

Building Infrastructure for Tomorrow

A look at how North Dakota builds what it needs and what comes next

Summer Meeting 2026

BROADBAND ASSOCIATION OF NORTH DAKOTA

Where We're Headed

1

Built through the decades

2

**The economic impact of
getting it right**

3

**Where activity is
concentrated today**

4

**The infrastructure that
connects it**

5

**Data centers and where
they fit**

6

**Countering
misinformation**

7

**Best practices for what's
next**

It Started With \$5 and a Handshake



- Farmers and ranchers went door to door collecting \$5 membership fees to build the first rural power lines.
- Investor-owned utilities had no interest in sparsely populated areas. Cooperatives stepped in.
- Co-ops formed across the state by 1940. World War II paused construction; electrification resumed after the war and moved fast.
- By the late 1940s, farms across North Dakota had power for the first time.

The Next Gap, Filled the Same Way

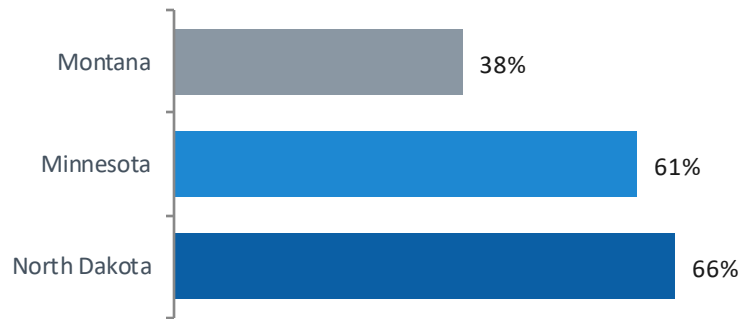
- By 1950, North Dakota had about 120,000 phones and most rural service was poor and unreliable.
- Congress extended REA lending to telephone service in 1949. Co-ops organized across the state to take advantage of the opportunity.
- In March 1953, directors from nine North Dakota telephone cooperatives met in Bismarck. That meeting led to the organization of what is now BAND.
- Same playbook as electrification: local people, local capital, a shared decision to solve the problem themselves.



The Co-op Model Meets the Internet

- Co-ops began fiber-to-the-premise builds in the 2000s, well ahead of many rural states.
- State and federal support, including STAGNet and the Broadband Technology Opportunities Program, added fuel to the build-out.
- Today, rural North Dakota outperforms most of the rural Midwest on broadband speed.
- The reason isn't a mystery, it's the same cooperative model that built the power grid and the phone network.

Share of users meeting the FCC 100/20 Mbps standard



Share of Speedtest users receiving the FCC 100/20 Mbps standard. Source: Ookla Speedtest Intelligence, 2H 2024. North Dakota ranks top-five nationally; Montana is one of only two states below 40%. Neighbor values reflect reported tiers.

Over 9% of North Dakota households have access to download speeds of at least 100 Mbps, and the state is on track to be the first in the nation at 100% coverage by 2028.

(NDIT / NTIA, 2025)

One State, One Pattern, Three Technologies



Electricity

1930s–40s



Telephone

1950s



Broadband

2000s–today

A gap the market wouldn't fill. Local people who filled it anyway.

A cooperative built to last.

That identity matters because the next infrastructure conversation is already underway.

Connectivity Pays For Itself

+18%

higher per-capita income
growth in rural counties with
high broadband use

Center on Rural Innovation — “Beyond Connectivity,” 2024

- Faster broadband speeds are tied directly to higher household income in rural areas.
- Broadband is the enabling layer under precision agriculture, telehealth, remote work, and small-town business retention.
- Connectivity now helps decide whether people and employers stay in small North Dakota communities, or leave.
- Building responsible infrastructure has been one of our advantages over the decades.

Where the Activity Is Concentrated

Red River Valley

Fargo & Harwood — a center of new digital infrastructure investment

South Central

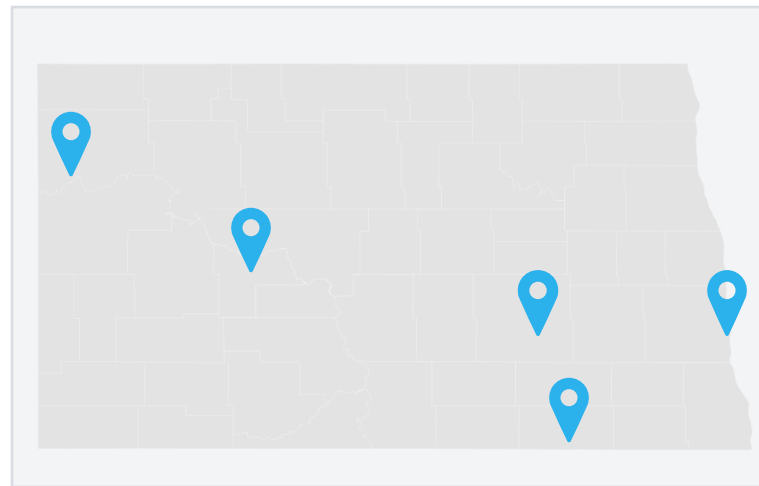
Ellendale & Jamestown — early sites for large-scale digital projects

