



INFORMATION TECHNOLOGY COUNCIL
OF NORTH DAKOTA

[STATE OF THE]

IT Industry GUIDE

2011
EDITION

[The State of North Dakota's IT Industry]

North Dakota's information technology (IT) industry is strong and growing. It is, and will continue to be, an integral component in virtually every workplace across the globe.

Given the nation's economic status, North Dakota once again stands out, as IT job growth has outpaced the nation over the past five years. These are high-quality jobs paying well above the state average. North Dakota is also unique in its partnerships between industry, education and government to ensure a top-notch workforce into the future. In addition, the state's reliable and redundant telecommunications infrastructure and business-friendly incentives continue to make it an attractive place to expand or start an IT business.

In a coordinated effort to share the story of North Dakota's IT industry, the Information Technology Council of North Dakota (ITCND), along with the sponsors below, is pleased to present the *2011 State of the IT Industry Guide*. The Guide is an assessment of North Dakota's IT industry in the areas of infrastructure, workforce, trends, competitiveness and economic impact on the state.

This publication will be a valuable tool in informing the community, partners in private and public sectors, and potential business prospects about opportunities within North Dakota's IT industry. We hope it will be an important resource for you and your organization.



ITCND's mission is to actively encourage the use, growth and development of IT in North Dakota. We are continually looking for new ways to advance that mission and would welcome your input. Feel free to contact me at inmangary@hotmail.com or 701-371-1563 or ITCND Executive Director Deana Wiese at office@itcnd.org or 701-355-4458.

Gary Inman

Gary Inman, President
Information Technology Council of North Dakota

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INTRODUCTION

Information technology (IT) is an integral component in virtually every industry across North Dakota. As one of the state's target industries for growth, the state's technology-based business sector is growing and diversifying and remains essential to the continuing growth and success of the state.

This report is produced biannually to demonstrate the impact of the state's IT sector and identify opportunities and challenges within the IT industry. The data was collected by ITCND in partnership with Job Service North Dakota and supplemented by the results of a survey of the ITCND membership. The information throughout the report refers to the North American Industry Classification System (NAICS) and the Occupational Information Network (O*NET).

For the purposes of this report, the North Dakota IT sector includes businesses classified within NAICS 51 – Information and NAICS 54 – Professional, Scientific and Technical Services. References made to the North Dakota IT subsectors include NAICS 511 – Publishing Industries (except Internet); NAICS 518 – Data Processing, Hosting and Related Services; and NAICS 541 – Professional, Scientific and Technical Services (Table 1).

Along with its sponsors, ITCND is pleased to present the 2011 edition of the *State of the IT Industry Guide*, which provides a snapshot of North Dakota's IT industry, including the economic impact to the state; the status of the IT workforce and infrastructure; the competitiveness of the industry at the regional and national level; and the key trends facing the industry.

[TABLE 1]

NORTH DAKOTA IT INDUSTRY BREAKDOWN

North Dakota IT Sector (NAICS)

- 51 – Information
- 54 – Professional, Scientific and Technical Services

North Dakota IT Subsectors (NAICS)

- 511 – Publishing Industries (except Internet)
- 518 – Data Processing, Hosting and Related Services
- 541 – Professional, Scientific and Technical Services

North Dakota IT Occupations (O*NET)

- 11-3021 – Computer and Information System Managers
- 15-1021 – Computer Programmers
- 15-1031 – Computer Software Engineers, Applications
- 15-1032 – Computer Software Engineers, Systems Software
- 15-1041 – Computer Support Specialists
- 15-1051 – Computer Systems Analysts
- 15-1061 – Database Administrators
- 15-1071 – Network and Computer Systems Administrators
- 15-1081 – Network Systems and Data Communications Analysts
- 15-1099 – Computer Specialists, All Other
- 25-1021 – Computer Science Teachers, Postsecondary

Source: Job Service North Dakota

EXECUTIVE SUMMARY

North Dakota has remained a bright spot in the national economy and its IT industry is no exception. With job growth in North Dakota's IT subsectors tripling that of the nation, the industry remains a growing and vibrant part of the state's economy. Opportunities for existing and start-up IT businesses are abundant, and North Dakota boasts one of the lowest unemployment rates in the country.

