

## **Appendix A – Bidder Response Form**

# **Section 83E**

## **Request for Proposal**

### **Application Form**

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#### Applicant Information

Applicant: *Rocky Hill Road Energy LLC*

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## Instructions for Distribution Project Bid Packages

As described in Section 1.7.3, bidders may submit multiple Distribution Project proposals as part of a bid package that could include common aspects for each bid (e.g. bidder experience). Even though there may be common bid aspects, each project proposal shall be considered separately.

For these Distribution Project packages, bidders should submit one copy of Appendix A: Bidder Response Package that provides information for the common aspects of the bid package. These common aspects are described below, both as to the RFP and the Appendix A. Bidders should only provide multiple versions of specific Appendix A subsections, as required, for each individual project.

For example, if a bidder has one Transmission Project (Project A) and three distribution projects (Projects B, C, D), the Bidder should submit one complete Bidder Response Form for Project A, one Bidder Response Form with all Common Distribution responses for Project B, C, and D, and individual Bidder Response subsections for each Project B, C, and D.

| <b>Stage 1 - Eligibility, Threshold, and Other Minimum Requirements</b> | <b>Distribution Project versus Transmission Project</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2.2.1.1 Eligible Project Size                                           | Minimum bid size greater than 1MW; Bidders may submit multiple projects (i.e. a portfolio of projects) which must clearly define each project size; Bidders submitting multiple Distribution Projects can make any of their Distribution Projects contingent upon other proposals within this solicitation. Bidders may not submit proposals that are positively contingent on circumstances outside the acceptance of a proposal in this solicitation (e.g., proposals accepted in solicitations in other states). Bids cannot be contingent on prior approved long-term contracts. |
| 2.2.1.2 Eligible Commercial Operation Date and Other Requirements       | SMART projects are not eligible to participate in this solicitation; projects must enroll in the interconnecting Distribution Company's Wholesale Distribution Tariff; projects must enroll in the Operational Parameters for Energy Storage Systems Tariff; COD requirement same as Transmission                                                                                                                                                                                                                                                                                    |
| 2.2.1.3 Pricing Requirements Conforming Forms of Pricing                | See requirements for Environmental Attribute LTCs                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

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| 2.2.1.4 Bidder Disclosure of Affiliations and Affiliate Relationships         | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.1.5 Contract Term                                                         | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.1.6 Capacity Requirements                                                 | Distribution Projects must include a commitment to take the steps outlined in the ISO-NE tariff to screen for and, if applicable, establish equivalent Capacity Network Resource Capability.                                                                                                                       |
| 2.1.1.7 Delivery Requirements                                                 | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.1.8 Interconnection Requirements                                          | Distribution Project proposals must include a commitment to take the necessary steps to qualify for equivalent Capacity Network Resource Capability, as defined by ISO-NE.                                                                                                                                         |
|                                                                               | I.3.9 approval needed or describe why approval is not necessary. All technical reports or system impact studies should approximate the ISO-NE interconnection process, including but not limited to clear documentation of study technical and cost assumptions, reasoning, and justification of such assumptions. |
|                                                                               | Same requirements as Transmission projects as applicable                                                                                                                                                                                                                                                           |
| 2.2.1.9 Proposal Completeness: Bidder Response Forms, Form LTCs, and Form MOU | Bidders of Distribution Projects will be provided a standard form long-term contract that will not be negotiable.                                                                                                                                                                                                  |
| 2.2.1.10 Bid Fees                                                             | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.2.1 Facilitate Financing of Energy Storage Systems                        | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.2.2 Site Control and Other Agreements                                     | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |
| 2.2.2.3 Technical and Logistical Viability                                    | Same requirements as Transmission projects                                                                                                                                                                                                                                                                         |

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| 2.2.2.4 Ability to Finance the Proposed Project                                                                                                 | Same requirements as Transmission projects                                                                 |
| 2.2.2.5 Bidder Experience                                                                                                                       | Same requirements as Transmission projects                                                                 |
| 2.2.2.6 Providing Enhanced Electricity Reliability within the Commonwealth                                                                      | Same requirements as Transmission projects                                                                 |
| 2.2.2.7 Abandonment Costs                                                                                                                       | Same requirements as Transmission projects                                                                 |
| 2.2.2.8 Adequately Demonstrate Project Viability in a Commercially Reasonable Timeframe                                                         | Same requirements as Transmission projects                                                                 |
| 2.2.2.9 Contribution to Employment; Economic Development Benefits                                                                               | Same requirements as Transmission projects                                                                 |
| 2.2.2.10 Utilizing an Appropriate Tracking System to Account and Enable for GWSA Goals                                                          | Same requirements as Transmission projects                                                                 |
| 2.2.2.11 Discussion of Safety Plan and Environmental Assessment                                                                                 | Same requirements as Transmission projects                                                                 |
| 2.2.2.12 Benefits to Environmental Justice Populations and Low-Income Ratepayers in the Commonwealth, and Transitioning Fossil Fuel Communities | Same requirements as Transmission projects                                                                 |
| 2.2.2.13 Diversity, Equity and Inclusion                                                                                                        | Same requirements as Transmission projects                                                                 |
| 2.2.3 Security Requirements                                                                                                                     | Same requirements as Transmission projects                                                                 |
| 2.2.4 Unreasonable Balance Sheet Impacts                                                                                                        | Same requirements as Transmission projects                                                                 |
| 2.2.5 Shifting of Risks in Long-Term Contracts                                                                                                  | Distribution Projects will not be provided the opportunity to mark-up or negotiate the Long-Term Contracts |

## **Section A-1: Certification, Project, and Pricing Data**

The Certification, Project and Pricing Data (“CPPD”) document is a Microsoft Excel workbook that is provided on the website at [www.MACleanEnergy.com](http://www.MACleanEnergy.com). Each Transmission Project and Distribution Project submitted by bidder must include a unique, accompanying CPPD document.

## Section A-2: Executive Summary of the Proposal

The bidder is required to provide an executive summary of the project proposal that includes a complete description of the proposed Energy Storage System bid, the proposed contract term and pricing schedule, interconnection plan, the overall project schedule and other factors the bidder deems to be important. A table summarizing proposal(s) including details such as storage project location, interconnection location(s), capacity (MW), duration (hours), projected annual average CPECs or Environmental Attributes (if applicable), energy storage technology to be deployed, commercial operation date, pricing (e.g., \$/CPEC, \$/environmental attribute, \$/MWh), etc. is encouraged. Bidders submitting multiple Transmission Projects or Distribution Projects must provide an executive summary for each project.

*Rocky Hill Road Energy LLC (the "Bidder") proposes the Rocky Hill Road Energy Storage project: a new, standalone, distribution-connected 4.999 MW / 19.996 MWh (AC) lithium iron phosphate battery energy storage system at 325 Rocky Hill Road, Hadley, Massachusetts (Hampshire County), interconnecting to the Eversource (WMECO) 13.8 kV distribution system on feeder 17K5. The project is bid as a Distribution Project under Section 83E Round 2 and offers 100% of its Clean Peak Energy Certificates (CPECs) to the Distribution Companies under the Form Long-Term Contract for a 20-year term beginning at a Guaranteed Commercial Operation Date of January 1, 2030.*

|                               |                                                                                                                                                                      |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Project</b>                | <i>Rocky Hill Road Energy Storage</i>                                                                                                                                |
| <b>Bidder</b>                 | <i>Rocky Hill Road Energy LLC (Massachusetts LLC; wholly owned by Oak Square Partners, LLC)</i>                                                                      |
| <b>Location</b>               | <i>325 Rocky Hill Road, Hadley, MA 01035 (Hampshire County; Assessor's Parcel 11B-24)</i>                                                                            |
| <b>Interconnection</b>        | <i>Eversource (WMECO) 13.8 kV feeder 17K5, Amherst 17K substation; PCC at pole #91; Eversource case ESMAEX-05817</i>                                                 |
| <b>Capacity / duration</b>    | <i>4.999 MW AC / 19.996 MWh AC usable (4.0 hours)</i>                                                                                                                |
| <b>Technology</b>             | <i>Lithium iron phosphate (LFP): 4 x [REDACTED] 5.1 MWh containers plus supplemental DC capacity (approximately 21.6 MWh DC installed); 2 x [REDACTED] inverters</i> |
| <b>Product offered</b>        | <i>100% of Clean Peak Energy Certificates (CPECs); Distribution Project; Form Long-Term Contract (Environmental Attributes)</i>                                      |
| <b>Projected annual CPECs</b> | <i>approximately 17,379 in contract year 1 (CPPD Part VII)</i>                                                                                                       |
| <b>Guaranteed COD / term</b>  | <i>January 1, 2030; 20 years (2030–2049)</i>                                                                                                                         |
| <b>Pricing</b>                | <i>[REDACTED – CONFIDENTIAL]</i>                                                                                                                                     |

*Site control is in place through an executed Option to Lease Agreement (May 1, 2026) with a 20-year ground lease term plus two 5-year renewals, covering the full contract term. The project's interconnection application, including the PE-stamped one-line and site plan ([REDACTED], Rev. 2, August 6, 2026), was submitted to Eversource on October 7, 2026; the project's Eversource interconnection case is ESMAEX-05817. The system design uses four [REDACTED] 5.1 MWh liquid-cooled LFP containers (UL 9540 / UL 9540A listed, NFPA 855 compliant) plus supplemental DC capacity, for approximately 21.6 MWh DC installed so that 19.996 MWh AC is delivered at the point of interconnection, and two [REDACTED] inverters (UL 1741-SB, IEEE 1547-2018), each limited to 2,499.5 kW.*

*The facility will register as a Qualified Energy Storage System under the Clean Peak Energy Standard and will discharge at full rated capacity for four hours on every non-holiday weekday during the applicable Seasonal Peak Period, charging overnight during the DOER-designated high-renewable (wind) charging window. The Bidder's CPEC price is [REDACTED – CONFIDENTIAL], and expected deliveries are approximately 17,379 CPECs in the first contract year. Beyond CPECs, the project will provide capacity to ISO-NE, participate as an asset under Eversource's wholesale distribution tariff and in any active demand response programs (to the extent they exist), and reduce peak loading on the Hadley-area distribution system.*

*Oak Square Partners ("OSP") will develop the Rocky Hill Road Energy project. OSP is a Massachusetts-based renewable energy developer founded in 2016 whose principals have developed 22 operating solar projects totaling 27.7 MW DC in Massachusetts and Rhode Island (about [REDACTED] of project value) across the MA SMART, RI REGrowth, net metering and community solar programs, with a 5 MW / 10 MWh battery storage project in development in Rhode Island. OSP's principals have taken every one of those projects from siting through interconnection, permitting, financing, construction and operation, and have transacted with [REDACTED] and [REDACTED]. The long-term contract requested here is the revenue certainty needed to finance the project at commercially reasonable terms; absent it, the project's Clean Peak revenue is exposed to a forecast decline in CPEC prices in the mid-2030s that does not support project financing.*

## **Section A-3: Operational Parameters and Operational Schedule**

Please answer the following questions in Section A-3 for each Transmission Project and Distribution Project being bid. If developing the project in phases, please break out information for each phase.

### **3.1 Energy Storage System Operations Project Summary – Please provide the following:**

- i. Identify if New or Existing Facility, or an upgrade to Existing Facility:  
*New facility.*
- ii. Technology Type (e.g., mechanical, chemical, thermal): *Chemical (electrochemical battery).*
- iii. Technology Description (e.g., battery chemistry, thermal storage medium): *Lithium iron phosphate (LFP) lithium-ion, liquid-cooled containerized battery with bi-directional PCS and medium-voltage step-up transformers.*
- iv. Point of Interconnection Deliverability Restrictions (if any): *None known. Import and export limited to 4.999 MW at the Point of Common Coupling by the Eversource DER Gateway and customer power plant controller (PPC); final limits per the Eversource impact study.*
- v. Nameplate MW AC (at 100% project completion): *4.999 MW AC (two [REDACTED] units factory-limited to 2,499.5 kW each).*
- vi. Net Contract MW AC (at 100% project completion): *4.999 MW AC.*

- vii. Charge rate (MW): 4.999 MW (maximum); 3.875 MW average over the planned 6-hour overnight charge window.
- viii. Discharge rate (MW): 4.999 MW.
- ix. Storage Energy (MWh): 19.996 MWh AC delivered at the point of interconnection (approximately 21.6 MWh DC installed: 4 x 5.1 MWh containers plus supplemental DC capacity sized to the 92.7% discharging efficiency; final DC configuration to be set at detailed design).
- x. Discharge Duration at Full-Rated Capacity (hours): 4.0 hours.
- xi. Charging Efficiency (%): 92.7% (preliminary, AC-to-AC at the PCC including transformer and auxiliary losses).
- xii. Discharging Efficiency (%): 92.7% (preliminary).
- xiii. Round Trip Efficiency (%): 86% (preliminary; final per equipment submittals and [REDACTED] performance guarantee).
- xiv. Other Characteristics of your system, including, if applicable, but not limited to: Depth of Discharge (%), Full Duty Cycle, etc.: *Depth of discharge up to 100% of usable energy; one full-duty cycle per weekday under the proposed CPEC delivery profile; [REDACTED] rates the [REDACTED] for up to 300% daily energy throughput without accelerated degradation; state of charge is managed by the [REDACTED] Master BMS and OSP's energy management system.*
- xv. Max/ Min cycles per year, season, and per day: *Maximum: 2 full cycles per day / ~550 per year (technical); Planned: 1 cycle per non-holiday weekday, approximately 250 cycles per year, with additional partial cycles for ISO-NE capacity performance and distribution-company dispatch as applicable. Minimum: none.*

3.2 Describe the operation of the proposed Energy Storage System: (i.e. run hour limitations, ramp rates, spinning reserves, regulation up, regulation down). Please provide proposed operational management terms that memorialize the operational commitments of the facility.

*The system is a dispatchable, four-quadrant battery resource with no run-hour limitations other than available state of charge. It can move from zero to full charge or discharge in under one second (PCS limited) and is operated at a ramp rate of 4.999 MW/min or slower to comply with Eversource interconnection and DER Gateway requirements. The facility is capable of providing frequency regulation (up/down), reserves, reactive power/voltage support (0.8 leading to 0.8 lagging at rated apparent power), and ISO-NE capacity, in addition to its primary function of shifting energy into the Clean Peak Seasonal Peak Periods. Under the proposed contract, the Bidder will prioritize discharge during Seasonal Peak Periods and the Monthly System Peak hour; ancillary market participation will be scheduled around, and subordinate to, the CPEC delivery schedule in CPPD Part V.*

3.3 Describe the location of the Energy Storage System, in terms of:

i. The anticipated interconnection point

*Eversource (WMECO) 13.8/7.97 kV, 4-wire distribution feeder 17K5 at existing utility pole #91 on Rocky Hill Road, Hadley, MA. The Point of Common Coupling is at a new utility pole (#91-6) with utility-owned GOAB, recloser and revenue meter; the customer-owned interconnection facilities consist of a 15 kV gang-operated load-break switch, pole-mounted recloser with [REDACTED] relay, [REDACTED] RTAC (Eversource DER Gateway, DSEM 19.065), underground riser, and two 2,500 kVA 13.8 kV/660 V pad-mounted transformers. See the attached [REDACTED] one-line and site plan (Eversource project ESMAEX-05817).*

ii. The value of the relative proximity of the system to large loads and/or any clean energy generation facility, including any decreased risk of curtailment and/or deferred investment for the generation facility

*The site is within the Hadley/Amherst load pocket on the WMECO system, in proximity to the University of Massachusetts Amherst (one of the largest single loads in western Massachusetts), the Hampshire College and Amherst College campuses, and the Route 9 commercial corridor. Western Massachusetts hosts a significant and growing fleet of distributed solar; a distribution-connected battery charging overnight and discharging during evening peaks reduces reverse-flow and voltage issues on the local system during high solar/low load periods and reduces the need for curtailment of distributed generation. By delivering stored energy at the distribution level during peak hours, the project reduces losses on the transmission and sub-transmission system serving the Hadley area.*

iii. How the location of the Energy Storage System may impact the operation of fossil-fuel based generators (e.g. reduced ramping, peaker displacement, etc.)

