



# Oregon

Tina Kotek, Governor

## Public Utility Commission

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October 17, 2023



BY EMAIL

Portland General Electric Company

pge.opuc.filings@pgn.com

RE: Advice No. 23-14

At the public meeting on October 17, 2023, the Commission adopted Staff's recommendation in this matter docketed as ADV 1536. The Staff Report and a receipted copy of the sheets in your advice filing are attached.

Nolan Moser

Chief Administrative Law Judge

Public Utility Commission of Oregon

(503) 378-3098

**PUBLIC UTILITY COMMISSION OF OREGON  
STAFF REPORT  
PUBLIC MEETING DATE: October 17, 2023**

**REGULAR**   X   **CONSENT**        **EFFECTIVE DATE**       October 18, 2023      

**DATE:** October 9, 2023

**TO:** Public Utility Commission

**FROM:** Joe Abraham

**THROUGH:** JP Batmale and Sarah Hall **SIGNED**

**SUBJECT:** PORTLAND GENERAL ELECTRIC:  
(Docket No. ADV 1536/Advice No. 23-14)  
Updates Schedules 8, 52, and 56 for transportation electrification  
measures.

**STAFF RECOMMENDATION:**

Approve Portland General Electric's Advice No. 23-14, modifying Schedules 8, 52, and 56, contingent on the Commission's acceptance of the Company's 2023-2025 Transportation Electrification Plan.

**DISCUSSION:**

Issue

Whether the Commission should approve Portland General Electric's Advice No. 23-14, modifying Schedules 8, 52, and 56 to align with the Company's 2023-2025 Transportation Electrification Plan.

Applicable Rule or Law

ORS 757.357 requires electric companies to file a Transportation Electrification (TE) Plan for acceptance by the Commission every three years.

OAR 860-087-0020 provides the requirements for an electric company TE Plan.

Under ORS 757.210, the Commission may approve tariff changes if they are deemed to be fair, just, and reasonable. Tariff revisions may be made by filing revised sheets with

the information required under the Commission's administrative rules, including OAR 860-022-0025.

According to ORS 757.220 and OAR 860-022-0015, filings that propose any change in rates, tolls, charges, rules, or regulations must be filed with the Commission at least 30 days before the effective date of the change.

House Bill (HB) 2165 directs each electric company with 25,000 or more Oregon retail electricity consumers to collect, through monthly meter charges, an amount from each retail electricity consumer served through its the distribution system.<sup>1</sup> The total amounts collected under this section must be set to one quarter of one percent of the total revenues collected by the electric company from all retail electricity consumers.<sup>2</sup>

Funds collected through the monthly meter charge must be expended by the electric company to support and integrate TE, be consistent with a budget approved by the Commission, and made on elements contained within the electric company's TE Plan accepted by the Commission pursuant to ORS 757.357.<sup>3</sup>

An electric company must account separately for all revenues and expenditures related to these funds and report the revenues and expenditures on a schedule and in the manner prescribed by the Commission.<sup>4</sup>

An electric company must make reasonable efforts to spend not less than one-half of the amount collected through the monthly meter charge to support TE in underserved communities.<sup>5</sup>

## Analysis

### ***Background***

In its Advice filing No. 23-14, Portland General Electric (PGE or Company) proposes updates to Schedules 8, 52, and 56 to allow implementation of the Company's proposed 2023-2025 TE Plan. Staff is recommending Commission acceptance of that Plan at the October 17, 2023, public meeting.

In this filing, PGE seeks to update tariffs for programs that the Commission has previously approved. In October 2020, the Commission adopted Staff's

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<sup>1</sup> Oregon Laws 2021, chapter 95, section 2(2), *compiled as a note after* ORS 757.357 (2021).

<sup>2</sup> *Id.*

<sup>3</sup> *Id.* at section 2(3).

<sup>4</sup> *Id.* at section 2(4).

<sup>5</sup> *Id.* at section 2(6).

recommendation to approve Advice No. 20-18, creating Schedule 8 and PGE's Residential Electric Vehicle (EV) Charging Pilot.<sup>6</sup> Two months later, the Commission adopted Staff's recommendation to approve Advice No. 20-19, creating Schedule 52 and the Company's Nonresidential EV Charging Pilot.<sup>7</sup> Finally, in May 2021 the Commission approved Advice No. 21-09, creating Schedule 56 and PGE's new Fleet Electrification Make-Ready Pilot.<sup>8</sup>

For context, PGE filed its first TE Plan on September 30, 2019. On September 8, 2022, the Commission adopted new Division 87 rules that prescribe the required elements of TE Plans.<sup>9</sup> On March 23, 2023, PGE filed a budget for Monthly Meter Charge expenditures in calendar year 2023,<sup>10</sup> which the Commission approved in Order No. 23-147 at the recommendation of Staff.<sup>11</sup> That Order approved PGE's Monthly Meter Charge budget and updates to the Company's Business and Multi-Family Make-Ready Solutions.

