**Overview and Prequalification Questionnaire**

**Advanced Technology Pilot Program**

# Overview

## Objective of the PJM Advanced Technology Pilot Program

PJM is well positioned as a credible organization with a reputation for providing valuable insight, analysis and collaboration that fosters innovation and evolution within the industry. PJM’s Advanced Technology Pilot Program (ATPP) and pilot projects (Pilots) represent our continuous effort to open PJM’s markets, operations and transmission planning to a new and diverse set of technologies that complement existing resources. Pilots are meant to enable advanced and emerging technologies to explore all opportunities to play a role in PJM operations, markets and planning. The ATPP will provide PJM and our members with experience to learn the impacts of emerging technologies, enabling us to better manage and influence our future. Any potential technology advancement from the ATPP will provide PJM an opportunity to further enhance market efficiency, system reliability and operational control.

## Types of Pilots

Different types of Pilots may be pursued through the ATPP. These include, but are not limited to:

1. **Desktop Studies**
2. Information sharing between entities to discuss detailed considerations for planning, operations and markets. These types of Pilots may include market or power system modeling but do not involve the installation of physical equipment and do not impact physical system conditions.
3. **Technology Deployment**
4. Installation of physical equipment that would provide the opportunity for data collection and simulation but would not materially impact physical system operations. These types of Pilots may include, for example, testing equipment in a laboratory or another controlled environment.
5. Installation of physical equipment that would be monitored and studied in physical system operations. These types of Pilots would include physical equipment that can be monitored by PJM and materially affect conditions on the grid.
6. **New Market Concepts**
7. First-of-kind implementation of a project that utilizes new market rules. These types of Pilots will participate and earn revenue in the market under existing rules, and they will collaborate with PJM and stakeholders to use information gained through the Pilot to enhance the quality of its wholesale electricity markets.

## Roles and Responsibilities of PJM

The ATPP, and each individual Pilot, will be conducted in a collaborative manner among PJM staff, members and/or non-members. With no financial interest in any project, PJM is open to all project proposals and will fairly evaluate all project candidates and questionnaire submissions.

PJM believes each Pilot should progress over the course of four phases: Initiation, Planning, Implementation and Completion. PJM’s responsibilities corresponding to each of these phases are outlined in the following table.

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| Phase | Description | Potential PJM Action Items |
| **Initiation** | Discussion phase, including review of the questionnaire | * Facilitate project review and information exchange * Provide education on relevant PJM business function * Decide whether to progress to next phase * Initiate NDA, as needed |
| **Planning** | Scoping phase, including detailing the Pilot’s objectives, timeline, outcomes, etc. | * Provide project scoping input * Provide additional data/analysis needed  by Pilot applicant * Identify key PJM resources * Develop legal agreements, to be signed by  all relevant parties |
| **Implementation** | Action phase, including the deployment of technology or collection of data and collaboration on impacts | * Support testing/monitoring/data collection * Provide results feedback, including analysis, data, suggested next steps, etc. |
| **Completion** | Analysis and results phase, including documentation and next steps (or not) | * Support dissemination of results, including to the PJM membership (as appropriate) * Develop Innovation Hall displays (as appropriate) |

## Prerequisites

ATPP candidates are required to sign PJM’s Non-Disclosure Agreement (NDA) if there is any exchange of proprietary company information. Without the NDA, only the information that can be accessed on the public domain (i.e., www.pjm.com) will be shared with a project candidate.

PJM membership is NOT required to participate in a Pilot. PJM membership is required if an external party intends to participate in any of the PJM markets and pursue financial benefits from the PJM market(s) or to view and use any data/information that PJM treats as confidential to members only.

# Pilot Prequalification Questionnaire

This questionnaire is used to collect initial information from an organization wishing to engage in a Pilot with PJM. The information gathered in this form will be used by PJM staff to initially screen the project proposal. We ask that you respond fully to each question and provide any supporting documentation you feel may be necessary for evaluation.

After receiving your response to this questionnaire, PJM staff will conduct an evaluation and provide you with our findings and feedback within a reasonable period of time.

## Identification:

* Company’s name, address and website:

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* Brief introduction of your company (history, core business, etc.):

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## General Questions:

* Where did you hear about the PJM Advanced Technology Pilot Program?

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* What is the main purpose of the proposed Pilot?

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* Is your company (or your parent company) currently a PJM member? If not, do you intend to become a PJM member before or after the Pilot? Do you currently provide technical solution(s) to PJM or to PJM member companies or organizations? If neither fits your case, please explain.

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* The three core business functions of PJM are reliable grid operations, fair and efficient wholesale electricity markets, and regional transmission planning. To which of these three areas is this project most closely aligned?

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* What is your expected start and end date for this project or other timeline considerations?

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## Technical Questions (if applicable):

* Please provide a brief introduction to the technology that will be demonstrated in your Pilot and explain its innovativeness.

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* Has the technology used in this potential Pilot been commercialized anywhere? It would be helpful if there is a case study to share, but it is not required.

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* If your Pilot involves energy/capacity resources, please provide a brief introduction of the resource type and the geographical location (including utility territory) of the resources.

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* Please identify technical support, training or data resources that you may need from PJM to proceed with this project.

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## Contact Information:

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| --- | --- | --- | --- | --- |
| **PJM Contact Information** | |  | **Participant Contact** **Information** | |
| **Name:** | *ATTN: Advanced Technology Pilot Program* |  | **Name:** |  |
| **Address:** | *2750 Monroe Boulevard*  *Audubon, PA 19403* |  | **Address:** |  |
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