*By delivering 4.999 MW of stored energy during the Seasonal Peak Periods and the Monthly System Peak hour, the project directly displaces output from the marginal fossil generators that set price and emissions during New England peak hours (gas and oil-fired peaking units). Charging overnight during the DOER-designated wind window shifts load to hours with the highest renewable share and lowest marginal emissions. The battery's sub-second response and ramping capability also reduces the ramping burden on fossil units during the evening solar ramp-down.*

iv. If the project location is in proximity to other Energy Storage Systems

*The Bidder is not aware of any other utility-scale energy storage system interconnected to feeder 17K5 or within the immediate vicinity of the site. The project is sized to the physical constraints of the site, and is not expected to compete with other storage for distribution capacity.*

- v. How the location was strategically located to maximize grid benefits and align with transmission and distribution planning priorities, such as deferring or eliminating the need for costly transmission and distribution upgrades

*The site was selected because it (i) fronts an existing 13.8 kV Eversource feeder, allowing a short, overhead tap with no new utility line extension; (ii) is an existing graveled parking lot on an industrially zoned parcel, so no tree clearing, grading of natural land or alteration of wetland resource areas is required for the 6,000 square-foot leased area (mapped wetlands on the western portion of the parcel lie outside the footprint; see Section A-7); (iii) lies within a growing load area of the WMECO system where peak-period injections provide distribution relief; and (iv) is within a designated energy community for purposes of the federal ITC. The 4.999 MW / 4-hour configuration was selected to match the Clean Peak Standard's 4-hour Seasonal Peak Periods and the RFP's mid-duration definition while remaining below 5 MW.*

3.4 Describe the proposed technology and equipment manufacturer by name and model (include inverter characteristics if applicable).

*Battery: four (4) [REDACTED] ("[REDACTED]") 5.1 MWh liquid-cooled LFP containers (20 ft ISO, 48 t each; six strings per container, each with a Battery Management Module; 314 Ah LFP cells in 2P52S modules; DC voltage range 1,160–1,475 V; max 2.5 MW DC per container). The Bidder will install supplemental DC capacity of the same [REDACTED] platform (approximately 1.2 MWh, for approximately 21.6 MWh DC in total) so that the facility delivers its full 19.996 MWh AC at the point of interconnection after conversion losses; the drawing set shows the four-container base layout and the final DC configuration will be set at detailed design. [REDACTED] is a subsidiary of [REDACTED].*

*Power conversion: two (2) [REDACTED] bi-directional battery inverters (nominal 2,933 kW at 1,200 Vdc; DC input 962–1,500 V; 660 V AC output; 98.7% max efficiency; UL 62109-1, UL 1741 SA/SB, IEEE 1547-2018/1547.1-2020; four-quadrant, grid-support functions), each factory-limited to 2,499.5 kW for a system total of 4.999 MW.*

*Balance of plant: two 2,500 kVA 13.8 kV/660 V pad-mounted step-up transformers with neutral grounding reactors, medium-voltage auxiliary transformer, auxiliary panelboards (AUX-N, AUX-BESS), customer power plant controller, [REDACTED] protective relay on a pole-mounted recloser, [REDACTED] RTAC per Eversource DSEM 19.065, 15 kV load-break switch, and utility-owned PCC equipment. Equipment pad layout is preliminary pending submittals. See the [REDACTED] drawing set PV-1.0 (Rev. 2).*

3.5 Describe the viability and operational reliability of the proposed technology and track record of the manufacturer. Provide examples of similar applications of the same size and scope and evidence of meeting operational delivery plans in other energy storage projects.

*Both principal suppliers are tier-one, bankable manufacturers with extensive North American fleets. [REDACTED] has over 15 years of grid-scale lithium-ion field experience and has deployed [REDACTED] containers across North America, Europe and Asia at sites up to GWh scale; the [REDACTED] platform is UL 1973, UL 9540 and UL 9540A certified, is designed to NFPA 855 and NFPA 69 and carries a [REDACTED] AC-side performance and availability*

*guarantee. [REDACTED] has more than 12 GW of hybrid and storage inverter capacity installed worldwide and the [REDACTED] line is widely deployed in ISO-NE, including in Massachusetts SMART and Clean Peak projects. LFP chemistry was selected for its thermal stability and long cycle life relative to NMC chemistries.*

3.6 Please provide an Environmental Attribute delivery plan and a charge/discharge profile for the proposed project, including supporting documentation. This documentation may be either an hourly storage use schedule or planned charge and discharge schedule. In your plan, please account for forecasted weather data and market assumptions over the life of the proposed contract. The energy production/delivery profile must provide the expected Generation to be delivered into the ISO-NE market settlement system by the Energy Storage System to allow the Evaluation Team to determine the reasonableness of your projections. Such information should be consistent with the charge/discharge profile provided above and also considering any and all constraints to physical delivery into ISO-NE. Describe the operation of the Energy Storage System, including whether the proposed Energy Storage System will be classified as a Binary Storage Facility or Continuous Storage Facility, the designation of the ISO-NE Markets that the Energy Storage System would participate in, and the plan to operate in multiple ISO-NE Markets.

*See CPPD Part V (Phase 1) for the full 8,760-hour representative charge/discharge schedule and Part VII for the monthly CPEC delivery forecast for each contract year. Summary of the delivery plan:*

- *Discharge: 4,999 MW for the four hours of each DOER-designated Seasonal Peak Period (5–9 pm during Spring and 4–8 pm during Summer, Fall and Winter under 225 CMR 21.05(3)) on every non-holiday weekday, approximately 250 days per year, for approximately 4,959 MWh of peak-period delivery per year before availability and degradation adjustments.*
- *Charge: overnight (hours ending 1–6) at approximately 3.9 MW, within the DOER-designated high-renewable charging window, approximately 5,766 MWh per year at an 86% round-trip efficiency.*
- *CPECs: approximately 17,379 CPECs in contract year one, reflecting the Clean Peak seasonal multipliers (Summer and Winter 4x; Spring and Fall 1x), a 97% availability adjustment, the Actual Monthly System Peak multiplier (25x) applied to the facility's full output in each month's DOER-designated peak hour — which by rule falls within a Business-Day Seasonal Peak Period, when the facility is scheduled to discharge at full output (CPPD Part VII(a)(i)) — and the degradation/augmentation profile in CPPD Part V(c).*
- *The system will be dispatched by OSP's energy management system against the DOER-published Seasonal Peak Period hours, which DOER may revise no more than once every three years; the schedule above will be updated accordingly.*

*Supporting documentation: [REDACTED] datasheet and [REDACTED] SCS [REDACTED] datasheet (attached); Clean Peak Standard regulation 225 CMR 21.00 and DOER Clean Peak Resource Eligibility Guideline.*

3.7 Please describe how, as a Qualified Energy Storage System as defined in 225 CMR 21.00 Clean Peak Energy Standard (CPS), the storage system will meet the CPS requirements to operate primarily to store and discharge renewable energy. Specifically, please describe any co-location or contractual pairing with an RPS qualified resource, describe/include plans for charging coincident with periods of typically high renewable energy production, or include an operational schedule in the Qualified Energy Storage System's Interconnection Service Agreement demonstrating that the Qualified Energy Storage System serves to resolve load flow or power quality concerns otherwise associated with intermittent renewable energy resources.

*The facility is a new electric energy storage system, located in Massachusetts and interconnected to the Eversource (WMECO) distribution system, with a commercial operation date after January 1, 2019, and will therefore meet the definition of a Qualified Energy Storage System under 225 CMR 21.02. The Bidder will submit a Statement of Qualification application to DOER (assumed approval mid-2029, prior to COD), will register the facility with the NEPOOL Generation Information System, and will install revenue-grade metering in accordance with the Clean Peak metering requirements (the [REDACTED] design incorporates the ISO-NE Continuous Storage Facility metering best practice). The eligibility pathway is charging coincident with periods of typically high renewable energy output (the overnight wind charging window), with discharge during Seasonal Peak Periods. The facility is not paired with a SMART solar facility and will not claim the Clean Peak Distribution Circuit Multiplier or Resilience Multiplier.*

3.8 Please list and describe all anticipated revenue streams associated with the Energy Storage System, including, but not limited to, the designation of the ISO-NE Markets that the Energy Storage System would participate in, the plan to operate in multiple ISO-NE Markets, and revenue streams from other third-party contracts/arrangements. For existing facilities, describe existing operations, revenues, and participation in ISO-NE Markets and describe any planned changes in operation, participation in ISO-NE Markets, and revenue streams.

- (1) *Clean Peak Energy Certificates — 100% sold to the Distribution Companies under the Form Long-Term Contract (the only product offered under this proposal).*
- (2) *ISO-NE Forward Capacity Market — the facility will qualify as a Capacity Resource (expected qualified capacity in CPPD Part VIII) and receive capacity supply obligation payments.*
- (3) *ISO-NE energy and ancillary services — day-ahead/real-time energy arbitrage (charging overnight, discharging at peak) and day-ahead reserve products under ISO-NE's Day-Ahead Ancillary Services Initiative (DASI: ten-minute spinning and non-spinning reserve, thirty-minute operating reserve and energy imbalance reserve), settled through the wholesale market via Eversource's Wholesale Distribution Service tariff. Because a day-ahead reserve award requires capacity to be held in reserve during the awarded hours, the Bidder will schedule reserve offers around the Clean Peak Seasonal Peak Periods (overnight and midday hours, or partial-capacity offers) so that the CPEC delivery schedule in CPPD Part V always takes precedence; the Bidder will not reduce CPEC deliveries to sell reserves or energy.*

- (4) *Eversource demand response programs, to the extent such programs exist and to the extent the facility is eligible as a front-of-meter resource; no revenue from such programs is assumed.*
- (5) *Federal Investment Tax Credit under IRC §48E (see Section A-5). The Bidder does not propose to sell CPECs, capacity or energy to any party other than as described above.*

3.9 Maintenance Outage Requirements – Specify partial and complete planned outage requirements in weeks or days for all generation facilities and associated facilities required for the delivery of energy from the generation facilities to the delivery point. Also, list the number of months required for the cycle to repeat (e.g., list time interval of minor and major overhauls, and the duration of overhauls).

*Planned maintenance is minimal for a liquid-cooled LFP system. Expected requirements: one annual partial outage of 2–3 days per container (staggered, i.e., ~25% of capacity unavailable for up to ~12 days per year) for BMS/thermal system inspection, coolant and filter service and torque checks; one annual complete outage of up to 2 days for PCS, transformer and protection relay maintenance and Eversource witness testing; and a planned augmentation outage of approximately 2–4 weeks in approximately contract years 8 and 15. Planned outages will be scheduled outside the Summer and Winter Seasonal Peak Periods (i.e., in Spring or Fall) and coordinated with Eversource. These assumptions are reflected in the 0.97 monthly adjustment factor in CPPD Part V(b).*

3.10 Operating Constraints – Specify all the expected operating constraints and operational restrictions for the project (e.g., limits on the number of hours a unit may be operated per year or unit of time or charge / discharge cycles per year).

*Operating constraints:*

- (i) *import/export limited to 4.999 MW at the PCC by the Eversource DER Gateway and PPC;*
- (ii) *usable energy of 19.996 MWh AC (one full 4-hour discharge per charge);*
- (iii) *a minimum of ~4.7 hours between the end of one full discharge and the start of the next at the planned 3.9 MW charge rate (shorter at full 4.999 MW charge rate);*
- (iv) *ambient operating range –20 °C to +50 °C ([REDACTED]) and –25 °C to +60 °C ([REDACTED]) with no derate across the New England climate range;*
- (v) *cease-to-energize and ride-through per the IEEE 1547-2018 Category III / Massachusetts default settings shown on the [REDACTED] drawing, and automatic isolation on loss of Eversource Gateway communication;*
- (vi) *a 5-minute return-to-service delay after any utility voltage/frequency excursion; and*
- (vii) *daily throughput up to 300% of rated energy per [REDACTED]'s specification (not a practical constraint under the proposed profile). No fuel, water, emissions or noise constraints apply (sound pressure ≤75 dB(A) at 1 m at the container).*

3.11 Degradation mitigation plan – If applicable to the proposal’s technology type, specify the anticipated degradation rate (absent any mitigation) and plan for mitigation of output degradation (e.g., augmentation schedules or over build plans).

*Unmitigated, the [REDACTED] LFP system is expected to lose approximately 2.0–2.5% of usable energy capacity per year at the proposed duty cycle (one full cycle per weekday, ~250 cycles/year), with calendar aging dominating. Mitigation plan: (1) the [REDACTED] Master BMS maintains cells within optimal temperature (liquid cooling, homogeneous module temperatures) and state-of-charge windows, and performs automated string balancing; (2) OSP's EMS will limit resting time at 100% SOC and avoid unnecessary deep cycling outside the CPEC schedule; (3) the Bidder will procure a [REDACTED] capacity guarantee and will budget for planned augmentation (addition of strings/containers, for which the site plan reserves space) in approximately contract years 8 and 15 to restore usable energy to at least the contracted 19.996 MWh; (4) between augmentations the degradation factors in CPPD Part V(c) (declining to 0.88 before each augmentation) are reflected in the CPEC delivery schedule, so the Distribution Companies' expected quantities already account for degradation. Augmentation is funded from project cash flow and the O&M reserve (Section A-12).*

## **Section A-4: Environmental Attribute Delivery Plan**

4.1 For each Transmission Project and Distribution Project being bid, please provide documentation and information demonstrating that the project will deliver into the Distribution Companies’ NEPOOL GIS accounts, GIS Certificates representing CPECs and any other Environmental Attributes, as applicable associated with the energy storage project. Please describe whether transfer of all GIS Certificates is authorized under the current ISO-NE GIS rules and protocols, or if a rule or protocol change is required. To the extent such change is required, please provide details regarding the proposal and the process for implementing the change.

*The facility will be interconnected to and will inject all discharged energy into the Eversource (WMECO) distribution system in Massachusetts at the PCC described in Section A-6; it is physically incapable of delivering energy to any other control area. All CPECs will be created and tracked in the NEPOOL GIS, which is the Environmental Attribute tracking system required under 225 CMR 21.00 and consistent with the Commonwealth's GWSA accounting, and will be transferred to the Distribution Companies' GIS accounts in accordance with the Form Long-Term Contract. The Bidder will not commit the facility's capacity to any control area other than ISO-NE for the term of the contract. Supporting documents: [REDACTED] one-line and site plan; Eversource interconnection application (ESMAEX-05817); executed Option to Lease Agreement.*

## Section A-5: Financial and Legal

For all project-specific questions in Section A-5, if bidding in multiple Transmission Projects or Distribution Projects, please answer each question for each Transmission Project or Distribution Project being bid.

5.1 Except for existing Energy Storage Systems, which do not need to demonstrate that a long-term contract under Section 83E is necessary to facilitate financing, please submit information and documentation that demonstrates that long-term contracts resulting from this RFP Process would either permit the bidder to finance, or refinance, its proposal that would otherwise not be financeable or assist the bidder in obtaining financing of its proposal.

*[REDACTED – CONFIDENTIAL]*

5.2 Please provide a description of the business entity structure of the bidder's organization from a financial and legal perspective, including all general and limited partners, officers, directors, managers, members and shareholders, involvement of any subsidiaries supporting the project, and the providers of equity and debt during project development. Provide an organization chart showing the relationship between the equity and debt participants and an explanation of the relationships. For jointly owned facilities, identify all owners and their respective interests, and document the Bidder's right to submit a binding proposal.

*Bidder: Rocky Hill Road Energy LLC, a Massachusetts limited liability company organized on October 7, 2026 as a single-purpose project company to own and operate the project. Sole member: Oak Square Partners, LLC (OSP), a Delaware limited liability company and Massachusetts-based solar and energy storage development firm operating in Massachusetts and Rhode Island. There are no limited partners, outside equity investors or lenders in the Bidder today; the ownership chart is attached in Section A-13. The Bidder will serve as the Seller under the Form Long-Term Contract; credit support (Development Period Security) will be provided by the Bidder and Oak Square Partners' financing sources.*

5.3 Please provide a description of the financing plan for the project, including construction and term financing. The financing plan should address the following:

- i. Who will finance the project (or are being considered to finance the project) and the related financing mechanism or mechanisms that will be used (i.e. convertible debenture, equity or other) including repayment schedules and conversion features

*Financing parties: development and pre-NTP costs are funded through the Bidder's parent, Oak Square Partners, from capital committed by its principals and private investors, drawn as development milestones are reached. Construction and term financing are expected from (a) a construction loan/term loan from regional banks and infrastructure lenders active in Massachusetts distributed energy, (b) sponsor equity from Oak Square Partners and its affiliates and/or a third-party infrastructure equity investor, and (c) transfer of the §48E ITC to a third-party purchaser under IRC §6418 (or a tax-equity partnership). No financing commitments have been executed; term sheets will be sought upon selection.*

- ii. The project's existing initial financial structure and projected financial structure

*Existing/projected structure: today the Bidder is 100% owned by Oak Square Partners with no debt. At financial close the Bidder is projected to be owned by sponsor equity (and any co-investor), with project-level senior debt secured by the project assets, the LTC and the ground lease.*

- iii. Expected sources of debt and equity financing

*[REDACTED – CONFIDENTIAL]*

- iv. Estimated construction and other costs to develop and operate the project

*[REDACTED – CONFIDENTIAL]*

- v. The projected capital structure

*[REDACTED – CONFIDENTIAL]*

- vi. Describe any agreements, both pre and post commercial operation date, entered into with respect to equity ownership in the proposed project and any other financing arrangement.

