

**BEFORE THE PUBLIC UTILITY COMMISSION  
OF OREGON**

UM 2377

In the Matter of

PUBLIC UTILITY COMMISSION OF  
OREGON,

Investigation into Marginal Cost Study  
Treatment for Large Customers and Further  
Modifications to Portland General Electric  
Company's Rule C and Rule I.

MODIFIED  
PROTECTIVE  
ORDER

DISPOSITION: MOTION FOR MODIFIED PROTECTIVE ORDER GRANTED AS  
MODIFIED.

On May 9, 2025, Portland General Electric Company (PGE) filed a motion for modified protective order (MPO) for use in this proceeding.

The MPO is drafted to cover information that 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. Under the terms of the MPO, access to highly protected information will be limited to Commission Staff and its counsel, the Oregon Citizens' Utility Board, and representatives for other parties who seek to be qualified, on a case-by-case basis, if agreed to by the PGE or ordered by the Administrative Law Judge.

Under our rules, I am to provide expedited review of any motion for an MPO and may issue an MPO to facilitate the filing of protected information and discovery.<sup>1</sup> In providing expedited review and issuing an MPO, it does not preclude parties from filing responses to the motion for an MPO.<sup>2</sup> If a response is filed to the motion for an MPO, I am to conduct a *de novo* review of the terms of the MPO and issue a ruling explaining my determination.<sup>3</sup> No information that was produced under the MPO in the interim will be released publicly without going through the process for objections to designations specified in the order itself.

---

<sup>1</sup> OAR 860-001-0080(3)(c).

<sup>2</sup> OAR 860-001-0080(3)(d).

<sup>3</sup> OAR 860-001-0080(3)(e).

I find PGE's filing includes the elements required by OAR 860-001-0080(3). However, I further modify the proposed MPO to clarify how PGE employees are qualified under the MPO. Under the proposed MPO, PGE employees are automatically qualified to access the company's own information. In order to ensure those individuals are identified, I amend the MPO to clarify that PGE must file a list of employees qualified under Section 13(c).

Further, Paragraph 14 provides that:

A party must identify all these persons in 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

Appendix B as filed does not provide for identification of multiple individuals. Additionally, because each individual must sign and submit Appendix B in order to be qualified, it is unclear what purpose this list would serve. Therefore, I delete this paragraph.

Finally, Paragraph 15 states:

Within five business days of receiving a copy of Appendix B, the designating party must either provide access to the requested information designated as Highly Protected Information or file an objection to the person seeking qualification under Paragraph 14.

Given the use of Huddle, the MPO has been amended to clarify that if the designating party does not file an objection to the person seeking qualification within five business days of receiving a copy of Appendix B, the person seeking qualification will then be provided access.

I grant the motion for modified protective order, attached as Appendix A, on an expedited basis pursuant to OAR 860-001-0080(3)(c) to facilitate the timely exchange of material that may be exempt from disclosure under Oregon's Public Records Laws and which appear to be necessary for the resolution of this docket. As previously stated, this expedited action does not foreclose a party from seeking *de novo* review of this MPO under OAR 860-001-0080(3)(d)&(e). Although the motion is granted, any party may file a response to the motion by 3:00 p.m. on May 20, 2025. If any responses are filed, PGE may file a reply by 3:00 p.m. on May 27, 2025.

**ORDER**

IT IS ORDERED that the modified protective order, attached as Appendix A, is adopted.

Made, entered, and effective on May 14, 2025.

*Katharine Mapes*

---

**Katharine Mapes**  
Administrative Law Judge



**MODIFIED PROTECTIVE ORDER**  
**UM 2377**

**Scope of this Order:**

1. This Modified Protective 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 2377. This Modified Protective Order also addresses the acquisition and use of High Protected Information that was produced in docket UE 430 and that may be transferred into, and used in, this docket UM 2377 subject to its being treated as Highly Protected Information under the terms of this Modified Protective Order. Finally, this Modified Protective Order also governs transmittal of confidential information between the OPUC and the Department of Justice.

**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 that is produced in docket UM 2377, a party must place the following legend on the material:

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

The parties acknowledge that Highly Protected Information designated as such in docket UE 430 will be transferred and used in this docket UM 2377. The parties agree that such information that is appropriately marked as follows will also be treated as Highly Protected Information consistent with the terms and conditions of this Modified Protective Order:

HIGHLY PROTECTED INFORMATION  
SUBJECT TO MODIFIED PROTECTIVE ORDER NO. 24-014

4. All Highly Protected Information disclosed by a designating party to a qualified person will be provided either through: (a) the Commission’s discovery portal; (b) a password protected and encrypted electronic ZIP file distributed to Qualified Persons who have signed the appropriate protective order; or (c) in a manner mutually agreed upon by the requestor and PGE.

5. 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. Each page of a document containing Highly Protected Information filed with the Commission or provided to Qualified Persons under this order, 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" or "Highly Confidential." If the cells in a spreadsheet or other native 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.
6. 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 via the Commission's naming conventions and uploaded to a file folder designated "highly protected" in Huddle, if applicable.
7. 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.
8. 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:**

9. 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.
10. 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.

11. 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.
12. The challenging party may file a written reply to any response within five business days of service of an objection. The designating party may file a sur-reply within three business days of service of a response. 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:**

13. 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; and
  - (c) PGE employees or counsel if the Highly Protected information is provided by PGE. PGE must identify any such employees for purposes of being provided access within the docket and must update this list throughout the proceeding to ensure it accurately identifies the employees who should have access.
14. 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 or the Citizens' Utility Board of Oregon; or
  - (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 16.
15. 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 file an objection to the person seeking qualification under Paragraph 14 or access will be provided to the designated information. 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 14, 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.

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

16. 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:**

17. All Qualified Persons must take reasonable precautions to keep Highly Protected Information secure. Qualified Persons may reproduce Highly 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.
18. 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.
19. 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.
20. 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:**

21. The Commission will preserve the designation of information as Highly Protected Information or Highly Confidential 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.
22. **Transmittal of Confidential Information between Commission employees and assistant attorneys general.**

Information designated as confidential under the General Protective Order may be transmitted between Commission employees and assistant attorneys general through encrypted electronic mail sent through a TLS secure connector using Transport Layer Security (TLS), which establishes a secure, encrypted channel between two parties. Notwithstanding Paragraph 4 of the General Protective Order, encrypted information sent by electronic mail sent through a TLS connector need not be password protected.



**APPENDIX B: QUALIFICATION OF PERSONS TO RECEIVE  
HIGHLY PROTECTED INFORMATION  
DOCKET NO. UM 2377**

**I. Consent to Be Bound—Persons Qualified pursuant to Paragraph 14: 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, 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, 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: \_\_\_\_\_

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

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

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

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

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

\_\_\_\_\_