The state's IT subsectors employ 16,500 people at more than 2,400 IT-related businesses. These businesses contribute \$617 million to the state's gross domestic product, which is an increase of 65% from 1998 to 2007. Of those 16,500 employees, 2,390 hold IT occupations with the remaining employed in areas such as accounting, human relations and management. An additional 3,220 North Dakotans hold IT occupations in other industries, such as energy, health care and finance, for a total of more than 5,610 IT employees.

North Dakotans holding IT occupations earn wages competitive with those in several surrounding states. The median hourly wage for IT positions in North Dakota is \$57,061, which is 59% higher than the state average, but lags behind the national average. The state is closing this gap as wages have increased at a greater rate than the nation.

The fact that the industry is strong and growing does pose a challenge. It is estimated that more than 2,000 new and replacement IT positions will be needed between 2008 and 2018 in North Dakota. Of these positions, 1,100 will be new jobs created by growth in the industry and the remaining will be replacements. With 5,610 IT employees currently in the state, this means replacement and new positions will equal nearly 40% of the current IT employees across all of the state's industries.

In an effort to address this issue, industry, government and education stakeholders are collaborating to inform students about the IT career opportunities and the potential education pathways to secure these positions. North Dakota currently offers more than 70 post-secondary IT education programs, a loan forgiveness program and internship opportunities.

North Dakota is well positioned to expand its current IT businesses and attract new companies. The state has numerous programs and incentives available to current North Dakota IT businesses looking to grow or expand, new businesses looking at locating within the state and innovative entrepreneurial ventures. In addition, North Dakota continues to be at the forefront of offering broadband services.

IT continues to play a vital role in North Dakota's economy, and the future of the industry is bright. As the industry continues to evolve, the cooperation among North Dakota's industry, government and education makes it well positioned to take advantage of state and national trends. This will allow the state's IT industry to remain a strong competitor in the global economy.

ECONOMIC IMPACT

North Dakota is home to a diverse IT industry that contributes significantly to the overall growth and economic strength of the state. There are more than 2,400 businesses within the IT subsectors, which employ 16,500 North Dakotans in various fields including IT, human relations, finance and marketing.

IT plays a key role in enhancing productivity and growth in numerous industries, including agriculture, health care, energy, manufacturing and financial services. In addition, the IT industry generates tax revenue for both local and state governments.

Three critical elements speak directly to the impact of IT on the state:

- IT businesses are knowledge-based and create a significant number of high-paying jobs.
- The IT industry is categorized as a primary sector, meaning it brings outside dollars into the state.
- Technology industries on average generate higher-added value per worker than non-technology industries.

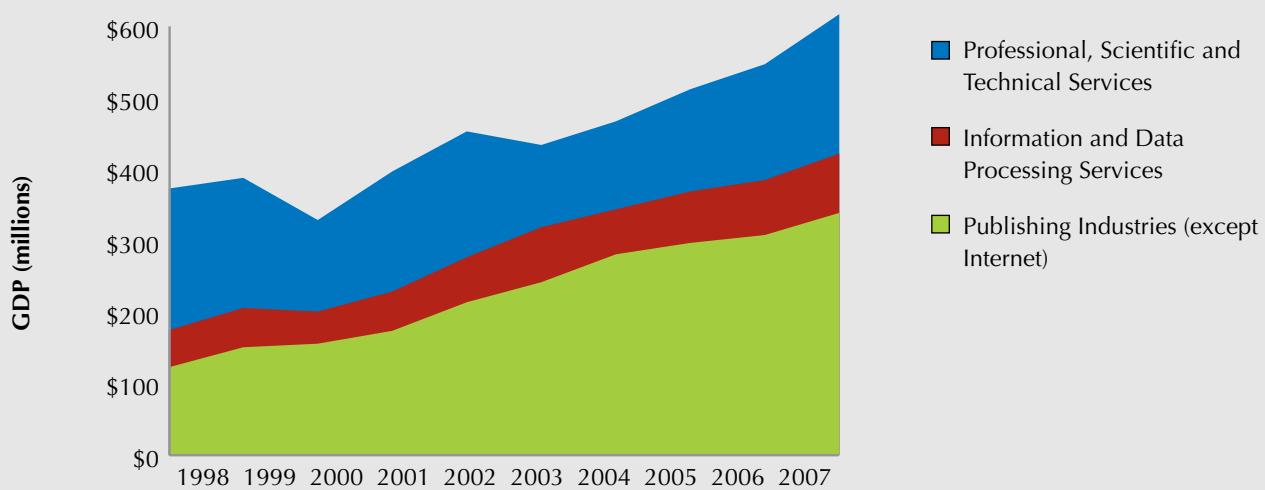
Gross Domestic Product Contribution

Gross domestic product (GDP) is defined as the total market value of all goods and services produced within a state and is one of the measures of income and output for the state's economy. It is considered the sum of the value added at every stage of production.