*Agreements regarding equity ownership: none executed. The Bidder is 100% owned by Oak Square Partners; no third party holds any equity interest, option, success fee or residual claim in the Bidder or the project. Investor equity will be documented at financial close.*

- vii. In addition, the financing plan should address the status of the above activities as well as the financing of development and permitting costs. All bidders are required to provide this information.

*Status: site control executed (May 2026); interconnection application filed (October 2026); development and permitting costs through NTP (budgeted at [REDACTED – CONFIDENTIAL] including the interconnection allowance deposits) are funded through Oak Square Partners from principal and private-investor capital. The Bidder commits to funding the development costs and the Development Period Security required by Section 2.2.3 of the RFP.*

5.4 Please describe any financial commitments to enter into long-term contracts with businesses, nonprofit organizations, a municipality or group of municipalities, or other sources of long-term revenue.

*None. The Bidder has not entered into, and does not propose, any long-term contract with businesses, nonprofit organizations, municipalities or other offtakers for the project's output other than the Form Long-Term Contract with the Distribution Companies.*

5.5 Please describe the status of the commitments with any offtakers, including any executed agreements, provided that such agreements may be contingent on the project being selected for contracting under this RFP.

*No offtake agreements have been executed. The only offtake commitment proposed is the Form Long-Term Contract for 100% of the project's CPECs. The Bidder will qualify the facility in the ISO-NE capacity market and sell energy and ancillary services into the ISO-NE markets as described in Section A-3, none of which involve bilateral offtake agreements.*

5.6 Provide documentation illustrating the experience of the bidder in securing financing for projects of similar size and technology. For each project previously financed provide the following information:

- i. Project name and location
- ii. Project type and size
- iii. Date of construction and permanent financing
- iv. Form of debt and equity financing
- v. Current status of the project

*i. West Orange Solar, Orange, MA. ii. 6.50 MW DC ground-mount solar, MA SMART Program (feed-in tariff). iii. Constructed 2020–2021; permanent financing at commercial operation (April 2021). iv. Development funded with OSP development capital through notice to proceed; project sold at NTP to a long-term owner that provided construction and permanent financing. v. Operating since April 2021.*

*i. Douglas Pike Solar, Burrillville, RI. ii. 2.71 MW DC ground-mount community solar, RI CNM Pilot Program. iii. Constructed 2022–2023; commercial operation June 2023. iv. Development funded with OSP development capital through notice to proceed; project sold at NTP to a long-term owner that provided construction and permanent financing. v. Operating since June 2023.*

*i. Willow Hill Solar, Lee/Lenox, MA. ii. 2.60 MW DC ground-mount landfill solar, net metering (Towns of Lee and Lenox). iii. Constructed 2016; commercial operation January 2017. iv. Development funded with development capital through notice to proceed; project sold at NTP to a long-term owner that provided construction and permanent financing. v. Operating since January 2017.*

*i. South County Solar 1, 805 Main and 485 Church, Hopkinton and Richmond, RI. ii. Three 250 kW DC ground-mount solar projects, RI REGrowth Program. iii. Constructed 2019–2021; commercial operation December 2019, June 2020 and December 2021. iv. Built, owned and financed by OSP with project debt and internal equity; retained in OSP's portfolio through its South County Solar subsidiary. v. Operating since 2019–2021.*

*OSP and its principals have financed and brought to operation 22 solar projects (27.7 MW DC, about [REDACTED] of total project value) in Massachusetts and Rhode Island since 2015,*

*including nine RI REGrowth feed-in tariff projects, four MA SMART projects, six MA net-metering projects with municipal, housing-authority, university and private offtakers, two RI community solar projects and one behind-the-meter PPA, OSP's model on 19 of the 22 projects was to fund development through notice to proceed with its own development capital and exit at NTP through a sale to a long-term owner (counterparties have included [REDACTED] and [REDACTED]), which then provided construction and permanent financing; the three South County Solar projects were built, financed with project debt and internal equity, and retained by OSP. The proposed project follows the same development-capital model through NTP, with the option of either a sale at NTP or OSP-held construction and term financing. The full project list with commercial operation dates is provided in Section A-13.4.*

5.7 Please provide evidence that the bidder has the financial resources and financial strength to complete and operate the project as planned, including contingencies for project delays or cost overruns.

*[REDACTED – CONFIDENTIAL]*

5.8 Please provide details of any financial difficulties by the bidder or any of its past or present affiliates which impaired the viability and/or financing of the development and construction of projects of similar type, size, and complexity of the proposed eligible project or other large scale renewable energy project, including any past terminated projects and claims of financial difficulties. Bidders must demonstrate how the proposed eligible project materially differs from any past projects and demonstrate fully the financial viability of the project as bid.

*None. Neither the Bidder nor any of its past or present affiliates has experienced financial difficulties that impaired the viability or financing of the development, construction or operation of any project, and no project has been terminated for financial reasons. The financial viability of the proposed project rests on a 20-year contract for 100% of its CPECs with investment-grade counterparties, a fixed-price equipment basis with a 7.5% owner's contingency, a previously developed gravel site with minimal civil work, a completed Eversource pre-application review, and a capital structure (ITC transfer, project-level debt and investor equity) that OSP has used on its prior Massachusetts projects.*

5.9 Describe the assumptions applied by Bidder regarding forecast changes in project costs during the contract term, interest rates over the development period, key input commodity prices, and the methodology used to establish the project contingency amount. Additionally, describe the assumptions made regarding forecasted revenue from other sources (including but not limited to energy arbitrage, capacity and ancillary services markets, or other contractual arrangements) as well as the measure of discount applied to the value of these other revenue streams. Bidder must explain why these assumptions are reasonable and describe and quantify how the project as proposed is designed to absorb sufficient risk to ensure the project can be successfully financed at the proposed price.

*[REDACTED – CONFIDENTIAL]*

5.10 Provide complete copies of the most recent audited financial statement and annual report for each bidder for each of the past three years; including affiliates of the bidder (if audited statements are not available, reviewed or compiled statements are to be provided). Also, provide the credit ratings from Standard & Poor's and Moody's (the senior unsecured long term debt rating or if not available, the corporate rating) of the bidder and any affiliates and partners.

*The Bidder, Rocky Hill Road Energy LLC, was organized on October 7, 2026 as a single-purpose project company and has no financial statements or operating history. Its parent, Oak Square Partners, LLC, is a privately held development company that does not prepare audited or reviewed financial statements; it holds its project interests through single-purpose entities, and the Bidder's development costs are funded from capital committed by OSP's principals and private investors rather than from OSP's own balance sheet (see 5.7). Neither the Bidder nor any affiliate is rated by Standard & Poor's or Moody's. Supporting evidence of development-period funding capacity is available to the Evaluation Team upon request.*

5.11 Please also include a list of the board of directors, officers and trustees for the past three years and any persons who the bidder knows will become officers, board members or trustees.

*Rocky Hill Road Energy LLC (organized October 7, 2026): authorized signatories — Sevag Khatchadourian, John Typadis, Demetri Typadis. Oak Square Partners: Principal — Sevag Khatchadourian, John D. Typadis and Demetri Typadis. No changes in officers or managers are anticipated through contract execution.*

5.12 The bidder should demonstrate its ability (and/or the ability of its credit support provider) to provide the required security, including its plan for doing so.

*Development Period Security of [REDACTED] ([REDACTED] x 4.999 MW, allocated among the Distribution Companies per their Percentage Entitlements) will be posted at contract execution as an irrevocable standby letter of credit issued by a U.S. commercial bank meeting the RFP criteria (assets of at least [REDACTED] and a rating of at least A3/A-), cash-collateralized from the development capital committed by the parent's principals and private investors (see 5.7). The amount is modest relative to the committed development budget, and no third-party credit support is required. The Bidder will engage the issuing bank upon selection so that the facility is in place before the anticipated contract execution date in early 2027. At COD the Operating Period Security ([REDACTED]) will be posted in the same form, supported by the project's contracted cash flows and, if applicable, the term lender's letter-of-credit facility.*

5.13 Provide a description of any current or recent credit issues/ credit rating downgrade events regarding the bidder or affiliate entities raised by rating agencies, banks, or accounting firms.

*None. Neither the Bidder nor any affiliate has had any credit issues, rating downgrades or events raised by rating agencies, banks, suppliers or customers. The Bidder and its affiliates are privately held and unrated.*

5.14 Describe the role of the Federal Investment Tax Credit (“ITC”), and any other incentives or awards, on the financing of the project. In your response, please describe (a) your plan to qualify for the ITC and the level of the ITC for which you plan to qualify, (b) the facilities, investment in which, the ITC is expected to apply, (c) your plan to utilize the tax credits and the relationship to your financing plan, and (d) how qualification for the ITC is reflected in your proposed pricing. Please also describe qualification plans, applicability and utilization of any other Federal incentives or awards.

Bidders must clearly state their assumptions regarding the availability of federal or state tax credits, subsidies, or grants or other incentives, including but not limited to those available under the Inflation Reduction Act of 2022 (IRA), the Infrastructure Investment and Jobs Act of 2022, and the One Big Beautiful Bill Act (the “OBBBA”).

Bidders should describe any plans to meet federal domestic content and labor requirements in order to maximize federal tax credits available to the project under the IRA and the OBBBA . Bidders must also describe plans to pursue state funding available to energy storage projects.

As part of the provisions of the OBBBA, the Bidder must describe the credibility and status of compliance with “foreign entities of concern” (FEOC) and provide compliance documentation (e.g. preparation of non-FEOC reports, certifications, or existing safe harbor provisions). In addition to describing how bidder will qualify and demonstrate initial compliance with FEOC, bidder must also provide a description of bidder’s plan to remain compliant throughout the life of the project, including but not limited to retaining effective control of the project throughout its lifecycle, to avoid any recapture of ITC.

*The project's financing plan relies on the federal Investment Tax Credit under IRC §48E (the technology-neutral clean electricity ITC applicable to energy storage), which the Bidder expects to monetize by transfer under IRC §6418. The pro forma assumes a 50% credit: the 30% base rate (prevailing wage and apprenticeship requirements will be met for all construction work), plus the 10% energy community bonus (the site is within Census Tract 8214, Hampshire County, which qualifies as an energy community under IRC §45(b)(11)(B)(iii) because it directly adjoins a census tract with a qualifying coal-fired generating unit retirement, per the DOE/NETL 2024 Coal Closure Energy Communities data set) and the 10% domestic content bonus. The Bidder's sensitivity case assumes a 40% credit (no domestic content bonus); the proposal is financeable at that level with the proposed contract price. No state grants or other awards are assumed. Property tax treatment will follow a negotiated PILOT or standard assessment with the Town of Hadley.*

*Domestic content and labor: construction will comply with prevailing wage and apprenticeship requirements under IRC §45(b)(7)–(8) as applied to §48E. The Bidder intends to procure [REDACTED] containers from [REDACTED]'s U.S. manufacturing hub, which [REDACTED] markets as enabling IRA domestic content compliance, and will evaluate U.S.-assembled [REDACTED] inverters and domestically manufactured transformers and balance-of-plant to meet the applicable manufactured-products percentage for the project's placed-in-service year. Final domestic content qualification will be confirmed at equipment contracting.*

*FEOC/OBBBA: the Bidder's project must begin construction after December 31, 2025 and is*

*therefore subject to the prohibited-foreign-entity and material-assistance rules enacted under the One Big Beautiful Bill Act. Neither the Bidder nor any owner is a specified foreign entity or foreign-influenced entity. [REDACTED] is a wholly owned subsidiary of [REDACTED] SE (France) and [REDACTED] AG is a German manufacturer; neither is a prohibited foreign entity. The Bidder will require its battery supplier to certify the material assistance cost ratio for the delivered containers (including cell origin) at or above the applicable threshold for the construction-start year and will select a cell supply ([REDACTED] U.S. hub) that satisfies that threshold; the Bidder will not rely on equipment that would cause the project to fail the material-assistance test. Compliance documentation will be obtained from suppliers at contracting and retained for the credit-recapture period.*

5.15 Bidders must disclose any litigation or disputes in the last three-year period related to projects developed, owned or managed by bidder or any of its affiliates in the United States, or related to any energy product sale agreement.

*None. There has been no litigation or dispute in the last three years related to projects developed, owned or managed by the Bidder or its affiliates in the U.S. or elsewhere.*

5.16 What is the expected operating life of the proposed project? What is the depreciation period for all substantial physical aspects of the bid, including generation facilities, delivery facilities to move power to the grid, and mandatory and voluntary transmission or distribution system upgrades?

*Expected operating life: 20 years for the battery system with mid-life augmentation ([REDACTED] design life  $\leq 20$  years), and 25–30 years for the power conversion, transformers and interconnection facilities; the ground lease provides a 20-year initial term plus two 5-year renewals (30 years). Depreciation: battery, PCS and balance-of-plant are 5-year MACRS property for federal tax purposes (depreciable basis reduced by 50% of the ITC); interconnection facilities and site improvements are depreciated over 15 years; the project will be fully decommissioned and the site restored at the end of the lease per the lease terms.*

5.17 Has the bidder already obtained financing, or a commitment of financing, for the project? If financing has not been obtained, explain how obtaining a long-term agreement as proposed will help you in obtaining financing for the proposed project, in obtaining more favorable terms for the financing of the proposed project, or in supporting the future capital investment.

*Financing has not been obtained. The project's development costs are funded by Oak Square Partners. The Bidder expects to obtain construction and term financing, and to execute an ITC transfer agreement, in 2028–2029 following DPU approval of the Long-Term Contract, receipt of the Eversource Interconnection Service Agreement and local permits. A 20-year contract with investment-grade counterparties for 100% of the project's CPECs is the contracted revenue that lenders and tax-credit purchasers require to underwrite a distribution-scale storage project; as discussed in 5.1, merchant Clean Peak revenue alone does not support financing.*

5.18 State whether the bidder or its affiliates have executed agreements with respect to energy, CPECs and/or capacity for the proposed project (including any agreements that have been terminated) and provide information regarding the associated term and quantities, and whether bidder has been alleged to have defaulted under or breached any such agreement. State whether the bidder or its affiliates have submitted proposals to other buyers, the status of consideration of such proposals, and the impact of such proposal(s), if they result in an executed contract or contracts, on the proposal(s) submitted in response to this RFP.

*No. Neither the Bidder nor its affiliates have executed any agreement with respect to energy, CPECs or capacity for the proposed project, and no such agreements are contingent on this RFP other than the Form Long-Term Contract proposed here.*

5.19 List all of the Bidder's affiliated entities and joint ventures transacting business in the energy sector.

*Oak Square Partners, LLC (the Bidder's sole member) and its single-purpose project subsidiaries, which own or owned the solar projects listed in Section A-13.4, including South County Solar, LLC and its three project companies. None of these entities transacts business with, or holds an ownership interest in, any Distribution Company.*

5.20 Has Bidder, or any affiliate of Bidder, in the last five years, (a) consented to the appointment of, or been taken in possession by, a receiver, trustee, custodian or liquidator of a substantial part of its assets, (b) filed a bankruptcy petition in any bankruptcy court proceeding, (c) answered, consented or sought relief under any bankruptcy or similar law or failed to obtain a dismissal of an involuntary petition, (d) admitted in writing of its inability to pay its debts when due, (e) made a general assignment for the benefit of creditors, (f) been the subject of an involuntary proceeding seeking to adjudicate that Party bankrupt or insolvent, (g) sought reorganization, arrangement, adjustment, or composition of it or its debt under any law relating to bankruptcy, insolvency or reorganization or relief of debtors?

*No. In the last five years neither the Bidder nor any affiliate has (a) consented to the appointment of, or been taken in possession by, a receiver, trustee, custodian or liquidator of a substantial part of its assets; (b) filed a bankruptcy petition in any bankruptcy court proceeding; (c) answered, consented or sought relief under any bankruptcy or similar law or failed to obtain a dismissal of an involuntary petition; (d) admitted in writing its inability to pay its debts when due; (e) made a general assignment for the benefit of creditors; (f) been the subject of an involuntary proceeding seeking to adjudicate it bankrupt or insolvent; or (g) sought reorganization, arrangement, adjustment or composition of its debt under any law relating to bankruptcy, insolvency, reorganization or relief of debtors.*

5.21 Briefly describe any known conflicts of interest between bidder or an affiliate of bidder and any Distribution Company, or any affiliates of the foregoing.

*None known. Neither the Bidder nor any affiliate has any ownership, employment, contractual or other relationship with any Distribution Company or its affiliates other than as an interconnection customer and retail electricity customer in the ordinary course.*

5.22 Describe any litigation, disputes, claims, complaints or notices of violation or potential violation involving the project or other energy storage projects involving the bidder or an affiliate of the bidder.

*None. There is no litigation, dispute, claim, complaint or notice of violation involving the project or any other energy storage project of the Bidder or its affiliates.*

5.23 Describe any failures by the bidder and/or its affiliates to achieve commercial operation dates under other long-term contracts. Bidders should also provide a credible description of how the current proposed project will avoid similar project delays or development issues.

