



**Portland General Electric Company**

121 SW Salmon Street • 1WTC0306 • Portland, Oregon 97204  
portlandgeneral.com

March 8, 2024

***Via Electronic Filing***

Public Utility Commission of Oregon  
Attention: Filing Center  
P.O. Box 1088  
Salem, OR 97308-1088

Re: UM 2274 - In the Matter of Portland General Electric Company, 2023 All-Source Request for Proposals, Request for Partial Waiver of Competitive Bidding Rules

Dear Filing Center:

Enclosed for filing in the above-captioned docket is Portland General Electric Company's Motion for Modified Protective Order, with proposed Modified Protective Order. *Expedited consideration is requested.*

Thank you for your assistance.

Sincerely,

A handwritten signature in blue ink, appearing to read "Erin Apperson", with a long horizontal flourish extending to the right.

Erin Apperson  
Managing Corporate Counsel

EA/mb

**BEFORE THE PUBLIC UTILITY COMMISSION  
OF OREGON  
UM 2274**

In the Matter of  
  
PORTLAND GENERAL ELECTRIC  
COMPANY,  
  
2023 All-Source Request for Proposals.

**PORTLAND GENERAL ELECTRIC  
COMPANY’S MOTION FOR A  
MODIFIED PROTECTIVE ORDER**  
  
*Expedited Consideration Requested*

**I. INTRODUCTION**

Pursuant to ORCP 36(C)(1), OAR 860-001-0080(3) and 860-001-0420, Portland General Electric Company (PGE) moves the Public Utility Commission of Oregon (Commission or OPUC) for an entry of a Modified Protective Order in this proceeding. Good cause exists to issue an order that supplements the General Protective Order in this docket. A Modified Protective Order would provide additional protection for highly confidential, sensitive, non-public information in this proceeding.

On January 12, 2024, the OPUC approved, subject to certain conditions, PGE’s 2023 All-Source Draft Request for Proposals (RFP). PGE anticipates receiving bids in response to this RFP. The bids and PGE’s evaluation will contain highly confidential, commercial sensitive information of bidders and PGE. Public disclosure of this information would violate PGE’s agreements with bidders, could damage and distort PGE’s negotiations process and hinder the Company’s efforts to acquire the most cost-effective resources for its customers.

**II. REQUEST FOR ADDITIONAL PROTECTION**

OAR 860-001-0080(3) contains six requirements for seeking a modified protective order. This motion addresses each of these requirements in the following subsections.

**A. The Parties and Exact Nature of the Information Involved (OAR 860-001-0080(3)(a)(A)).**

The following parties have intervened in UM 2274: the Alliance of Western Energy Consumers; Northwest Intermountain Power Producers Coalition; Swan Lake North Hydro, LLC and FFP Project 101, LLC; NewSun Energy, LLC; and Renewable Northwest. This proceeding will likely implicate highly confidential information including RFP bidder information, the analysis and creation of equally highly confidential modeling and results. Public disclosure of this commercially sensitive information would harm PGE and its customers by disrupting PGE's procurement efforts, putting PGE at a commercial disadvantage, and violating confidentiality agreements with third parties.

**B. Legal Basis for the Claim the Information is Protected under ORCP 36(C)(1) or the Public Records Law (OAR 860-001-0080(3)(a)(B)).**

ORCP 36(C)(1) provides protection against unrestricted discovery of "trade secrets or other confidential research, development, or commercial information." A "trade secret" is information, including cost data, that: (a) derives independent economic value, actual or potential, from not being generally known to the public or to other persons who can obtain economic value from its disclosure or use; and (b) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy.<sup>1</sup>

In addition, the Oregon Public Records Law exempts from disclosure public records that are "trade secrets" that:

[M]ay include, but are not limited to, any formula, plan, pattern, process, tool, mechanism, compound, procedure, production data, or compilation of information which is not patented, which is known only to certain individuals within an organization and which is used in a business it conducts, having actual or potential commercial value, and which gives its user an opportunity to obtain a business advantage over competitors who do not know or use it.<sup>2</sup>

---

<sup>1</sup> See Uniform Trade Secrets Act, ORS 646.461 to 646.475.

<sup>2</sup> ORS 192.345(2).

PGE requests a Modified Protective Order so it may designate commercially sensitive information as Highly Protected Information and minimize the risk of violating obligations to third parties under existing agreements and otherwise comply with applicable law.

