



## ***BROADCASTING AND TELECOMMUNICATIONS Metro Denver and Northern Colorado Industry Cluster Profile***

The broadcasting and telecommunications cluster includes companies that help deliver voice, data, and video to end users. This cluster includes landline and wireless telephone communications companies, radio and television communications services, and cable and Internet service providers.

Facilitated by broadband expansion and growing bandwidth infrastructure, telecommuting is emerging as a popular business strategy. Telecommuting—or working at home while connected by information technology—has grown rapidly and has led to expanded networks and service areas. Denver earned the fifth-best spot in Microsoft’s 2011 “Work Without Walls” survey based on the percentage of employees able to telecommute, the extent to which company policies support remote working, and the technologies enabling telecommuting practices. Also in 2011, Denver ranked fifth on *CNBC*’s list of “America’s Most Wired Cities” with an average download speed of 10.2-megabits per second (Mbps). The city received particular accolades for its large number of state and federal agencies and its key role as a distribution hub, making fast Internet connections a necessity in the region.

Telecommunications carriers in the nine-county Metro Denver and Northern Colorado region<sup>1</sup> are expanding their fourth-generation mobile broadband, long-term evolution network, or 4G LTE. AT&T plans to invest at least \$100 million to upgrade its nine-county region wireless network. The company is adding new fiber-optic connections, cell sites, and specialized antenna systems for improved Internet connectivity and call quality. Verizon Wireless expanded its 4G LTE network in the region in 2010 to include Highlands Ranch, Broomfield, Golden, Parker, Fort Collins, and Colorado Springs. The Verizon Wireless network has download speeds of up to 10 times faster than the 3G network.

Companies in the nine-county region play an important role in cloud-based infrastructure by combining their competitive advantages as network operators with technological innovation.

- Denver-based Thought Equity Motion Inc. received a \$25 million investment from a Los Angeles-based private equity firm to expand its cloud-based infrastructure. The company modifies video to allow viewers to search for specific content.
- EchoStar Technologies deployed three new, high-definition, set-top boxes that support cloud-based TV applications for cable operators. The boxes are pre-loaded with Internet protocol-based content management features and are optimized to support the company’s new Aria™ ‘ecosystem’ of hosted TV services.
- Centennial is home to one of five Comcast Labs across the nation that serves as the company’s technology research and development division. The Centennial-based team worked on a number of projects in 2011 including transforming set-top boxes to cloud or remote computer servers, developing a next-generation video project that will integrate advanced web features, and launching Skype TV video-calling service. Comcast Labs are also located in Seattle, Silicon Valley, Philadelphia, and Washington D.C. The Centennial-based team developed the XFINITY® iPad application to view TV guide channels on their tablet, which has been downloaded three million times.

The nine-county region’s broadcasting and telecommunications companies continue to grow and expand.

- Satellite Internet provider WildBlue Communications Inc. moved its Greenwood Village headquarters to an 80,000-square-foot building in Douglas County. The company plans

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<sup>1</sup> The nine-county Metro Denver and Northern Colorado region consists of Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, Jefferson, Larimer, and Weld Counties.

to launch its ViaSat1 satellite to support its satellite broadband service. The 12 Mbps service will be faster than the traditional 1.5 Mbps offered to WildBlue's current customers and will be available to customers nationwide in early 2012.

- California-based RingCentral Inc. opened an office in the Denver Tech Center. The company provides cloud-based business phone systems and cited the region's high quality of life, talented labor force, and easy access to the West Coast as key factors in its location decision.
- Internet search engine Google Inc. plans to hire more workers in Boulder as the company expands its operations into three buildings and grows its local site. The company opened its Boulder office in 2007 and is working on Google Chrome, Google Earth, and Google Applications.
- Denver-based Alpine Access Inc. expanded its Denver Tech Center facility. The company's headquarters is located in downtown Denver and uses home-based agents to provide customer service and tech support.
- Comcast Corp. moved its expanded occasional satellite operations into a new operations center that could house a significant number of workers in Douglas County. The new center will open as Comcast consolidates three centers in the company's western region, which includes Colorado and 10 other states.
- Ohio-based call center outsourcing company Convergys Corp. will hire customer service agents in the nine-county region. The company is expanding its business lines and needs additional staff.

