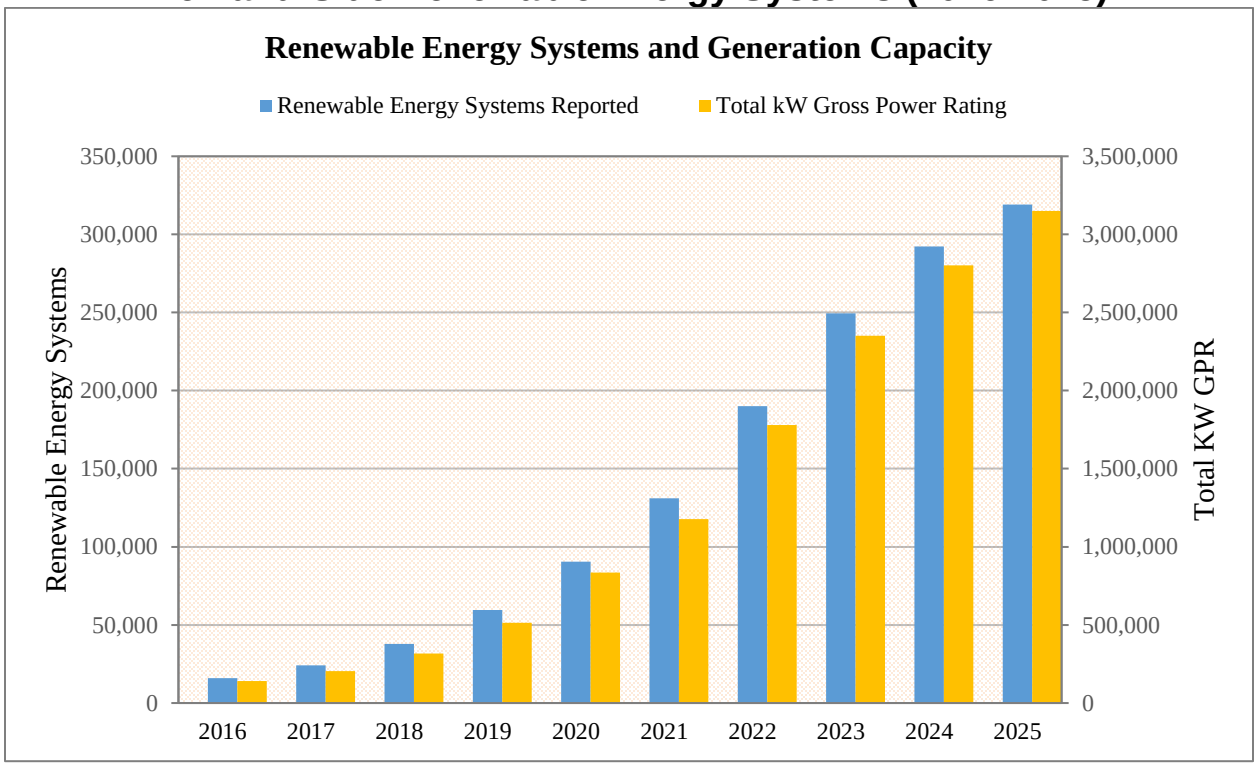
Source: Goal approval orders, by utility, are identified in footnotes 17 and 18 below.

As part of its review of goals, the Commission recognized that Rule 25-6.065, F.A.C., (Customer-Owned Renewable Generation Rule) is an effective means of encouraging the development of demand-side renewable energy systems. Figure 2 shows the growth in the number of customer-owned renewable energy systems in Florida, as well as the growth in gross power ratings (i.e., generating capacity) since 2016. In 2025, the total number of renewable energy systems reported was 319,068, with a total gross power rating of 3,149,937 kilowatts.

EG; issued September 20, 2024, in Docket No. 20240014-EG, *In re: Commission review of numeric conservation goals (Tampa Electric Company);* Order No. PSC-2024-0431-FOF-EG; issued September 20, 2024, in Docket No. 20240015-EG, *In re: Commission review of numeric conservation goals (Florida Public Utilities Company);* Order No. PSC-2024-0432-FOF-EG, issued September 20, 2024, in Docket No. 20240016-EG, *In re: Commission review of numeric conservation goals (JEA)*; and Order No. PSC-2024-0433-FOF-EG, issued September 20, 2024, in Docket No. 20240017-EG, *In re: Commission review of numeric conservation goals (Orlando Utilities Commission).*

[18]See Order No. PSC-2024-0505-FOF-EG, issued December 18, 2024, in Docket No. 20240012-EG, *In re: Commission review of numeric conservation goals (Florida Power & Light Company).*

Figure 2
Demand-Side Renewable Energy Systems (2016-2025)



Source: Data compiled from Net Metering Summary Spreadsheet (Net Metering Reports) provided to the Commission from IOU, municipal, and rural electric cooperative electric companies, 2016-2025.

2.2 2024 DSM Goalsetting Proceedings for Peoples Gas

PGS is the only natural gas utility that meets the therm sales threshold for establishing conservation goals under FEECA.[19] A Commission docket was established in 2024 to set goals for PGS for the same period as was established for the FEECA electric utilities (2025 through 2034 period).[20] In the 2024 PGS goalsetting proceeding, PGS estimated its goals for 2025 through 2034 based upon the same Commission-approved DSM programs that were approved in the 2019 goalsetting proceeding. PGS utilized the Participants and GRIM cost effectiveness tests to calculate its goals.[21] The Commission approved the 2025-2034 goals for PGS in Order No. PSC-2024-0280-PAA-GU, issued on July 30, 2024.[22] Table 6 details the Commission-approved cumulative savings goals for PGS for the 2025-2034 period.

[19]Section 366.82, F.S., provides that a natural gas utility is subject to FEECA requirements if a utility's annual retail sales volume is equal to or greater than 100 million therms.
[20]See Docket No. 20240018-EG, Commission review of numeric conservation goals (Peoples Gas System). For the FEECA electric utilities, Rule 25-17.0021(1), F.A.C., sets forth that the Commission will initiate a proceeding at least once every five years to establish goals over a ten-year period.
[21]Rule 25-17.009, F.A.C., requires natural gas utilities that seek to recover costs for conservation programs to file the cost-effectiveness test results of the Participants test and the GRIM test.
[22]Order No. PSC-2024-0280-PAA-GU, issued July 30, 2024, in Docket No. 20240018-EG, *In re: Commission review of numeric conservation goals (Peoples Gas System.)*

Table 6
Commission-Approved DSM Goals for PGS (2025-2034)

Cumulative Savings (Therms)		
Residential	**Small Commercial**	**Combined**
3,634,183	4,388,865	8,023,048

Source: Order No. PSC-2024-0280-PAA-GU.

2.3 Impact of Outside Factors on FEECA Utility DSM Programs

Conservation in Florida is prompted by customer actions to conserve energy, federal appliance efficiency standards, state building codes, and utility-sponsored DSM programs. Customers can save energy and reduce their bills through behavioral changes and by investing in energy efficient homes, appliances, and equipment. Federal appliance efficiency standards have become more stringent over time, thus increasing the baseline energy efficiency of new appliances and heating and air conditioning equipment available to Florida's consumers. Likewise, changes in the Florida State Building Code (FLBC) have resulted in more energy efficient homes.

Utilities design DSM programs to encourage conservation that exceeds levels achievable through current building codes and minimum efficiency standards. However, the cost-effectiveness of some DSM measures has declined due to several factors outside of the FEECA utilities' control. More stringent state and federal efficiency standards, building codes, and customer actions to implement efficiency outside of utility programs, such as the deployment of renewable energy systems, reduce the potential incremental demand and energy savings available from utility-sponsored DSM programs.

Federal efficiency standards and state building codes establish a baseline in assessing the cost-effectiveness of a potential DSM program. Florida utility DSM programs offer rebates and incentives for appliances that exceed federally established minimum efficiency standards. However, increases in federal efficiency standards, independent conservation efforts by consumers, and general conservation practices make it more challenging for utilities to attract voluntary participants in order achieve demand and energy savings through DSM programs. Electric rates are also a contributing factor in customers' decisions to enroll or not enroll in DSM programs, or invest in more efficient appliances. Increasing electric rates tend to increase customer energy efficient investments, while stable or declining electric rates tend to reduce customer energy efficiency investments. In combination, these factors make it crucial that the FEECA utilities frequently evaluate their conservation program offerings to ensure that they remain cost-effective and attractive to customers. In addition, the FEECA utilities are also expected to engage in research or evaluate the potential for new, cost-effective DSM program opportunities as energy-efficiency technologies develop.

State Building Code

At the state level, the FLBC is amended annually to incorporate interpretations and clarifications as well as to update efficiency standards. In 2025, the Florida Building Commission enacted changes to the 8th Edition, although none were related to efficency standards.