**C. Exact Nature of the Relief Requested (OAR 860-001-0080(3)(a)(C)).**

The Company requests that the Commission enter the proposed Modified Protective Order that is included in this Motion as Appendix A. The Modified Protective Order will protect the Highly Protected Information by limiting access to the following: Staff and its counsel; PGE and its counsel; and representatives for other parties who seek to be qualified, on a case-by-case basis, if agreed to by PGE or ordered by the Administrative Law Judge. These limitations are similar to terms in Modified Protective Orders that have been issued in prior dockets.<sup>3</sup> The Commission and ALJ assisting the Commission would also have access to Highly Protected Information.

The proposed Modified Protective Order also requires that Highly Protected Information be maintained in a manner distinct from non-confidential information and from Protected Information. Like Protected Information, Highly Protected Information must be maintained in a separate, secured location, and Highly Protected Information may not be used or disclosed for any purpose other than participation in this proceeding. The proposed Modified Protective Order outlines treatment of Highly Protected Information consistent with those outlined in Order No. 23-132, which modified the Commission's standard form for General Protective Order.<sup>4</sup>

---

<sup>3</sup> See *In the Matter of Portland General Electric Company 2021 All-Source Request for Proposals*, Order No. 22-025 (Feb. 1, 2022); *In the Matter of Portland General Electric Company 2019 Integrated Resource Plan*, Order No. 20-123 (Apr. 10, 2020); *In the Matter of Portland General Electric Company Application for Waiver of the Competitive Bidding Guidelines*, Order No. 17-343 (Sept. 13, 2017).

<sup>4</sup> Docket No. UM 2054. Additionally, prior to approving the new general protective order template, the Chief ALJ outlined temporary measures for handling confidential information stating that for a temporary period Confidential Information will be received and distributed electronically, consistent with the Agency's COVID-19 response as reflected in Order No. 20-088.

The terms of the Modified Protective Order are narrowly tailored. The proposed Modified Protective Order will allow the transmission of such information to the Parties that sign the Modified Protective Order. By identifying specific individuals qualified to access Highly Protected Information, the parties to the Modified Protective Order will have certainty regarding the permissible disclosure of Highly Protected Information.

**D. Specific Reasons the Relief Requested is Necessary (OAR 860-001-0080(3)(a)(D)).**

The requested Modified Protective Order will protect against widespread disclosure of Highly Protected Information that is protectable under law while providing access to entities covered by Commission rules. The goal of PGE's proposed protections is to minimize the number of persons who have access to the Highly Protected Information and to ensure that it does not fall into the hands of market participants or get used in commercial negotiations. Accordingly, release of highly sensitive Highly Protected Information could significantly adversely impact PGE, and its customers. For this reason, it is important that the Commission issue a Modified Protective Order that limits the number of people who receive Highly Protected Information and ensures that persons not covered by the Commission rules will not have access to the Highly Protected Information.

The additional protection provided by the Modified Protective Order will allow the Parties access to the information in a manner that protects highly sensitive and Highly Protected Information. The requested Modified Protective Order will also help reduce the risk of an inadvertent disclosure of the highly sensitive Highly Protected Information. A General Protective Order is insufficient as it is general in nature and does not have adequate safeguards to protect Highly Protected Information.

**E. Detailed Description of the Intermediate Measures Explored by the Parties (OAR 860-001-0080(3)(a)(E)).**

The standard protective order will be insufficient to protect the highly sensitive Highly Protected information. Intermediate measures are not available—selective redaction would not be possible while also responding to data requests or providing workpapers, which may include highly confidential information contained in excel workbooks, among other information.

**F. Certification of Conferring with Parties (OAR 860-001-0080(3)(a)(F) and OAR 860-001-0420(6)(a)).**

On February 15, 2024, PGE gave notice to parties in the docket of its intention to seek a modified protective order in this docket and provided parties the draft motion and draft order. Staff and NIPPC stated that they do not object to this motion. NewSun objected to a number of aspects of the modified protective order, which PGE responded to. NewSun has stated that PGE’s responses have not alleviated NewSun’s concerns so NewSun continues to object.

The next step in this proceeding is scheduled for March 26, 2024, when benchmark scores will be filed with the Commission so that the next phase of bids can be opened and scored. Although PGE has been attempting to work with NewSun to resolve any objections, should NewSun seek to formally respond to PGE’s motion, PGE respectfully requests that the deadline for responses be shortened. PGE respectfully requests that the timelines outlined in OARs 860-001-0080(3)(d) and 860-001-0420(4) and (5) be waived and modified such that responses are due March 18, 2024, shortening the 15-day turnaround. Additionally, PGE offers to shorten reply filings from 7 days to 4 days with replies due March 22, 2024 in order to accommodate issuing a modified protective order by March 26, 2024.