PGE received Commission approval to delay filing a 2023-2025 TE Plan until June 1, 2023.<sup>12</sup> PGE filed a draft version of the Plan on June 1, 2023, and a revised (final) TE Plan on August 25, 2023, for Commission acceptance.<sup>13</sup>

#### *Summary of Proposed Schedule Changes*

PGE's proposed updates to Schedule 8 reflect changes to the Company's Residential EV Charging Pilot, which provides a rebate for the installation of a home EV charger and rewards participation in a demand response program. Staff finds the Company's updates to Schedule 8 are consistent with the Residential EV Charging Pilot in the Company's TE Plan.

PGE's updates to Schedule 8 include removing the participation cap of 5,000 residential customers for the Company's Residential EV Charging Pilot. PGE also proposes to extend the Pilot enrollment deadline and Pilot duration by one year, to July 31, 2025 and December 31, 2025, respectively. The Company's updates reduce the one-time rebate for the purchase and installation of a qualified Level 2 EV charger from \$500 to \$300, but provide additional options for how the customer may receive the rebate. Finally, PGE clarifies how customers may opt-out of participating in managed charging

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<sup>6</sup> See Docket No. ADV 1151. <https://edocs.puc.state.or.us/efdocs/UBF/adv1151ubf113615.pdf>.

<sup>7</sup> See Docket No. ADV 1155. <https://edocs.puc.state.or.us/efdocs/UBF/adv1155ubf114425.pdf>.

<sup>8</sup> See Docket No. ADV 1261. <https://edocs.puc.state.or.us/efdocs/UBF/adv1261ubf14348.pdf>.

<sup>9</sup> See Docket No. AR 654, OPUC, Order No. 22-336, September 8, 2022, p 1.

<sup>10</sup> See Docket No. UM 2033, PGE, Oregon HB 2165 2023 Monthly Meter Charge Budget, March 2023.

<sup>11</sup> See Docket No. UM 2033, OPUC, Order No. 23-147.

<sup>12</sup> Order No. 23-034. <https://apps.puc.state.or.us/orders/2023ords/23-034.pdf>.

<sup>13</sup> See Docket No. UM 2033.

events. Staff finds the pilot and these changes were not a source of controversy among stakeholders in Docket No. UM 2033.

PGE's proposed updates to Schedule 52 and 56 incorporate the Company's Business and Multi-Family Make-ready solutions in its 2023-2025 TE Plan. PGE's updates to both Schedule 52 and 56 adjust incentive amounts and include new qualification requirements for multi-family sites participating in both Schedules. The Company also indicates in its TE Plan that it will allow existing Business EV Charging rebates in Schedule 52 to sunset, and Schedule 52 will move forward as a make-ready measure.

PGE's updates to Schedule 52 clarify that eligible customers can receive up to \$36,000 in rebates for installing Level 2 electric vehicle supply equipment (EVSE). The Company's updates to Schedule 52 also provide further detail on rebates for the purchase of a qualified Level 2 EVSE installed at multi-family sites. Specifically, for eligible Non-Fleet customers who participate in Schedule 56, or the Company's Commercial EV Make-Ready Pilot, the Company will issue the Schedule 52 Multi-Family Level 2 EVSE rebate in two parts. The first \$1,000 in rebates per charger will be issued at installation and the remaining \$1,300 will be given after five years if the property owner maintains rates within ten percent of Schedule 50.

The Company's updates to Schedule 56 include important details and distinctions for Fleet- and Non-Fleet customers. Eligible Non-Fleet customers must install a minimum of eight Level 2 EVSE ports at existing commercial, workplace, or multi-family sites, and are intended to be used by EVs owned or leased by residential customers. PGE's updates to Schedule 56 also clarify a revised incentive for Fleet customers and a new incentive for Non-Fleet customers. Staff finds PGE's updates to Schedule 52 and 56 are consistent with its Business and Multi-Family Make-ready solutions in its 2023-2025 TE Plan.

Finally, PGE's updates to both Schedule 52 and 56 define several new terms (e.g., "Non-Fleet customer") as well as clarify goals, customer eligibility, and enrollment periods. The Company also includes several updates to "special conditions" in Schedule 56 that clarify customer responsibilities and requirements.