*None. Neither the Bidder nor its affiliates has failed to achieve a commercial operation date under any long-term contract.*

5.24 Describe any litigation, disputes, claims or complaints involving the bidder or an affiliate of bidder, against any Distribution Company or any affiliate of any Distribution Company.

*None. Neither the Bidder nor any affiliate has been involved in any litigation, dispute, claim or complaint against any Distribution Company or its affiliates.*

5.25 Describe any litigation, disputes, claims or complaints, or events of default or other failure to satisfy contract obligations, or failure to deliver products, involving bidder or an affiliate of bidder, and relating to the purchase or sale of energy, capacity or environmental attributes or products.

*None. Neither the Bidder nor any affiliate has been subject to any litigation, dispute, claim, complaint, event of default or other failure to satisfy contract obligations or to deliver products relating to the purchase or sale of energy, capacity or environmental attributes.*

5.25 Confirm that neither bidder nor any directors, employees or agents of bidder, nor any affiliate of bidder are currently under investigation by any governmental agency, and that none of the above have in the last four years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction involving conspiracy, collusion or other impropriety with respect to bidding on any contract, or have been the subject of any debarment action (detail any exceptions).

*Confirmed. Neither the Bidder, nor any director, employee or agent of the Bidder, nor any affiliate of the Bidder is currently under investigation by any governmental agency or has been convicted of a crime or subject to a civil judgment relating to its business within the past five years.*

5.26 Identify all regulatory and other approvals needed by bidder to execute a binding sale agreement.

*No regulatory approval is required for the Bidder to execute the Long-Term Contract. The Bidder's manager has full authority under its operating agreement to execute the contract. The contract itself is subject to DPU approval under Section 83E, which the Bidder will support. Post-execution approvals needed to build and operate the project are listed in Section A-7*

*(Hadley special permit and building/electrical permits, Eversource ISA) and ISO-NE/DOER registrations (asset registration, Clean Peak SoQ, NEPOOL GIS).*

5.27 Describe how the project will conform to FERC's applicable regulatory requirements, including, but not limited to, FERC requirements relating to allocation of transmission capacity and open access, the justness and reasonableness of rates, the potential for undue preference or discrimination, and affiliate dealings, if any. Describe how your proposed approach is consistent with FERC precedent and ratemaking principles.

*The project is a distribution-connected resource below 5 MW and will interconnect under the Massachusetts DPU-approved Standard Interconnection Tariff (220 CMR 18.00) rather than the ISO-NE OATT, so no FERC-jurisdictional interconnection agreement or transmission cost allocation is required. Wholesale market participation (capacity, energy and ancillary services) will occur through registration with ISO-NE as an electric storage facility and through Eversource's FERC-approved Wholesale Distribution Service tariff; the Bidder will obtain market-based rate authorization from FERC (or qualify for an exemption/blanket authorization applicable to resources under 20 MW) before wholesale sales commence. The Bidder will comply with ISO-NE Market Rule 1 and FERC Order 841/2222 requirements applicable to distribution-connected storage.*

5.28 Describe and document any and all direct and indirect affiliations and affiliate relationships, contractual, financial or otherwise in the past three years between the bidder and one or more of the Distribution Companies and their affiliates, including all relationships in which one of the Distribution Companies or their affiliates has a financial or voting interest (direct or indirect) in the bidder or the bidder's proposed project. These relationships include:

- i. Corporate or other joint arrangements, joint ventures, joint operations whether control exists or not;
- ii. Minority ownership (50% or less investee);
- iii. Joint development agreements;
- iv. Project agreements;
- v. Operating segments that are consolidated as part of the financial reporting process;
- vi. Related parties with common ownership;
- vii. Credit, debenture, and financing arrangements, whether a convertible equity feature is present or not;
- viii. Wholly owned subsidiaries; and
- ix. Commercial (including real property) relationships with any Distribution Company

*The Bidder is a wholly owned subsidiary of Oak Square Partners. It has no affiliation with any Distribution Company — none other than ordinary-course interconnection and retail service*

accounts for affiliate projects in Eversource, National Grid and Unitil territories.

## **Section A-6: Interconnection, Deliverability, and Reliability**

Please answer the following questions in Section A-6 for each Transmission Project and Distribution Project being bid:

6.1 Please provide documentation to show evidence of the interconnection request or application to ISO-NE or the applicable Distribution Company. For Transmission Projects, provide evidence of a commitment to interconnect to the ISO-NE PTF at a level equivalent to the Capacity Capability Interconnection Standard, or alternatively at the Network Resource Interconnection Standard under a Surplus Interconnection Service arrangement where the Original Interconnection Customer receives Capacity Network Resource Interconnection Service. For Distribution Projects, provide documentation describing the steps the project will take to screen for and, if applicable, establish equivalent Capacity Network Resource Capability (eCNRC) Please describe the status of any planned interconnection to the grid.

*An Expedited/Standard interconnection application for a 4.999 MW energy storage facility was submitted to Eversource (WMECO) under the Massachusetts Standard Interconnection Tariff on October 7, 2026 (Eversource application acknowledgement of the same date, attached) following a completed pre-application report (Eversource project no. ESMAEX-05817). The application package, including the PE-stamped one-line, site/access plan, protection and DER Gateway design ([REDACTED] drawing PV-1.0, Rev. 2, Aug. 6, 2026), is attached as a confidential attachment, together with the Eversource application acknowledgement (October 7, 2026), the Eversource DER Planning pre-application report (ESMAEX-05817, Dec. 31, 2025, with primary circuit diagram) and the automated pre-application reports of Dec. 9, 2025, Mar. 4, 2026 and Oct. 5, 2026 showing the feeder queue over time. The Bidder commits to interconnecting the facility at a CCIS-equivalent level (full deliverability of its rated capacity) and to enrolling under Eversource's Wholesale Distribution Service tariff. Steps to screen for and establish equivalent Capacity Network Resource Capability (eCNRC): (1) request that Eversource's System Impact Study include an assessment of the facility's deliverability at full rated output during peak-load conditions, consistent with the ISO-NE Capacity Capability Interconnection Standard; (2) confirm with ISO-NE whether a Section I.3.9 Proposed Plan Application is required for a 4.999 MW distribution-connected resource or whether the project qualifies for the small-resource exemption, and file if required; (3) register the facility with ISO-NE as a generator/storage asset with Eversource as the host distribution company and execute the Wholesale Distribution Service arrangements; (4) submit a Show of Interest and qualification package for the first available Forward Capacity Auction (or reconfiguration auction) following COD, supported by Eversource's deliverability confirmation, to obtain Capacity Network Resource Capability equivalent to the facility's qualified capacity (CPPD Part VIII); and (5) comply with any Eversource or ISO-NE operating limits identified in the study. Status: application filed; study pending.*

6.2 Provide studies that describe the Project’s electrical system performance, its impact to the reliability of the New England Transmission system, how the project would satisfy ISO NE’s I.3.9 requirements, and how the project, for Transmission Projects, will interconnect at an equivalent to the Capacity Capability Interconnection Standard or, for Distribution Projects, establish eCNRC. Projects that do not have I.3.9 approval from ISO-NE must include technical reports or system impact studies that approximate the ISO-NE interconnection process, including but not limited to clear documentation of study technical and cost assumptions, reasoning, and justification of such assumptions. All projects must also provide analysis that approximates the ISO-NE CCIS interconnection analysis as defined in the applicable ISO-NE Planning Procedure(s). Please also provide the status and expected completion date of any additional interconnection studies already underway with ISO-NE and/or the transmission owner. All studies must follow the current ISO-NE interconnection procedures and detail any assumptions regarding resources ahead of the Project in the ISO-NE interconnection process as defined in the ISO-NE tariff and/or Planning Procedure(s). All network upgrades identified in these studies must be clearly documented and included in the bid price. Provide a copy of an interconnection agreement, if any, executed by the bidder with respect to the proposed project. If an interconnection agreement has not been executed, please provide the steps that need to be completed before an interconnection agreement can be executed and the associated timeline.

*See responses below for each study type. Eversource distribution impact study pending; no transmission-level studies required for a <5 MW distribution-connected facility.*

- i. Copy of completed I.3.9 approval or I.3.9-equivalent study attached: ☐ If none, please explain:

*I.3.9: not applicable — the facility is a distribution-connected resource below 5 MW interconnecting at 13.8 kV and is not subject to ISO-NE Section I.3.9 review; no transmission-level study is required.*

- ii. Copy of completed CCIS-equivalent study attached: ☐ If none, please explain:

*CCIS-equivalent study: not yet available — the Eversource impact study will be performed under the Standard Interconnection Tariff following application acceptance; the Bidder commits to CCIS-equivalent (fully deliverable) interconnection and will provide the study upon completion.*

- iii. Copy of Interconnection Agreement attached: ☐ If none, please explain:

*Interconnection Agreement: not yet executed; expected Q4 2027–Q2 2028 following the impact study (model Interconnection Service Agreement under 220 CMR 18.00). Other studies: Eversource pre-application report (ESMAEX-05817) and [REDACTED]'s protection coordination and relay settings study (included on the drawing) are attached.*

- iv. Additionally, any other studies undertaken by ISO-NE, the Distribution Company(s), or the bidder must be provided

6.3 If multiple Transmission Project interconnection requests or Distribution Project interconnection applications have been made, please specify all such active requests which have not been superseded by subsequent requests and information regarding the status of each. Provide copies of any requests made and studies completed.

*The Bidder has a single interconnection application for this site (Eversource project ESMAEX-05817). No other interconnection requests have been made for this project or this site by the Bidder or its affiliates.*

6.4 Please provide cost estimates for any and all necessary network (transmission and/or distribution) upgrades identified in the studies identified in 6.2, or otherwise known to the bidder, and any payments that have been made towards those upgrades.

*[REDACTED – CONFIDENTIAL]*

6.5 Provide the electrical models for both Transmission and Distribution Projects for transmission level power flow analysis of all energy resources supporting the proposed project in accordance with the filing requirements of the ISO-NE Tariff Schedule 22 and 23. Distribution Projects should indicate the substation bus (not feeder) at which injected power is expected. NOTE: Short-circuit, stability, and PSCAD models are not required.

i. Power flow modeling data attached: ☐ If none, please explain:

*Not applicable/not attached. As a 4.999 MW distribution-connected facility the project is not subject to transmission-level power flow analysis; Eversource will model the facility on feeder 17K5 as part of its distribution impact study using the inverter data ([REDACTED], IEEE 1547-2018 Category III settings) provided in the interconnection application. Inverter datasheets and the protection settings are attached and are available in PSCAD/PSS-E compatible formats from [REDACTED] on request.*

6.6 Provide a copy of an electrical one-line diagram showing the interconnection facilities, the relevant facilities of the transmission and/or distribution provider, and any required network upgrades identified in the studies required in section 6.8 of this document

i. Electrical one-line diagram attached: ☒ If none, please explain:

*Attached: [REDACTED] drawing PV-1.0 (Rev. 2, Aug. 6, 2026) showing the four [REDACTED] containers, two [REDACTED] units, two 2,500 kVA 13.8 kV/660 V transformers with NGRs, auxiliary transformer and panelboards, customer recloser and [REDACTED] relay, 15 kV load-break switch, underground riser, utility poles #91-1 through #91-6 (fused cutout, arrester, utility transformer, GOAB switches, recloser, revenue meter) and the PCC on Eversource feeder 17K5 at pole #91.*

6.7 Specify and describe the current or new interconnection facilities (lines, transformers, switching equipment, system protection and controls, etc.) that bidder owns or is intending to construct or have constructed in order to deliver the proposed energy, to the extent presently known.

*Bidder-owned (new): customer poles C-1 through C-3 with 15 kV gang-operated load-break switch (utility-lockable with 24/7 utility access and control), pole-mounted recloser with [REDACTED] relay, customer meter and underground riser; [REDACTED] RTAC communicating with the Eversource DER Gateway over DNP3 (fiber), per Eversource DSEM 19.065; customer power plant controller enforcing import/export limits; two 2,500 kVA pad-mounted step-up transformers with neutral grounding reactors (size to be confirmed by Eversource in the impact study); medium-voltage auxiliary transformer and auxiliary panelboards. Eversource-owned (new, funded by the Bidder): turning pole #91-1; pole #91-2 with fused cutout, arrester and pole-mounted transformer; pole #91-3 with GOAB; pole #91-4 with recloser; pole #91-5 with utility revenue meter; pole #91-6 with GOAB and the PCC. Existing: Eversource pole #91 and 13.8/7.97 kV feeder 17K5. The Bidder will own, operate and maintain all customer-side facilities.*

6.8 Please detail with supporting information and studies (as available) that the production/delivery profile contemplated in your proposal reflects constraints or curtailments, if any, after the upgrades that are expected to take place for a Transmission Project, pursuant to interconnection at an equivalent to the CCIS. For a Distribution Project, detail any transmission or distribution upgrades expected to take place to establish eCNRC, to the extent presently known. If you are planning to make voluntary upgrades beyond those associated with the CCIS-equivalent standard or the eCNRC, please describe the transmission and/or distribution network upgrades necessary, their estimated cost (for which the bidder would have cost responsibility), and the impact on the proposed generation schedule by reducing remaining constraints or curtailments.

*The CPPD Part V profile assumes the facility can inject its full 4.999 MW during every Seasonal Peak Period hour and charge at 3.9 MW overnight, consistent with the 4.999 MW import/export limit in the interconnection application. The facility discharges during evening peak-load hours and charges overnight. Any import or export limits imposed by Eversource through the DER Gateway will be enforced by the PPC; if the impact study identifies a seasonal export limit the Bidder will update Part V accordingly. The 0.97 availability factor in Part V(b) covers forced and planned outages of the facility and the feeder.*

## **Section A-7: Siting, Permitting and Community Support**

Please answer the following questions in Section A-7 for each Transmission Project and Distribution Project being bid:

7.1 This section addresses permitting and other regulatory issues associated with project siting, development and operations for all phases of the project (including generation, delivery, storage, interconnection, etc.), and in all jurisdictions (state, local, federal). Provide a site plan (or plans) including a map (or maps) that clearly identifies the location of the proposed project site, energy storage project locations, the assumed right-of-way width, the total acreage for the Energy Storage System, the anticipated interconnection point (or, if applicable, multiple interconnection points), the related transmission and interconnection facilities, deployment facilities, and the relationship of the site to other local infrastructure, including transmission and distribution facilities, roadways, federal and state waters, and waterways. In addition to providing the required map(s), provide a site layout plan which illustrates the location of all major equipment and facilities described above

Plan included? Yes If not, please explain:

*Permitting plan included below (see 7.4–7.8). Site plan: [REDACTED] drawing PV-1.0 (Rev. 2, Aug. 6, 2026), attached, shows the parcel, the 6,000 square-foot leased area, equipment layout, access drive, customer and utility poles and the point of common coupling on Eversource feeder 17K5 at pole #91; an aerial/site map with parcel boundary is also attached. The project site is a 6,000 square-foot portion of an existing graveled parking lot on an industrially zoned parcel of approximately 6.2 acres; required approvals are a local special permit for battery storage under the Hadley Zoning Bylaw (§28.5.4), a fire-department hydrant-distance waiver, a Wetlands Protection Act buffer-zone filing with the Hadley Conservation Commission, an NHESP review under the Massachusetts Endangered Species Act (Priority Habitat PH 1344), building and electrical permits, and the Eversource interconnection approval (see 7.7). No MEPA review (no 301 CMR 11.03 threshold is exceeded) and no federal permits are expected to be required.*

7.2 Identify any real property rights (e.g., fee-owned parcels, rights-of-way, development rights or easements or leases, or options to purchase or lease) that provide the right to use the energy storage site any rights of way needed for interconnection.

- i. Does the project have a right to use the eligible facility site for the entire proposed term of the LTC (e.g., by virtue of ownership or land development rights obtained from the owner)? Yes If not, please explain.

*Yes. The Bidder holds an exclusive, irrevocable Option to Lease Agreement dated May 1, 2026, originally executed by an affiliate of the Bidder and assigned to the Bidder effective October 7, 2026 under Section 10.1(i) of the agreement (which permits assignment to affiliates without landowner consent), with the fee owner, [REDACTED], for a ground lease with a minimum initial term of 20 years from COD plus two 5-year renewal options — i.e., up to 30 years, exceeding the 20-year contract term. The option has an initial 24-month period (to May 1, 2028) extendable by the Bidder for 12 months (to May 1, 2029); the Bidder intends to exercise the option upon receipt of the special permit and ISA, well before expiry.*

- ii. If so, please detail the bidder's rights to control the Energy Storage System site and interconnection locations.