Should a modified protective order not be issued by March 26, 2024, PGE intends seal its benchmark bid scores, provide them to the independent evaluator in this case, and file any non-highly confidential materials to avoid a delay in the scoring process. However, PGE would

prefer to have a modified protective order in place as contemplated by OAR 860-089-0350.

**G. Expedited Motion (OAR 860-001-0420(6)).**

PGE requests expedited consideration of this motion.

**III. CONCLUSION**

For the reasons set forth above, PGE respectfully requests that the Commission issue a Modified Protective Order in the format provided as Appendix A to this Motion for the purposes of this docket, UM 2274.

DATED this 8<sup>th</sup> day of March, 2024.

Respectfully submitted,



---

Erin E Apperson, OSB No. 175771  
Assistant General Counsel III  
Portland General Electric Company  
121 SW Salmon Street, 1WTC1301  
Portland, Oregon 97204  
Phone: 503-464-8544  
Email: [erin.apperson@pgn.com](mailto:erin.apperson@pgn.com)

## **Appendix A: Proposed Modified Protective Order**



**MODIFIED PROTECTIVE ORDER**  
UM 2274

**Scope of this Order:**

1. This order supplements General Protective Order No. 23-132 and governs the acquisition and use of “Highly Protected Information” produced or used by any party to docket UM 2274.

**Designation of Highly Protected Information**

2. Any party may designate as Highly Protected Information any information the party reasonably determines:
  - (a) Falls within the scope of ORCP 36(C)(1) (a trade secret or other confidential research, development, or commercial information) or the exemptions under Oregon Public Records law, ORS 192.345 and 192.355 (OPRL);
  - (b) Is not publicly available; and
  - (c) Is not adequately protected by the general protective order.
3. To designate information as Highly Protected Information, a party must place the following legend on the material:

HIGHLY PROTECTED INFORMATION  
SUBJECT TO MODIFIED PROTECTIVE ORDER NO. 24- \_\_\_\_

The party should make reasonable efforts to designate as Highly Protected Information only the portions of the information that satisfies paragraph 2 of this Modified Protective Order.

4. All Highly Protected Information in OPUC Docket UM 2274 will be provided either through: (a) the Commission’s discovery portal; or (b) a password-protected and encrypted electronic ZIP file distributed to Qualified Persons who have signed the appropriate protective order.

Each page of a document containing Highly Protected Information filed with the Commission or provided to Qualified Persons under this order, electronically or through a designated shared workspace, must be clearly marked as Highly Protected Information and maintained in a separate, secure folder. Any file or folder containing Highly Protected Information must be designated "Highly Protected." If the cells in a spreadsheet or other tabular document include information that has been designated as highly protected and that would be impractical or unduly burdensome to mark as required above, the party designating information as highly protected need not comply with this requirement but must identify that information in a way that reasonably provides the Commission and Qualified Persons with sufficient identification of the information to be protected.

5. Highly Protected Information disclosed by a designated party to a person qualified to access Highly Protected Information through informal discovery or by means of Commission's Huddle website will be marked "Highly Protected Information" and uploaded to a file folder designated "highly protected" in Huddle, if applicable.
6. A party may designate as Highly Protected Information any information previously provided by giving written notice to the Commission and other parties. Parties in possession of newly designated Highly Protected Information must make reasonable efforts that all copies of the material containing the information bear the above legend if requested by the designating party.
7. A designating party must make reasonable efforts to ensure that information designated as Highly Protected Information continues to warrant protection under this order. If designated information becomes publicly available or no longer falls within the scope of ORCP 36(C)(1), the designating party should make reasonable efforts to remove the protected designation and provide written notice to the Commission and other parties.

**Challenge to Designation of Information as Highly Protected:**

8. A party may informally challenge any designation of Highly Protected Information by notifying the designating party. Once notified, the designating party bears the burden of showing that the challenged information is covered by ORCP 36(C)(1) and that the "Highly Protected Information" designation is necessary.
9. If the dispute cannot be resolved informally, the challenging party may file a written objection with the ALJ. The objection need only identify the information in dispute and certify that reasonable efforts to achieve informal resolution have failed.
10. Within five business days of service of the objection, the designating party must either remove the protected designation or file a written response. A written response must identify the factual and legal basis of how the challenged information is protected under the Oregon Public Records Act, ORS 192.410 et seq, or the Uniform Trade Secrets Act, ORS 646.461(4). Broad allegations unsubstantiated by specific facts are not sufficient. If the designating party does not timely respond to the objection, the Commission will remove the protected designation from the challenged information.
11. The challenging party may file a written reply to any response within five business days of service of a response. The designating party may file a sur-reply within three business days of service of a reply. The ALJ will make all reasonable efforts to resolve the matter within 10 business days of service of the last filing.