#### *Stakeholder Engagement and Feedback*

Stakeholders provided significant input and comments in Docket No. UM 2033 on PGE's draft and final 2023-2025 TE Plans. Staff broadly summarizes these stakeholder comments and the Company's response in its memo.<sup>14</sup>

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<sup>14</sup> Staff memo for the October 17, 2023 Public Meeting.  
<https://edocs.puc.state.or.us/efdocs/HAU/um2033hau152528.pdf>.

Relative to the Schedules in this filing, stakeholders are concerned that incentivized EVSE at multi-family sites without utility ownership may leave residents vulnerable to higher and unregulated charging costs. In response to stakeholder concerns, PGE proposed in its final TE Plan a two-part Multi-Family Level 2 EVSE rebate in Schedule 52, with the second of the two-part rebate aligned with Schedule 50. On September 29, 2023, stakeholders concerned about these risks posted additional comments to Docket No. UM 2033 expressing support for PGE's modifications to its final TE plan in response to their earlier comments.<sup>15</sup>

### Conclusion

Staff finds PGE's modifications to Schedules 8, 52, and 56 reasonable and consistent with the Company's final 2023-2025 TE Plan. Staff recommends the Commission approve these modifications contingent on acceptance of the Company's TE Plan.

### **PROPOSED COMMISSION MOTION:**

Approve Portland General Electric's Advice No. 23-14, modifying Schedules 8, 52, and 56, contingent on the Commission's acceptance of the Company's 2023-2025 Transportation Electrification Plan.

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<sup>15</sup> See Docket No. UM 2033.

**PORTLAND GENERAL ELECTRIC COMPANY  
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**SCHEDULE 8  
RESIDENTIAL ELECTRIC VEHICLE CHARGING PILOT**

**PURPOSE**

This Residential Electric Vehicle Charging Pilot (Pilot) is applicable to Residential Customers who own or lease an Electric Vehicle (EV). The Pilot offers rebates for the purchase, installation, and/or integration of technologies that help manage and increase the flexibility of load associated with residential EV Charging. The Pilot is expected to operate from October 23, 2020 to December 31, 2025.

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**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

This Pilot is available to all eligible Residential Customers that elect to enroll and participate in the Pilot. Qualifying Customers will remain on Schedule 7 and be eligible for rebates and incentives described in this schedule.

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**DEFINITIONS**

Active Charging Session – A period of time during which an EV is plugged into an EVSE for the purposes of having electricity supplied to the vehicle through the EVSE.

Direct Load Control – A remotely controllable communication device that allows the utility to operate an appliance/equipment, often by cycling.

Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring alternating current electricity at 208 or 240 volts between the electrical infrastructure and the EV.

Event Notification – The Company may issue a notification of a Managed Charging Event to participating Customers. Notification methods may include email, text, auto-dialer phone call, or via mobile app notification.

Holidays – The following are holidays for purposes of the Pilot: New Year's Day (January 1), Martin Luther King Day (third Monday in January), Memorial Day (last Monday in May), Independence Day (July 4), Labor Day (first Monday in September), Thanksgiving Day (fourth Thursday in November), and Christmas Day (December 25). If a holiday falls on a Saturday, the preceding Friday will be designated the holiday. If a holiday falls on a Sunday, the following Monday will be designated the holiday.

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## SCHEDULE 8 (Continued)

### DEFINITIONS (Continued)

Income-Eligible Customer – A verified Residential Customer at 120% or below the state median income as defined by the US Department of Housing Urban Development, or the home qualifies for Section 8 housing.

Managed Charging Event – A period during which the utility will provide Direct Load Control by sending communication signals to a customer's vehicle or EVSE to adjust the rate or time of charge.

Participation Year – Twelve consecutive months from the anniversary date of a Qualifying Customer's enrollment in the Smart Charging Program.

Qualifying Customer – A Residential Customer in an existing single-family residence, including separately metered residences with assigned parking, with a Qualified L2 EVSE (excludes new construction or multifamily property).

Qualified Level 2 Electric Vehicle Supply Equipment (L2 EVSE) – A pre-approved L2 EVSE that meets the program's connectivity and controllability criteria.

Vehicle Telematics - Device installed in a vehicle that allows the sending, receiving, and storing of telemetry data.

### ELIGIBILITY

Eligible Customers must comply with the terms of the participation agreement and be a Qualifying Customer with either of the following.