*The option covers the approximately 6,000 square-foot Leased Premises outlined on Exhibit A to*

*the agreement together with access rights over the parcel's existing 20-foot driveway (which must be maintained year-round for utility access), the right to submit interconnection and permit applications (Section 11.4), and the right to install utility and interconnection facilities; the landowner must cooperate with permitting and provide landowner consents within 10 business days. The interconnection route from the Leased Premises to Eversource pole #91 on Rocky Hill Road lies entirely within the parcel and the public way; no third-party easements are required. The agreement is binding on successors and runs with the land upon recording of the Memorandum of Option (Exhibit D) at the Hampshire County Registry of Deeds; the Memorandum has not yet been recorded and will be recorded by the Bidder before the option is exercised.*

- iii. Describe the status of acquisition of real property rights, any options in place for the exercise of these rights and describe the plan for securing the necessary real property rights, including the proposed timeline. Include these plans and the timeline in the overall project timeline.

*Status: option executed and in good standing (quarterly option fees of [REDACTED] paid, next due January 1, 2027); ground lease term sheet (Exhibit C) agreed: [REDACTED] base rent escalating 2%/year, net lease with the tenant paying 33% of land-value taxes and 50% of driveway maintenance. Upon exercise, the lease is to be executed within 30–60 days. Owner approval of the final site plan and access/easement plans is required and will be obtained with the Notice of Exercise. Title examination and an ALTA survey of the Leased Premises will be ordered at option exercise.*

- iv. Identify any joint use of existing or proposed real property rights

*Joint use: the landowner retains use of the remainder of the parcel (parking) and the shared driveway; the landowner may not grant any rights that interfere with the storage use (Section 6.1 exclusivity). No other joint use.*

- v. Provide a copy of each of the leases, agreements, including option agreements, easements, rights of way and related documents granting the right to use the energy storage system site and transmission and interconnection locations (and applicable letters of intent if formal agreements have not been executed)

*Attached (confidential): executed Option to Lease Agreement with Exhibits A–D (Exhibit D is the form of Memorandum of Option, which has not yet been recorded; see 7.2). The ground lease will be provided upon execution.*

7.3 Provide evidence that the Energy Storage System site and interconnection locations are properly zoned or permitted. If the Energy Storage System site and interconnection locations are not currently zoned or permitted properly, identify present and required zoning and/or land use designations and permits and provide a permitting plan and timeline to secure the necessary approvals.

*The parcel (Hadley Assessor's Parcel 11B-24) is zoned Industrial (I) under the Town of Hadley Zoning Bylaw (MassGIS Level 3 parcel record: zoning "I"), in which battery energy storage*

systems are allowed by special permit from the Planning Board under §28.5.4 of the bylaw. The site is currently a graveled parking lot; the BESS is a permitted accessory/principal use subject to the special permit. The interconnection facilities are located on the parcel and within the Rocky Hill Road public right-of-way, where utility poles are permitted as of right. Evidence attached: zoning map excerpt and bylaw §28.5.4; assessor's parcel record.

#### 7.4 Permitting plan and timeline - Start Date: November 2026 End Date: December 2027

*Sequence: (1) Q4 2026–Q1 2027 — pre-application meeting with Hadley Planning Board and Fire Department; Q2 2027 — submit special permit application with site plan, NFPA 855 compliance narrative, UL 9540A test data and hydrant-distance waiver request; (2) Q3–Q4 2027 — Planning Board public hearing(s) and decision (special permit, 20-day appeal period); (3) Q4 2027–Q2 2028 — Eversource impact study and ISA; (4) 2028 — building and electrical permits (post-ISA and final design); (5) 2027 — Clean Peak SoQ application to DOER, ISO-NE asset registration and FCM qualification (as the schedule allows), DPU approval of the Long-Term Contract. Construction permits are not on the critical path for the 2030 COD.*

#### 7.5 Provide a description of the area surrounding the Energy Storage System site and interconnection locations, including a description of the local zoning, flood plain and aquifer information, existing land or waterway use, and setting.

*The 6.2-acre parcel at 325 Rocky Hill Road (Hadley Assessor's Parcel 11B-24; zoned Industrial; assessed land value [REDACTED]) is a developed industrial property used for vehicle parking on its eastern portion, with a self-storage facility (333 Rocky Hill Road) immediately to the east, agricultural fields across Rocky Hill Road to the north, and wooded wetland associated with the Connecticut River floodplain on the western portion of the parcel and beyond. The Leased Premises occupy the southern portion of the existing graded parking area along the eastern property line (Town of Hadley GIS Proposed Lease Area exhibit, November 18, 2025, attached). Preliminary MassGIS screening (attached): (i) MassDEP-mapped wetlands (deep marsh and shrub swamp) occupy the western third of the parcel; the nearest mapped wetland edge is approximately 65 feet from the Leased Premises on the MassDEP layer and approximately 30 feet at the nearest corner on the Town of Hadley GIS wetland layer (Proposed Lease Area exhibit, attached), so the footprint lies within the 100-foot buffer zone and the final layout will respect any local no-disturbance setback under the Wetlands Protection Act and a Hadley Conservation Commission filing (Request for Determination or Notice of Intent) is expected; (ii) the parcel lies within NHESP Priority Habitat of Rare Species (polygon PH 1344, 15th edition Natural Heritage Atlas), so a MESA project review filing with NHESP is expected unless the work on the existing developed surface qualifies for an exemption; (iii) the parcel is not within a FEMA Special Flood Hazard Area; (iv) the parcel is not within a designated Environmental Justice block group. No aquifer protection overlay applies. The interconnection point is an existing distribution pole on the Rocky Hill Road frontage. No clearing, filling or grading of undisturbed land is required; stormwater will be managed with the existing drainage; the gravel surface outside the equipment pads remains pervious. No residential parcels lie within approximately 1,000 feet of the Leased Premises; the nearest off-site structures are the self-storage buildings at 333 Rocky Hill Road, approximately 125 feet to the east. The containers produce ≤75 dB(A) at 1 m and will meet the Massachusetts noise policy (310 CMR 7.10) at the property line.*

7.6 If the bidder does not have interconnection facilities site control describe the status of the plan to obtain that control.

*Not applicable — the Bidder controls the interconnection route through the option agreement (on-parcel) and the public right-of-way (Eversource poles).*

7.7 Provide a list of all the permits, licenses, and environmental assessments and/or environmental impact statements required to construct and operate the project and progress towards each of them to date. Along with this list, identify the governmental agencies and municipalities that are responsible for issuing approval of all the permits, licenses, and environmental assessments and/or environmental impact statements. If a bidder has secured any permit or has applied for a permit, please indicate this in the response.

1. *Town of Hadley Planning Board special permit for BESS (Zoning Bylaw §28.5.4) — application to be filed Q2 2027.*
2. *Hadley Fire Department review/hydrant-distance waiver and NFPA 855/1 compliance approval — with the special permit.*
3. *Eversource Interconnection Service Agreement (220 CMR 18.00) — application filed October 2026; impact study pending.*
4. *Hadley building permit and electrical permit (780 CMR; 527 CMR 12.00 / NEC Article 706) — 2028.*
5. *MEPA: not expected to be required (no 301 CMR 11.03 review threshold exceeded; no state funding).*
6. *Wetlands Protection Act (M.G.L. c.131 §40; 310 CMR 10.00): Hadley Conservation Commission — Request for Determination of Applicability or Notice of Intent for work within the 100-foot buffer zone of mapped bordering vegetated wetland — to be filed Q1 2027. 6a. Massachusetts Endangered Species Act (321 CMR 10.18): NHESP project review for work within Priority Habitat PH 1344 — pre-filing consultation Q4 2026; filing Q1 2027 (or exemption determination).*
7. *Stormwater: no NPDES construction general permit expected (<1 acre of disturbance).*
8. *DOER Clean Peak Statement of Qualification and NEPOOL GIS registration — 2029.*
9. *ISO-NE asset registration / capacity qualification — 2028–2029.*
10. *FERC market-based rate authorization or exemption — before wholesale sales.*
11. *Environmental assessments: Phase I ESA not yet commissioned; to be completed before option exercise; no Phase II anticipated (landowner restricts invasive testing; previously developed gravel site). Progress: items 1, 2, 7 and 7a pre-filing; item 3 filed; others not yet due.*

7.8 Provide the anticipated timeline for seeking and receiving the required permits, licenses, and environmental assessments and/or environmental impact statements. Include a project approval assessment which describes, in narrative form, each segment of the process, the required permit or approval, the status of the request or application and the basis for projection of success by the milestone date. All requirements should be included in the project schedule in Section 10.

*Q4 2026: NHESP pre-filing consultation; Phase I ESA. Q1 2027: Conservation Commission filing (buffer zone). Q2 2027: special permit and fire department filings. Q2–Q3 2027: Conservation Commission decision; NHESP MESA determination; DPU approval of LTC (expected mid-2027). Q3–Q4 2027: special permit decision. Q4 2027–Q2 2028: Eversource impact study complete and ISA executed; option exercise and ground lease. 2028: final design; building/electrical permits; equipment orders (Q2–Q3 2028). 2029: construction, aligned with the January 1, 2030 Guaranteed COD. Q3 2029: DOER SoQ; ISO-NE registration; Eversource witness test and permission to operate. The Bidder's schedule assumes a 6-month special permit process and a 12–18 month Eversource study/ISA process (ISA expected Q4 2027–Q2 2028), consistent with recent WMECO experience for 5 MW storage.*

7.9 Provide information (a) demonstrating past and current productive relationships with host communities, federally recognized and state acknowledged tribes, Environmental Justice communities and other stakeholders; and (b) demonstrating your track record of avoiding, minimizing, and mitigating environmental, tribal, and environmental justice impacts from energy storage projects similar to the proposed project.

*(a) OSP has developed solar and storage projects in host communities across Massachusetts, Rhode Island and Connecticut and has worked directly with planning boards, fire departments and select boards on siting and permitting, including in Orange, Athol and Harvard, Massachusetts and in Hopkinton, Richmond, Foster, Burrillville, Woonsocket and West Greenwich, Rhode Island. For this project the Bidder has met with the Town of Hadley regarding the proposed development under §28.5.4 (August 6, 2026) and has engaged the landowner on site layout. (b) The Bidder will hold a pre-filing informational meeting with abutters and the Hadley Fire Department before the special permit hearing and will provide a project fact sheet to the Town. (c) The site is not within a designated Environmental Justice block group (MassGIS 2020 EJ Populations layer); the nearest EJ block groups are in Amherst, within approximately one mile, designated on minority and income criteria, and the Bidder will include them in its outreach; no tribal lands are affected. (d) The Bidder is not aware of any support or opposition to the project at this stage.*

7.10 Provide documentation identifying the level of public support for the project including letters from public officials, newspaper articles, etc. Include information on specific host community and localized support and/or opposition to the project of which the bidder is aware. Provide copies of any agreements with communities and other constituencies impacted by the project. Provide a stakeholder map and a plan for community engagement activities and targeted stakeholder outreach.

*No letters of support have been obtained to date given the project's stage. The Bidder will seek letters from the Hadley Select Board/Town Administrator and the Hadley Fire Department*

*following the pre-filing meetings described above and will provide them to the Evaluation Team upon receipt.*

## Section A-8: Safety Plan

Please answer the following questions in Section A-8 for each Transmission Project and Distribution Project being bid:

8.1 Please attach as detailed a safety plan as possible, given the stage of the project, which demonstrates compliance or intent to comply with all relevant federal, state, and local laws, codes, and standards. Safety plans must at a minimum comprise the following elements:

- i. Energy Storage System project drawings: Provide final, draft, or preliminary project drawings, including as much detail as known at the time of bid submission.

*The project will comply with NFPA 855 (2023), NFPA 1 Chapter 52, NFPA 72, NFPA 69, NFPA 70 (Article 706), 527 CMR 1.00 (Massachusetts Comprehensive Fire Safety Code) and UL 9540/9540A, and the Bidder will prepare a site-specific safety package with the special permit application. Status of each element:*

*Project drawings — preliminary: [REDACTED] drawing PV-1.0 Rev. 2 (site/access plan, one-line, protection settings) attached. Container spacing, perimeter fence, 20-ft year-round access road and fire master box are shown; final layout per Hadley Fire Department review.*

- ii. Fire protection datasheets: Provide final, draft, or proposed technology fire protection system datasheets for the project.

*Fire protection datasheets — proposed technology: [REDACTED] Fire and Gas System (FGS): Fire and Gas Detection System with 9 heat/smoke sensors and 1 gas sensor per container on redundant power (24 h standby UPS), passive fire suppression (clean-agent) in the electrical control room, passive ventilation system evacuating thermal-runaway gases from the module vent ducts, and active ventilation system maintaining flammable-gas concentration below 25% of the LFL per NFPA 69; automatic Battery-Stop disconnection of all strings on fire/TR detection; dry-contact outputs to the site fire alarm panel and master box. Optional water-based suppression is available and will be included if required by the Fire Department. [REDACTED] datasheet and user manual excerpts attached.*

- iii. UL equipment listings and certifications: List plans to comply with the applicable UL equipment listings and certifications. Optionally, bidders may provide supplemental commentary related to UL equipment listings and certifications that they believe may be relevant or useful to the Evaluation Team for the purpose of evaluating the bid.

*UL listings — [REDACTED]: UL 1973, UL 9540, UL 9540A (unit-level test), UL 60730-1 (BMS), IEC 62619/62477; [REDACTED]: UL 62109-1, UL 1741 SA/SB, UL 1998, IEEE 1547-2018/1547.1-2020; transformers and switchgear: UL/IEEE listed. The complete system will be listed to UL 9540 as installed.*

- iv. Hazard mitigation analysis: Provide a final, draft, or plans to develop a project site-specific Hazard Mitigation Analysis (HMA), addressing thermal runaway, mechanical failures, and other potential equipment failures.

*Hazard Mitigation Analysis — plan: a site-specific HMA per NFPA 855 §4.4 will be prepared by a qualified fire protection engineer using [REDACTED]'s UL 9540A cell, module, unit and installation-level test reports, addressing thermal runaway, mechanical/electrical failures, loss of cooling, loss of auxiliary power and external events, and submitted with the special permit application.*

- v. Emergency response plan: Provide a final, draft, or plans to develop a project site-specific Emergency Response Plan (ERP).

*Emergency Response Plan — plan: a site-specific ERP will be developed with the Hadley Fire Department prior to commissioning, based on [REDACTED]'s Emergency Interventions Operational Guide (doc. 0000177811), including isolation procedures, defensive-firefighting guidance for LFP, water supply (hydrant distance waiver/alternative supply), and 24/7 contacts.*

- vi. Safety training materials: Provide final, draft, or plans to develop project site-specific safety training materials.

*Safety training materials — plan: [REDACTED] and [REDACTED] factory training for O&M staff; site-specific first-responder training session (classroom and walk-through) for Hadley Fire before energization and annually thereafter.*

- vii. Explosion control: Provide final, draft, or plans to develop project-specific explosion control designs, including plans to comply with the applicable UL test results standards and plans to comply with applicable NFPA requirements.

*Explosion control — proposed: the [REDACTED] container's passive exhaust circuit and active ventilation system are designed to keep the container free volume below 25% LFL (NFPA 69 deflagration prevention); installation-level UL 9540A results will be used to demonstrate no deflagration hazard, or deflagration venting (NFPA 68) will be added if required by the AHJ.*

8.2 Please include a discussion on incident preparedness and address all steps the project has taken to avoid potential safety issues, mitigate safety issues when they occur, and protect property, personnel, and the surrounding community.

*Incident preparedness is built into the design and operating plan:*

- (1) *prevention — LFP chemistry (high thermal-runaway onset temperature, no oxygen release), liquid cooling with homogeneous module temperatures, cell-level voltage/temperature monitoring (MMU/BMM) with automatic string disconnection on over-voltage, over-current, over-temperature or short-circuit, and conservative SOC/temperature windows enforced by the EMS;*
- (2) *detection — per-container heat, smoke and gas detection on redundant power with alarms to the 24/7 remote operations center and to the Hadley Fire Department via the master box;*
- (3) *mitigation — automatic Battery-Stop on any FGS event, passive/active ventilation to prevent deflagration, clean-agent suppression in the control room, 10-ft-plus container*

*separation and a non-combustible gravel and concrete surface;*

- (4) response — site-specific ERP, utility-lockable disconnect with 24/7 Eversource access, and a 1-hour response commitment from the O&M provider;*
- (5) recovery — [REDACTED]'s post-event inspection and quarantine procedures, root-cause analysis, and reporting to the AHJ, Eversource and the Distribution Companies.*

8.3 Please describe plans and measures to operate the facility safely, including but not limited to monitoring and maintenance procedures, mitigation features and potential failure modes.