The region's highly attractive and complementary telecommunications-related companies and an increase in competitive technology invention and innovation contributed to significant acquisition and merger activity in the region in 2011.

- Denver-based Qwest Communications International Inc. completed a merger with Louisiana-based CenturyLink Inc. on April 1, 2011, to create the nation's third-largest telecommunications company. The combined company has more than 17 million phone lines, 190,000 fiber optic route miles, and serves 20 million phone and broadband subscribers in 37 states. Despite the relocation of the company's headquarters to Monroe, La., Denver is a regional headquarters for the company and hosts its business markets division. The company plans to spend \$70 million on broadband infrastructure in Colorado over the next five years.
- Boulder-based Lijit Networks Inc. sold to Internet marketing firm Federated Media Publishing. Federated Media Publishing helps advertisers develop conversational marketing programs and online campaigns. The pairing of both companies will allow publishers access to analytic tools and advertising to help monetize sites. The company's headquarters will remain in Boulder.
- Louisville-based Zayo Group secured \$315 million to finance its acquisition of Seattle-based 360networks. The deal marks the company's 17th acquisition since opening in 2007 and is the largest in its history. Zayo's expansive fiber-optic network connects 73 markets in 22 states.
- Broomfield-based Level 3 Communications Inc. acquired New Jersey-based Global Crossing Ltd. in a \$3 billion deal. The combined company's fiber-optic network will span three continents.
- Douglas County-based TeleTech acquired customer care operations for Kirkland, Wash.-based Clearwire Corp. The agreement builds on an existing relationship between the two companies and will boost efficiencies for Clearwire, which is making significant investments to develop a 4G network for its majority owner, Sprint Nextel.

In an effort to expand from satellite video companies to TV and broadband companies, Englewood-based DISH Network and sister company, EchoStar Corp., strategically purchased satellite technology and landline companies in 2011.

- Douglas County-based DISH Network acquired Texas-based Blockbuster Inc. The company will allow DISH to compete in the market for video streaming and video-by-mail services and will keep 500 of Blockbuster's 1,700 stores open.
- Arapahoe County-based EchoStar Corp. acquired Maryland-based Hughes Communications Inc. Hughes Communications sells broadband satellite network

products for consumers and businesses and satellite video and data services to media and telecom companies.

- DISH Network merged with Denver-based Liberty Bell Telecom to expand its landline broadband connectivity across 14 states and experiment with triple play video and Internet bundling.
- DISH Network purchased Virginia-based TerreStar Networks, Inc. and DBSD North America following the companies' Chapter 11 bankruptcy filings. The combined \$2.4 billion sale gives DISH access to more than 40 megahertz of wireless broadcast frequency and would make the provision of mobile satellite broadband services a viable option.

The nine-county region's telecommunications industry is rapidly evolving, creating further opportunities for innovation and growth. Douglas County ranked fourth in the 250,000 to 499,999 population category in the "2011 Digital Counties Survey," while the city of Aurora ranked fourth in the more than 250,000 population category. The cities of Arvada, Thornton, and Westminster ranked among the top-10 in the 75,000 to 124,999 population category in the "2011 Digital Cities Survey." Both surveys—compiled by e.Republic's Center for Digital Government and Digital Communities—recognized counties and cities that provided exemplary digital serve to their residents and highlighted the areas' best practices.