- A. Qualified L2 EVSE and agree to the following minimum participation requirements:
- (1) the Qualified L2 EVSE is successfully connected to the Smart Charging Program for at least 50% of the participation year,
  - (2) the Qualified L2 EVSE participates in six Managed Charging Events, and
  - (3) the Qualified L2 EVSE completes 25 Active Charging Sessions.
- Or
- B. EV with Vehicle Telematics connected to an approved vehicle telematics provider and agreement to the following minimum participation requirements:
- (1) the connected EV participates in six Managed Charging Events,
  - (2) the connected EV completes 25 Active Charging Sessions, and
  - (3) the vehicle telematics provider's participation agreement.

### ENROLLMENT

Qualifying Customers can enroll in the Pilot at [PortlandGeneral.com](http://PortlandGeneral.com) through July 31, 2025. Unless PGE terminates this Pilot, customers will remain enrolled in the Smart Charging Program for the entire Pilot term. Qualifying Customers that reenroll in the Pilot are not eligible for a second payment for installation of a single Qualified L2 EVSE. A Qualifying Customer continuing service at a new residence is not considered a new enrollment.

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**SCHEDULE 8 (Continued)**

**INCENTIVES**

Qualifying Customers with more than one Qualifying L2 EVSE are eligible for the following incentives per each unique EV and EVSE pair during their participation in the Pilot:

<u>Incentive</u>	<u>Description</u>	<u>Amount</u>	
Standard EVSE Installation Rebate	A one-time rebate for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Upon approval of rebate qualification, Qualifying Customers will receive the rebate in a manner allowed by the Company, including by check, bill credit, ACH, electronic payment, or an invoice credit and or through a payment by the Company to an authorized designee.	Up to \$300; capped at price paid	(C)
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Income-Eligible EVSE Installation Rebate	A one-time rebate for Income-Eligible Qualifying Customers for the purchase and installation of a Qualified L2 EVSE. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Upon approval of rebate qualification, Qualifying Income-Eligible Customers will receive the rebate by check, bill credit, ACH, electronic payment, or an invoice credit and or through a payment by the Company to an authorized designee.	Up to \$1,000; capped at price paid	(C)
			(C)
Bring Your Own Charger Rebate	A one-time rebate for Qualifying Customers with an existing Qualified L2 EVSE at a Qualifying Home, who enroll in the Smart Charging Program.	Up to \$50	
Vehicle Telematics Participation Incentive	A one-time incentive for the integration with a Vehicle Telematics provider. PGE will automatically enroll Qualifying Customers into the Smart Charging Program. Qualifying Vehicle Telematics Customers will receive the incentive by check or bill credit from the Company upon approval of rebate qualification.	Up to \$50	(C)
Smart Charging Participation Incentive	For Qualifying Customers enrolled in the Smart Charging Program who participate in the minimum number of Managed Charging Events and Active Charging Sessions as described in this schedule. This incentive will be sent by check or as a bill credit within two billing cycles following the end of the interval period.	Up to \$50 per participation year	

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**SCHEDULE 8 (Continued)**

INCENTIVES (Continued)

Smart Charging Program Reconnection Incentive	A one-time promotional incentive to encourage Qualifying Customers who unenrolled (intentionally or unintentionally) from the Smart Charging Program to re-enroll. This offer is available once per participant and at the discretion of the Company.	Up to \$25	(M) — (M)
Standard Panel Upgrade Rebate	A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for a Standard EVSE Installation Rebate. Upon approval of rebate qualification, Qualifying Customers will receive the rebate in a manner allowed by the Company, including by check, bill credit, ACH, electronic payment, an invoice credit, or through a payment by the Company to an authorized designee. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.	Up to \$1,000; capped at price paid.	(C) — (C)
Income-Eligible Panel Upgrade Rebate	A one-time incentive to aid in the materials and electrical work necessary to upgrade participating customers' home electrical panels to 200A service in order to install a Qualified Level 2 EVSE. Customers must also be applying for an Income-Eligible EVSE Installation Rebate. Upon approval of rebate qualification, Qualifying Income-Eligible Customers will receive the rebate in a manner allowed by the Company, including by check, bill credit, ACH, electronic payment, an invoice credit, or through a payment by the Company to an authorized designee. This incentive is available until the designated Panel Upgrade Rebate funding is exhausted.	Up to \$5,000; capped at price paid.	(C) — (C)

**MANAGED CHARGING EVENTS**

Customers will be randomly assigned into one of three groups: A, B, or C. Group A will be the control group and will have no demand response tactics scheduled. Group B will participate in load shifting events where charging times will be shifted away from system peak periods. Group C will have their charging slowed or stopped during event periods. The Company will strive to maintain the equal number of participants and EVSE models in each group. Managed Charged Events may be called at any hour and any weekday excluding Holidays. During Managed Charging Events, the Customer will allow the Company to control their Qualified L2 EVSE or connected EV for the duration of the event. The Customer has the option not to participate by overriding via the manufacturer's or third party mobile application or website. (C)