The contribution of the IT subsectors to the state's GDP has increased 65% from 1998 to 2007 (Figure 1). With a contribution of \$617 million, the IT subsectors are responsible for nearly 2% of the state's total GDP.

[FIGURE 1]

GDP: IT SUBSECTORS (1998-2007)



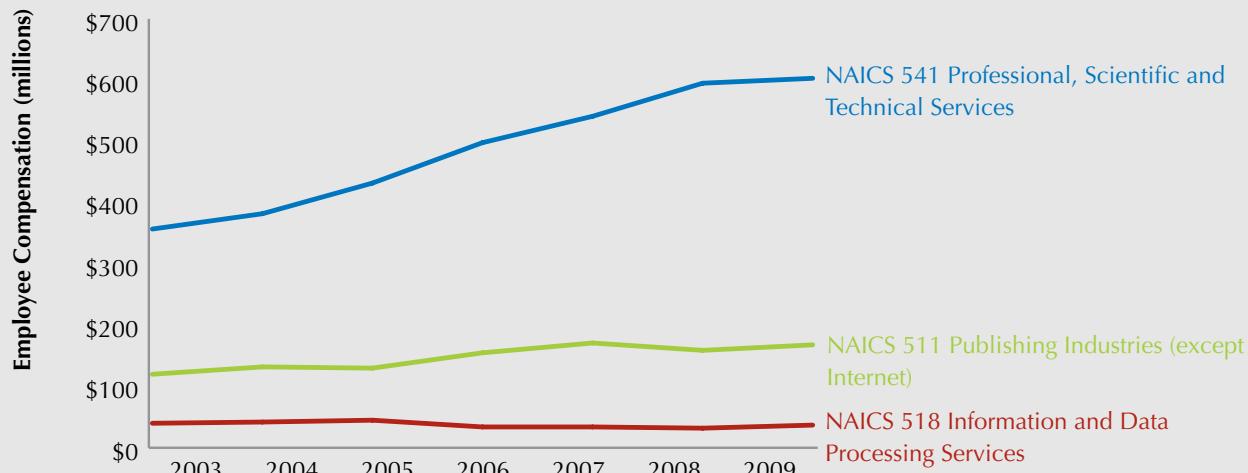
Source: U.S. Bureau of Economic Analysis, U.S. Department of Commerce

Pay Contributed to the Economy

In 2009, total employee compensation contributed to the state's economy by the 16,500 jobs in the IT subsectors was approximately \$757 million. This is an increase of 56% since 2003 (Figure 2). An additional \$16 million was contributed through the 3,220 individuals holding IT occupations in businesses other than IT, such as health care, energy, finance or government.

[FIGURE 2]

EMPLOYEE COMPENSATION CONTRIBUTED TO THE ECONOMY (2003-2009)



Source: Job Service North Dakota, Quarterly Census of Employment and Wages

The average pay for the 16,500 jobs in the IT subsectors increased an average of 22% between 2003 and 2009 (Table 2).

[TABLE 2]

AVERAGE PAY (2003-2009)

NAICS	Subsectors	2003	2009	% Increase
511	Publishing Industries (except Internet)	\$41,608	\$54,921	32%
518	Information and Data Processing Services	\$34,931	\$38,842	11%
541	Professional, Scientific and Technical Services	\$35,969	\$44,418	22%

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

IT Subsector Job Growth

The employment growth of North Dakota IT subsectors (publishing industries (except internet); data processing, hosting and related services; and professional, scientific and technical services) has tripled the national growth rate. There has been a 7% increase in employment from 2003 to 2009 across the nation, while North Dakota's IT subsectors have experienced a 22% increase (Table 3). This is an excellent indicator of the continued growth potential for IT in North Dakota well into the future.