### **Broadcasting and Telecommunications Economic Profile**

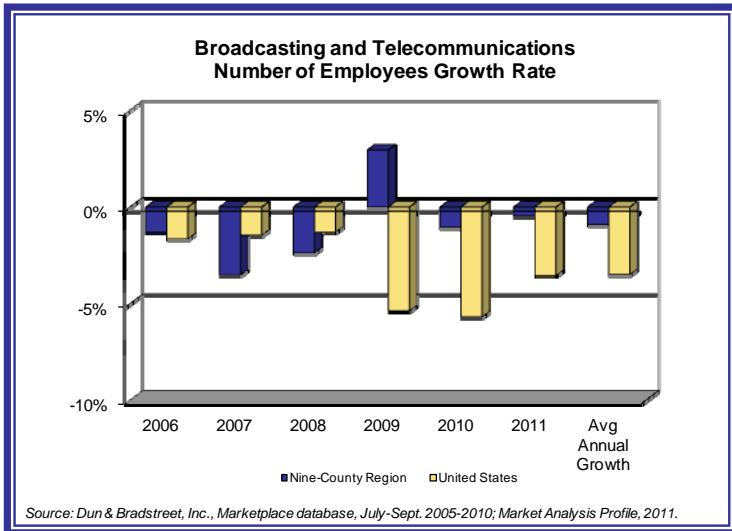
The broadcasting and telecommunications industry cluster consists of 16, six-digit North American Industry Classification System (NAICS) codes including radio and television communications equipment, telephone communications, and cable television services.

***The nine-county region ranked fourth out of the 50 largest metro areas for broadcasting and telecommunications employment concentration in 2011.*** With direct employment of about 40,500 broadcasting and telecommunications employees, the region ranked ninth in absolute employment. About 82 percent of Colorado's broadcasting and telecommunications cluster employees worked in the region.

	<u>Nine-County Region</u>	<u>U.S.</u>
Direct Employment, 2011	40,500	1,221,680
Number of Direct Companies, 2011	2,640	171,860
One-Year Direct Employment Growth, 2010-2011	-0.5%	-3.6%
Five-Year Direct Employment Growth, 2006-2011	-4.5%	-16.3%
Avg. Annual Direct Employment Growth, 2006-2011	-0.9%	-3.5%
Direct Employment Concentration	2.3%	0.8%

*Sources: Dun & Bradstreet, Inc. Marketplace database, July-Sept. 2006-2010; Market Analysis Profile, 2011; Development Research Partners.*

## Broadcasting and Telecommunications Employment



- The broadcasting and telecommunications cluster directly employed about 40,500 people in the nine-county region in 2011.
- Broadcasting and telecommunications companies employed 2.3 percent of the region's total employment base, compared with a 0.8 percent employment concentration nationwide.
- Employment in the region's broadcasting and telecommunications cluster declined 4.5 percent from 2006 to 2011, compared with a 16.3 percent decline at the national level.
- More than 67 percent of the broadcasting and telecommunications employees provided telephone communication and cable and other subscription services.

- Nearly 76 percent of the region's broadcasting and telecommunications employees worked in the City and County of Denver (32 percent) and in Arapahoe (28 percent) and Douglas (15 percent) Counties.

## Wages

The 2010 average annual salary for broadcasting and telecommunications employees in the nine-county region was \$89,660, compared with \$72,970 nationwide. Total payroll for the broadcasting and telecommunications cluster in the region exceeded \$3.6 billion in 2010.

### Denver-Aurora-Broomfield MSA Occupational Salaries, 2010 Annual Average

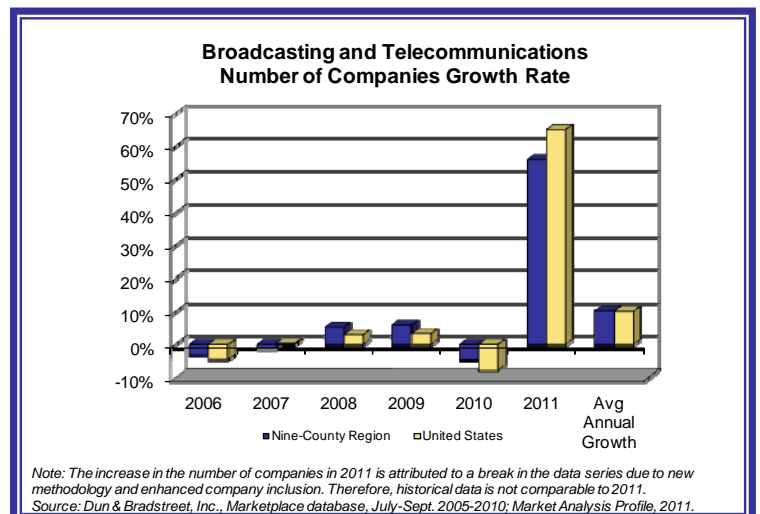
Electronics Engineers, Except Computer	\$90,180
Telecommunications Equipment Installers & Repairers	\$60,660
Telecommunications Line Installers & Repairers	\$50,400
Broadcast Technicians	\$45,910

