

Data Center Task Force Meeting Two

3/30/2026

Approx. 45 attendees

PRESENTATION

Rob Worden, President/CEO, Vision Net

About Vision Net

- Statewide fiber network
- Operating in 24 states
- Six data centers across the state
- Anyone with a cell phone is a Vision Net customer
- Take care of 911 network connections
- Owned by the 8 cooperative telephone companies in Montana – created in 1995

What are the Types of Data Centers?

1. **Hyperscale** – centralized entities primary purpose is training the large language models
2. **Hyperscaler Co-Location** – access large language models
3. **Neoclouds** – graphic processing units sold as a service
4. **Edge** – Vision Net shines here – regional data center that gets the user closer to the AI services – inference happens here – the AI Query goes somewhere (today to the hyper scaler) as the edge further developers the query gets closer to the user
5. **Micro Edge** – AI Pods – containerized datacenters dropped next to where the data is utilized – hospitals or research universities
6. **Device Edge** – next generation - as close to the user as possible. Example) NVIDIA is pitching products and services in this space – a device on your desk.

The distance and networks between you and your AI Query take a lot of time. Goal is 10 millisecond criteria. For AI to be worthwhile it has to go faster. The fiber network has to be strong.

In 2025 Vision Net upgraded to an 800 G capacity network in Montana. The driver behind this investment was to connect all data centers as a core component of the AI Edge build out.

Why Montana?

- They are power shopping. Hyperscalers looking for the best deal or likely to move on.
- Montana current total electrical generation capacity is 7.2GW
- Where is the connectivity?
- Next question is the labor force.
 - o Construction jobs brought in experts from other states
- Currently being built in Texas – 168 GW capacity right now.
- Spreading small data centers across communities connected by existing fiber networks.
- Small footprint data centers – can carry the lift without all the power and water use.
- Example 50,000 sq. feet is our largest center
- Six current data centers across state
 - o Kalispell upgrade and Bozeman new market
 - o Three in Billings
 - o One in Great Falls
 - o One in Missoula
 - o One in Butte

Edge Model

- Leverage existing network and distributed facilities across the state to advance AI in Montana
- Localize where information goes = increased speed and solves the latency problem
- Out of state hyper scaler – could be anywhere near us and Vision Net can still handle the connection
- Power grows incrementally - moderate electrical usage
- Cars using AI – latency can't occur – high-capacity networks required.
- INDATEL
 - o Ownership partner
 - o A complete network across the US

Questions from Last Time

1. Hyperscale Data Centers

- a. Getting the headlines
- b. Driving industry but not the only player
- c. Must have tech closer to the user – edge centers
- d. Are necessary at some degree – training centers for all the tech and information – but just one piece of the puzzle

2. Water Resources

- a. Lots of variation
- b. Tied up by hyper scaler conversation
- c. Depends on type of technology
- d. Vision Net – Air cooled data centers – not big water consumers and is incremental

3. Energy Demand

- a. Lots of variation
- b. Everyone does it differently
- c. Incremental
- d. Total 15 MW power per day could go up to 50 MW per day
- e. Distributed locations = distributed resource allocations

4. Jobs

- a. Various
- b. Permanent jobs could be 1-3% of construction jobs
- c. Many construction jobs are out of state jobs

5. Fair Cost Allocation

- a. Montana rate payers don't want to pay for the upgrades for hyper scalers
- b. Vision Net pays commercial rates – number one expense pay the same as all businesses pay

6. Data Sovereignty

- a. Control of data
- b. Edge and micro data centers a better way to allow consumers to keep their data secure

Community Q & A Notes

Q: Is there room to put more data centers in Cascade County?

A: Economics are the driver; the question is what the does the market need? For example, if Benefis could use a containerized AI system to support their efforts and operations, that would be an example of possible expansion. There are currently no new Vision Net locations planned in Cascade County. Everything comes down to taking a very serious and hard look at demand.

Q: Have you considered putting the data centers underground or using geothermal?

Does Vision Net have training programs? And what about hollow core fiber?

A: We view growth as an evolution and are constantly evaluating options. We do not currently have any formal training programs but use local labor and in 31 years only two employees that live out of state. Hollow core fiber is technology where a vacuum in a glass

tube reduces latency. Vision Net can't acquire any hollow core fiber; the rumor is currently that Meta has sucked up all the available hollow core.

Q: Do you explore self-sustained power like wind and solar? Do you consider behind the meter power? Do you consider different kinds of cooling technology?

A: The landscape is evolving, we need to better understand the power load requirements of all the technologies. We will look at gas, solar, wind, nuclear, geothermal from a business and environmental standpoint. We are interested in behind the meter power. We currently cool with air, but as all technologies evolve we will continue to evaluate and look at what makes sense.

Q: Are you LEED certified?

A: We are not currently LEED certified and have no current plans to pursue certification. We monitor our power usage effectiveness (PUE) which shows how efficiently we are using energy. This is a standard data center operating metric.

Q: Where does your cooling water come from?

A: We currently air cool our operations.

Q: Do you get special rates on power?

A: No, we pay business commercial rates through NorthWestern Energy and our largest business expense is power.

Q: Since you are located near Calumet, do you not pay any property taxes?

A: We are not located near Calumet, and we pay a lot of taxes in Montana.

Q: What is the timeline for the edge component of data centers to be ready?

A: Estimate 3 years from now, we are 10 months into that timeline.

Next Meeting to be announced.

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