[TABLE 3]

IT SUBSECTOR JOB GROWTH (2003-2009)

Subsector	2003 US	2003 ND	2009 US	2009 ND	US % Change	ND % Change
Publishing Industries (except Internet)	929,451	2,897	793,370	3,059	-15%	6%
Data Processing, Hosting and Related Service	402,231	1,147	245,843	948	-39%	-17%
Professional, Scientific and Technical Services	6,638,679	9,473	7,479,927	12,456	13%	31%
Total	7,970,361	13,517	8,519,140	16,463	7%	22%

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages

The Labor Market Information Center Puts Research at Your Fingertips



- Compare salaries by occupation
- Find the number of available workers in different areas of the state
- Compare benefits by area and industry
- Review industry trends for better planning

Visit the LMI Center today at ndworkforceintelligence.com or call 701-328-2868 or 800-366-6888 (TTY).



Job Service is an equal opportunity employer/program provider.
Auxiliary aids and services are available upon request to individuals with disabilities.

INFRASTRUCTURE

Despite having one of the lowest population densities in the nation, North Dakota continues to be at the forefront of offering broadband services to even the most rural communities in the state. According to the North Dakota Association of Telephone Cooperatives, more than 95% of the state's population has access to broadband services.

North Dakota's broadband infrastructure has made significant advances in recent years. Service providers have invested hundreds of millions of dollars deploying fiber to the most rural areas across the state. For example, Dakota Carrier Network and the independent telephone companies have more than 16,000 miles of fiber optic facilities offering Carrier Ethernet, DSL and cable-based internet access. Qwest also has a major fiber footprint in the state with connections to its advanced fiber optic network. This network spans more than 173,000 route miles globally. Qwest offers its Qwest Metro Optical Ethernet services for businesses in Bismarck and Fargo, and has more than 300 remote terminals for DSL throughout North Dakota.

Consumers in the state can choose from Dakota Carrier Network, Qwest, Midcontinent Communications or the local independent telephone company for their broadband needs. Broadband connections can be ordered as T1, DS3 or OCx connections.

The North Dakota state government has recognized the importance of a robust IT infrastructure in order to compete in today's global economy. It created the Information Technology Department to provide effective and efficient state-of-the-art services to serve education, agencies and public safety groups throughout the state. Education and public services benefit from the foresight of creating this key state department.

Broadband infrastructure is one of the Obama Administration's sectors of business targeted with the stimulus program. To date, North Dakota service providers have been awarded more than \$100 million to improve the state's broadband infrastructure. Recipients include: BEK Communications, Dakota Central Telecommunications, Dakota Carrier Network, SRT Communications, Consolidated Telcom, Moore & Liberty Telephone, Griggs Telephone Company, Red River Telephone and Reservation Telephone. These companies will be installing fiber optic-based infrastructure in their territories, enabling customers to have access to the most state-of-the-art broadband service.

The fiber backbone serving North Dakota is supported by multiple Dense Wavelength Division Multiplexing (DWDM) rings, offering 10, 40 and future 100 Gigabit speeds. Redundancy has been built into every corner of the state. The state of North Dakota is served by multiple fiber optic backbone rings that provide broadband access to every K-12 school, state agency and hospital in the state.

STATUS OF THE WORKFORCE

Although not immune to the effects of the national recession, North Dakota's economy has remained strong with opportunities existing for business start-ups and expansions and one of the lowest unemployment rates in the country. Industry, government and education continue to work together to inform potential in- and out-of-state employees of the great jobs that exist in North Dakota's IT industry.

North Dakota's three IT subsectors employ 16,500 individuals. These subsectors include the state's IT businesses. The average annual pay for jobs in the three subsectors is \$46,060 – 28% higher than the state average. Of these jobs, 14.5% (2,390) are IT positions. The remaining jobs are in areas such as accounting, sales and marketing.

An additional 3,220 North Dakotans hold IT occupations in numerous other industries, including health care, energy, education and government. The average annual pay for these positions is \$57,061 – 59% higher than the state average. When combined with the 2,390 IT employees in the IT industry, the total number of North Dakota IT professionals is 5,610 (Table 4).