Note: Mean annual salary data is for the 10-county Denver-Aurora-Broomfield Metropolitan Statistical Area (MSA) consisting of Adams, Arapahoe, Broomfield, Clear Creek, Denver, Douglas, Elbert, Gilpin, Jefferson, and Park Counties.

Source: U.S. Bureau of Labor Statistics, Metropolitan Area Occupational Employment and Wage Estimates, May 2010, [www.bls.gov](http://www.bls.gov).

## Broadcasting and Telecommunications Companies

- About 2,640 broadcasting and telecommunications companies operated in the nine-county region in 2011.
- Approximately 76 percent of the region's broadcasting and telecommunications companies employed fewer than 10 people, while one percent employed 250 or more.
- The majority of broadcasting and telecommunications companies in the region provided either wired or wireless telecommunications or other communications services.
- About 61 percent of the region's broadcasting and telecommunications companies were located in the City and County of Denver (24 percent) and in Arapahoe (21 percent) and Jefferson (16 percent) Counties.



## Major Broadcasting and Telecommunications Companies

- Alcatel-Lucent  
[www.alcatel-lucent.com](http://www.alcatel-lucent.com)
- AT&T Inc.  
[www.att.com](http://www.att.com)
- Avaya Inc.  
[www.avaya.com](http://www.avaya.com)
- BT Conferencing, Inc.  
[www.btconferencing.com](http://www.btconferencing.com)
- Cbeyond, Inc.  
[www.cbeyond.net](http://www.cbeyond.net)
- CenturyLink, Inc.  
[www.centurylink.com](http://www.centurylink.com)
- Clear Channel Communications, Inc.  
[www.clearchannel.com](http://www.clearchannel.com)
- Comcast Corp.  
[www.comcast.com](http://www.comcast.com)
- Convergys Corp.  
[www.convergys.com](http://www.convergys.com)
- DISH Network  
[www.dishnetwork.com](http://www.dishnetwork.com)
- DIRECTV, Inc.  
[www.directv.com](http://www.directv.com)
- EchoStar Corp.  
[www.echostar.com](http://www.echostar.com)
- Google Inc.  
[www.google.com](http://www.google.com)
- Integra Telecom, Inc.  
[www.integratelecom.com](http://www.integratelecom.com)
- Level 3 Communications, Inc.  
[www.level3.com](http://www.level3.com)
- Liberty Media Corp.  
[www.libertymedia.com](http://www.libertymedia.com)
- RingCentral Inc.  
[www.ringcentral.com](http://www.ringcentral.com)
- Sprint Nextel  
[www.sprint.com](http://www.sprint.com)
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- tw telecom  
[www.twtelecom.com](http://www.twtelecom.com)
- Verio Inc.  
[www.verio.com](http://www.verio.com)
- Verizon Wireless  
[www.verizonwireless.com](http://www.verizonwireless.com)
- WildBlue Communications, Inc.  
[www.wildblue.com](http://www.wildblue.com)
- Zayo Group  
[www.zayo.com](http://www.zayo.com)

## ***Key Reasons for Broadcasting and Telecommunications Companies to Locate in the Nine-County Region***

The region is a top 10 broadcasting and telecommunications location offering:

### **1. A central location and easy global access**

- Metro Denver's unique geographic location in the Mountain time zone makes it the largest region in the U.S. to offer one-bounce satellite uplinks. This capability provides companies with real-time connections to six of seven continents in one business day. (Metro Denver Economic Development Corporation)
- Denver earned the fifth-best spot in Microsoft's 2011 "Work Without Walls" survey based on the percentage of employees able to telecommute, the extent to which company policies support remote working, and the technologies enabling telecommuting practices. Denver received particular accolades for its high rates of peer and managerial support and secure collaboration tools. (Microsoft Corp., 2011)
- Denver International Airport (DIA) was the fifth-busiest airport in the nation and 10th-busiest worldwide in terms of passenger traffic in 2010. The airport is home to 14 commercial airlines—the largest of which are United Airlines, Southwest, and Frontier Airlines—that offer scheduled nonstop service to more than 160 domestic and international destinations. (U.S. Bureau of Transportation Statistics, 2011; Airports Council International, 2011; and Denver International Airport, 2011)
- The *U.S. News and World Report* ranked Denver the best city for public transportation in 2011. Criteria for the ranking included public transportation investment, safety, and ridership. Denver's light rail and bus rapid transit lines, convenient airport shuttle service, and ongoing \$7.8 billion FasTracks expansion contributed to this top position. (*U.S. News & World Report*, 2011)
- The nine-county region's central U.S. location allows convenient access as air travelers can easily reach two-thirds of the nation within two hours. Further, the region is within four

hours flying time of every North American city with a population of one million or more. (Metro Denver Economic Development Corporation)

- The risk of natural disasters (hurricanes, tornados, and earthquakes) in Metro Denver is minimal compared to locations on the east, west, and southern coasts. (National Oceanic and Atmospheric Administration, 2011; University of Miami, 2011; U.S. Geological Survey, 2011)

## **2. A large concentration of high-quality technology workers**

- Of Colorado's adult population, about 36 percent has completed a bachelor's or higher-level degree. That makes Colorado the second-most highly educated state in the nation behind Massachusetts. (U.S. Census Bureau, 2010 American Community Survey)
- Colorado ranked third in tech-worker concentration for the fifth-consecutive year, with 87 of every 1,000 private-sector workers employed in technology firms. Colorado also had the nation's 10th-largest employment base in the Internet and telecommunications services industry and ranked 14th for absolute employment in the high-tech industry, seventh for average high-tech wage, and 11th for absolute number of high-tech businesses. Colorado tech workers earn 96 percent more than the average private sector worker. (TechAmerica Foundation, *Cyberstates 2011: The Definitive State-by-State Analysis of the U.S. High-Technology Industry*, 2011)
- Colorado has one of the nation's most innovative economies. The state ranked eighth in the nation in the U.S. Department of Commerce, Economic Development Administration's State Innovation Index. The index incorporates a mix of input measures that characterize the place and its people (accounting for 60 percent of the overall index score) and output measures that characterize its economic success (40 percent of the overall score). (U.S. Department of Commerce, 2011)
- Colorado ranked among the top five states in the nation for entrepreneurship in 2010, according to the annual *Kauffman Index of Entrepreneurial Activity*. The index measures the percentage of the adult, non-business owner population that starts new businesses. Colorado's fifth-highest ranking indicates increased innovation with the ability to attract potential investors. (Ewing Marion Kauffman Foundation, 2011)
- Colorado ranked third in the nation for funds raised per worker from the Small Business Innovation Research (SBIR) grant program and received 284 grants totaling more than \$95.4 million in 2010. More SBIR funding indicates a higher level of technological sophistication. (U.S. Small Business Administration, 2011; U.S. Bureau of Labor Statistics, 2011)
- *Forbes* ranked Metro Denver seventh among "America's Best Cities for Young Professionals." Rankings of the nation's 100 largest metropolitan areas were based on seven factors ranging from unemployment rate and average salary for college graduates to affordability and public company presence. Denver received particular accolades for its highly educated population, healthy job growth rate, and large concentration of small businesses. (*Forbes*, 2011)