Under Florida law, the Florida Building Commission is required to update the FLBC every three years, and in 2025, work began on publishing the 9th Edition with changes to become effective on December 31, 2026.[23] Key updates to the Commercial Energy Efficiency chapter address thermal envelope efficiency requirements, enhanced air leakage rate reduction and testing criteria, increased minimum HVAC equipment efficiency, reduced lighting power allowances, and expanded requirements and procedures for additional efficiency measures.[24] For the Residential Energy Efficiency chapter, key changes include several clarifications, prescriptive and performance compliance stringency increases, removal of a performance compliance duct testing exception, and form updates.[25]

Federal Government Efficiency Standards

At the federal government level, the U.S. Department of Energy's (DOE) Building Technologies Office sets energy efficiency standards for more than 70 appliances and other equipment, including HVAC equipment.[25] Within the Building Technologies Office, the Appliances and Equipment Standards Program maintains a multi-year rulemaking schedule that establishes minimum energy efficiency standards and test procedures which are the basis for these standards. The products regulated by DOE standards represent about 90 percent of home, 70 percent of commercial building, and 30 percent of industrial energy use.[26] Some of the consumer products regulated by these Conservation Standards and Test Procedures include laundry appliances, dishwashers, microwave ovens, televisions, and several other common household products. In addition to consumer products, there are categories for lighting, plumbing, and commercial/industrial products.[27]

The 2025 period marked a direct shift in policy related to appliances' efficiency standards as the new administration looked to reduce the private expenditures required to comply with Federal regulations through Executive Order 14192, *Unleashing Prosperity Through Deregulation*.[28] In line with the administration's policy goal related to efficiency standards, the DOE has sought to amend, postpone, or withdraw the final rulings of the previous administration. For example, the DOE has finalized a new test procedure for central air conditioners and heat pumps with the enforcement of these new efficiency standards being implemented on July 7, 2026.[29] The DOE

[23]The 2024 Supplements to the 8th Edition added code language for consistency with changes in laws that became effective August 19, 2024. Details of the Eighth Edition (2023) Florida Building Code and all Supplements to it can be found at https://www.floridabuilding.org/fbc/Links_to_Code_Resources.html.

[24]9th Edition (2026) Florida Building Code, Energy Conservation Volumes – COMMERCIAL & RESIDENTIAL. https://www.floridabuilding.org/fbc/thecode/2026_Code_Development/2026_DBPR_Energy_Code_Changes_Overview.pdf

[25]Pursuant to Section 553.975, F.S., the Commission must report the effectiveness of state energy conservation standards established by Sections 553.951-553.973, F.S. Florida's appliance efficiency standards are mandatory efficiency improvements but have not been updated since 1993, and therefore have likely been superseded by more recent federal efficiency standards.

[26]Federal Appliance and Equipment Standards Program: https://www.energy.gov/eere/buildings/appliance-and-equipment-standards-program

[27]Federal Conservation Standards and Test Procedures: https://energy.gov/eere/buildings/standards-and-test-procedures

[28]Unleashing Prosperity Through Deregulation. https://www.federalregister.gov/documents/2025/02/06/2025-02345/unleashing-prosperity-through-deregulation

[29]2025-09-09 Energy Conservation Program: Test Procedure for Central Air Conditioners and Heat Pumps; Final rule. https://www.regulations.gov/document/EERE-2022-BT-TP-0028-0084

has also withdrawn the 2024 final rulings that would have established amended energy conservation standards for walk-in coolers and walk-in freezers[30] and gas-fired instantaneous water heaters.[31] During the 2025 period, the DOE has proposed to further rescind the energy conservation standards and design requirements for appliances, such as microwave ovens,[32] compact residential clothes washers,[33] conventional cooking tops and ovens,[34] and dehumidifiers.[35]

In 2026, Congress has taken attempted to take further action in repealing energy efficiency performance standards. Currently, the Home Appliance Protection Act, which has been referred to the Committee on Energy and Natural resources, aims to modify the process by which the DOE issues or revises energy conservation standards for consumer products. Additionally, the bill would modify the criteria used to prescribe new or amended energy conservation standards by establishing a new criteria for determining whether a standard is economically justified.[36] Congress has also referred the Reliable Federal Infrastructure Act to the Committee on Environment and Public Works as the bill aims to repeal energy efficiency performance standards for new federal buildings and those undergoing major renovations with a focus on repealing the performance standards that phase out fossil fuel use in such buildings by FY2030.[37]

Federal standards that change the baseline requirements for a product may have a direct effect on DSM programs. With Federal action in repealing energy efficiency standards, utilities' DSM programs may become more cost-effective and provide more in savings.

[30]2025-05-20 Energy Conservation Program: Energy Conservation Standards for Walk-In Coolers and Walk-In Freezers; Final rule; withdrawal. https://www.regulations.gov/document/EERE-2017-BT-STD-0009-0112

[31]Energy Conservation Program: Energy Conservation Standards for Consumer Gas-Fired Instantaneous Water Heaters. https://www.federalregister.gov/documents/2025/05/20/2025-09030/energy-conservation-program-energy-conservation-standards-for-consumer-gas-fired-instantaneous-water

[32]Energy Conservation Program: Energy Conservation Standards for Microwave Ovens. https://www.regulations.gov/docket/EERE-2025-BT-STD-0014

[33]Energy Conservation Program: Energy Conservation Standards for Compact Residential Clothes Washers. https://www.federalregister.gov/documents/2025/05/16/2025-08581/energy-conservation-program-energy-conservation-standards-for-compact-residential-clothes-washers

[34]Energy Conservation Program: Energy Conservation Standards for Conventional Cooking Tops. https://www.federalregister.gov/documents/2025/05/16/2025-08589/energy-conservation-program-energy-conservation-standards-for-conventional-cooking-tops

[35]2025-05-16 Energy Conservation Program: Rescinding in Part the Amended Energy Conservation Standards for Dehumidifiers; Proposed rule; request for comments. https://www.regulations.gov/document/EERE-2025-BT-STD-0013-0001

[36]H.R.4626 – Home Appliance Protection and Affordability Act. https://www.congress.gov/bill/119th-congress/house-bill/4626

[37]H.R.4690 – Reliable Federal Infrastructure Act. https://www.congress.gov/bill/119th-congress/house-bill/4690

Section 3. FEECA Utilities' Goal Achievements

3.1 Assessing Goal Achievement

Commission rules require separate goals be set for electric residential and commercial/industrial (C/I) classes, assigning context to measuring goal achievement within these two primary customer categories. Each utility's achievements in these categories are also combined and compared against total demand and energy savings goals.

Every FEECA utility must file an annual DSM report pursuant to Rule 25-17.0021, F.A.C., which summarizes demand savings, energy savings, and customer participation rates for each approved program. The report also includes the residential, C/I, and total energy efficiency achievements compared to the approved DSM goals. Each FEECA utility's current (2025) and archived annual DSM reports from prior years can be found on the Commission's website: http://www.psc.state.fl.us/.

Monitoring annual goal achievements enables the Commission to evaluate the effectiveness of each utility's programs. In addition to reviewing the FEECA utilities' annual DSM reports, staff issues discovery requests for additional information from the utilities on their demand and energy saving achievements. Staff's data requests also seek explanations of factors preventing the utilities from achieving projected participation levels. Each FEECA utility's DSM performance in 2025 is discussed below. The utility achievements have been compared to the annual goals established by the Commission in the 2024 DSM Goalsetting proceedings referenced in Sections 2.1 and 2.2 of this report Table 7 provides a breakdown of each electric utility's goal achievements for the 2025 period, and Table 8 provide similar information for PGS.

FPL

FPL exceeded all DSM demand reduction and energy savings goals in 2025. For the residential customer class, higher participation in its audit program helped boost enrollment in other programs, including the Residential Low-Income Weatherization and Residential Ceiling Insulation programs. Similarly, the higher level of customer participation in the commercial class audit program in 2025 compared to 2024, contributed to FPL exceeding all C/I customer class goals.

DEF

In 2025, DEF exceeded all residential and commercial class demand reduction and annual energy savings goals. For the residential customer class, the higher level of customer participation in 2025, compared to 2024, in the Home Energy Check and Residential Incentive programs balanced the effects of lower customer participation in other programs. For the C/I customer class, DEF surpassed all customer class goals, despite lower participation levels across most C/I programs.

TECO

In 2025, TECO exceeded 6 out of 9 of its DSM demand reduction and annual energy savings goals. While TECO met its 2025 summer demand and annual energy goals for both customer classes and on an overall basis, the company did not meet its winter demand reduction goals for

either customer class. This was due to lower participation in 2025 in several programs that produce relatively high winter savings values. For the residential class, lower savings due to lower participation in Residential Duct Repair, Energy Star Thermostats, and Energy Star Pool Pumps programs was offset to some degree by higher participation in its audit programs and in its Ceiling Insulation program. For the C/I customer class, program participation in audit programs was higher in 2025 compared to 2024, which mitigated the impacts of lower participation levels in lighting programs.

FPUC

In 2025, FPUC failed to meet any of its demand reduction and energy savings goals in 2025. For the residential customer class, program enrollment numbers were lower for all programs compared to 2024. No program enrollments were reported for any program in the C/I customer class. Not achieving customer class goals in 2025 resulted in the utility also falling short of overall demand reduction and annual energy savings goals. Partial-year results were reported by the utility for its new Low Income program, and the utility is optimistic that other mid-2025 changes in its DSM portfolio will result in more favorable demand and energy savings results prospectively.

JEA

JEA exceeded all individual customer class goals in 2025; thus, the utility met its total demand and energy savings goals as well.

OUC

OUC exceeded 8 of 9 demand reduction and energy savings goals in 2025, falling short of meeting its goal for annual energy savings in the residential class. The shortfall in this metric was primarily attributable to lower program enrollment in the utility's Residential Efficiency Delivered program. All commercial and overall class goals were exceeded in 2025.

