

Sun River Electric Cooperative

A Touchstone Energy® Cooperative



Office Hours: 8 a.m. to 4:30 p.m. Mon.-Fri.
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Website: www.sunriverelectric.coop

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Be sure to check your breakers before reporting outages.

Ripples

JULY 2026

Annual Meeting follow up

Data centers may affect Sun River Electric indirectly

DURING the 2026 annual meeting I touched on the state of our industry related to data centers, regional transmission organizations and artificial intelligence impacts. These topics are moving quickly and change shape monthly.

This report will share where I see things as of today and how Sun River Electric may or may not be affected by the developments.

Data centers are energy hogs! These warehouse-type loads are facilities loaded with computer servers stacked wall to wall and floor to ceiling. The energy requirements to serve require large generation, large substation transformers and large transmission lines. None of these are available in the Sun River Electric footprint. For these reasons I do not see a data

MESSAGE

FROM THE MANAGER

COLUMN BY **BRAD BAUMAN**

center landing in our neighborhoods.

Does this mean we will not feel the impact? No, as a 1/139th part owner of Basin Electric Power Cooperative in North Dakota, the cooperative will be a part of the just completed Pioneer Station (750 megawatt) generation facility and the recently commenced generation facility called Bison Station (1,450 MW). These new additions are being built to serve



“member” growth.

A small number of cooperatives may consider serving smaller versions of the data center landscape and thus the possibility exists that some of the forementioned generation may go to serve some form of data-center-type loads.

The more common new load of the Basin members is oil field development, refining and industry attached to the refining industry.

The effect on SREC is that we as an owner will help in paying for construction of these facilities through rates that in turn come back to the members in distribution rates.

The majority of data center growth will require the developer to fund their own energy resources without funding by the Basin Electric membership. To

See DATA CENTERS, next page

HIDDEN NUMBER

If you find your account number hidden in this issue, it is worth a \$50 credit on your next statement. There is one number hidden in every issue. Give us a call if you are the lucky consumer.

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DATA CENTERS

Continued from page 5

date, just one of these such requests is in the queue for “study,” not construction, in the Basin service region. Many tire kickers exist, and once asked to put up money to study the feasibility of a site they tend to fall away.

The areas where more of the data center development will take place will be up and down the east and west coasts and the southern border of the country. In the north, Denver, Chicago and the upper Midwest may see some impact. In Montana, the southern I-90 corridor may see a site or two because

the electric infrastructure is more robust than the northern portion of the state.

Data centers are being built to support artificial intelligence. As a computer queries the vast Internet system to interrogate information, it teaches itself to be “smarter” or more intelligent. This process builds on itself at exponential speeds, which requires more and more data storage capabilities and thus more energy. 231158

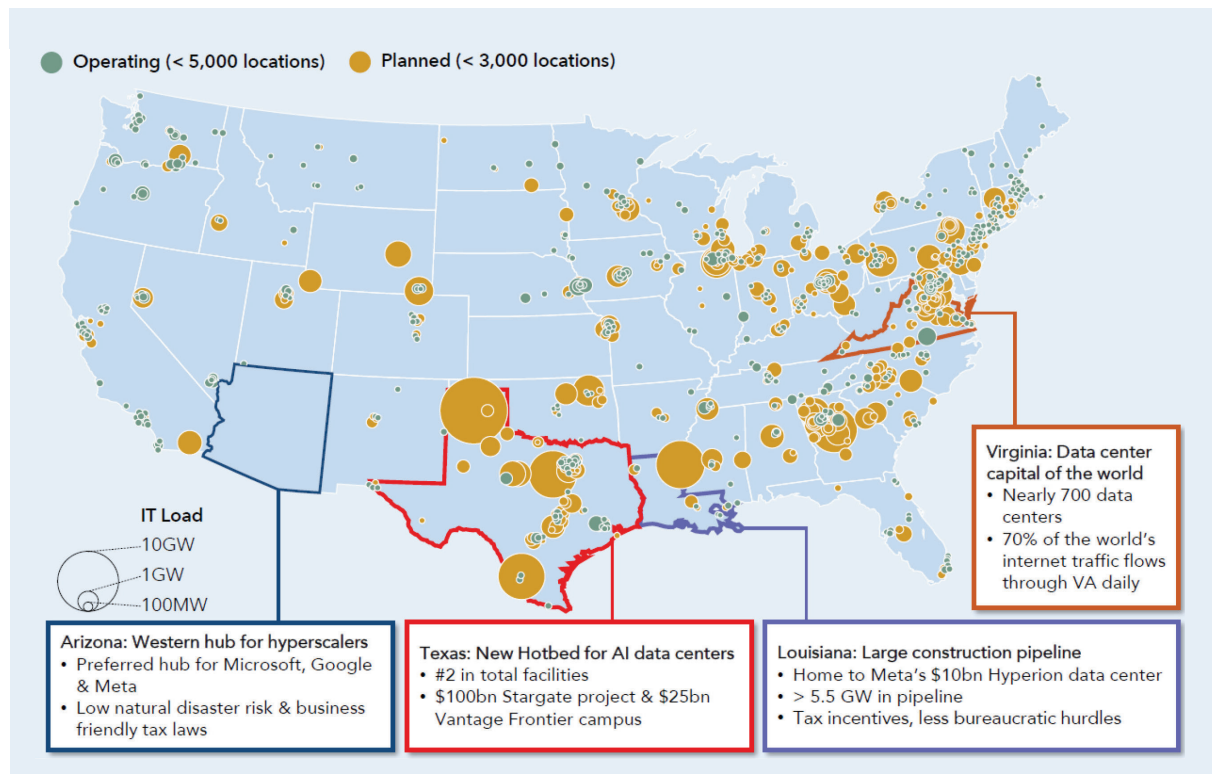
The robust electric resources and infrastructure are not as available in Montana, and especially not in our area. For that reason, do not expect a data center in our backyard any time soon.