## **3. Low to moderate costs of doing business**

- Colorado ranked sixth in the 2011 *ALEC-Laffer State Economic Competitiveness Index*, which evaluates the link between states' policies and economic performance. Low taxes on income, property and business, restrictive government spending, and the absence of an estate tax boosted Colorado's ranking. (American Legislative Exchange Council, 2011)
- Colorado ranked fifth overall on *Forbes'* 2011 "Best States for Business and Careers" list. Rankings were based on each state's business costs and regulations, economy, labor supply, quality of life, and growth prospects. Colorado received its highest rankings for labor supply (first overall) and economic climate and quality of life (10th overall). (*Forbes*, 2011)
- Metro Denver office rental rates averaged \$23.99 per square foot in the fourth quarter of 2011, making the region's office market highly competitive with other major markets in the U.S. (CoStar Realty Information, The CoStar Office Report, Q4 2011)

#### 4. A pro-business environment and competitive tax structure

- Colorado offers a simple corporate income tax structure based on single-factor apportionment, which allows companies to pay taxes based solely on their sales in the state. Along with few regulatory burdens, Colorado's corporate income tax rate of 4.63 percent is one of the lowest and most competitive tax structures in the nation. (State of Colorado; The Tax Foundation)
- Colorado has one of the nation's most small business friendly environments. The state ranked among the top 10 in the Small Business & Entrepreneurship Council's 2011 "Small Business Survival Index," which considers property rights, healthcare and energy costs, individual and corporate tax rates, and government spending. The state ranked most favorably for taxes on capital gains and corporate income. (Small Business & Entrepreneurship Council, 2011)
- Colorado has the nation's 10th-best tax climate for small businesses and entrepreneurs, according to the Small Business & Entrepreneurship Council's "Business Tax Index 2011." The index examines each state's tax policies on 18 metrics ranging from rates of property, income, and sales taxes to unemployment insurance taxes and levies on online commerce. (Small Business & Entrepreneurship Council, 2011)
- Colorado ranked fifth among the nation's top states for business, according to an annual ranking by *CNBC*. The ranking evaluated each state's composite scores on 43 metrics in 10 broad categories, and Colorado earned top 10 rankings in the categories that measure business friendliness (sixth), quality of life (seventh), and workforce (seventh). (*CNBC*, 2011)
- Colorado ranked second in entrepreneurship and innovation and seventh in workforce development and training, according to the U.S. Chamber of Commerce and the National Chamber Foundation's *Enterprising States* report. The state also received notable recognition in the infrastructure and tax and regulation categories. States with top rankings support job growth and emphasize business-friendly policy, training, infrastructure, and entrepreneurship. (National Chamber Foundation, 2011)
- The Colorado Innovation Network (COIN)—a privately funded alliance designed to foster new technology development across the state's existing and emerging industries—launched in 2011. COIN is part of Gov. John Hickenlooper's economic development plan, Blueprint Colorado, and will eventually operate from a business incubator in the Denver Tech Center.

#### 5. An overall better quality of life

- Colorado ranked among the top 25 states for Internet speeds and had faster download and upload speeds than the U.S. median in 2010. High-speed Internet contributes to economic growth, global competitiveness, and a better quality of life. (Communications Workers of America, Speed Matters, 2011)
- Louisville topped *Money Magazine's* 2011 list of the "Best Places to Live," which highlights small cities and towns that offer excellent housing and education, job opportunities, and abundant activities. Castle Rock (19th), Superior (20th), and Parker (29th) were also named to the list. (*Money Magazine*, 2011)
- *The Daily Beast* ranked Denver first among the nation's 30 fittest cities. The ranking reflects each city's percentage of physically active residents, the percentage of residents in good or excellent health, the percentage of residents characterized as obese, each city's placement on the Gallup-Healthways "Well-Being Index," and healthy behavior. (*The Daily Beast*, 2011)
- Colorado's adults have the lowest prevalence of obesity in the nation (19.8 percent) and it is the only state with an obesity rate below 20 percent. (Trust for America's Health, 2011; Robert Wood Johnson Foundation, 2011)
- Colorado ranked ninth among the "10 Best States for Making a Living," according to financial resource website MoneyRates.com. The ranking was compiled using each state's adjusted average income, or average income weighted by cost of living, tax burden, and job availability. (MoneyRates.com, 2011)