Table 7
Electric DSM Goals Compared to Annual Achievements (2025)

Utility	Winter (MW)		Summer (MW)		Annual (GWh)	
	Goals	Achieved Reduction	Goals	Achieved Reduction	Goals	Achieved Reduction
FPL						
Residential	21.79	25.23	29.82	33.29	51.68	52.11
Commercial/Industrial	9.65	13.53	16.24	21.52	48.40	50.46
Total	31.44	38.76	46.06	54.81	100.08	102.57
DEF						
Residential	32.00	36.00	21.00	21.00	50.00	53.00
Commercial/Industrial	4.00	25.00	7.00	30.00	5.00	13.00
Total	35.00	61.00	28.00	51.00	56.00	65.00
TECO*						
Residential	14.0	**12.0**	7.9	9.6	24.8	27.5
Commercial/Industrial	5.4	**4.8**	6.4	6.5	22.2	38.3
Total	19.4	**16.8**	14.3	16.1	47.0	65.8
FPUC*						
Residential	0.155	**0.074**	0.055	**0.012**	0.406	**0.127**
Commercial/Industrial	0.021	**0.000**	0.022	**0.000**	0.111	**0.000**
Total	0.175	**0.074**	0.077	**0.012**	0.517	**0.127**
JEA						
Residential	1.02	1.031	0.76	1.243	3.789	5.073
Commercial/Industrial	0.37	0.514	0.44	0.515	3.346	4.665
Total	1.39	1.545	1.20	1.758	7.135	9.738
OUC*						
Residential	0.181	0.469	0.111	0.484	1.072	**1.011**
Commercial/Industrial	0.380	1.522	0.485	1.726	3.207	10.353
Total	0.561	1.991	0.597	2.211	4.279	11.364

***Bold numbers shown indicate the utility did not meet its annual goals within that category.**

Source: FEECA utilities' 2025 demand-side management annual reports.

PGS

PGS achieved all of its residential, C/I, and total therm reduction savings goals in 2025. Significantly more participation in the utilities' Commercial Retention and New Construction programs accounted for the majority of the therm savings for that customer class.

Table 8
Natural Gas DSM Goals Compared to Annual Achievements (2025)

Peoples Gas System	Annual Energy Reduction (Therms)	
	Goals	Achieved Reduction
Residential	344,604	443,528
Commercial/Industrial	434,348	2,784,065
Total	**778,952**	**3,227,593**

Source: Peoples Gas 2025 demand-side management annual report.

3.2 Information on Energy Audit Programs

Residential energy audits are required by Section 366.82(11), F.S. Energy audits serve as an avenue for utilities to identify and evaluate energy conservation opportunities for customers. FEECA utilities use energy audits as a gateway to their other DSM programs. For example, some rebate programs require customers to have an energy audit so that the utility can identify existing equipment to determine program eligibility before the customer is eligible to participate. Utilities also use energy audits to educate customers on behavioral changes and energy efficiency investments they can make outside of the utility-sponsored DSM programs.

Rule 25-17.0021, F.A.C., requires that all FEECA utilities offer a Walk-Through Audit, a Building Energy-Efficiency Rating System (BERS) Audit, and a Computer-Assisted Audit to their residential customers. All FEECA electric utilities offer Walk-Through Audits for their commercial customers as well. In addition to the required audits, some FEECA utilities also offer online and phone audits which have become increasingly popular with residential IOU customers. While online and phone audits are not as thorough as Walk-Through Audits, they give customers access to much of the same information on their own time, without the need to schedule appointments with their utility. These audits also typically have lower administrative costs than Walk-Through Audits.

As a part of its goalsetting process, PGS was granted a waiver which exempts the company from the requirement to offer Walk-Through Audits. The Commission allowed PGS to offer an electronic, online-only audit in lieu of on-site audits for residential customers. In April 2020, PGS launched its Residential Customer Assisted Audit program as an online audit program for residential customers. In 2025, a total of 6,619 audits of this type were conducted. In addition, PGS completed 169 Commercial Walk-Through Energy Audits in 2025.

Residential Energy Audits

Table 9 shows FEECA electric utilities performed a total of 216,691 residential audits in 2025, which was about 19,828 fewer residential audits compared to 2024, when 239,519 audits were conducted.[38]

Table 9
Residential Energy Audits by Type (2025)

Utility	Audit Type			
	Walkthrough, BERS, or Computer Assisted	Online	Phone	Total
FPL	18,162	71,544	16,023	105,729
DEF	8,422	21,694	2,223	32,339
TECO	4,464	67,177	0	71,641
FPUC	18	61	0	79
JEA	5,763	0	0	5,763
OUC	1,140	0	0	1,140
Total	**37,969**	**160,476**	**18,246**	**216,691**

Source: FEECA utilities' 2025 demand-side management annual reports.

By type, FEECA electric utilities conducted 37,969 residential in-person audits in 2025, an increase relative to 2024, when 32,531 audits of this type were conducted. The overall number of residential online audits decreased in 2025 (160,476) compared to 2024 (195,147). Only FPL and DEF offered virtual audits via telephone and more audits of this type were conducted in 2025 (18,246) compared to 2024 (11,841).

By utility, DEF, TECO, and FPL reported more residential audits in all type categories were conducted in 2025 compared to 2024. FPUC reported 79 audits were conducted in 2025, reflecting fewer in-person and online audits, on an overall basis, which is a decrease compared to its 2024 audits (120). In 2025, JEA and OUC offered slightly fewer in-person audits, compared with the quantities each offered in 2024. Although recorded as audits in 2024 but as reports in 2025, OUC offered 36,828 free online home utility reports to its customers in 2025. On an overall basis across all audit types and all utilities, the number of residential audits conducted in 2025 fell by about 9.5% percent, compared with 2024, primarly due to the data reporting change from OUC (reclassifying its residential online audits as reports).

Commercial / Industrial Audits

Table 10 below shows that the FEECA electric utilities performed 6,306 commercial/industrial energy audits in 2025, compared to 6,003 such audits in 2024. During periods of COVID-era suspensions that began in 2021, FPL, DEF, and TECO offered C/I audits through in-person and virtual means. However, in 2025, only FPL and DEF continued the practice of offering virtual audits. For TECO, JEA, and OUC, all of the audits conducted for this customer class in 2025 were conducted by site visits (shown on Table 10 as in-person audits). FPUC offers consultation services on energy saving opportunities, but does not offer a formal audit program for

[38]Walk-Through, BERS, and Computer-Assisted audits all require a utility auditor to physically inspect the customer's premises. These types of audits are commonly referred to as 'in-person' audits.

commercial/industrial customers. Across all types and all utilities, the number of commercial/industrial audits conducted in 2025 increased by about 5.0% percent, compared with 2024.

Table 10
Commercial / Industrial Energy Audits by Type (2025)

Utility	Audit Type			
	Walkthrough, BERS, or Computer Assisted	Online	Phone	Total
FPL	1,449	864	2,481	4,794
DEF	287	0	11	298
TECO	818	0	0	818
FPUC	0	0	0	0
JEA	313	0	0	313
OUC	83	0	0	83
Total	**2,950**	**864**	**2,492**	**6,306**

Source: FEECA utilities' 2025 demand-side management annual reports.

3.3 Low-Income Programs

Electric FEECA utilities have implemented measures and/or programs that assist and educate low-income customers in matters related to energy conservation opportunities. Low-income customer participation in energy conservation programs furthers the intent of FEECA by encouraging potential demand and energy reduction in Florida. Customers that participate in these programs benefit through increased knowledge of conservation opportunities and through rebates on energy saving equipment, resulting in potential bill reduction.

Low-income programs mainly focus on efforts to provide energy efficiency information, weatherization opportunities and the installation of energy efficient measures to residential homes. In many cases, the utilities have established partnerships with government and non-profit agencies. They work together to help identify low-income neighborhoods and educate customers on conservation opportunities through energy audits, bill inserts, presentations, and other measures.

Since 2015, all of the electric FEECA utilities have submitted programs in their DSM plans tailored to offer assistance to qualifying customers. Each FEECA utility's conservation efforts taken to assist and educate low-income customers during 2025 are discussed below.

FPL

Through its Low-Income Weatherization program, FPL leverages its partnerships with Weatherization Assistance Providers throughout its territory to offer these providers rebates for installation of program measures in qualifying homes.[39] In 2025, FPL enrolled 17,128 customers in its Low-Income Weatherization program, representing a decrease of 1,553 customers from 2024. In part, these enrollments decreased because of the mid-year addition of the newly-offered ceiling insulation measure required additional contractor coordination in implementing the program.

Additionally, FPL launched a Residential Low-Income Renter Pilot program in September 2025 to encourage landlords of qualifying low-income rental properties to install high-efficiency HVAC systems. However, the program reported zero participants in 2025 and into September 2026, while program costs were incurred primarily through payroll and benefits expenses associated with implementation and administration.

DEF

In 2025, DEF continued its efforts to expand offering its Neighborhood Energy Saver (NES) program, a program that serves all customers, including low income customers. By identifying targeted demographic areas within a 15-mile radius, the utility was able to facilitate easier scheduling of appointments for customers and minimize travel times for its vendor. These efforts resulted in 5,816 program enrollments in 2025, which was very similar to the 2023 and 2024 enrollment numbers of 5,846 and 5,821, respectively.

[39]The Weatherization Assistance Program offered by FPL and other investor-owned electric utilities in Florida is a United States Department of Energy program that is administered at the state and local levels. Resource links are provided at this website: https://www.energy.gov/scep/wap/how-apply-weatherization-assistance

In 2025, DEF continued offering its Low-Income Weatherization Assistance Program (LIWAP), which partners with local weatherization providers and the Florida Department of Economic Opportunity to deliver energy-efficiency measures to income-eligible households. During the year, 1,224 weatherization measures were installed across 261 residential homes.

TECO

TECO's Neighborhood Weatherization provides qualifying customers with energy-efficiency kits and energy conservation education designed to help households better manage and reduce their energy usage that includes 12 energy savings measures, plus ceiling insulation and/or duct sealing, depending on the needs of the home. The utility uses Florida Census Track Data[40] to determine eligibility for this program. In 2025, 8,665 customers enrolled in the program, an increase of 2,031 participants compared to 2024. This growth reflects a recovery from disruptions caused by hurricanes and ransomware attacks in 2024.

FPUC

In 2025, FPUC launched its Low-Income Energy Outreach program, Efficiency for All. The pilot targeted eligible low-income communities in the Northwest and Northeast service territories and emphasized community-based engagement. Program implementation was supported by a third-party partner responsible for installation of energy efficiency measures, customer education, and documentation. FPUC reported that the program is intended to transition from a targeted, community-based pilot to a broader customer-driven enrollment model beginning in 2027. The program reported 10 participants in its initial year of implementation.