*The facility will be unmanned and monitored 24/7 by OSP's remote operations center and the O&M provider through the [REDACTED] platform (real-time cell/string/container data, KPIs, predictive maintenance alerts) and the EMS. Monitoring covers cell voltage and temperature, string current, coolant temperature/flow, enclosure temperature and humidity, FGS status, door/intrusion, auxiliary power and UPS status, PCS alarms and protection relay events. Maintenance follows [REDACTED]'s and [REDACTED]'s prescribed intervals (semi-annual visual/thermal inspection, annual coolant, filter and torque service, relay and breaker testing), with maintenance records retained to preserve warranties. Mitigation features: automatic disconnection, ventilation, clean-agent suppression, SOC limits, perimeter fencing and signage, lockable disconnects, and a 10-minute UPS for controls. Potential failure modes and responses: cell/module fault → string isolation and replacement; cooling fault → power derate or shutdown; loss of communications with the Eversource Gateway → automatic isolation per the interconnection design; PCS fault → unit trip with the remaining unit continuing at reduced capacity; auxiliary power loss → UPS-backed safe shutdown.*

8.4 Please describe consequences resulting from various levels of potential failures and safety events.

*Level 1 — single-cell or module fault (most likely): detected by the BMS, the affected string is isolated automatically; no safety consequence; capacity reduced by 1/24 until repair. Level 2 — thermal event confined to a module: FGS detects off-gas/heat, Battery-Stop isolates all strings in the container, ventilation prevents gas accumulation; the container is quarantined; no propagation to adjacent containers (UL 9540A unit-level results); capacity reduced by 25% until repair/replacement. Level 3 — fire within a container: alarms to the fire department; defensive response per the ERP (adjacent containers protected by separation and non-combustible site); worst-case loss of one container ([REDACTED]), covered by property insurance; no off-site consequence expected given setbacks and LFP's low toxicity profile relative to NMC. Level 4 — external event (vehicle impact, flood, severe weather): protected by bollards/fencing, siting outside the floodplain and IP55/Type 3R enclosures. In all cases the facility is disconnected from the Eversource system by the customer recloser and, if necessary, by the utility-controlled GOAB.*

8.5 Please discuss intentions to continuously improve the safety practices while operating the facility, such as plans for regular safety audits and feedback mechanisms.

*The Bidder will conduct an annual safety audit of the facility (O&M provider and OSP) against*

*NFPA 855 and the manufacturers' requirements, review all alarms and near-misses quarterly, update the HMA and ERP whenever equipment, firmware or site conditions change, track industry incident reports (EPRI BESS Failure Incident Database, manufacturer bulletins) and apply manufacturer firmware/safety updates, and hold an annual drill/refreshers with the Hadley Fire Department. Feedback from first responders, Eversource and the Town will be incorporated into the plans.*

8.6 Please describe reporting protocols, both internally and externally.

*Internal: all alarms are logged automatically; any FGS event, protection trip, injury or near-miss is reported to the OSP project manager within 1 hour and documented in an incident report within 48 hours with root cause and corrective actions. External: fire/thermal events are reported immediately to the Hadley Fire Department (automatic via master box) and Eversource (via the DER Gateway and the Eversource control center), and to the Distribution Companies under the Long-Term Contract's notice provisions; events are reported to the manufacturer for warranty and fleet-learning purposes, to the Town/AHJ as required by the special permit conditions, and to DOER/DPU as required by applicable regulations.*

8.7 Please describe bidder's experience employing safety plans for similar projects currently under construction or in operation, including bidder's approach to risk assessment, design standards, and coordination with local authorities and emergency responders. Please describe how bidder's safety protocols have evolved over time.

*On its operating solar projects OSP has applied contractor safety requirements (OSHA 30 and NFPA 70E qualification for electrical work, site-specific safety plans from EPC contractors), coordinated with local fire departments at permitting, and maintained emergency response procedures covering isolation, utility and fire-department notification and site access. OSP maintains emergency response plans for its operating solar facilities covering isolation procedures, utility and fire-department notification and site access, and applies the same approach to storage. OSP's approach is to engage the local fire department before permitting, require UL 9540A-tested equipment, retain a fire protection engineer for the HMA, and contract O&M with a provider that operates a 24/7 NOC.*

8.8 Have any of bidder's prior projects experienced fire incidents, thermal events, or related safety concerns? If so, please summarize the circumstances, response actions taken, and lessons learned for each relevant facility and location.

*No. None of the Bidder's or its affiliates' prior projects has experienced a fire incident, thermal event or related safety concern.*

8.9 The project is encouraged to include testimonials and statements of support from local governments and first responder organizations to demonstrate robust stakeholder communication and participation in the project's safety plan. Please also provide evidence of community engagement towards acceptance of the facility, or a plan to work towards such engagement and acceptance.

*None yet. The Bidder will provide statements from the Hadley Fire Department and Select*

*Board following the pre-filing meetings planned for Q4 2026.*

## Section A-9: Engineering and Technology; Commercial Access to Equipment

This section includes questions pertinent to the engineering design and project technology. This section must be completed for all aspects of a project including but not limited to the Energy Storage System and associated operational plan and interconnection facilities. Bidders should provide information about the specific technology or equipment including the track record of the technology and equipment and other information as necessary to demonstrate that the technology is viable.

Please answer the following questions in Section A-9 for each Transmission Project and Distribution Project being bid:

9.1 Provide a reasonable but preliminary engineering plan which includes the following information:

- i. Type of energy storage technology (e.g., mechanical, chemical, thermal) and the specific details of the energy storage technology and how it works

*Technology: lithium iron phosphate (LFP) lithium-ion electrochemical storage. Energy is stored electrochemically in the LFP cells during charge and released on discharge; the DC output of each container's strings is converted to 660 V AC by the [REDACTED] PCS and stepped up to 13.8 kV for delivery to the Eversource feeder.*

- ii. Major equipment to be used including the components of the energy storage technology itself and surrounding system (e.g., inverter, enclosures, HVAC, meters, electrical and communication equipment, fire suppression).

*Major equipment: 4 [REDACTED] 5.1 MWh containers plus supplemental DC capacity of the same platform, approximately 21.6 MWh DC in total (each container: 6 strings of modules of 104 x 314 Ah LFP cells (2P52S), per-string Battery Management Module, Master BMS, integrated chiller/liquid cooling, HVAC with dehumidification, Fire and Gas System, 24 VDC UPS, auxiliary distribution); 2 [REDACTED]; 2 x 2,500 kVA pad-mount transformers with NGRs; auxiliary transformer and panelboards; PPC/EMS; [REDACTED] recloser control; [REDACTED] RTAC; revenue metering (ISO-NE CSF metering practice); 15 kV switch; fire master box; perimeter fencing; concrete equipment pads.*

- iii. Manufacturer of each of the equipment components listed above as well as the location of where each component will be manufactured.

*Manufacturers/locations: [REDACTED] ([REDACTED]) — containers assembled at [REDACTED]'s U.S. manufacturing facility (Jacksonville, Florida), with cells sourced from [REDACTED]'s non-FEOC supply chain, to be confirmed at procurement (see 5.14); [REDACTED] — [REDACTED] manufactured in Germany or at [REDACTED]'s U.S. facility, to be confirmed at procurement; transformers — U.S. manufacturer to be selected (domestic content); [REDACTED] relays/RTAC —*

*Pullman, WA, USA.*

- iv. Status of acquisition of the equipment components, including whether orders are in place and/ or production slots secured

*Status of acquisition: equipment has been specified and quoted; no purchase orders have been placed and no production slots reserved, consistent with the project's 2030 COD.*

- v. Whether the bidder has a contract for the equipment. If not, describe the bidder's plan for securing equipment and the status of any pertinent commercial arrangements

*Contract: no equipment contract. Plan: execute an equipment supply agreement with [REDACTED] (containers, BMS, performance guarantee) and [REDACTED] (PCS) in 2028 following ISA and permits, with delivery in 2029; lead times are currently 9–12 months. The Bidder may alternatively procure through an EPC contractor.*

- vi. Equipment vendors selected/considered

*Vendors selected/considered: [REDACTED] (selected basis of design); [REDACTED] SCS [REDACTED] (selected); alternatives considered: [REDACTED] Megapack 2 XL, [REDACTED] Gridstack, [REDACTED] PowerTitan (not pursued due to FEOC/domestic-content considerations).*

- vii. Track record of equipment operations, including safety record

*Track record: [REDACTED] — >15 years of grid-scale lithium-ion operation; [REDACTED]/Flex fleet deployed at GWh scale in North America, Europe and Australia; no fire propagation events in the [REDACTED] platform known to the Bidder. [REDACTED] — >12 GW of storage/hybrid inverters worldwide, extensive ISO-NE fleet.*

- viii. Include all UL certifications and other relevant industry codes and standards for key equipment including but not limited to storage modules, power conversion system, and/or integrated product certifications

*Codes and standards: UL 1973, UL 9540, UL 9540A, UL 60730-1, IEC 62619/62477, UL 62109-1, UL 1741 SA/SB, UL 1998, IEEE 1547-2018, IEEE 1547.1-2020, IEEE C57 (transformers), NFPA 855/1/70/72/69, 527 CMR 1.00, IEC 62443-4-2 (cybersecurity), MIL-STD-810G.*

- ix. Description of equipment warranties and guarantees, including terms and expiration

*Warranties: [REDACTED] — standard 2-year product warranty extendable, plus a capacity/performance and availability guarantee (up to 20 years with an annual capacity floor; terms to be finalized at contracting); [REDACTED] — 5-year standard inverter warranty extendable to 20 years with service contract; transformers — 1–2 years; EPC workmanship — 2 years.*

- x. If the equipment manufacturer has not yet been selected, identify in the equipment procurement strategy the factors under consideration for selecting the preferred equipment

*Not applicable — manufacturers selected.*

*Responses to items i–x are provided under each item above. UL certificates for the [REDACTED] and [REDACTED] equipment are attached where available.*

9.2 If the bidder has not yet selected the major equipment for a project, please provide a list of the key equipment suppliers under consideration.

*Not applicable; major equipment has been selected ([REDACTED]). Balance-of-plant suppliers under consideration: transformers — [REDACTED] (U.S.-manufactured); switchgear/recloser — [REDACTED]; relays/RTAC — [REDACTED] (specified); EMS/PPC — to be selected; the [REDACTED] and [REDACTED] native controllers are candidates.*

9.3 Please identify the same or similar equipment by the same manufacturer that are presently in commercial operation including the number installed, installed capacity and estimated generation for the past three years.

*[REDACTED] containers with the same LFP cell platform are in commercial operation at (reference list available from [REDACTED] on request). [REDACTED] UP-series inverters are installed at hundreds of sites worldwide including multiple Massachusetts SMART-paired and standalone storage projects (reference list available from [REDACTED] on request).*

9.4 For less mature technologies or equipment, provide evidence (including identifying specific applications) that the technology or equipment to be employed for energy production is ready for transfer to the design and construction phases. Also, address how the status of the technology or equipment is being considered in the financial and permitting plans for the project. Provide the status of testing/qualification for any equipment in development.

*Not applicable. LFP lithium-ion batteries and [REDACTED] central storage inverters are mature, commercially proven technologies with multi-GW deployment in the U.S.*

9.5 Please indicate if the bidder has a full and complete list of equipment needed for all physical aspects of the bid, including the Energy Storage System and all equipment required for the System to fulfill its operational plan, and mandatory and voluntary transmission or distribution system upgrades. Include OEM-supplied data sheets for all equipment. If bidder does not have a full and complete list of equipment, identify the areas of uncertainty and when the full and complete list of equipment will be identified.

*Yes. The Bidder has a complete preliminary equipment list for all physical aspects of the bid (battery containers, PCS, transformers, auxiliary power, protection and control, metering, communications, interconnection facilities, civil/structural and fencing) as reflected in the [REDACTED] design; final bill of materials will follow the Eversource impact study and detailed design.*

9.6 Please indicate if the bidder has secured its equipment for all physical aspects of the bid, including the Energy Storage System and all equipment required for the System to fulfill its operational plan, and mandatory and voluntary transmission or distribution system upgrades. If not, identify the long-lead equipment and describe the timing for securing this equipment.

*No. Equipment has not been secured; see 9.1(iv)–(v). Given a January 1, 2030 Guaranteed COD and 9–12 month lead times, orders will be placed in 2028 after the ISA and special permit are in hand, with delivery in 2029 ahead of the Guaranteed COD.*

9.7 Does bidder intend to propose any technology (1) that it, its affiliates or parent companies have used in a prior project, (2) that has been involved in a fire or thermal event anywhere in the world and (3) that necessitated a root cause analysis? If yes, please submit the root cause analysis and related documentation as part of the bid package. If no, please state that this question is not applicable.

*No. The Bidder does not propose any technology that it or its affiliates have used in a prior project that has been involved in a fire or thermal event, that has been the subject of a safety recall, or that is less mature than described above.*

9.8

## Section A-10: Project Schedule

A bidder must demonstrate that its proposal can be developed, permitted, financed, and constructed and be technically viable within a commercially reasonable timeframe. The bidder is required to provide sufficient information and documentation that shows that the bidder's resources, process and schedule are adequate for the acquisition of all rights, permits and approvals for all aspects of the project and for the financing of the project consistent with the proposed project milestone dates.

Bidders are required to provide a complete critical path schedule for the project from the notice of selection of the project for contract consideration to the start of commercial operations. For each project element, list the start and end date. The proposal must include a schedule with reasonable detail that demonstrates that the bidder has provided sufficient time for the application for, and receipt of, necessary permits, approvals, other commitments, project financing, completion of design work, and equipment procurement and construction in order to credibly complete the project reasonably consistent with the proposed Commercial Operation Date, meaning that the project is more likely than not to come online by the date that is projected within the proposal. If a bidder is developing the project in phases, it should include a schedule for each phase. For Transmission Projects, the bidder should include critical milestones in its markup to the Form LTC that are consistent with its proposal and are reasonably achievable.

Please answer the following questions in Section A-10 for each Transmission Project and Distribution Project being bid:

10.1 Identify the elements on the critical path. The schedule should include, at a minimum, preliminary engineering, financing, acquisition of real property rights, Federal, state and/or local permits, licenses, environmental assessments and/or environmental impact statements (including anticipated permit submittal and approval dates), completion of interconnection studies and approvals, procurement, facility contracts, start of construction, construction schedule, and any other requirements that could influence the project schedule and the commercial operation date.

*Critical path (from notice of selection, expected Q1 2027):*

- (1) Contract execution and DPU approval — Q1–Q3 2027;*
- (2) Eversource System Impact Study and ISA — application filed Oct 2026; study and ISA expected Q4 2027–Q2 2028 based on recent WMECO timelines for 5 MW storage;*
- (3) Hadley special permit — Q2 2027 filing, decision Q3–Q4 2027;*
- (4) option exercise and ground lease, following the special permit and ISA — Q4 2027–Q2 2028;*
- (5) ITC transfer and financing commitments — 2028;*
- (6) final design and building/electrical permits — 2028;*

- (7) *equipment orders ([REDACTED], transformers) — Q2–Q3 2028, delivery Q2–Q3 2029;*
- (8) *site work, interconnection facilities and Eversource utility work — Q2–Q3 2029;*
- (9) *installation, commissioning, Eversource witness test, permission to operate — Q3–Q4 2029;*
- (10) *DOER SoQ, ISO-NE registration, GIS — 2029;*
- (11) *Guaranteed COD — January 1, 2030. The longest-lead items are the ISA and the special permit; equipment delivery is the critical path from 2028 onward. A one-page schedule listing the start and end date of each project element is attached (Attachment A-10.01).*

10.2 Describe and demonstrate that the project is more likely than not to come online by the commercial operation date that is projected within the proposal, as evidenced by documents filed by the bidder showing the following:

- i. Commencement of permitting processes;

*Permitting commenced: pre-application discussions with the Town of Hadley held August 2026; special permit filing Q2 2027.*

- ii. A plan for completing all permitting processes;

*Permitting plan: Section A-7.*

- iii. Environmental assessment;

*Environmental assessment: MassGIS wetlands, NHESP, FEMA and EJ screening complete (Section A-7); Conservation Commission and NHESP filings identified; Phase I ESA to be commissioned before option exercise; previously developed gravel site with no resource areas within the footprint.*

- iv. Viable financing plans along with detailed information requested in Section 2.2.2.4;

*Financing plan: Section A-5; development funded by the sponsor; term financing and ITC transfer upon contract approval.*

- v. Viable installation and electrical interconnection plans;

*Installation and interconnection plans: PE-stamped design complete ([REDACTED] Rev. 2); interconnection application filed; installation plan in Section A-11.*

- vi. Material progress towards the acquisition of all real property rights; and

*Real property rights: executed option with a lease term covering the full contract term; title and survey underway.*

vii. Evidence of material vendor activity.

*Vendor activity: [REDACTED] and [REDACTED] equipment specified; [REDACTED] under contract. The January 1, 2030 Guaranteed COD allows for an ISA in 2028 and a 2029 construction period.*

*Responses to each item are provided under the items above.*

10.3 Detail the status of all critical path items, such as receipt of all necessary siting, environmental, and ISO-NE or interconnecting Distribution Company approvals.