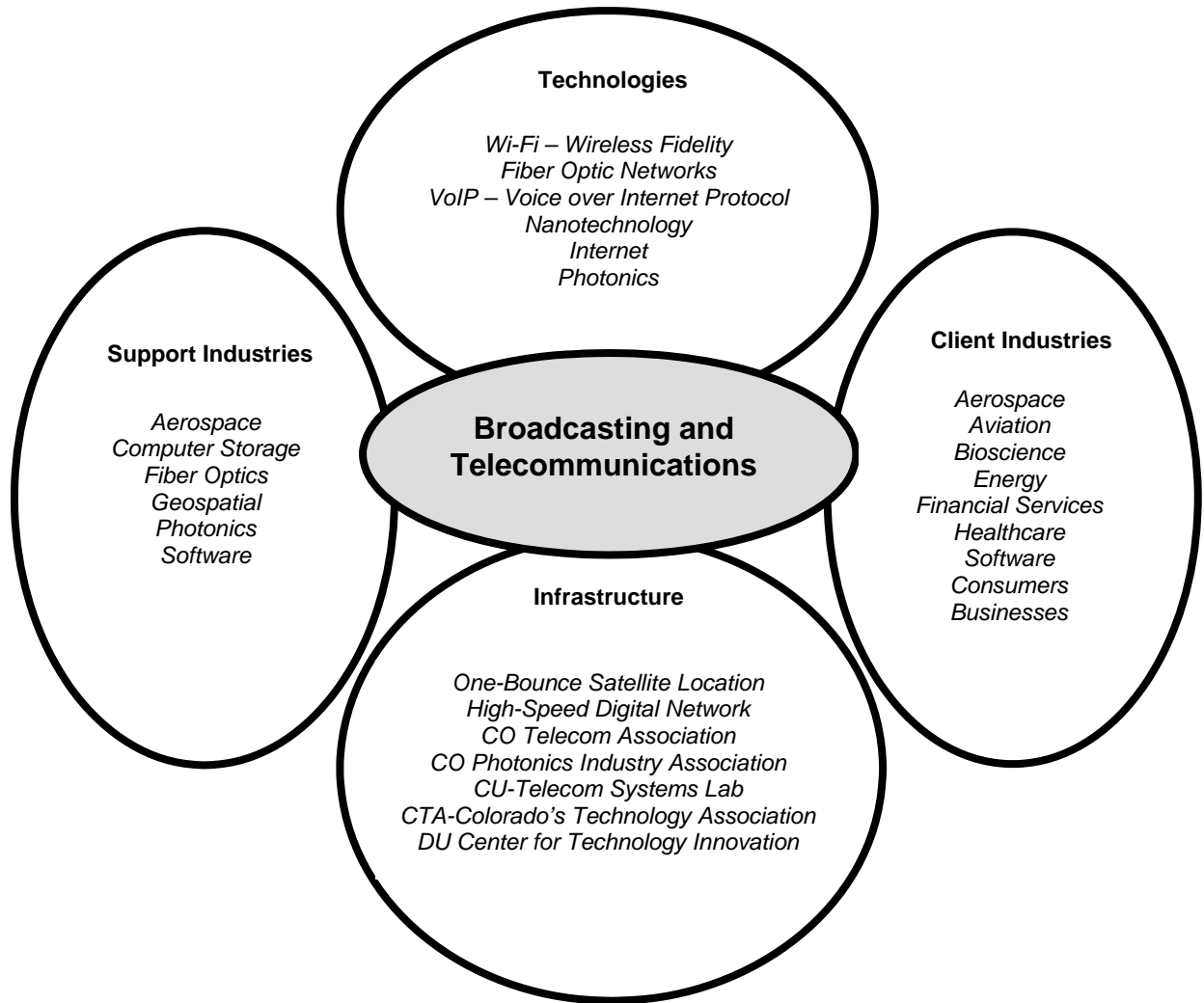
- Colorado has the third-highest percentage of state land area devoted to the National Forest System, according to the U.S. Forest Service. With more than 40 state parks, 56 national parks and wilderness areas, and the greatest number of 14,000-foot peaks in the nation, Colorado's quality outdoor recreation serves as a cornerstone of the state's economy. (U.S. Forest Service, 2011; Colorado State Parks, 2011; Wilderness.net, 2011)
- Denver ranked among five U.S. "Cities on the Edge" of greatness and received accolades for its educated population and support for extreme sports, according to Sperling's Best Places on behalf of Edge® Shave Gel. Criteria included commitment to green living and the vibrancy of each city's arts, culture, and sports scenes. (Sperling's Best Places, 2011)
- Boulder outranked all other metro areas in the 2010 Gallup-Healthways "Well-Being Index." Boulder ranked first among 188 metros tracked for the index, which reflects how well metro areas support physical and mental health, healthy behaviors, and other factors central to well-being. The survey-based index has a statewide component that ranked Colorado fifth for its residents' overall well-being. (Gallup-Healthways, 2011)
- Boulder ranked third on RelocateAmerica's 2011 list of the "Top 100 Places to Live." Criteria for the ranking included quality of life, community leadership, and measures related to education and employment. (RelocateAmerica, 2011)
- The cost of living in Metro Denver is only five percent above the national average and is well below that of many other major cities. (The Council for Community and Economic Research, ACCRA Cost of Living Index, Q3 2011)
- Metro Denver voters approved the funding of FasTracks in November 2004. FasTracks is a \$7.8 billion comprehensive plan for the design and construction of high-quality, multimodal transit service and facilities. FasTracks will vastly improve mobility throughout the region.
- With sunshine on nearly 70 percent of the days each year, Metro Denver ranked third-sunniest among 20 major U.S. cities. (U. S. National Oceanic and Atmospheric Administration, National Climatic Data Center, 2011)