JEA

JEA's Neighborhood Energy Efficiency Program includes free installation of conservation products and provides energy education packets that give income-qualified customers energy-saving tips and information about JEA's other DSM programs. JEA also promotes the availability of nonprofit community-based utility bill assistance programs, including its Neighbor to Neighbor donation program. These programs are featured on the JEA website and amplified through social media and direct email promotions.

In 2025, JEA continued its partnership with multiple government and non-profit agencies that provide direct and indirect financial assistance to customers in its service territory. In addition, JEA developed and presented conservation based educational resources designed to help homeowners understand the biggest users of energy and water inside and outside the home.

OUC

In 2025, OUC continued its Project Care and Efficiency Delivered programs to assist low-income customers in conserving energy and demand. Project Care assists customers in paying their energy bills and implementing energy efficiency measures. In this program, OUC supplements donations it receives, and applies such donations to the customers' utility bill. In the income-based Efficiency Delivered program, OUC pays for 85 percent of the costs for energy and water efficiency upgrades, up to a cap of $2,125 per installation. Income qualified participants pay the remaining 15 or 50 percent (based on income tiers) over a 24 month period, interest free.

[40]Online tool provided by the United States Census Bureau showing demographic, economic, and geographical data.

3.4 Investor-Owned Utility Research and Development Programs

In addition to specific DSM programs that provide measurable demand and energy savings, the four electric IOUs conduct conservation research and development initiatives to evaluate emerging DSM opportunities. In these programs, Florida's electric IOUs often partner with universities or established industry research organizations. With the arrival of new electricity-consuming products and new technologies, research and development by Florida's electric IOUs creates opportunities to identify emergent options to conserve electricity. The recent initiatives undertaken by the electric IOUs are discussed below.

FPL

In 2025, FPL's research and development program focused on two key projects: the Smart Panel Pilot and a retro-commissioning study. The Smart Panel Pilot continued to evaluate the capabilities of smart panels in enhancing residential energy efficiency and demand response. As of December 2025, 100 smart panels had been installed in customer homes, with the pilot scheduled to run through 2028.

FPL also advanced its retro-commissioning study at a large, multi-building church campus. In 2025, the church implemented several measures based on the study, including chiller equipment replacement, CO2 sensors for demand control ventilation, and variable frequency drive equipment. FPL will monitor the installed measures over a 12-month period to evaluate their energy efficiency impact.

DEF

In 2025, DEF continued its ongoing research efforts local universities, and industry alliances to test and evaluate the potential for new and emerging technologies to support future program offerings to customers. One such example is the utility's Vehicle to Grid Ford Lightning technology study, which tests electric vehicle batteries and two-way energy flows on the grid.

TECO

TECO continued its commercial battery storage research project, originally begun in 2016 in partnership with the University of South Florida. Installations were completed in 2024 for further study at two pilot sites: a nonprofit vocational training center and a community center facility. Following the successful installation of battery systems at these locations, TECO commissioned activity for additional study in 2026 at the community center facility (in April of 2025) to begin evaluating the technical performance, operational requirements, and customer billing impacts of behind-the-meter battery storage systems.

FPUC

FPUC did not pursue any Conservation Demonstration and Development initiatives in 2025. The utility stated its priority was placed on core portfolio administration and implementation of the new 2025-2029 Demand Side Management plan.

Section 4. Conservation Cost Recovery

Florida's IOUs are allowed to recover reasonable expenses for Commission-approved DSM programs through cost recovery clauses. For electric IOUs, the recovery mechanism is the ECCR clause. For natural gas LDCs, the recovery mechanism is the NGCCR clause. These costs include utility expenses such as administrative costs, equipment, and incentive payments to customers. Before requesting recovery of costs through the ECCR clause, an electric IOU must provide data on DSM program cost-effectiveness. The Commission conducts a financial audit each year prior to approving cost recovery of these expenses.

4.1 Electric IOU Cost Recovery

Since 2016, annual electric utility expenditures to fund conservation programs has varied over a rolling ten-year period, due to additions and modifications of these voluntary programs. In addition, these utilities have reported that 2020 and 2021 COVID-related impacts have resulted in lower levels of customer participation in DSM programs, contributing to the decline in DSM expenditures in those years. Table 11 shows the annual DSM expenditures recovered by Florida's IOUs from 2016-2025.

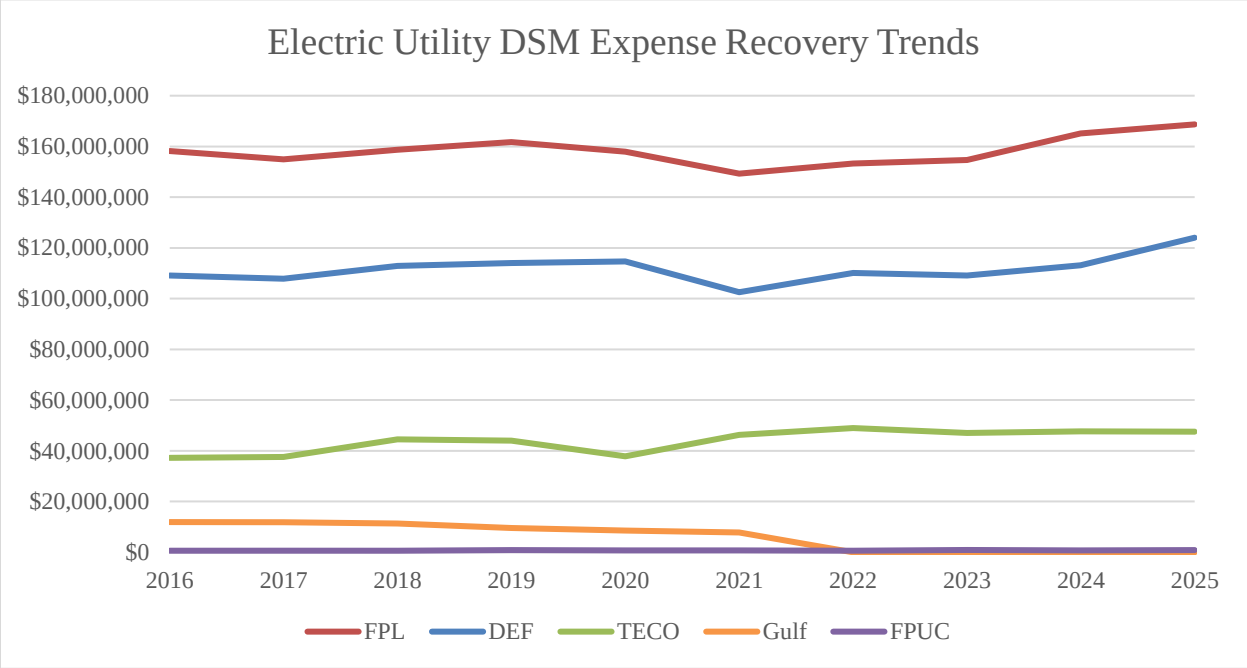
Table 11
DSM Expenditures Recovered by IOUs (2016-2025)

	FPL	DEF	TECO	Gulf	FPUC	Total
2016	$158,174,787	$109,155,438	$37,242,148	$11,915,459	$687,590	$317,175,422
2017	$154,916,595	$107,890,962	$37,585,598	$11,854,558	$640,996	$312,888,709
2018	$158,735,829	$112,863,333	$44,558,717	$11,399,250	$656,154	$328,213,283
2019	$161,738,898	$114,084,224	$43,988,528	$9,607,262	$865,843	$330,284,755
2020	$157,892,907	$114,692,900	$37,850,526	$8,637,394	$782,143	$319,855,870
2021	$149,275,934	$102,542,901	$46,328,538	$7,852,934	$751,683	$306,751,990
2022	$153,282,683	$110,172,154	$48,985,457	*	$668,543	$313,108,837
2023	$154,681,984	$109,076,687	$47,028,255	*	$919,544	$311,706,470
2024	$165,109,197	$113,135,520	$47,729,098	*	$811,045	$326,784,860
2025	$168,697,310	$124,029,727	$47,597,019	*	$889,009	$341,213,065
Total						**$3,207,983,261**

Source: Docket Nos. 20170002-EG through 20260002-EG, Schedules CT-2 from the IOUs' May testimonies.
*Effective January 1, 2021, FPL aquired Gulf, but Gulf operated as a separate division through the end of the year. By Order No. PSC-2021-0446-S-EI, issued in Docket No. 20210015-EI, the Commission approved Gulf and FPL merger with effective date of January 1, 2022.

Figure 3 shows the data featured in Table 11 in a line graph.[41]

Figure 3
DSM Expenditures Recovered by Electric IOUs (2016-2025)



Source: Docket Nos. 20170002-EG through 20260002-EG, Schedules CT-2 from the IOUs' May testimony.

During the annual ECCR clause proceedings, the Commission approves the ECCR factors, by customer class, which each utility will apply to the energy and demand portions of customer bills. These factors are set using each IOU's estimated conservation costs for the next year and reconciliation for any actual conservation cost over- or under-recovery amounts associated with the current and prior years.

In November 2026, the Commission set the ECCR factors for the period January through December 2027. Table 12 illustrates the approved ECCR factors and the monthly bill impact for a residential customer. For illustrative purposes, these factors are applied to a monthly residential bill based on 1,000 kilowatt-hours (kWh) per month energy usage.

[41]Because Figure 3 incorporates the dollar amounts for DSM expenditures between the largest (FPL) and smallest (FPUC) investor-owned electric utilities, the scale for the Y-axis (dollars) must accommodate very small and very large data points. As such, the data points in the line graph for FPUC appears as near zero values, although the actual values range between $640,000 and $920,000.