**SCHEDULE 8 (Concluded)**

**SPECIAL CONDITIONS**

1. If a Qualifying Customer moves to a different residence, the customer may continue participation in the Smart Charing Program at the new residence if the Customer meets the eligibility requirements.
2. The Company will defer and seek recovery of all Pilot costs not otherwise included in rates.
3. The provisions of this schedule do not apply for any period that the Company interrupts the Qualifying Customer's load for a system emergency or any other time that a Qualifying Customer's service is interrupted by events outside the control of the Company. The provisions of this schedule will not affect the calculation or rate of the regular service associated with the Qualifying Customer's Schedule 7 charges and associated charges.

**TERM**

This pilot began October 23, 2020 and expires December 31, 2025.

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**SCHEDULE 52  
NONRESIDENTIAL ELECTRIC VEHICLE CHARGING REBATE PILOT**

**PURPOSE**

This Nonresidential Electric Vehicle (EV) Charging Rebate Pilot provides eligible Customers a rebate towards the purchase and installation of EV chargers or infrastructure, or both, that meets the defined eligibility criteria. The overarching goals of the pilot are to:

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- Accelerate EV adoption by ensuring adequate charging infrastructure is available to meet customers' charging needs;
- Reduce the cost and complexity of installing EV Supply Equipment that can preclude Customers from deploying charging infrastructure; and
- Create a network of demand-side resources to reduce the costs of serving EV loads by supporting efficient grid operations and future renewables integration.

**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

This pilot is applicable to Nonresidential Customers and property managers/owners of multifamily residence(s) until the cap approved in OPUC Order No. 19-385 and the authorized HB 2165 Monthly Meter Charge budget have been reached. Temporary customers such as construction sites which have not received their certificate of occupancy are excluded.

**DEFINITIONS**

Direct Current Fast Charger (DCFC) EVSE – An EVSE that transfers direct current to the EV.

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Electric Vehicle Supply Equipment (EVSE) – The device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring electricity between the electrical infrastructure and the EV.

Electric Vehicle Service Provider (EVSP) – The entity responsible for operating networked EVSEs.

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Level 2 (L2) EVSE – An EVSE that transfers alternating current to the EV at 208 or 240 volts.

Make-Ready Infrastructure – The infrastructure at the Site to deliver electricity from the Service Point to the EVSE(s), including any panels, stepdown transformers, conduit, wires, connectors, meters, and any other necessary hardware.

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### SCHEDULE 52 (Continued)

#### DEFINITIONS (Continued)

Operational – An EVSE installed on the premises that is able to transfer energy between the premises wiring and the EV, with all the applicable payment methods (e.g., credit card, phone app, subscription card), and transmit operational data (e.g., energy usage, session start/end times) to the EVSP.

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Port – The cable and coupler used to transfer energy from the EVSE to the EV. The number of Ports is defined by the number of EVs that can be charged simultaneously by a given EVSE. There are commonly one or two Ports per EVSE.

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Qualified EVSE –The list of qualified EVSE(s) that are available for rebate is determined by the Company and listed on PortlandGeneral.com.

#### ELIGIBILITY

Eligible Customers must own, lease, or demonstrate control over the site where the EVSE(s) are installed. The Customer will be responsible for procuring the Qualified EVSE(s) and are eligible for the pilot as follows:

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1. Qualified EVSEs are eligible for the following rebates, unless the EVSE cost is covered by PGE grant funding or installation of the EVSE's Make-Ready Infrastructure is provided by the Commercial Electric Vehicle Make Ready Pilot (Schedule 56):
  - a. Standard L2 EVSE Rebate.
  - b. Multi-Family (MF) L2 EVSE Rebate.
  - c. L2 EVSE Installation Rebate.
  - d. DCFC EVSE Rebate.
2. Qualified EVSEs installed by Fleet Customers using Make-Ready Infrastructure provided by the Commercial Electric Vehicle Make Ready Pilot (Schedule 56) are eligible for the following rebate:
  - a. Standard L2 EVSE Rebate; limit of \$8,000 per Customer.
3. Qualified EVSEs installed by Non-Fleet Customers using Make-Ready Infrastructure provided by the Commercial Electric Vehicle Make Ready Pilot (Schedule 56) are eligible for the following rebates:
  - a. Standard L2 EVSE Rebate; limit is the lesser of either 12 rebates or number of chargers supported by infrastructure built per Customer.
  - b. Multifamily L2 EVSE Rebate; limit of 12 rebates per Customer.