### **Broadcasting and Telecommunications Industry Cluster Definition**

<b>NAICS Code*</b>	<b>NAICS Description</b>	<b>SIC Code</b>	<b>SIC Description</b>
334210	Telephone apparatus mfg.	3661	Telephone & telegraph apparatus
334220	(P) Radio & television broadcasting & wireless communications equipment mfg.	3663	Radio & tv communications equipment
334290	Other communications equipment mfg	3669	Communications equipment, NEC
335921	Fiber optic cable mfg	3357	Drawing & insulating of nonferrous wire
335929	(P) Other communication & energy wire mfg.	3357	Drawing & insulating of nonferrous wire
515111	Radio networks	4832	Radio broadcasting stations
515112	Radio stations	4832	Radio broadcasting stations
515120	Television broadcasting	4833	Television broadcasting stations
515210	Cable networks & other subscription prog.	4841	Cable & other pay television services
517110	Wired telecommunications carriers	4813	Telephone communication except radio
517110	Wired telecommunications carriers	4822	Telegraph & other communications
517110	Wired telecommunications carriers	4841	Cable & other pay television services
517110	Wired telecommunications carriers	7375	Information retrieval services
517210	Wireless telecommunications carriers (except satellite)	4812	Radiotelephone communication
517210	Wireless telecommunications carriers (except satellite)	4899	Communication services, NEC
517210	Wireless telecommunications carriers (except satellite)	7375	Information retrieval services
517410	Satellite telecommunications	4899	Communication services, NEC
517911	Telecommunications resellers	4812	Radiotelephone communication
517911	Telecommunications resellers	4813	Telephone communication except radio
517919	(P) All other telecommunications	4899	Communication services, NEC
517919	(P) All other telecommunications	7375	Information retrieval services
519130	(P) Internet publishing & broadcasting & web search portals	8999-0800	Communication services
561499	(P) All other business support services	7389-1004	Teleconferencing services

\*(P) indicates that only part of the NAICS industry category is represented in the industry cluster definition.  
 Note: NEC indicates "not elsewhere classified."

# Broadcasting and Telecommunications Industry Cluster Relationships



For additional information, contact us:



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