Table 12
Residential Energy Conservation Cost Recovery Factors (2027)

Utility*	ECCR Factor (Dollars per kWh)	Monthly Bill Impact (Based on usage of 1,000 kWh per month)
FPL	0.130	$1.30
DEF	0.356	$3.56
TECO	0.261	$2.61
FPUC	0.057	$0.57

Source: Order No. PSC-2026-XXXX-FOF-EG, Docket No. 20260002-EG.
*While JEA and OUC fall under the FEECA Statute, the Commission does not regulate electric rates for municipal utilities.

4.2 Natural Gas Cost Recovery

Commission Rule 25-17.015, F.A.C., establishes a mechanism for recovery of reasonable costs attributed to natural gas conservation programs. While Peoples Gas System (PGS) is the only natural gas utility subject to FEECA, the other LDCs [Florida City Gas (FCG), Florida Public Utilities Company (FPUC), St. Joe Natural Gas Company (SJNG), and Sebring Gas System (SGS)] covered in this section offer Commission-approved DSM programs without a specific therm savings goal. As it does for the electric IOUs, the Commission also conducts financial audits of the LDCs' conservation expenditures on a yearly basis and adjusts the LDCs' cost recovery factors to allow for recovery of actual and projected program-related costs. Table 13 shows the amounts each LDC recovered in natural gas conservation program expenditures from 2016-2025.

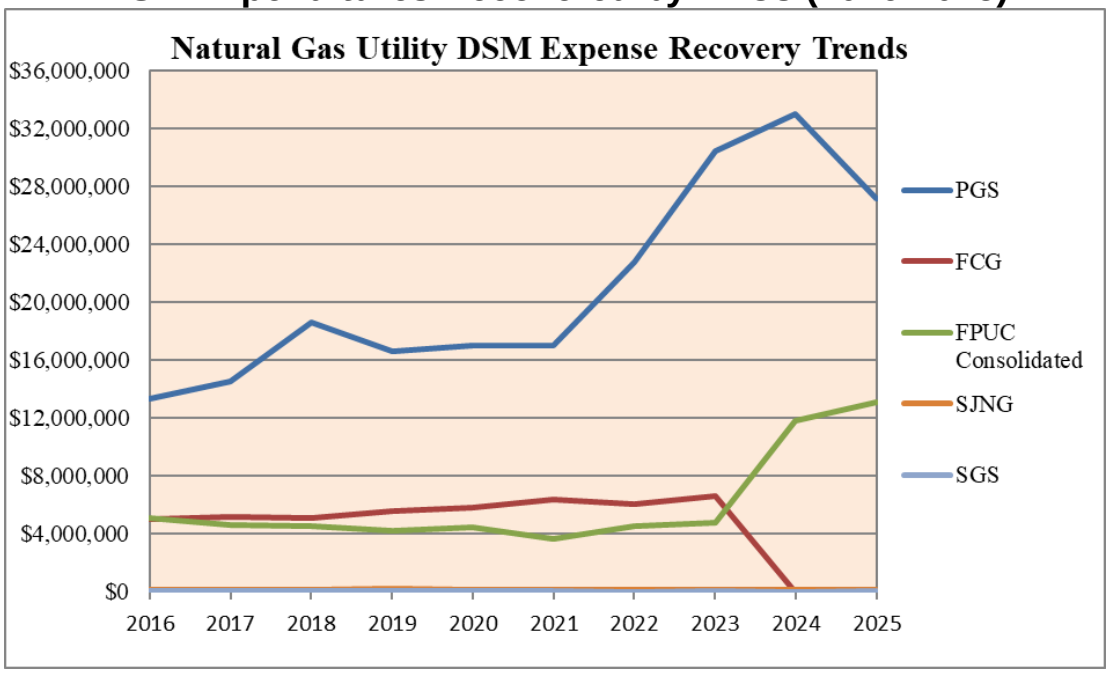
Table 13
DSM Expenditures Recovered by LDCs (2016-2025)

	PGS	FCG	FPUC Consolidated Companies	SJNG	SGS	Total
2016	$13,345,716	$5,037,863	$5,098,245	$156,250	$36,801	$23,674,875
2017	$14,543,555	$5,149,573	$4,617,501	$144,900	$42,237	$24,497,766
2018	$18,605,532	$5,067,917	$4,562,021	$190,625	$47,126	$28,473,221
2019	$16,619,336	$5,564,237	$4,252,769	$231,600	$46,184	$26,714,126
2020	$17,031,280	$5,824,651	$4,447,010	$189,625	$52,162	$27,544,728
2021	$16,999,771	$6,421,893	$3,653,829	$179,450	$40,411	$27,295,354
2022	$22,801,408	$6,070,844	$4,573,742	$173,225	$30,841	$33,650,060
2023	$30,425,021	$6,649,986	$4,796,193	$181,225	$45,846	$42,098,271
2024	$33,000,351	*	$11,821,867	$143,000	$33,664	$44,998,882
2025	$27,191,247	*	$13,079,529	$116,750	$41,214	$40,428,740
Total						$319,376,023

Source: Docket Nos. 20170004-EG through 20260004-EG, Schedules CT-2 from the LDCs' May testimony.
*In September 2023, Chesapeake Utilities Corporation purchased FCG making Chesapeake Utilities Corportation the parent company of both FCG and FPUC. Consolidation of Conservation Cost Recovery amounts was approved in Order No. PSC-2024-0486-FOF-GU, issued November 25, 2024, in Docket No. 20240004-GU.

Figure 4 shows the data featured in Table 13 in a line graph.[42]

Figure 4
DSM Expenditures Recovered by LDCs (2016-2025)



Source: Docket Nos. 20160004-EG through 20260004-EG, Schedules CT-2 from the LDCs' May testimony.
*Note that since 2014, DSM expenditures for CUC and IGC were consolidated with FPUC-Fort Meade, and reported as FPUC Consolidated Companies.

In November 2026, the Commission set the natural gas LDC conservation cost recovery factors for the 2027 billing cycle. Table 14 provides the LDCs' residential cost recovery factors for 2027 and the impact on a residential customer bill using 20 therms of natural gas per month.

[42]Because Figure 4 incorporates the dollar amounts for DSM expenditures between the largest (PGS) and smallest (SGS) investor-owned natural gas utilities, the scale for the Y-axis (dollars) must accommodate very small and very large data points. As such, the data points in the line graph for SGS and SJNG appear as near zero values, although the actual values range between $30,000 and $58,000 for SGS and $123,000 and $231,000 for SJNG. The upward-sloping trend line shown for PGS since 2021 was due to incentive payments primarily attributable to new construction activity in its service territory.

Table 14
Residential Natural Gas Conservation Cost Recovery Factors (2027)

Utility	Cost Recovery Factor (Dollars per Therm)	Monthly Bill Impact (Based on usage of 20 Therms per month)
PGS	0.12379	$2.48
FPUC	0.30464	$6.09
FCG	0.38306	$7.66
SJNG	0.03627	$0.73
SGS	0.12872	$2.57

Source: Order No. PSC-2026-XXXX-FOF-GU, Docket No. 20260004-GU.

Section 5. Educating Florida's Consumers on Conservation

5.1 Commission Consumer Education Outreach

While the Commission has statutory authority to require conservation efforts by regulated utilities, as part of the agency's outreach program, the Commission complements these utility initiatives by providing consumers with additional conservation information and resources.

To reach the broadest possible audience, the Commission shares conservation information through a variety of communication channels, including its website, public outreach events, brochures, press releases, articles, and social media. Unless otherwise noted, the information presented in this section covers activities conducted from October 2025 through August 2026.

In addition to the Commission's outreach efforts, consumers can also access conservation information through a variety of governmental and utility resources. Section 5.2 provides links to state and federal agencies, investor-owned electric utilities, and local gas distribution companies for additional information and resources.

National Consumer Protection Week

National Consumer Protection Week (NCPW), observed March 1-7, 2026, is an annual campaign dedicated to promoting consumer protection and education. As part of this nationwide effort led by the Federal Trade Commission, the Commission helps consumers protect their finances by providing information on energy efficiency, conservation, and utility-related consumer issues. The 2026 NCPW theme was "Avoid, Report, and Recover from Scams."

During NCPW 2026, the Commission conducted outreach events in Marion and Leon counties, providing consumers with practical tips to reduce energy costs through conservation while raising awareness of utility-related scams and how to avoid them. The FPSC has participated in National Consumer Protection Week for more than a decade, joining federal, state, and local government agencies, consumer advocacy organizations, and private-sector partners in this nationwide consumer education initiative.

Older Americans Month

Each May, the Commission participates in Older Americans Month, a national observance that recognizes the contributions of older Americans while promoting resources that support their health, independence, and well-being. The 2026 theme, "Champion Your Health," encouraged older adults to take an active role in maintaining their physical, mental, and emotional well-being.

As part of its outreach efforts, the FPSC partnered with community centers in Holmes, Wakulla, Leon, and Duval Counties to meet with older Floridians, share information about Commission resources, and discuss ways to manage utility costs, conserve energy, and avoid utility-related scams.

Library Outreach Campaign

Each August, the Commission conducts its annual Library Outreach Campaign, providing Florida's public libraries with educational materials, including FPSC conservation brochures and consumer information, for distribution to library patrons statewide.

In 2026, the campaign reached 538 public libraries and branch locations across Florida, expanding access to reliable information on utility conservation and consumer protections. The campaign continues to serve as an effective year-round outreach effort, with many libraries requesting additional FPSC educational materials throughout the year to meet ongoing community demand.

Energy Awareness Month

Each October, the U.S. Department of Energy sponsors National Energy Awareness Month to promote smart energy choices and highlight economic and job growth, environmental protection, and increased energy independence. In 2025, the FPSC highlighted National Energy Awareness Month on X (@floridapsc) and issued a news release encouraging consumers to make smart energy choices. In addition to its online outreach, the Commission distributed a variety of energy conservation publications, including Conservation House and Conserve Your World, at outreach events throughout October.