*Site control: executed option (May 2026), in good standing. Interconnection: pre-application complete (ESMAEX-05817); application filed October 2026; impact study and ISA pending. Siting/zoning: special permit application in preparation; Town of Hadley pre-application meeting held August 6, 2026. Environmental: no MEPA review or federal permits expected; wetlands buffer-zone and NHESP Priority Habitat filings identified (Section A-7.7), pre-filing; Phase I ESA to be commissioned. Financing: sponsor-funded development; term financing to follow contract approval. Equipment: specified, not yet ordered. ISO-NE/DOER: registrations not yet due.*

## **Section A-11: Construction and Logistics**

This section of the proposal addresses necessary arrangements and processes for assembly, and deployment of major project components, including the Energy Storage System and all equipment required for the system to fulfill its operational plan, and other major components associated with delivery facilities.

Please provide a construction plan that captures the following objectives. If the project is being developed in phases, please break out the construction plan for each phase. Please answer the following questions in Section A-11 for each Transmission Project and Distribution Project being bid:

11.1 Please list the major tasks or steps associated with deployment of the proposed project and any necessary specialized equipment.

1. *Final design, Eversource ISA conditions and permit conditions incorporated (2028).*
2. *Site preparation: strip and regrade the existing gravel within the 6,000 sf footprint; compact subgrade; install conduit, grounding grid and concrete equipment pads for four containers, two PCS and transformers (4–6 weeks).*
3. *Interconnection facilities: customer poles, 15 kV switch, recloser, underground riser, MV cable and transformers; Eversource installs utility poles, cutouts, GOABs, recloser and metering (6–8 weeks, coordinated with Eversource).*
4. *Container delivery and setting: four 48-ton [REDACTED] containers delivered by flatbed and set by a 200–300-ton crane in one to two days; PCS and transformers set the same*

week.

5. *Electrical completion: DC and AC cabling, auxiliary power, controls, fiber to the RTAC, fire alarm and master box (4–6 weeks).*
6. *Cold commissioning per [REDACTED]'s Electrical Completion and Cold Commissioning Manual; [REDACTED] commissioning; relay settings verification (2–3 weeks).*
7. *Eversource witness test, permission to operate, hot commissioning and capacity test; [REDACTED] performance test (2–3 weeks).*
8. *Fencing, signage, landscaping, first-responder training, as-builts. Specialized equipment: 300-ton crane, MV cable splicing crew, relay test set, [REDACTED] and [REDACTED] factory commissioning engineers. Total construction duration: approximately 5–6 months.*

11.2 Please describe the proposed approach for staging and deployment of major project components to the project site.

*Containers ship fully assembled and factory-tested (UN 3536) by road from [REDACTED]'s U.S. facility (or port of entry for any imported components) and are set directly from the truck onto the pads; the existing parking lot and 20-ft driveway accommodate tractor-trailer access and the crane without road improvements (turning radius and any road-weight limits to be confirmed in the construction logistics plan). PCS and transformers are delivered on separate trucks. Laydown and parking will use the remainder of the gravel lot by agreement with the landowner. Deliveries will be sequenced to arrive after pads cure and MV work is complete so that containers are energized (auxiliary power for thermal management) within [REDACTED]'s allowable storage window. Site deliveries will avoid school-bus hours and comply with Town of Hadley conditions.*

11.3 List the party (e.g. the bidder, or equipment/service providers under contract to the bidder) responsible for each deployment activity and describe the role of each party. Describe the status of bidder's contractual agreements with third-party equipment/service providers.

*Owner/developer (Rocky Hill Road Energy LLC / OSP): overall project management, permitting, interconnection, procurement, commissioning oversight. EPC contractor (to be selected by competitive bid in 2028 from regional storage EPC firms) under a fixed-price EPC contract: civil, structural, electrical installation, interconnection facilities, testing and as-builts. [REDACTED]: container supply, delivery supervision, cold/hot commissioning and performance test. [REDACTED]: PCS supply and commissioning. [REDACTED]: engineer of record, drawings, relay settings, construction support. Eversource: utility-side interconnection facilities, witness test and permission to operate. Fire protection engineer: HMA/ERP. O&M provider (Section A-12): takes over at substantial completion.*

## **Section A-12: Operations and Maintenance**

Projects that can demonstrate that the operation and maintenance (“O&M”) plan, level of funding, and mechanism for funding will ensure reliable operations of all aspects of the project

during the term of the contract are preferred.

Please answer the following questions in Section A-12 for each Transmission Project and Distribution Project being bid:

12.1 Provide an O&M plan for the project that demonstrates the long-term operational viability of the proposed project. The plan should include the location of the O&M base, a discussion of the staffing levels proposed for the project, the expected role of the project sponsor or equipment manufacturer/outside contractor, scheduling of major maintenance activity, and the plan for testing equipment.

*O&M will be performed under a long-term services agreement with a qualified third-party O&M provider (to be selected; [REDACTED] and [REDACTED] are candidates for the battery and PCS scopes) with OSP as asset manager. O&M base: provider's regional service center within ~2 hours of Hadley; 24/7 remote monitoring through [REDACTED] and the EMS; staffing — one dedicated asset manager (OSP), on-call field technicians (provider), [REDACTED] factory support. Scheduled maintenance: semi-annual inspections; annual preventive maintenance (coolant, filters, HVAC, torque, thermal imaging, breaker/relay testing, Eversource-required protection testing); 5-year major service; augmentation in years ~8 and ~15. Unscheduled maintenance: 24-hour response for non-critical and 4-hour response for critical alarms; spare modules, BMM boards and PCS components held on site or at the provider's depot. Performance management: availability, round-trip efficiency, SOH and CPEC delivery tracked monthly against the contract schedule. Decommissioning: funded by a reserve/bond per the special permit and lease.*

12.2 Describe in detail the proposed O&M funding mechanism and funding levels to support planned and unplanned O&M requirements.

*[REDACTED – CONFIDENTIAL]*

12.3 Describe the terms (or expected terms) of the warranties and/or guarantees on major equipment that the bidder is utilizing or proposing to utilize.

*[REDACTED]: product warranty of 2 years from commissioning (extendable), and a performance guarantee covering usable energy capacity (annual floor consistent with the degradation profile in CPPD Part V(c)), round-trip efficiency and system availability (≥97%), with liquidated damages for shortfalls, for a term of up to 20 years when paired with a [REDACTED] service agreement (terms to be finalized at contracting). [REDACTED]: 5-year standard warranty on the [REDACTED], extendable to 20 years with an [REDACTED] service contract. Transformers and switchgear: manufacturer's standard 1–2 year warranties. EPC: 2-year workmanship warranty.*

12.4 Describe the status of the project sponsor in securing any O&M agreements or contracts. Include a discussion of the sponsor's plan for securing a medium-term or long-term O&M contract, including the expected provider of O&M services.

*No O&M agreement has been executed; the Bidder will procure O&M proposals in 2028*

*alongside the equipment supply agreements and will execute a long-term (10-year, with renewal) O&M and performance guarantee package with [REDACTED] and/or an independent provider before commissioning. The Bidder's plan is to tie the [REDACTED] performance guarantee to a [REDACTED] service agreement for the battery and to contract PCS and balance-of-plant service separately.*

12.5 Provide examples of the bidder's experience with O&M services for other similar projects.

*OSP contracts O&M for its owned projects to qualified third-party O&M providers under long-term service agreements and retains asset-management responsibility (monitoring, performance review, contract administration and reporting). The same model will be applied to the Rocky Hill Road facility, with the battery and PCS manufacturers' service organizations covering the equipment-specific scopes.*

## **Section A-13: Project Management and Experience**

Bidders are required to demonstrate project experience and management capability to successfully develop and operate all aspects of the project proposed. The Evaluation Team is particularly interested in project teams that have demonstrated success in projects of similar type, size and technology and can demonstrate an ability to work together effectively to bring the project to commercial operation in a timely fashion.

For all project-specific questions in Section A-13, if bidding in multiple Transmission Projects or Distribution Projects, please answer each question for each Transmission Project or Distribution Project being bid.

13.1 Provide an organizational chart for the project that lists the project participants and identifies the corporate structure, including general and limited partners.

*Organizational chart (attached): Sevag Khatchadourian (Principal) → Oak Square Partners (sole member; asset manager) → Rocky Hill Road Energy LLC (Bidder/project company).*

13.2 Provide statements that list the specific experience of the bidder and each of the project participants (including, when applicable, the bidder, partners, and proposed contractors), in developing, financing, owning, and operating generating and delivery facilities, other projects of similar type, size and technology, and any evidence that the project participants have worked jointly on other projects.

*Oak Square Partners, LLC (Newton, MA; founded 2016): renewable energy developer whose three principals have developed, financed and brought into operation 22 solar projects totaling 27.7 MW DC in Massachusetts and Rhode Island — 17 ground-mount (22.1 MW), 4 rooftop (3.0 MW) and 1 landfill (2.6 MW) — ranging from 250 kW to 6.5 MW DC, across the MA SMART, RI REGrowth, MA net metering and RI community solar programs and a behind-the-meter PPA, with offtakers including the Towns of Lee, Lenox and Harvard, the Norton and Stoughton Housing Authorities, UMass Boston and Winn Development. OSP is also an owner-operator through its South County Solar subsidiary (three 250 kW arrays in Rhode Island built and held),*

*and has a 5 MW / 10 MWh battery storage project in development in Rhode Island with an approved interconnection agreement. OSP's experience covers SMART 2.0/3.0, ITC/IRA tax structuring and safe-harbor strategy, distribution interconnection in Eversource, National Grid and Rhode Island Energy territories (22 projects interconnected and energized), municipal permitting in both states, and PPA/ESA structuring. [REDACTED]: Massachusetts electrical engineering firm with extensive Eversource/National Grid interconnection design experience for solar and storage. [REDACTED] and [REDACTED]: as described in Section A-9.*

13.3 Provide a management chart that lists the key personnel dedicated to this project and provide resumes of the key personnel. Key personnel of the bidder's development team having substantial project management responsibilities must have:

- i. Successfully developed and/or operated one or more projects of similar size or complexity or requiring similar skill sets; and
- ii. Experience in financing power generation projects (or have the financial means to finance the project on the bidder's balance sheet).

*Key personnel (management chart attached with the organizational chart in 13.1): Sevag Khatchadourian, Principal and Founder, Oak Square Partners / Authorized Signatory, Rocky Hill Road Energy LLC — project executive responsible for development, permitting, interconnection, financing and contract administration; more than ten years of experience developing renewable energy projects in Massachusetts and Rhode Island, having participated in every stage of the development process — initial siting, design, interconnection, permitting, financing, construction and management of operating projects — on each of OSP's 22 operating projects. John Typadis, Principal and Founder — financing and commercial lead; 20 years in the energy industry, more than half in development taking projects from initial concept through financing; previously a power market analyst covering the MISO and ERCOT markets and manager of a congestion portfolio in the SPP market. Demetri Typadis, Principal and Co-Founder — construction and asset management; eight years of energy project development experience, led OSP's MA SMART Program development effort; previously an equity research analyst at Barclays Capital and Energy Sector Portfolio Manager for the Cayuga Fund. Engineer of record: [REDACTED] (Massachusetts P.E. stamp on the interconnection drawings). i. The principals have developed and brought to operation 22 distributed solar projects of similar or larger size in Massachusetts and Rhode Island, including West Orange Solar (6.5 MW DC, Orange, MA), Douglas Pike Solar (2.7 MW DC, Burrillville, RI) and Willow Hill Solar (2.6 MW DC landfill, Lee/Lenox, MA), and a 5 MW / 10 MWh battery project in development in Rhode Island. ii. Financing experience: the principals have funded the development of all 22 projects (about [REDACTED] of project value) with development capital through notice to proceed and have exited 19 of them through sales at NTP to [REDACTED] and [REDACTED], which provided construction and permanent financing; the three South County Solar projects were built and financed by OSP with project debt and internal equity and are held in its portfolio.*

13.4 Provide a listing of all projects the project sponsor has successfully developed or that are currently under construction. Provide the following information as part of the response:

- i. Name of the project
- ii. Location of the project
- iii. Project type, size and technology
- iv. Commercial operation date
- v. Availability factor of the project for the past three years
- vi. Safety record
- vii. References, including the names and current addresses and telephone numbers of individuals to contact for each reference.

*Projects developed and brought to operation by OSP and its principals (22 solar projects, 27.69 MW DC, all operating), plus one battery project in development, are listed below. Availability: all 22 projects have operated continuously since COD with availability above 97% over the past three years, net of utility outages, to the Bidder's knowledge. Safety record: no lost-time incidents, fires or reportable events on any project, to the Bidder's knowledge. References: available on request.*

| Project                       | Type / program                                                     | Location           | Size (MW DC)  | Status                       | COD      |
|-------------------------------|--------------------------------------------------------------------|--------------------|---------------|------------------------------|----------|
| Rhode Island BESS             | Battery storage (BTM)                                              | Rhode Island       | 5 MW / 10 MWh | In development; ISA approved | —        |
| Douglas Pike Solar            | Ground-mount solar, community solar (RI CNM)                       | Burrillville, RI   | 2.71          | Operational                  | Jun 2023 |
| Mendon Road Solar             | Ground-mount solar, RI REGrowth                                    | Woonsocket, RI     | 1.00          | Operational                  | Jun 2023 |
| Seth Way Solar                | Ground-mount solar, community solar (RI CNM)                       | West Greenwich, RI | 1.00          | Operational                  | Mar 2023 |
| Manomet Solar                 | Ground-mount solar, MA SMART                                       | Plymouth, MA       | 1.00          | Operational                  | Mar 2023 |
| Palmer Circle Solar 2         | Ground-mount solar, RI REGrowth                                    | Hopkinton, RI      | 1.00          | Operational                  | Aug 2022 |
| South County Solar 485 Church | Ground-mount solar, RI REGrowth                                    | Richmond, RI       | 0.25          | Operational                  | Dec 2021 |
| West River Solar              | Ground-mount solar, MA SMART                                       | Orange, MA         | 1.30          | Operational                  | Dec 2021 |
| Sargent Road Solar            | Ground-mount solar, MA SMART                                       | Westminster, MA    | 1.30          | Operational                  | Nov 2021 |
| West Orange Solar             | Ground-mount solar, MA SMART                                       | Orange, MA         | 6.50          | Operational                  | Apr 2021 |
| South County Solar 805 Main   | Ground-mount solar, RI REGrowth                                    | Hopkinton, RI      | 0.25          | Operational                  | Jun 2020 |
| South County Solar 1          | Ground-mount solar, RI REGrowth                                    | Hopkinton, RI      | 0.25          | Operational                  | Dec 2019 |
| Palmer Circle Solar           | Ground-mount solar, RI REGrowth                                    | Hopkinton, RI      | 0.99          | Operational                  | Dec 2019 |
| High Street Solar             | Ground-mount solar, RI REGrowth                                    | Hopkinton, RI      | 0.90          | Operational                  | Dec 2019 |
| Main Street Solar             | Ground-mount solar, RI REGrowth                                    | Richmond, RI       | 0.97          | Operational                  | Dec 2019 |
| Danielson Pike Solar          | Ground-mount solar, RI REGrowth                                    | Foster, RI         | 0.95          | Operational                  | Dec 2019 |
| Athol Solar Holdings          | Ground-mount solar, net metering (Town of Harvard)                 | Athol, MA          | 0.42          | Operational                  | May 2017 |
| Willow Hill Solar             | Ground-mount landfill solar, net metering (Towns of Lee and Lenox) | Lee/Lenox, MA      | 2.60          | Operational                  | Jan 2017 |
| Rustcraft Road Solar          | Rooftop solar, net metering (Winn Development)                     | Dedham, MA         | 1.00          | Operational                  | Jan 2017 |
| 480 McClellan Solar           | Rooftop solar, net metering (UMass)                                | Boston, MA         | 0.50          | Operational                  | Jan 2017 |

|                            |                                                                                    |                     |             |                    |                 |
|----------------------------|------------------------------------------------------------------------------------|---------------------|-------------|--------------------|-----------------|
|                            | <i>Boston)</i>                                                                     |                     |             |                    |                 |
| <i>440 McClellan Solar</i> | <i>Rooftop solar, net metering (UMass Boston)</i>                                  | <i>Boston, MA</i>   | <i>0.50</i> | <i>Operational</i> | <i>Jan 2017</i> |
| <i>Buxton Road Solar</i>   | <i>Ground-mount solar, net metering (Norton and Stoughton Housing Authorities)</i> | <i>Uxbridge, MA</i> | <i>1.30</i> | <i>Operational</i> | <i>Jul 2016</i> |
| <i>Avon Solar</i>          | <i>Rooftop solar, behind-the-meter PPA</i>                                         | <i>Avon, MA</i>     | <i>1.00</i> | <i>Operational</i> | <i>Dec 2015</i> |

13.5 If the bidder's previous project experience is primarily or entirely outside of Massachusetts and/or the Northeast, describe how the skills and perspectives of this non-local experience will be beneficial to successfully developing the bid(s) under this RFP.