West Central

Energy-infrastructure counties now drawing similar interest

Western ND

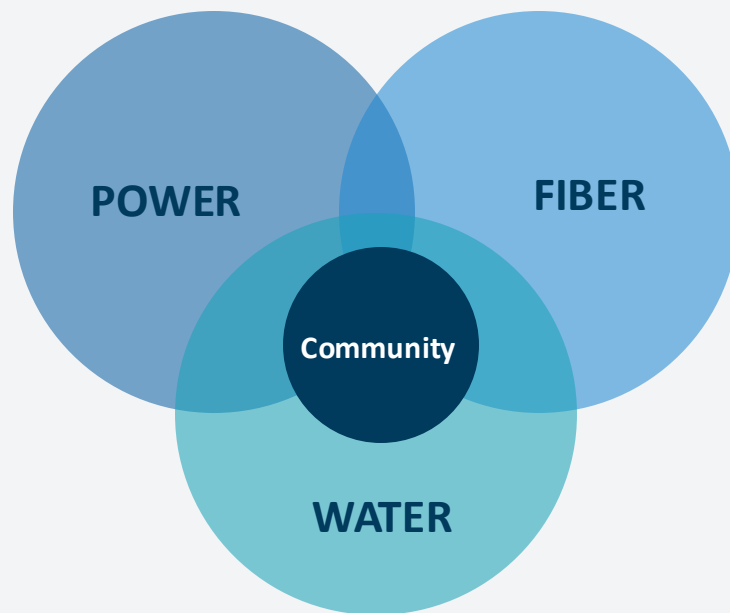
The Williston area is entering the conversation as well



Pattern to watch: the regions with the most energy infrastructure are becoming the regions with the most digital infrastructure interest.

Power, Fiber, and Water Aren't Separate Anymore

- A single project today often touches power capacity, fiber backbone, and water access all at once.
- Middle-mile and last-mile fiber built by BAND members is often what makes a site viable in the first place.
- State's broader network act as connective tissue between local systems.
- When a large customer funds a grid or fiber upgrade, the surrounding community often benefits too.



BAND members aren't bystanders in this build-out. In many cases they are the reason a project can locate in North Dakota at all.

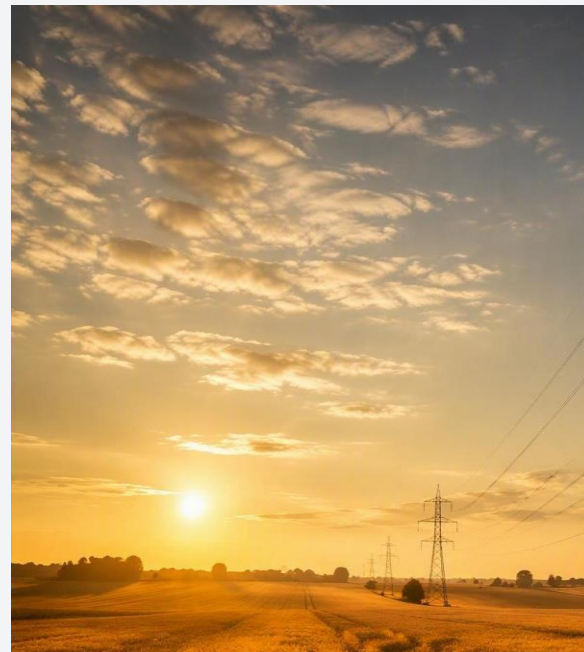
TechND Starts a Multi-Sector Response

THE PUSHBACK

- Fears of strained grids and rising residential rates
- Local water consumption by tech hubs
- High-voltage lines routed through farms and neighborhoods
- Frustration over opaque corporate deals

THE RESPONSE

- TechND launches an Infrastructure Education Coalition
- Unites energy, digital, pipelines and transmission, agriculture, water, economic development, construction, & local government
- Coordinates messaging and elevates local voices
- Delivers facts before misinformation takes root



Several BAND members are long-standing TechND Members.

Why They're Choosing North Dakota

- Abundant, low-cost power.
- A cooling climate that reduces operating costs for much of the year.
- Available land and an existing fiber backbone to build on.
- Projects underway or proposed need power in the hundreds of megawatts.
- Some have paid for grid upgrades that benefit surrounding ratepayers, not just the project.
- Communities are still working through good questions on pace, transparency, and long-term impact — a healthy, ongoing conversation.

Hundreds of megawatts — a meaningful addition to the grid

Facts Travel Best on Local Voices

- Rumors about a new project spread faster than any press release can catch up to.
- The best messengers aren't state officials or company spokespeople, they're the neighbors, co-op employees, and local leaders people already trust.
- Ask questions directly of the source, share verified information instead of secondhand claims and show up to the local meetings where decisions get made.
- BAND members already do this every day through member communication and education.

Hear the facts early, from someone you trust, and a rumor rarely takes hold.



Getting It Right the First Time

1 Engage early Talk with the community before a project is announced, not after.

2 Be transparent Be clear about what a project needs, what it will cost, and who benefits.

3 Build shared capacity Design so one project's investment strengthens the whole region.

4 Bring in local providers Cooperatives know the terrain, the people, and the systems in place.

5 Plan for the long term Decisions made today will serve, or burden, this state for decades.

What Other States and Industries Are Learning Too

Coordinated, factual information consistently outperforms any single company or industry speaking alone.

1

Investment lags behind need until a crisis forces it. North Dakota can plan ahead of the data-center boom instead of reacting.

2

Power, water, and connectivity are increasingly one planning problem, not three separate ones.

3

Community trust depends on early engagement, not damage control after the announcement.

None of this is new to BAND — it's the same lesson this organization has practiced since 1953.

THE TIME IS NOW

North Dakota has never waited for someone else to build what it needed.

Broadband providers are positioned to lead the next chapter the same way cooperatives led the first three. Tomorrow's infrastructure is being built on today's decisions — let's make good ones.



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