Community Events

The FPSC actively engages with communities throughout Florida by providing energy and water conservation information to Floridians, including older adults, low-income residents, and other consumers, through presentations at community centers, local organizations, and public events.

To expand its outreach efforts, the FPSC continually seeks new opportunities to connect with consumers and typically participates in at least two public events each month.

In-person events (Oct. 2025-Aug.2026) included:

- Summer Manatee County Senior Wellness Expo
- Hope Through the Storm Health Fair
- Jacksonville Disability and Adaptive Recreation Expo
- Fort Braden Community Center
- Wakulla Senior Citizens Council
- Holmes County Senior Celebration Health Fair
- Jacksonville Senior Expo (2 days)
- Woodville Community Center
- Arietta Senior Living
- Marion Oaks Community Center
- Marion Senior Services
- 8th Avenue Activity Center
- Miccosukee Community Center

- Advent Christian Village Expo
- Senior Wellness EXPO Apopka
- Flagler County Housing Authority
- Bradfordville Community Center
- Woodville Community Center
- Lake Jackson Community Center
- Jacksonville Senior Expo
- Lake Jackson Community Center
- Taylor County Senior Citizens Center

Virtual meetings (Oct. 2025-Aug. 2026) included:

- Mandarin Parkinson's Caregivers Support Group
- Hernando County Housing
- Columbia County Housing Authority
- Florida Impact
- Hernando County SHIP

Service Hearings and Customer Meetings

As part of its ongoing consumer outreach efforts, the Commission provides conservation brochures and educational materials to customers attending FPSC service hearings and customer meetings throughout the state. During the reporting period, the Commission conducted several in-person service hearings for customers of one investor-owned natural gas utility and one water and wastewater utility.

To provide greater accessibility and convenience, the FPSC also offers virtual service hearings and customer meetings. Customers participating in either in-person or virtual proceedings receive a Rate Case Overview that explains the utility's rate request, outlines the rate case process, and includes links to consumer resources available on the FPSC website, along with information on energy and water conservation.

Website Outreach Resources

The FPSC website offers a wide variety of free brochures, publications, and educational resources to help consumers conserve energy and water and make informed utility decisions. Consumers can view and print conservation materials directly from the FPSC’s website, order printed copies online, or request materials by mail or telephone.

During the reporting period, the Commission received and fulfilled thousands of requests for publications, demonstrating continued public interest in the FPSC's consumer education and conservation resources.

Media Outreach

The FPSC uses a variety of communication channels to keep consumers informed about Commission decisions, programs, and conservation initiatives. News releases highlighting major Commission decisions, meetings, and public events are posted on the FPSC website and distributed through email, LinkedIn, and X.

Throughout the year, the Commission also shares conservation tips and consumer education messages through news releases and social media campaigns, promoting energy and water conservation during annual outreach initiatives such as Energy Awareness Month and National Consumer Protection Week.

Youth Education

The FPSC promotes conservation awareness among young Floridians through Be Utility Smart!, an educational activity guide that introduces energy and water conservation concepts through games, puzzles, coloring pages, and other interactive activities. During the reporting period, numerous copies of the guide were distributed statewide at various outreach events. The booklet is also included in the Commission's annual Library Outreach Campaign and is available at community outreach events, where it continues to be a popular resource for children and families.

The Commission also promotes conservation education through special events, including Take Your Child to Work Day. During the 2026 event, children participated in interactive activities focused on energy conservation, water protection, and sustainability.

5.2 Related Websites

State Agencies and Organizations

Florida Public Service Commission – http://www.floridapsc.com/
Florida Department of Environmental Protection – https://floridadep.gov/
The Office of Energy – https://www.fdacs.gov/Divisions-Offices/Energy
Florida Solar Energy Center – https://energyresearch.ucf.edu/
Florida Weatherization Assistance – https://www.benefits.gov/benefit/1847
Florida's Local Weatherization Agencies List - https://floridajobs.org/community-development/Weatherization-Assistance-Program/contact-your-local-weatherization-office-for-help

U.S. Agencies and National Organizations

U.S. ENERGY STAR Program – https://www.energystar.gov/
U.S. Department of Energy – Energy Efficiency and Renewable Energy Information http://www.eere.energy.gov/
National Energy Foundation – https://nef1.org/

Florida's Utilities Subject to FEECA

Florida Power & Light Company – http://www.fpl.com/
Duke Energy Florida, LLC – http://www.duke-energy.com/
Tampa Electric Company – http://www.tampaelectric.com/
Florida Public Utilities Company – http://www.fpuc.com/
JEA – http://www.jea.com
Orlando Utilities Commission – http://www.ouc.com/
Peoples Gas System – http://www.peoplesgas.com/

Florida's Investor-Owned Natural Gas Utilities

Florida City Gas – http://www.floridacitygas.com/
Florida Division of Chesapeake Utilities – http://www.chpk.com/companies/chesapeake-utilities/
Florida Public Utilities Company – http://www.fpuc.com/
Florida Public Utilities Company – Ft. Meade Div. – http://www.fpuc.com/
Florida Public Utilities Company – Indiantown Div. – http://www.fpuc.com/
Peoples Gas System – http://www.peoplesgas.com/
Sebring Gas System – http://www.sebringgas.com/
St. Joe Natural Gas Company – http://www.stjoenaturalgas.com/

Appendix A. 2025 FEECA Utility Conservation Programs

Electric IOUs

Florida Power & Light Company	
Residential Programs	Residential Home Energy Survey Residential Load Management (On Call®) HVAC On-Bill Residential HVAC Residential New Construction (BuildSmart®) Residential Ceiling Insulation Residential Low-Income Weatherization Residential Low-Income Renter Pilot
Commercial/Industrial Programs	Business Energy Evaluation (BEE) Business On Call® Commercial/Industrial Demand Reduction (CDR) Business Heating, Ventilating, and Air Conditioning (HVAC) Business Lighting Business Custom Incentive (BCI)
Other	Conservation Research and Development (CRD)

Duke Energy Florida, LLC	
Residential Programs	Home Energy Check Residential Incentive Multi-Family New Builder Neighborhood Energy Saver Low-Income Weatherization Assistance Residential Load Management
Commercial/Industrial Programs	Business Energy Check Smart $aver Business (f/k/a Better Business) Smart $aver Custom Incentive Interruptible Service Curtailable Service Standby Generation
Other	Technology Development Qualifying Facilities

Tampa Electric Company	
Residential Programs	Residential Energy Audits (3 Programs) Residential Ceiling Insulation Residential Duct Repair Energy Education, Awareness, and Agency Outreach ENERGY STAR for New Multi-Family Residences ENERGY STAR for New Homes ENERGY STAR Thermostats ENERGY STAR Pool Pumps Residential Heating and Cooling Neighborhood Weatherization (Low-Income) Residential Price Responsive Load Management (Energy Planner) Residential Prime Time Plus (Residential Load Management)
Commercial/Industrial Programs	Commercial/Industrial Energy Audits (2 Programs) Cogeneration Commercial/Industrial Custom Energy Efficiency Demand Response Facility Energy Management System Industrial Load Management (GSLM 2&3) Lighting Conditioned Space Lighting Non-Conditioned Space Lighting Occupancy Sensors Commercial Load Management (GSLM 1) Commercial Smart Thermostats Standby Generator Variable Frequency Drive for Compressors Commercial Water Heating
Other	Conservation Research and Development Renewable Energy Integrated Renewable Energy System (Pilot)

Florida Public Utilities Company	
Residential Programs	Residential Energy Survey (Efficiency First) Residential Heating and Cooling Efficiency Upgrade Residential Small Appliance Low Income Energy Outreach (Efficiency for All)
Commercial/Industrial Programs	Commercial Heating and Cooling Efficiency Upgrade Commercial Chiller Upgrade Commercial Exterior and Interior Lighting
Other	Conservation Demonstration and Development LED Conversion

Electric Municipal Utilities

JEA	
Residential Programs	Residential Energy Audit Neighborhood Efficiency (Low-Income) Residential Home Efficiency Upgrade Rebates Energy Efficient Products Rebates
Commercial/Industrial Programs	Commercial Energy Audit Commercial Prescriptive Lighting Rebates

Orlando Utilities Commission	
Residential Programs	Home Energy Survey Residential Existing Home Rebates Residential New Home Rebates Residential Efficiency Delivered
Commercial/Industrial Programs	Energy Audit Commercial/Industrial Prescriptive Rebates Commercial/Industrial Lighting Rebates Commercial/Industrial Custom Incentive Rebates

Natural Gas LDC

Peoples Gas System	
Residential Programs	Residential Customer Assisted Energy Audit Residential New Construction Residential Retrofit Residential Retention
Commercial/Industrial Programs	Commercial Walk-Through Energy Audit Commercial New Construction Commercial Retrofit Commercial Retention
Other	Conservation Research and Development

Appendix B. 2025 FEECA Utility Conservation Program Descriptions

Electric FEECA IOUs

A. Florida Power & Light Company

Residential Programs

- **Residential Home Energy Survey**
  The Residential Home Energy Survey Program educates customers on energy efficiency and encourages implementation of recommended energy efficiency measures, even if they are not included in FPL's DSM programs. The Residential Home Energy Survey Program is also used to identify potential candidates for other FPL DSM programs. FPL offers in-home, phone-assisted, and online audits for its residential customers.

- **Residential Load Management (On Call)**
  The Residential Load Management Program allows FPL to turn off certain customer-selected appliances using FPL-installed equipment during periods of extreme demand, capacity shortages, or system emergencies.

- **HVAC On-Bill**
  The HVAC On-Bill pilot provides customers with new HVAC equipment, routine service, and maintenance to encourage efficient, new HVAC, equipment and provides cost-effective load control.