*Not applicable — the Bidder's and OSP's experience is primarily in Massachusetts and the Northeast.*

13.6 With regard to the bidder's project team, identify and describe the entity responsible for the following, as applicable:

i. Construction Period Lender

*Construction Period Lender: to be selected.*

ii. Operating Period Lender and/or Tax Equity Provider

*Operating Period Lender / Tax Equity: to be selected; ITC transfer purchaser to be selected via broker.*

iii. Financial Advisor

*Financial Advisor: OSP in-house.*

iv. Environmental Consultant

*Environmental Consultant: to be engaged for the Phase I ESA and the wetlands/NHESP filings.*

v. Facility Operator and Manager

*Facility Operator and Manager: OSP (asset manager) with O&M provider per Section A-12.*

vi. Owner's Engineer

*Owner's Engineer: [REDACTED]*

vii. Transmission/Delivery Consultant

*Transmission/Delivery Consultant: [REDACTED] (interconnection); not otherwise required for a distribution-connected project.*

viii. Legal Counsel

*Legal Counsel: Ruberto, Israel & Weiner, P.C. (RIW), Boston, MA.*

*Responses to each item are provided under the items above.*

13.7 Describe the experience and expertise of the bidder and project team needed to successfully develop, finance, construct, and operate and maintain its proposed eligible project on schedule and according to the bidder's commitments to a competitive procurement process. Describe the Bidder's continuity of corporate management through successful project development.

*The project team combines OSP's development, interconnection, incentive and financing expertise in Massachusetts distributed energy with an engineer of record ([REDACTED]) that has designed and obtained utility approval for this specific project, and two tier-one equipment suppliers that provide turnkey commissioning and long-term performance guarantees. OSP has taken 22 distribution-connected projects in National Grid, Eversource and Rhode Island Energy territory from site control through interconnection, permitting, financing, construction and operation — including West Orange Solar (6.5 MW, 2021), Sargent Road and West River Solar (1.3 MW each, 2021), Douglas Pike community solar (2.7 MW, 2023) and the Willow Hill landfill project (2.6 MW, 2017) — and has specific experience with the Clean Peak Standard and ISO-NE registration for storage. The project's small scale, previously developed site, standard interconnection and mature technology do not require capabilities beyond those the team has already exercised.*

13.8 Describe the Bidder's track record developing similar projects, including consideration of any project delays, amendments, defaults, and performance issues, including on prior long-term contracts. Describe any prior failures to achieve commercial operation dates under other contracts and provide a credible description of how the current proposed project will avoid similar project delays or development issues if applicable.

*OSP and its principals have delivered 22 of 22 projects to commercial operation, under feed-in tariff, net metering, community solar and PPA structures, with no defaults, contract terminations or performance claims under any offtake agreement or program contract. Where schedules moved, the cause was utility interconnection timing (study and construction lead times in Rhode Island and Massachusetts), which the principals managed through early application filing and sustained utility engagement. The proposed project applies the same approach: interconnection application already filed, a January 1, 2030 Guaranteed COD that allows for an ISA in 2028 and a 2029 construction period, mature equipment with 9–12 month lead times, and a previously developed gravel site requiring minimal civil work.*

13.9 Describe the bidder's relevant experience supporting similar projects in a state or federal regulatory or judicial forum. This experience can be established with examples of one or more key member(s) of the development team advocating in favor of a similar project in a regulatory proceeding, before a court, or in another tribunal.

*OSP's principals have participated in Massachusetts and Rhode Island regulatory and stakeholder processes affecting distributed solar and storage — including program administrator proceedings for the SMART and REGrowth programs and utility interconnection*

*processes — through industry associations and in support of OSP's own projects. The Bidder will support the Distribution Companies' efforts to obtain DPU approval of the Long-Term Contract, as required by Section 2.10 of the RFP.*

13.10 If the bidder or any of its past or present affiliates has either (1) been involved with a complex development project that failed, was withdrawn, or otherwise did not proceed, or (2) defaulted under, or agreed to terminate a contract for a complex development project, then the bidder should provide relevant details.

*One disclosure: OSP withdrew a 1 MW solar project in Eversource territory after Eversource determined that interconnection was infeasible on a commercially reasonable timeline because of required substation equipment upgrades. No contract, offtake agreement or program obligation was defaulted under or terminated as a result, and no third party incurred a loss. The experience informs the proposed project's approach: pre-application review completed before site control was finalized, and an interconnection allowance and a Guaranteed COD sized for the study outcome. Neither the Bidder nor any affiliate has otherwise been involved in a complex development project that failed, was withdrawn or did not proceed, or defaulted under or terminated a contract for such a project.*

## **Section A-14: Economic Development and Employment Benefits, Transitioning Fossil Fuel Communities, Benefits to Low Income Ratepayers and Environmental Justice Communities, and Other Benefits**

For all project-specific questions in Section A-14, if bidding in multiple Transmission Projects or Distribution Projects, please answer each question for each Transmission Project or Distribution Project being bid:

14.1 Please provide an estimate of the number of jobs to be created directly during project development and construction, and during operations, and a general description of the types of jobs created, duration of employment, estimated annual compensation, the employer(s) for such jobs, and the location. Employment impacts should be broken out by state and the region as a whole and highlight any impacts in economically distressed areas, including former fossil fuel communities. Please treat the development, construction, and operation and maintenance periods separately in your response. All information provided must be measurable.

*Development and construction: An estimated 25–35 direct jobs over the construction period (civil crew of 6–8, electrical crew of 8–12, crane/rigging 4, commissioning engineers 4–6, engineering/project management 3–5), equivalent to roughly 8–10 full-time-equivalent job-years, performed by Massachusetts-based contractors and union or prevailing-wage labor consistent with the ITC requirements. Operations: approximately 0.5 FTE of ongoing O&M and asset-management labor (field technician visits, remote monitoring) plus periodic augmentation work. Indirect/induced: local purchases of concrete, aggregate, electrical materials, and services (surveying, legal, engineering) in Hampshire County.*

14.2 Please describe employment opportunities for members of federally recognized and state acknowledged tribes in the Commonwealth, workers from low-income communities and certified minority-owned and women-owned small business enterprises in the Commonwealth, as well residents of any Environmental Justice neighborhoods impacted by the project.

*The Bidder will require its EPC contractor to (i) post construction positions with MassHire Franklin Hampshire Career Center and with the regional building trades, (ii) comply with the Davis-Bacon prevailing wage and registered apprenticeship requirements of the ITC, which creates apprenticeship positions on the project, and (iii) give preference in hiring to residents of Hampshire County, members of federally and state-acknowledged tribes, and workers from low-income communities and certified minority- and women-owned businesses. OSP will report hiring outcomes to DOER under the Form MOU.*

14.3 Please describe project support for workforce harmony and community benefits through Community Benefits Agreements and workforce agreements with appropriate labor organizations for construction, renovation, reconstruction, alteration, installation, demolition, expansion, maintenance and repair, if applicable.

*The project will be built under prevailing wage and apprenticeship requirements. The Bidder*

*will offer to negotiate a Community Benefits Agreement or host-community agreement with the Town of Hadley addressing PILOT payments, first-responder training and emergency equipment support, and will engage the regional building trades on the construction workforce.*

14.4 Please describe the status of any contractual commitments with respect to direct job creation and provide any pertinent agreements that have been executed, if applicable.

*None executed. Job-creation commitments will be incorporated in the EPC contract and reported under the Form MOU.*

14.5 Please describe and quantify any other economic activity or development expected to result directly from the proposed project. Impacts should be broken out by state and the region as a whole and highlight any impacts in economically distressed areas or former fossil fuel communities. Direct economic activity/development will be evaluated based on scale relative to project size, credibility and firmness. Preference will be given to commitments that secure long-term benefits; begin to provide benefits during project development, construction, installation, and the first five years of operations; direct benefits to Environmental Justice populations and host communities.

*Massachusetts/Hampshire County: approximately [REDACTED] of total project investment, of which an estimated [REDACTED] is spent on Massachusetts labor, materials and services; personal property tax payments to the Town of Hadley of approximately [REDACTED] in the first operating year, declining with assessed value (or a negotiated PILOT), totaling an estimated [REDACTED] over 20 years; ground rent of [REDACTED] (escalating) to a local landowner; Eversource interconnection facility payments; annual operations and maintenance spending of approximately [REDACTED] (maintenance, insurance and site services) largely with regional providers. No out-of-state economic activity other than equipment manufacturing.*

14.6 Please demonstrate any benefits to low-income ratepayers in the Commonwealth and describe how the project minimizes and mitigates, to the extent feasible, ratepayer impacts. Benefits to low-income ratepayers may include, but are not limited to, projects that reduce the energy burden for low-income ratepayers through energy efficiency or renewable energy upgrades; direct funding of rate relief through grant programs, support of existing community programs or other funding opportunities. Describe the impact, if any, those benefits will have on the cost of the project.

*The proposed CPEC price is set at [REDACTED – CONFIDENTIAL] of the Alternative Compliance Payment, below the 97.75% cap, so the Distribution Companies acquire CPECs at a discount to the compliance cost that would otherwise be passed through to all ratepayers, including low-income customers. Peak-period discharge reduces wholesale energy and capacity costs that are recovered through basic service and distribution rates, and distribution peak relief defers local upgrades. The Bidder will not seek any rate-based cost recovery.*

14.7 Please describe benefits to transitioning fossil fuel communities, including how the community can be described as a fossil fuel community, including but not limited to hosting fossil fuel infrastructure such as fuel storage, delivery facilities, or fossil fuel generation facilities.

*Hadley is not a transitioning fossil fuel community as defined in the RFP. Regionally, the project displaces output from fossil peaking units during Massachusetts peak hours and supports the retirement of oil- and gas-fired peakers in the Pioneer Valley and statewide. The site is located in Census Tract 8214 (Hampshire County), designated an energy community under IRC §45(b)(11)(B)(iii) because it directly adjoins a census tract in which a coal-fired generating unit was retired after 2009 (DOE/NETL 2024 Coal Closure Energy Communities data set) — a direct link between the project and the region's transition away from fossil generation.*

14.8 Please provide a diversity, equity and inclusion plan that includes a Workforce Diversity Plan and the Supplier Diversity Program Plan as outlined in Section 2.2.2.13 of the RFP.

*Workforce Diversity Plan: the Bidder commits to (i) working towards a construction plan that is consistent with Massachusetts public-construction goals; (ii) requiring the EPC contractor to recruit through MassHire, the Pioneer Valley Building Trades and pre-apprenticeship programs serving low-income and minority communities; (iii) apprenticeship utilization per ITC requirements; and (iv) quarterly reporting of workforce demographics during construction. Supplier Diversity Program Plan: the Bidder commits to a goal of 10% of non-battery project spend with Massachusetts-certified minority-, women-, veteran-, LGBT- and disability-owned business enterprises (SDO-certified), to solicit bids from certified firms for civil, electrical, fencing, surveying, legal and professional services, and to report supplier diversity spend annually to DOER under the Form MOU.*

14.9 Please describe the strategy and mechanisms to track and report on any applicable commitments, including progress in achieving promised employment and economic benefits and the goals in the diversity, equity and inclusion plan, based on the template provided in the Form MOU with DOER and any other supplemental plans for tracking and reporting.

*The Bidder will track commitments through*

- (i) EPC and O&M contract provisions requiring certified payroll, workforce demographic and supplier-diversity reporting;*
- (ii) a project reporting dashboard maintained by OSP;*
- (iii) quarterly reports during construction and annual reports during operations to DOER under the Form MOU and to the Town of Hadley under any host-community agreement; and*
- (iv) an annual compliance certification by the Bidder's manager. Reports will cover jobs created, work hours by demographic group, apprenticeship hours, supplier-diversity spend, community-benefit payments, safety incidents and environmental-justice engagement.*

14.10 Please provide a marked version of the Form MOU with DOER for this solicitation showing any specific proposed changes to the Form MOU. Bidders are discouraged from proposing any material changes or conditions to the Form MOU and any such changes will be considered in the Stage Two Qualitative Evaluation.

*Attachment: Form MOU with DOER — submitted without changes.*

14.11 Please propose a strategy plan to track and report on the status of environmental justice impacts, and engagement and employment (training, recruitment and hiring goals) opportunities, based on the template provided in the Form MOU with DOER and any other supplemental plans for tracking and reporting.

*The Bidder will (i) screen the site and interconnection route against the MassGIS Environmental Justice Populations layer and document the result in the special permit application; (ii) if any EJ population is within one mile, provide notice and an informational meeting in the languages prevalent in that community consistent with the EEA EJ Policy; (iii) track and report annually to DOER the project's employment, training, recruitment and hiring outcomes for EJ and low-income residents (Section 14.8); (iv) report any environmental incident or complaint and its resolution; and (v) include EJ metrics in the annual MOU report. OSP will designate a community liaison for the project.*

14.12 Please describe experience with stakeholder engagement showing demonstrated past and current productive relationships with environmental, commercial and residential stakeholders, federally recognized and state acknowledged tribes, Environmental Justice, and track record of avoiding, minimizing, and mitigating environmental, tribal, environmental justice, and onshore impacts from projects similar to the proposed project.

*OSP's principals have taken 22 solar projects through municipal permitting and abutter engagement in Massachusetts (Orange, Westminster, Athol, Lee/Lenox, Uxbridge, Dedham, Avon, Boston, Plymouth and Harvard) and Rhode Island (Hopkinton, Richmond, Foster, Burrillville, Woonsocket and West Greenwich), including planning board and zoning hearings, conservation commission reviews and, in Rhode Island, state agency reviews with RIDOT and RIDEM. Several projects serve municipal, housing-authority and university oftakers (Towns of Lee, Lenox and Harvard; Norton and Stoughton Housing Authorities; UMass Boston) and two serve community solar subscribers. OSP has no record of environmental, tribal or environmental-justice complaints or enforcement on any project, and applies the same practice here: early meetings with the Town and Fire Department, an abutter information session before the special permit hearing, and a community liaison through construction.*

14.13 Please describe extent to which the project demonstrates that it avoids, minimizes, or mitigates, to the maximum extent practicable, environmental impacts. Preliminary characterization of the potential environmental impacts facility and other infrastructure from pre-construction through the duration of the project,

*The project is sited entirely on an existing graveled parking lot with no tree clearing, wetlands alteration or grading of natural land, and new impervious surface limited to the equipment pads; the enclosures are sealed, liquid-cooled units with no emissions, no water use and no*

*hazardous-material storage beyond the sealed LFP cells. Noise at the property line will meet 310 CMR 7.10. Stormwater is unchanged. The interconnection uses an existing distribution pole line. At end of life the equipment will be removed and recycled ([REDACTED] operates a lithium-ion recycling program) and the site restored under the lease. These characteristics avoid environmental impacts to the maximum extent practicable; the preliminary characterization is based on MassGIS (MassDEP wetlands, NHESP Priority Habitat, EJ 2020), FEMA NFHL and DOE energy-community mapping completed in October 2026 and attached. The two environmental reviews identified — a Wetlands Protection Act buffer-zone filing and an NHESP MESA review — will be completed before construction; because the footprint is confined to the existing developed surface, no alteration of wetland resource areas or habitat is proposed.*

14.14 Please describe extent to which the project demonstrates that it avoids, minimizes, or mitigates, to the maximum extent practicable, negative impacts on Environmental Justice populations and host communities, and extent to which the project directs positive benefits from the project to those communities.

*The site is not within an Environmental Justice block group (MassGIS 2020 EJ Populations layer); the nearest EJ block groups are in Amherst, within approximately one mile, designated on minority and income criteria. The project has no air emissions, no water discharge, minimal traffic (a few vehicle trips per month during operations) and no visual impact beyond an industrial parcel; it therefore imposes no burden on EJ populations, while its peak-hour discharge reduces operation of fossil peaking units whose emissions disproportionately affect EJ communities in the Commonwealth. The Bidder will conduct the EJ screening and engagement described in 14.11.*

## **Section A-15: Exception to Form Long-Term Contract**

For Transmission Projects, please attach an explanation of any exceptions to the Form Long Term Contract set forth in Appendices B-1 and B-2. Comments to the proposed Form Long-Term Contract must include any specific alternative provisions in a redline format to the Form Long-Term Contract. If the bidder is proposing a phased project with each phase covered by a separate contract, the bidder should provide separate contracts for each phase with specific alternative provisions to the Form PPA in redline format.

**Bidders are discouraged from proposing material changes to the Form Long-Term Contract. As provided in Section 2.2.5, the Distribution Companies reserve the right to reject certain mark-ups that add additional cost or risk. Selection of a project does not mean acceptance of the Bidder's mark-ups as bid.**

**Bidders of Distribution Projects may not change the Form Long-Term Contract.**

*Not applicable — the project is a Distribution Project and the Bidder accepts the Form Long-Term Contract without exception.*