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#### ENROLLMENT

The customer enrollment period will be open until funds have been allocated. Eligible Customers may enroll at PortlandGeneral.com.

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**SCHEDULE 52 (Continued)**

**REBATES**

Rebate	Description	Amount
Standard L2 EVSE Rebate	A one-time rebate for the purchase of a Qualified L2 EVSE.	Up to \$1,000 per Port; capped at price paid. Customers are eligible for up to \$50,000 in Standard L2 EVSE Rebates per site, unless otherwise noted.
Multifamily L2 EVSE Rebate	A one-time rebate for the purchase of a Qualified L2 EVSE installed at a multifamily dwelling.	Up to \$2,300 per Port; capped at price paid. For customers who also participate in Schedule 56, the rebate will be issued in two parts – the first \$1,000 will be issued at installation and the remaining \$1,300 will be given after five years if the property owner maintains rates within 10% of Schedule 50. Customers are eligible for up to \$50,000 in Multifamily L2 EVSE Rebates per site, unless otherwise noted.
L2 Installation Rebate	A one-time rebate for installing a L2 EVSE. Eligible covered costs include the cost of installing electrical infrastructure to support the EVSE, including but not limited to trenching, conduit, switchgear, equipment pads, line extension costs, site restoration, and EVSE installation.	Up to 80% of eligible costs paid or \$6,000 per Port, whichever is less. Customers are eligible for up to \$36,000 in L2 Installation Rebates per site.
DCFC EVSE Rebate	A one-time rebate for the purchase and installation of a Qualified DCFC EVSE.	Up to \$350 per kW of maximum power output for the EVSE, up to a maximum of \$25,000 per Port.

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Rebates are available for reservation on a first come-first serve basis per the reservation process identified on PortlandGeneral.com. Eligible Customers must comply with the application instructions and agree to the pilot Terms and Conditions on PortlandGeneral.com to receive the rebate.

**SCHEDULE 52 (Concluded)**

REBATES (Continued)

Participating Customers will receive the one-time payment by check no later than 90 days from the Company receiving a complete application. All EVSE(s) installed under the pilot are subject to verification by PGE.

Participating Customers must meet the pilot requirements for 10 years. In the event the Participating Customer does not meet this commitment, the Participating Customer commits to reimburse PGE the pro-rata value of the rebate, calculated over the 10-year term.

**SPECIAL CONDITIONS**

1. Participation in this pilot is not mandatory to install EV charging equipment.
2. The Customer's charges for Electricity Service under any of the Company's Standard Service or Direct Access Service schedules are not changed or affected in any way by service under this schedule and are due and payable as specified in those schedules.
3. The Company will defer and seek recovery of all pilot costs not otherwise included in rates.
4. Participating Customers will maintain the EVSE(s) on a Standard Service Schedule. Customers on Direct Access Service must have the participating chargers separately metered and on a Standard Service Schedule.
5. Participating Customers will ensure the EVSE(s) are Qualified and Operational. If a property with EVSE(s) installed under the pilot changes ownership, lesseeship or management, participation in the pilot can be assumed by a new owner, lessee or manager that is willing to meet the pilot requirements.
6. Participating Customers will authorize the EVSP to provide operational data (e.g. energy usage, time of day usage and number of unique drivers) to PGE. Participating Customers agree to allow Company and its agents and representatives to use data gathered as part of the pilot in regulatory reporting, ordinary business use, industry forums, case studies or other similar activities, in accordance with applicable laws and regulations and to participate in Company-led research such as surveys.
7. Participating Customers may terminate participation in the pilot after providing PGE no less than 30 days' notice and are subject to the noncompliance reimbursement referenced in this Tariff. At the end of the 10-year term, Participating Customers have the option to continue to participate in the pilot if it is still active, but there is no obligation to do so.

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**SCHEDULE 56**  
**COMMERCIAL ELECTRIC VEHICLE MAKE-READY PILOT**

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**PURPOSE**

This Commercial Electric Vehicle (EV) Make-Ready Pilot provides eligible Fleet and Non-Fleet Customers with incentives to install Electric Vehicle charging infrastructure to support fleet and personal electric vehicles at fleet, commercial, workplace, and multifamily sites. The overarching goals of the pilot for both Fleet and Non-Fleet Customers are to:

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- Evaluate the methods and incentives used to support both Fleet and Non-Fleet Customers' electric transportation transition;
- Create a network of demand side resources to reduce the costs of serving EV loads by supporting efficient grid operation and future renewables integration; and
- Generate empirical data that can be used to inform existing utility analyses, support customers transitioning to electric vehicles, and develop future products and programs.