Regional transmission organizations, RTO’s, are in the news as well. The idea behind these regional marketing groups is to alleviate price spikes by moving energy from one part of the region to another portion of the region to meet electric grid shortfalls in the energy loads of the larger area.

The event in Texas in 2021, Storm Uri, triggered this response. Remember lives were lost because of a deep freeze in the south, and the ability to move energy into the region was one of the culprits.

The freezing of the natural gas system was the major problem, and it could be said that failure to maintain the system adequately was a major

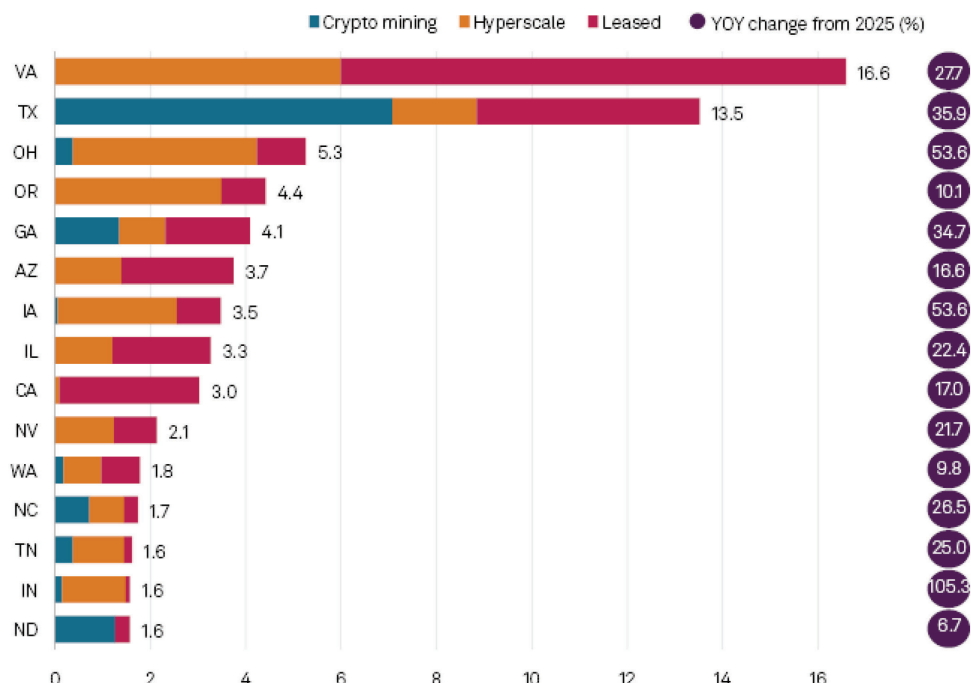
U.S. Data Center Sites



Source: CFC,
Bottlenecks
to Scaling AI
Computational
Power / MAY
2026

Data Center Demand 2026 Forecast (GW)

Source: CFC, Bottlenecks
to Scaling AI Computational
Power / MAY 2026



issue. That is a portion of the story that I could spend a more in-depth review on, but in consideration of article length, I will leave it there.

