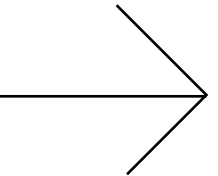




Presented by Roger Gray- PNGC CEO Retired
COU Perspectives on Data Centers and Large Loads

06.26.2026

Governor's Data Center Advisory Committee



Roger Gray- Retired CEO PNGC Power

(disclaimer - My views and comments here are solely my own. I do not represent PNGC, any COUs or other organizations)

Retired after 40+ Years in Utility Industry with diverse work experience in California and Pacific Northwest

- System operations, planning, energy trading, finance/rates, R&D, IT and executive management
- CEO of two PNW Coops (NRU and PNGC)
- CEO/GM of OR Muni (EWEB)
- Other experience in CA IOUs (SCE and PG&E) and Muni (LADWP)



COU Characteristics

BPA Tier 1 Fully Allocated and subject to Tier 2, NLSL policy and NR rate (growth pays for growth)

Generally, all COUs face same “growth pays for growth” situation

COUs possess full ratemaking authority (this is critical)

Some have implemented “large load policies”

Extremely rate sensitive and generally focused on protection of legacy customers/members and service/commitment to local community



Large Load Issues and Risk

May be an absolute number or a percentage of load situation

Location is a huge issue (transmission constraints)

Stranded assets or supply contracts

Power Supply contracts, costs and risks

Transmission, substation and distribution build out

Clean energy policy issues

Credit, default and cashflow risks

Contracts and tariffs can mitigate and control risks

Reliability, Resource Adequacy and NERC Issues



Take Away Perspectives

COU existing ratemaking authority and smart actions can address many/most issues

BPA statutes and BPA contracts and ratemaking design sends clear signals about growth.

Possible adjustments to clean energy policies (direct assignment?)

Data centers and growth may be “good” or “bad” depending on many variables. Proper tariff and rate design can make things better and mitigate risk

Suggested reading and sources:

Brattle - <https://www.brattle.com/insights-events/news/new-brattle-report-finds-better-utilization-of-existing-power-grid-could-save-us-consumers-more-than-100-billion-in-the-next-decade/>

E3 - <https://www.ethree.com/data-center-grid-utilization/>

SPOTP - Robert Echenrode (he does this stuff!)





Q&A

Panel discussion session