- **Residential HVAC**
  The Residential HVAC program aims to help customers reduce their heating and cooling costs by encouraging customers to opt for systems that exceed federal efficiency standards.

- **Residential New Construction (BuildSmart®)**
  The Residential New Construction Program encourages builders and developers to design and construct new homes that achieve BuildSmart® certification and move towards ENERGY STAR® qualifications.

- **Residential Ceiling Insulation**
  The Residential Ceiling Insulation Program encourages customers to improve their homes' thermal efficiency.

- **Residential Low-Income Weatherization**
  The Residential Low-Income Weatherization Program assists low-income customers through state Weatherization Assistance Provider (WAP) agencies and FPL-conducted Energy Retrofits.

- **Residential Low-Income Renter**
  The Residential Low-Income Renter Pilot encourages landlords of low-income rental properties to upgrade their HVAC systems for energy efficiency.

Commercial/Industrial Programs

- **Business Energy Evaluation (BEE)**
  The Business Energy Evaluation Program educates customers on energy efficiency and encourages implementation of recommended practices and measures, even if these are not included in FPL's DSM programs. The Business Energy Evaluation is also used to identify potential candidates for other FPL DSM programs. FPL offers the Business Energy Evaluation in on-site or online formats.

- **Business On Call®**
  The Business On Call® Program allows FPL to turn off customers' direct expansion central air-conditioning units using FPL-installed equipment during periods of extreme demand, capacity shortages, or system emergencies.

- **Commercial/Industrial Demand Reduction (CDR)**
  The Commercial/Industrial Demand Reduction Program allows FPL to control customer loads of 200 kW or greater during periods of extreme demand, capacity shortages, or system emergencies. FPL installs a load management device at the customer's facility and provides monthly credits to customers. Unlike the CILC program, the CDR program is still open to new customers.

- **Business Heating, Ventilating, and Air Conditioning (HVAC)**
  The Business HVAC Program encourages customers to install high-efficiency HVAC systems.

- **Business Lighting**
  The Business Lighting Program encourages customers to install high-efficiency lighting systems.

- **Business Custom Incentive (BCI)**
  The Business Custom Incentive Program encourages customers to install unique high-efficiency technologies not covered by other FPL DSM programs.

Other Programs

- **Conservation Research and Development (CRD) Project**
  This project consists of research studies designed to: identify new energy efficient technologies; evaluate and quantify their impacts on energy, demand, and customers; and where appropriate and cost-effective, incorporate an emerging technology into a DSM program.

B. Duke Energy Florida, LLC

Residential Programs

- **Home Energy Check**
  The Home Energy Check is a residential energy audit program that provides residential customers with an analysis of their energy consumption and educational information on how to reduce energy usage and save money. The Home Energy Check Program is the foundation for other residential demand-side management programs and offers walkthrough, online, phone-assisted, and Home Energy Rating audits for its residential customers. Participants in the program may receive a residential Energy Efficiency Kit that contains energy-saving measures that can be easily installed and utilized by the customer.

- **Residential Incentive**
  The Residential Incentive Program provides incentives to residential customers for energy efficiency improvements in both existing and new homes. This includes incentives for measures such as duct testing, duct repair, attic insulation, replacement of windows, high-efficiency heat pump replacing resistance heat, high-efficiency heat pump replacing a heat pump, and newly constructed Energy Star homes.

- **Multi-Family New Builder Construction**
  The Multi-Family New Builder Construction program provides incentives to builders and allows bundling of multi-family measures.

- **Neighborhood Energy Saver**
  The Neighborhood Energy Saver Program installs energy conservation measures, identified through an energy assessment, in the homes of customers in selected neighborhoods where at least 50 percent of households have incomes equal to or less than 200 percent of the poverty level established by the U.S. government.

- **Low-Income Weatherization Assistance Program**
  The Low-Income Weatherization Assistance Program works with the Florida Department of Economic Opportunity and local weatherization providers to deliver energy education, efficiency measures, and incentives to weatherize the homes of income-eligible families. DEF assists by providing energy education materials and financial incentives to weatherize the homes of low-income families.

- **Residential Load Management**
  The Residential Load Management Program is a voluntary program that uses direct control of customer equipment to reduce system demand during winter and summer peak capacity periods by controlling service to select customer appliances.

Commercial/Industrial Programs

- **Business Energy Check**
  The Business Energy Check Program is a commercial energy audit program that provides commercial customers with an analysis of their energy usage and information about energy-saving practices and cost-effective measures that they can implement at their facilities.

- **Smart $aver Business (f/k/a Better Business)**
  Smart $aver Business is an umbrella efficiency program that provides incentives to existing C/I and government customers for HVAC, ceiling and roof insulation upgrades, duct leakage and repair, demand-control ventilation, and cool roof coating.

- **Smart $aver Custom Incentive**
  The Smart $aver Custom Incentive Program is designed to encourage C/I customers to make capital investments for energy-efficiency measures which reduce peak demand and provide energy savings. This program provides incentives for projects which are cost-effective but not otherwise addressed through DEF's incentive programs.

- **Interruptible Service**
  Interruptible Service is a direct load control program that allows DEF to reduce system demand by interrupting electrical service during times of capacity shortage during peak or emergency conditions. In return, customers receive a monthly bill credit.

- **Curtailable Service**
  Curtailable Service is an indirect load control program that reduces system demand through customer contracts to curtail all or a portion of their electricity demand at times of capacity shortage during peak or emergency conditions. In contrast to the Interruptible Service Program, the customer is able to control whether their appliances are turned off during times of stress on the grid. In return, customers receive a monthly bill credit.

- **Standby Generation**
  The Standby Generation Program is a demand control program that allows DEF to reduce system demand by dispatching the customer's standby generator. This is a voluntary program available to C/I customers who have on-site generation capability and are willing to reduce demand on DEF's system when requested for system reliability purposes.

Other Programs

- **Technology Development**
  The Technology Development Program allows DEF to investigate technologies that support the development of new demand response and energy-efficiency programs. DEF is investigating hardware and software to manage residential loads, the value of long-duration customer-side energy storage systems, precision temperature measurement and analysis, solar resources, and data and patterns related to charging electric vehicles.

- **Qualifying Facilities Program**
  This program develops standard offer contracts, negotiates, enters into, amends and restructures nonfirm energy, and firm energy and capacity contracts entered into with qualifying cogeneration, small power producers, and renewable facilities.

C. Tampa Electric Company

Residential Programs

- **Residential Energy Audit Programs**
  Tampa Electric offers three Residential Energy Audits Programs, including walk-through free energy audits, customer assisted energy audits, and also computer assisted audits.

- **Residential Ceiling Insulation**
  The Residential Ceiling Insulation Program offers rebates to existing residential customers to install additional ceiling insulation in existing homes.

- **Residential Duct Repair**
  The Residential Duct Repair Program encourages residential customers to repair leaky duct work of central air conditioning systems in existing homes.

- **Energy Education, Awareness, and Agency Outreach**
  The Energy Education, Awareness, and Agency Outreach Program engages and educates groups of customers and students on energy efficiency in an organized setting. Also, participants receive an energy savings kit with energy saving devices and information.

- **ENERGY STAR for New Multi-Family Residences**
  The ENERGY STAR for Multi-Family Residences Program utilizes a rebate to encourage construction of new multi-family residences that meet the requirements to achieve the ENERGY STAR certified apartments and condominiums label.

- **ENERGY STAR for New Homes**
  The ENERGY STAR for New Homes Program incentivizes residential home builders to build homes that qualify for the ENERGY STAR award by achieving energy efficiency levels greater than current Florida building code baseline practices.

- **ENERGY STAR Thermostats**
  The ENERGY STAR Thermostats Program offers customer rebates for installing an ENERGY STAR certified smart thermostats to help reduce their energy consumption.

- **ENERGY STAR Pool Pumps**
  The ENERGY STAR Pool Pumps program offers customer rebates for installing high efficiency ENERGY STAR rated pool pumps to help reduce their energy consumption.

- **Residential Heating and Cooling**
  The Residential Heating and Cooling Program offers rebates to residential customers for installing high-efficiency heating and cooling equipment in existing homes.

- **Neighborhood Weatherization (Low-Income)**
  The Neighborhood Weatherization Program provides for the installation of energy efficient measures for qualified low-income customers.

- **Residential Price Responsive Load Management (Energy Planner)**
  The Residential Price Responsive Load Management (Energy Planner) Program reduces weather-sensitive loads through an innovative price responsive rate. The price responsive rate encourages residential customers to make behavioral or equipment usage changes by pre-programming HVAC, water heating, and pool pumps.

- **Residential Prime Time Plus (Residential Load Management)**
  The Residential Prime Time Plus (Residential Load Management) is a residential load management program designed to alter the Utility's system load curve by reducing summer and winter demand peaks. Customers participating in Prime Time Plus will receive monthly incentive credits on their electric bill. This program is an enhancement of a retired program with a similar name (Residential Prime Time).

Commercial Programs

- **Commercial/Industrial Energy Audit Programs**
  Tampa Electric offers two C/I Energy Audits Programs, one free, and the other a more comprehensive audit that a customer pays for.

- **Cogeneration**
  The Cogeneration Program incentivizes large industrial customers with waste heat or fuel resources to use their onsite energy to avoid fuel waste and install electric generating equipment. The large industrial customers may sell their surplus electric generation to TECO.

- **Commercial/Industrial Custom Energy Efficiency**
  The Commercial/Industrial Custom Energy Efficiency program encourages customers to make cost-effective improvements to existing facilities.

- **Demand Response**
  The Demand Response Program incentivizes C/I customers to reduce electricity demand at certain peak times.

- **Facility Energy Management System**
  The Facility Energy Management System Program encourages C/I customers to install a facility energy management system that provides real time information which enables the customer to reduce their energy consumption and demand and reduce TECO's peak demand.