I will say our industry is being changed because of the lack of performance of individuals and the natural gas system. A similar event in 2011 on Groundhog Day occurred, and although recommendations were suggested, no significant improvements were accomplished. Fool me once...

A concern with these RTO organizations is that every time a larger group of utilities congregate under a bigger umbrella, the impact of each smaller entity becomes diluted. This concerns me related to Sun River Electric because we are a small utility and losing our regional impact means our reliance on others to fight our political positions allows the tail to wag the dog.

Our associations with the Montana Electric Cooperatives' Association

The robust electric resources and infrastructure are not as available in Montana, and especially not in our area. For that reason, do not expect a data center in our backyard any time soon.

(MECA), Northwest Public Power Association (NWPPA), and the National Rural Electric Cooperative Association (NRECA) help us in these pursuits.

As a SREC management team and board of trustees, we will need to stay vigilant in making our positions under-

stood because the industry is changing and we need to be at the table, not on it. We will continue to follow these developments and others as we perform our duties for you.

All is not in a state of flux, we find ourselves in a better position than most, and are thankful for the support we get from our member/owners. Our summer infrastructure improvements are occurring as are our system inspections.

We have seen a couple outages due to weather and system age, but for the most part things are going well.

As I write this, we just enjoyed 3 inches of rain! What a blessing for our area, and for our agriculture members. Let's hope this leads to a bountiful harvest for all.

Enjoy the rest of summer in this beautiful area we get to call home. As always, give me a call or stop in if you have things to discuss. 

REMINDER:

Bills not paid by the 10th of the month will be charged a \$10 late fee.



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SIGN UP FOR FREE KIDS BOOKS

Preschool children, ages birth to 5, who live within the Sun River Electric Cooperative service territory, are eligible.

You can register online at <https://imaginationlibrary.com> or scan the QR code below.



APPLIANCE REBATES

Remember that SREC has appliance and water-heater rebates. Go to www.sunriverelectric.coop for details.

HAPPY 4th OF JULY

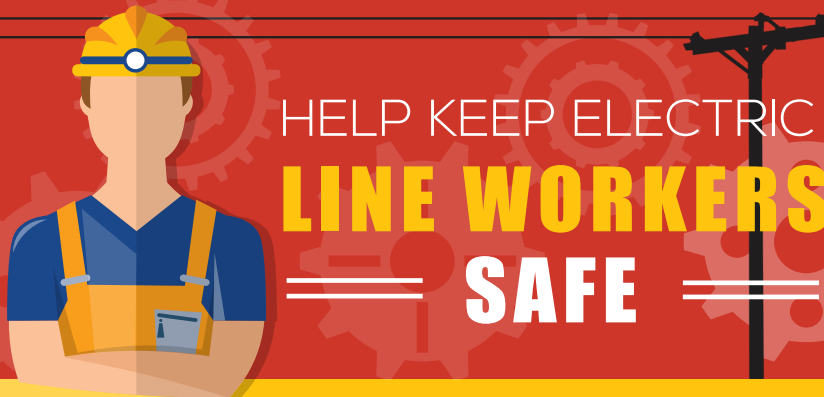
INDEPENDENCE DAY

1776



CLOSURE

Sun River Electric Cooperative's office will be closed Friday, July 3



HELP KEEP ELECTRIC LINE WORKERS SAFE



Be patient when the power goes out. Workers need to work efficiently and **safely** to restore power.



ZONE IN ON SAFETY



Respect **roadside** work crews.



Don't drive distracted.
Reduce your speed.
Change lanes.

1 work zone crash occurs
every **5.4 minutes**



70 work zone crashes
result in **injuries**
each day



12 work zone crashes
result in at least
1 fatality each
week



Never plug a generator into a wall outlet in your home or garage. The power that back feeds into the electric line **could electrocute a utility worker** or neighbor.



DON'T post signs
on **utility poles**.

Foreign objects can **tear** utility workers' **protective clothing**, which is the first line of protection from an **electric shock**.



Electric line workers **RANK 15** on the list of **25 MOST DANGEROUS JOBS** in America. Help keep them safe!



Learn more at  **Safe Electricity.org**