

**SCHEDULE 14**  
**RESIDENTIAL BATTERY ENERGY STORAGE PILOT**

**PURPOSE**

This residential battery energy storage pilot will evaluate the ability of residential batteries to deliver services in support of PGE's electrical system. The battery energy storage pilot offers incentives to allow the Company to manage the charging and discharging of customer batteries with the option for a customer override. The pilot is expected to be conducted from August 1, 2020 through December 31, 2026.

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**AVAILABLE**

In all territory served by the Company.

**APPLICABLE**

This program is applicable to Residential (Schedule 7) Customers that own a qualifying battery<sup>1</sup> and elect to enroll and participate in the pilot. Customers will remain on Schedule 7 and will be eligible for the incentives described in this schedule. The pilot is optional and limited to a total of 9,480 kWh enrolled energy storage.

**ELIGIBILITY**

Customers must submit an interconnection application which must be approved by PGE, purchase or already own a qualifying battery, proceed with installation, and apply for acceptance into the pilot.

**ENROLLMENT**

Customers will be allowed to enroll in this pilot until the pilot reaches its maximum enrollment of 9,480 kWh of enrolled energy storage. Unless this pilot is otherwise terminated, participating Customers will be enrolled for the entire pilot term.

**INCENTIVES**

Basic Offering

Available to customers who have a qualifying battery and allow PGE to manage the charging and discharging of such equipment for the benefit of PGE's electric system. A customer shall receive \$1.70 per kWh that is dispatched by PGE. A customer shall inform PGE when they enroll in the program the maximum kWh PGE may dispatch from their device during an event. A customer may change their maximum nomination by contacting PGE in writing, allowing a minimum of three business days for the change to take effect.

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1. A list of approved qualifying battery storage systems for this pilot is available on [PortlandGeneral.com](http://PortlandGeneral.com)

**SCHEDULE 14 (Continued)**

**INCENTIVES (Continued)**

**Test Bed Rebate**

1. Available only to customers who are participating in PGE's SALMON initiative or the Reeds Crossing Solarize campaign, both as defined on PGE's website regarding the "Smart Battery Pilot"; who purchase a new qualifying battery, and allow PGE to manage the charging and discharging of such equipment for the benefit of PGE's electric system.
2. PGE shall provide a rebate for the new purchase and installation of a qualifying battery storage system. The new purchase rebate is limited to 960 kWh of nominated energy storage. The rebate amount shall be \$405 per kWh of energy storage nominated to PGE to be directly dispatchable by PGE.
3. The rebate level will be reserved for a customer for nine months from when the pilot application is approved to when the battery storage system is operable by PGE and enrolled in this pilot. If the battery storage system does not begin communications with PGE within nine months of pilot application approval, the customer's reserved rebate will be released. When communications are established the customer may receive the incentive, if still available.
4. A customer receiving a Test Bed Rebate is not eligible to also receive the Basic Offering.
5. The Test Bed Rebate is based on the maximum kWh a customer elects to make available to PGE during a peak event dispatch (referred to as the "nomination.") The nomination may not exceed 80% of the customer's gross energy storage capacity.
6. A customer may change their maximum nomination by contacting PGE in writing, allowing a minimum of three business days for the change to take effect. However, reducing the nomination may result in customer partial repayment of the rebate.
7. A developer or builder is eligible to receive the rebate if purchase and installation of a qualified battery storage system occurred prior to occupancy by a residential customer and enroll the battery in the Pilot.

**Income Qualified Rebate**

1. Available to customers receiving incentives from the Energy Trust of Oregon's Solar Within Reach program that purchase a new qualifying battery storage system and allow PGE to operate such equipment for the benefit of PGE's electric system.
2. In addition to the Basic Offering, PGE shall provide a rebate of \$5,000 for the new purchase and installation of a qualified battery storage system. The rebate is limited to the first 25 customers.

**SCHEDULE 14 (Continued)**

**SPECIAL CONDITIONS**

1. Participants are responsible for any equipment, installation, and associated costs of the battery storage system, including any upgrades identified in the PGE interconnection process and ensuring all installation complies with all applicable building code requirements.
2. The participant will retain ownership of the battery storage system and is responsible for all maintenance, replacement, and disposal costs.
3. In the event of non-payment of electricity bill charges or disconnection for non-payment, for Electricity Service rendered, PGE will discontinue credit payments and battery storage system operation until the participant is current on all past-due balances. The participant will be removed from the pilot if basic service electricity charges are not current after two consecutive months.
4. The participant is required to maintain reliable communications with the battery storage system. If communications to the battery storage system are not restored in a timely manner PGE may discontinue paying the monthly incentive until communications are reestablished, or PGE may remove the customer from the pilot.
5. A participant that only receives the Basic Offering and did not receive a Test Bed or Income Qualified rebate may disenroll from the pilot at any time, upon which PGE will cease payments.
6. If the participant has received a rebate, the customer may be required to repay the unamortized portion of the rebate in the event that the customer voluntarily disenrolls prior to the end of the pilot, reduces their dispatch nomination, or if the battery storage system is removed from the pilot due to lapses in communications. This is defined as the proportion of the months left until the end of the pilot divided by the months the customer has participated in the pilot.
7. Participants must agree to the contractual terms laid out in the Residential Battery Energy Storage Pilot agreement.
8. PGE will never discharge the battery storage system below 20% of capacity or below the manufacturer's warranty recommendation, whichever is higher.
9. The participant may override PGE's control up to ten times per calendar year for a period of 24 hours per time.

**SCHEDULE 14 (Concluded)**

**SPECIAL CONDITIONS (Continued)**

10. During times of severe weather, defined as any time PGE has placed emergency operators on Standby status, PGE will allow the battery storage system to fully charge.
11. In the event of a power outage, the customer will have full use of the battery storage system until grid service is restored. Power outages are not considered a customer override.
12. Customers enrolled in Solar Payment Option may not participate in this Pilot offering.
13. A customer may not participate in both Peak Time Rebates as outlined in Schedule 7 and this Pilot offering.

**TERM**

This pilot began on August 1, 2020 and ends on December 31, 2026.

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