- **Industrial Load Management (GSLM 2&3)**
  The Industrial Load Management Program incentivizes large industrial customers to allow TECO to interrupt part or all of their electrical service during periods of peak grid stress.

- **Lighting Conditioned Space**
  The Lighting Conditioned Space Program encourages C/I customers to invest in more efficient lighting technologies in existing conditioned areas of C/I facilities.

- **Lighting Non-Conditioned Space**
  The Lighting Non-Conditioned Space Program encourages C/I customers to invest in more efficient lighting technologies in existing non-conditioned areas of C/I facilities.

- **Lighting Occupancy Sensors**
  The Lighting Occupancy Sensors Program encourages C/I customers to install occupancy sensors to control C/I lighting systems.

- **Commercial Load Management (GSLM 1)**
  The Commercial Load Management Program incentivizes C/I customers to allow TECO to control weather-sensitive heating, cooling, and water heating systems to reduce the associated weather-sensitive peak demand.

- **Commercial Smart Thermostats**
  The Commercial Smart Thermostat Program is designed to encourage customers to install smart thermostats to help reduce their demand while reducing TECO's weather sensitive peak demand.

- **Standby Generator**
  The Standby Generator Program incentivizes C/I customers to use available emergency electrical generation capacity to reduce weather-sensitive peak demand on the grid.

- **Variable Frequency Drive for Compressors**
  The Variable Frequency Drive for Compressors Program offers customer rebates for installing variable frequency drives to their new or existing refrigerant or air compressor motors to help reduce their demand while reducing TECO's weather sensitive peak demand.

- **Commercial Water Heating**
  The Commercial Water Heating program encourages customers to install energy efficient water heating systems to help reduce their energy consumption and demand.

Other Programs

- **Conservation Research and Development**
  The Conservation Research and Development Program allows TECO to explore DSM measures that have insufficient data on cost-effectiveness and the impact on TECO's ratepayers.

- **Renewable Energy**
  The Renewable Energy (Sun to Go) Program delivers renewable energy options to TECO's customers through program administration, renewable electricity generation, evaluation of potential new renewable sources, and market research.

- **Integrated Renewable Energy System (Pilot)**
  The commercial/industrial Integrated Renewable Energy System Program is a five-year pilot program to study the capabilities and DSM opportunities of a fully integrated renewable energy system.

D. Florida Public Utilities Company

Residential Programs

- **Residential Energy Survey (Efficiency First)**
  In the Residential Energy Survey Program, FPUC offers in-home and online audits which provides the customer with specific whole-house energy efficiency recommendations, a list of blower-door test contractors who can check for duct leakage, and a conservation kit.

- **Residential Heating and Cooling Efficiency Upgrade**
  The Residential Heating and Cooling Upgrade Program incentivizes customers operating inefficient heat pumps and air conditioners to replace them with more efficient units.

- **Residential Small Appliance**
  The Residential Small Appliance program incentivizes customers to purchase ENERGY STAR-certified clothes washes.

- **Low-Income Energy Outreach (Efficiency for All)**
  The Efficiency for All program aims to enhance energy efficiency in low-income households and communities.

Commercial Programs

- **Commercial Heating and Cooling Efficiency Upgrade**
  The Commercial Heating and Cooling Upgrade Program provides rebates to small commercial customers (customers with a maximum of 5-ton units) if the customers install a high-efficiency central air conditioner or heat pump with a minimum 15 SEER.

- **Commercial Chiller Upgrade**

The Commercial Chiller Upgrade Program offers commercial customers who replace existing chillers with a more efficient system, an incentive of up to $100 per kW of additional savings above the minimum efficiency levels.

- **Commercial Exterior & Interior Lighting**
  The Commercial Exterior & Interior Lighting Program continues its Commercial Heating and Cooling Efficiency Upgrade program, which provides to small commercial customers aimed at curbing peak demand and energy consumption growth.

Other Programs

- **Conservation Demonstration and Development**
  The Conservation Demonstration and Development Program researches energy efficiency and conservation projects to identify, develop, demonstrate, and evaluate promising end-use energy efficient technologies across a wide variety of applications. In 2019, FPUC installed two battery storage systems to improve customer electric system reliability and resiliency, and has extended this study with completion expected in 2021.

- **LED Conversion Program**
  The LED Conversion program is a temporary two-year energy conservation project to facilitate the conversion of street lamps to LED technology.

Electric FEECA Municipal Utilities

A. JEA

Residential Programs

- **Residential Energy Audit**
  In the Residential Energy Audit Program, utility auditors examine homes, educate customers, and makes recommendations on low-cost or no-cost energy-saving practices and measures.

- **Neighborhood Efficiency (Low-Income)**
  The Neighborhood Efficiency Program offers education on the efficient use of energy and water as well as the direct installation of an array of energy and water efficiency measures at no cost to income qualified customers.

- **Residential Home Efficiency Upgrade Rebates**
  The Residential Efficiency Upgrade Program provides incentives to encourage the use of high efficiency HVAC and water heating. This program has not been approved by the Commission and is not part of JEA's FEECA goalsetting process. Nevertheless, JEA maintains that this program creates demand and energy savings.

- **Energy Efficient Products Rebates**
  The Energy Efficient Products Program provides incentives to encourage the use of high efficiency lighting and efficient appliances. This program has not been approved by the

Commission and is not part of JEA's FEECA goalsetting process. Nevertheless, JEA maintains that this program creates demand and energy savings.

Commercial Programs

- **Commercial Energy Audit**
  In the Commercial Energy Audit Program, JEA examines businesses, educates customers, and makes recommendations on low-cost or no-cost energy-saving practices.

- **Commercial Prescriptive Lighting Rebates**
  Commercial Prescriptive Lighting Program pays a financial incentive to customers to encourage the use of high efficiency lighting technology.

B. Orlando Utilities Commission

Residential Programs

- **Home Energy Survey**
  The home energy walk-through surveys were designed to provide residential customers with recommended energy efficiency measures and practices customers can implement, and to encourage participation in various OUC rebate programs. OUC provides participating customers specific tips on conservation and details on customer rebate programs.

- **Residential Existing Home Rebates**
  OUC's Residential Existing Home Rebates program offers rebates for six energy-efficiency measures: heat pump water heaters, heat pump air conditioners, ceiling insulation, duct repairs, ENERGY STAR® windows, and smart thermostats. Customers may apply for rebates through multiple submission methods with proof of purchase, and incentives are typically provided as bill credits or checks after the rebate application is processed.

- **Residential Efficiency Delivered**
  The Efficiency Delivered Program is income based and provides up to $2,500 of energy and water efficiency upgrades based on the needs of the residential customer's home. An OUC Conservation Specialist visits the home, performs a home survey, and recommends which home improvements have the most potential of lowering utility bills.

- **Residential New Home Rebates**
  The Residential New Home Rebates Program provides incentives for qualifying energy-efficient measures in newly constructed homes and encourages builders to exceed current building code requirements to maximize energy savings.

Commercial Programs

- **Energy Audit**
  The Energy Audit Program includes a free survey consisting of a physical walk-through inspection of the commercial facility performed by experienced energy experts. The

customer receives a written report detailing cost-effective recommendations to make the facility more energy and water efficient.

- **Commercial/Industrial Prescriptive Rebates Program**
  The Commercial/Industrial Prescriptive Rebates Program provides rebates to customers to adopt more energy efficient measures, such as ceiling insulation, heat pump water heaters, and smart thermostats.

- **Commercial/Industrial Lighting Rebates Program**
  The Commercial/Industrial Lighting Rebates program provides rebates through a broad suite of lighting measures for customers that are more efficient.

- **Commercial/Industrial Custom Incentive Rebates Program**
  The Commercial/Industrial Custom Incentive Rebate program gives customers incentives based on the reduction in peak demand their projects achievements.

Natural Gas FEECA Utility

A. Peoples Gas System

Residential Programs

- **Residential Customer Assisted Energy Audit**
  The Residential Customer Assisted Audit is designed to save energy by increasing residential customer awareness of natural gas use in personal residences. Recommendations provided to the customer include an estimated range of energy savings including insightful advice on how to manage their overall energy usage. This audit is only available in an online format.

- **Residential New Construction**
  The Residential New Construction Program is designed to save energy for new homeowners by offering incentives to builders and developers who construct new single family and multi-family homes with the installation of energy efficient natural gas appliances.

- **Residential Retrofit**
  The Residential Retrofit Program offers rebates to encourage customers to make cost-effective improvements in existing residences by replacing existing electric appliances with energy efficient natural gas appliances.

- **Residential Retention**
  The Residential Retention Program offers rebates to encourage new and current natural gas customers to make cost-effective improvements in existing residences by replacing existing natural gas appliances with energy efficient natural gas appliances.

Commercial/Industrial Programs

- **Commercial Walk-Through Energy Audit**
  This program is designed to reduce demand and energy consumption of C/I facilities by increasing customer awareness of the energy use in their facilities.

- **Commercial New Construction**
  The Commercial New Construction Program is designed to save energy for new commercial facility owners by offering incentives to commercial customers for the installation of natural gas appliances.

- **Commercial Retrofit**
  The Commercial Retrofit Program is designed to encourage commercial customers to make cost-effective improvements in existing facilities by replacing electric appliances with energy efficient natural gas appliances.

- **Commercial Retention**
  The Commercial Retention Program is designed to encourage current natural gas commercial customers to make cost-effective improvements in existing residences by replacing existing natural gas appliances with energy efficient natural gas appliances.

Other Programs

- **Conservation Research and Development (R&D)**
  The Conservation R&D Program is designed to encourage Peoples Gas System and other natural gas LDCs to pursue opportunities for individual and joint research, including testing of technologies to develop new energy conservation programs.