**Access to Highly Protected Information:**

12. Only Qualified Persons may access Highly Protected Information designated by another party under this Modified Protective Order. Persons automatically bound and qualified to access Highly Protected Information are:
  - a. Commission employees; and
  - b. Assistant Attorneys General assigned to represent the Commission.
13. Persons qualified to access Highly Protected Information upon a signing the Consent to be Bound section of Appendix B are:
  - a. An employee or counsel of PGE;
  - b. Any other party or party representative, upon the mutual agreement of that party and PGE, and subject to any additional restrictions mutually agreed-upon; or
  - c. Any party or party representative that the ALJ determines should have access under paragraph 15.

A party must identify all these persons in section 2 of Appendix B when consenting to be bound by the order and must update this list throughout the proceeding to ensure it accurately identifies Qualified Persons.

**Objection to Access to Highly Protected Information:**

14. All persons qualified to have access to Highly Protected Information will have access to Highly Protected Information unless the designating party objects as provided in this paragraph. Within five business days of receiving a copy of Appendix B, the designating party must either provide the access to the requested information designated as Highly Protected Information or file an objection under paragraphs 13 and 14. As soon as the designating party becomes aware of reasons to restrict access to a Qualified Person, or objects to a person seeking qualification under Paragraph 13, the designating party must provide the person and his or her counsel notice stating the basis for the objection. The parties must promptly confer and attempt to resolve the dispute on an informal basis.
15. If the parties are unable to resolve the matter informally, the designating party must file a written objection with the ALJ. The requesting party may file a response to the motion within 5 business days of service of an objection. The ALJ will make all reasonable efforts to resolve the matter within 10 business days of the last filing. Pending the ALJ's decision, the specific Highly Protected Information may not be disclosed to the person subject to the objection.

**Use of Highly Protected Information:**

16. All Qualified Persons must take reasonable precautions to keep Highly Protected Information secure. Qualified Persons may reproduce Highly

ORDER NO.

Protected Information to the extent necessary to participate in these proceedings only. A Qualified Person may discuss Highly Protected Information obtained under this order only with other Qualified Persons who have obtained the same information under this order, and only in relation to this proceeding.

17. Without the written permission of the designating party, any person given access to Highly Protected Information under this order may not use or disclose Highly Protected Information for any purpose other than participating in these proceedings.
18. Nothing in this protective order precludes any party from independently seeking through discovery in any other administrative or judicial proceeding information or materials produced in this proceeding under this protective order.
19. Counsel of record may retain memoranda, pleadings, testimony, discovery, or other documents containing Highly Protected Information to the extent reasonably necessary to maintain a file of these proceedings or to comply with requirements imposed by another governmental agency or court order. Any other person retaining Highly Protected Information must destroy or return it to the designating party within 90 days after final resolution of these proceedings unless the designating party consents in writing to retention of the Highly Protected Information. This paragraph does not apply to the Commission or its staff.

**Duration of Protection:**

20. The Commission will preserve the designation of information as Highly Protected Information for a period of five years from the date of the final order in these proceedings, unless extended by the Commission at the request of the designating party. The Commission will notify the designating party at least two weeks prior to the release of Protected Information or Highly Protected Information.

**APPENDIX B: QUALIFICATION OF PERSONS TO RECEIVE  
HIGHLY PROTECTED INFORMATION  
DOCKET NO. UM 2274**

**I. Consent to Be Bound—Persons Qualified pursuant to Paragraph 13: Highly Protected Information**

I have read the Modified Protective Order and agree to be bound by the terms in the order. I understand that ORS 756.990(2) allows the Commission to impose monetary sanctions if a party subject to the jurisdiction of the Commission violates an order of the Commission. I certify that:

- (a) I am an employee of PGE or the Citizens' Utility Board of Oregon and have a legitimate and non-competitive need for the Highly Protected Information and not simply a general interest in the information; **or**
- (b) I am not an employee of PGE or the Citizens' Utility Board of Oregon, I have a legitimate and non-competitive need for the Highly Protected Information and not simply a general interest in the information, and I have come to a mutual agreement with PGE that I am qualified to receive Highly Protected Information; **or**
- (c) I am not an employee of PGE or the Citizens' Utility Board of Oregon, I have a legitimate and non-competitive need for the Highly Protected Information and not simply a general interest in the information, and the Administrative Law Judge has issued a ruling allowing my qualification to receive Highly Protected Information

I provide the following information.

By: Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Email Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Associated Party: \_\_\_\_\_

Job Title: \_\_\_\_\_

If not employee of party, description of practice and clients:

\_\_\_\_\_