The primary goals of the pilot for Fleet Customers are to:

- Enable and support the electrification of commercial, public (municipal, county, state, federal), school, non-profit and transit fleets by reducing customer cost and complexity associated with transitioning to electric fuel;
- Better understand the Fleet Customer and barriers and opportunities in the fleet electrification market; and
- Identify areas for utility process improvement with respect to fleet electrification.

The primary goals of the pilot for Non-Fleet Customers are to:

- Support the equitable electric transportation transition at commercial, workplace, and multifamily locations by reducing costs and complexity for property owners;
- Gain insight and information to better understand the barriers for Non-Fleet Customers and users of public and semi-public charging infrastructure; and
- Identify areas of utility process improvement for non-fleet commercial electrification and make ready infrastructure deployment.

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**AVAILABLE**

In all territory served by PGE.

**APPLICABLE**

This pilot is applicable to nonresidential customers within PGE's service area.

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**SCHEDULE 56 (Continued)**

**DEFINITIONS**

Activation Date – date that PGE first determines an EVSE is Operational.

Electric Vehicle Supply Equipment (EVSE) – the device, including the cable(s), coupler(s), and embedded software, installed for the purpose of transferring electricity between the electrical infrastructure at the Site and the EV.

Electric Vehicle Service Provider (EVSP) – provider of connectivity across a network of EVSE(s).

Fleet Customer – A nonresidential customer installing EVSEs for the purpose of the use or operation of their fleet of vehicles.

Line Extension – has the same meaning as set forth in Rule I.

Line Extension Allowance – has the same meaning as set forth in Rule I and is calculated per Schedule 300.

Line Extension Cost – has the same meaning as set forth in Rule I.

Make-Ready Cost – the cost to design and construct and/or upgrade the Make-Ready Infrastructure and Line Extension, excluding those accounted for in the Line Extension Cost.

Make-Ready Infrastructure – the infrastructure at the Site to deliver electricity from the Service Point to the EVSE(s), including any panels, stepdown transformers, conduit, wires, connectors, meters, and any other necessary hardware.

Make-Ready Port – Make-Ready Infrastructure constructed in a way that supports the future installation of EVSEs with the corresponding number of ports. For example, a site constructed with Make-Ready Infrastructure for five dual-port EVSEs would have ten (10) Make-Ready Ports.

Non-Fleet Customer – A nonresidential customer installing EVSEs at commercial, workplace, multifamily, or other sites for use by EVs owned or leased by Residential Customers.

Operational – an EVSE installed at the Site is able to transfer energy between the Site wiring and the EV, with any applicable payment methods (e.g., credit card, phone app, subscription card), and transmitting operational data (e.g. energy usage, session start/end times) to the Qualified EVSP.

Qualified EVSE – list of qualified EVSE(s), determined by PGE.

Qualified Level 2 EVSE – An EVSE on PGE’s qualified list that provides Alternating Current (AC) electricity to the EV at 208 or 240 volts.

Qualified EVSP – list of qualified EVSP(s), determined by PGE.

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**SCHEDULE 56 (Continued)**

DEFINITIONS (Continued)

Qualified Service Schedule – list of qualified service schedules, including Schedules 32, 38, 83, 85, and 89. The list of qualified service schedules may be expanded to include new rates in the future.

Service Point – has the same meaning as set forth in Rule B.

Site – has the same meaning as set forth in Rule B.

Site Owner – entity holding title to the Site.

**ELIGIBILITY**

Eligible Fleet Customers are nonresidential customers that use or operate fleets (including, but not limited to, commercial, non-profit, public, school or transit fleets) within PGE's service territory installing a minimum of 70 kW of EV charging. Eligible Fleet Customers must own or lease the Site.

Eligible Non-Fleet Customers are nonresidential customers that are installing a minimum of 8 Qualified Level 2 EVSE Ports at existing commercial, workplace, or multi-family properties and are intended to be used by EVs owned or leased by Residential Customers. Eligible Non-Fleet Customers must own, lease, or manage the Site, and not have any active construction occurring at the site at the time of installation.

**ENROLLMENT**

The customer enrollment period for eligible Fleet Customers will be open through December 2025, or until available funds for the pilot have been fully reserved. Eligible customers may apply at PortlandGeneral.com and enroll by signing a participation agreement.

The enrollment period for eligible Non-Fleet Customers will be open through December 2025, or until available funds for the pilot have been fully reserved. Eligible customers may apply at PortlandGeneral.com and enroll by signing a participation agreement.

**INCENTIVE**

Fleet Customers will pay for the Make-Ready Cost, less a custom incentive. The custom incentive will be calculated as the lower of the following amounts:

- Estimated Year 5 EVSE annual energy use x Line Extension Allowance x 7.5; or
- The participant's Make-Ready Costs; or
- \$400,000.

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**SCHEDULE 56 (Continued)**

INCENTIVE (Continued)

Non-Fleet Customers will pay for Make-Ready Cost and Line Extension costs less an incentive not to exceed \$17,000 per Make Ready Port. Non-Fleet Customers receiving the incentive cannot also receive a Line Extension Allowance for the same project. The incentive will be calculated as the lower of the following amounts:

- \$17,000 per Make-Ready Port;
- The participant's Make-Ready Costs; or
- \$204,000.

**SPECIAL CONDITIONS**

1. Participation in this pilot is not mandatory to install EV charging equipment.
2. Any chargers installed as a part of this pilot must receive service on one of PGE's Standard Service Schedules. The customer's charges for electricity service under any of PGE's Standard Service or Direct Access Service schedules are not changed or affected in any way by participating in this schedule and are due and payable as specified in those schedules.
3. For both Fleet and Non-Fleet Customers, PGE will locate, design, install, own, operate and maintain the Make-Ready Infrastructure. For Fleet Customers, EVSE(s) will be separately metered from any other load at the Site. EVSE(s) may be separately metered at Non-Fleet Customer sites.
4. The Site Owner may be required to grant an easement to PGE to maintain PGE-owned facilities.
5. If the final design of the Make-Ready Infrastructure is estimated to cost in excess of \$15,000, PGE may require the customer to submit a deposit prior to proceeding to final design and enrollment. The deposit will be the amount of the estimated final design costs and will be applied to the Make-Ready Costs or refunded upon the participating customer's enrollment in the Pilot. If the customer does not enroll, the deposit will not be refunded.
6. If the final design of the Make-Ready Infrastructure has been completed and the Customer does not enroll in the Pilot, the Customer may be required to reimburse PGE for final design costs and any other associated expenses that PGE incurs due to the cancellation of the project.
7. If the participating Fleet Customer's custom incentive is in excess of \$250,000, the participating Fleet Customer agrees that PGE may verify its creditworthiness at any time and seek financial security to ensure the participating Fleet Customer is able to meet its obligations as set forth in the participation agreement.

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**SCHEDULE 56 (Concluded)**

SPECIAL CONDITIONS (Continued)

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| 8. The participating Fleet Customer is responsible for the procurement and installation of at least one new Qualified EVSE(s) within 6 months of PGE's completion of the Make-Ready Infrastructure. The participating Non-Fleet Customer is responsible for the procurement and installation of all Qualified Level 2 EVSE(s) within 12 months of PGE's completion of the Make-Ready Infrastructure.  | (C)<br>(C)<br> <br>(C) |
| 9. The participating customer must maintain the EVSE(s) on a Qualified Service Schedule for 10 years following the Activation Date of the first Qualified EVSE installed at the Site.   | (T)                    |
| 10. The participating customer will ensure the EVSE(s) remain Qualified EVSE(s) and Operational for 10 years following the Activation Date of the first Qualified EVSE installed at the Site.   | (T)                    |
| 11. The participating Fleet Customer will adhere to an energy usage plan that sets forth the minimum amount of energy the participating customer commits to using over the 10 years following the Activation Date of the first Qualified EVSE installed at the Site, but in no event will the minimum energy usage amount be less than the Estimated Year 5 energy use x 6.   | (C)                    |
| 12. The participating customer will authorize and require the Qualified EVSP to provide operational data (e.g. charging session data, energy interval data) to PGE. The participating customer agrees to allow PGE and its agents and representatives to use data gathered as part of the pilot in regulatory reporting, ordinary business use, industry forums, case studies or other similar activities, in accordance with applicable laws and regulations and to participate in PGE-led research such as surveys. | (T)                    |
| 13. If the Site changes ownership or lesseeship, participation in the pilot may be assumed by the new owner or lessee if it is willing to meet the pilot requirements. The participating Fleet Customer will be responsible for any pro-rata reimbursement for estimated minimum usage deficiencies between the participating customer's original energy usage plan and the new customer's energy usage plan.   | (T)<br>(C)             |
| 14. In the event the participating customer breaches or terminates the participation agreement, the participating customer will reimburse PGE the pro-rata value of the custom incentive, calculated over the 10-year term.   | (T)                    |
|   | (M)                    |