[TABLE 4]

NORTH DAKOTANS WITH IT OCCUPATIONS (2009)

O*NET	Occupation	Number of Employees
11-3021	Computer and Information Systems Managers	470
15-1021	Computer Programmers	630
15-1031	Computer Software Engineers, Applications	600
15-1041	Computer Support Specialists	1,780
15-1051	Computer Systems Analysts	740
15-1071	Network and Computer Systems Administrators	450
15-1081	Network Systems and Data Communications Analysts	260
15-1099	Computer Specialists, All Other	190
25-1021	Computer Science Teachers, Postsecondary	120
	Other IT Occupations	370
	Total	5,610

Source: Occupation Employment Statistics, Job Service North Dakota

Leading Subsectors for IT Employees

The subsectors with the most North Dakota IT employees in 2009 were professional, scientific and technical services with 1,710 employees; publishing industries (except internet) with 590 employees; and insurance carriers and related activities, with 510 employees.

The subsectors with the largest percentage of IT employment growth between 2002 and 2009 were insurance carriers and related activities (97%); hospitals (46%); and professional, technical and scientific services (38%) (Table 5).

[TABLE 5]

IT SUBSECTOR EMPLOYMENT CHANGE (2002-2009)

NAICS	Subsector	2002	2009	Number Change	% Change
541	Professional, Scientific and Technical Services	1,240	1,710	470	38%
524	Insurance Carriers and Related Activities	260	510	250	97%
511	Publishing Industries (except Internet)	530	590	60	11%
622	Hospitals	120	180	60	46%
992	State Government	450	460	10	2%
551	Management of Companies and Enterprises	410	400	-10	0%
522	Credit Intermediation and Related Activities	100	70	-30	-32%
561	Administrative and Support Services	190	90	-100	-55%
611	Educational Services	630	500	-130	-20%
518	Data Processing, Hosting and Related Services	230	90	-140	-62%

Source: Job Service North Dakota

IT Occupations

More than 5,610 North Dakotans hold IT occupations, and the number of jobs has grown by more than 13% over the past six years. The occupations seeing the fastest growth, both in number and percent, during this time period were computer support specialists, software engineers (applications) and computer system analysts (Table 6).

[TABLE 6]

CHANGE IN IT OCCUPATIONS (2003-2009)

O*NET	Occupation	2003	2009	Number Change	% Change
11-3021	Computer and Information System Managers	500	470	-30	-6%
15-1021	Computer Programmers	710	630	-80	-11%
15-1031	Computer Software Engineers, Applications	500	600	100	20%
15-1041	Computer Support Specialists	1,210	1,780	570	47%
15-1051	Computer Systems Analysts	500	740	240	48%
15-1071	Network and Computer Systems Administrators	370	450	80	22%
15-1081	Network Systems and Data Communications Analysts	250	260	10	4%
15-1099	Computer Specialists, All Other	230	190	-40	-17%
25-1021	Computer Science Teachers, Postsecondary	120	120	0	0%
	Other IT Occupations	560	370	-190	-34%
	Total	4,950	5,610	660	13%

Source: Job Service North Dakota

Employee Concentration

Of the 16,500 employees in North Dakota's IT subsectors, the largest concentration of workers are found in the following counties: Cass (7,242), Burleigh (2,699), Grand Forks (1,405), Morton (575) and Ward (355). These counties have the largest number of private businesses, government entities and educational institutions that help drive employment and provide a large, skilled labor pool to meet growing workforce needs.

Projected IT Workforce Needs

It is estimated that between 2008 and 2018, more than 2,000 new and replacement IT positions will be needed in North Dakota. Of this total, 1,100 employees will fill new positions created by growth in the industry, and the remaining positions will be replacements.

With 5,610 IT employees currently in North Dakota, this growth means replacement and new positions will equal nearly 40% of the current IT employees across all of the state's industries. The IT occupations with the highest percentage of growth are network systems and data communications analysts (49.5%), computer software engineers (applications) (nearly 30%) and operations research analyst (more than 23%) (Table 7).

The three IT occupations projected to have the largest number of openings through 2018 include computer support specialists with 685 projected openings, computer systems analysts with 382 openings, and computer software engineers (applications) with 256 projected openings (Table 7).

The majority of these employment opportunities are for high-skill, high-wage occupations. As a result, training and education partners in the state are working together to meet these industry needs through new curriculum and personalized, flexible training opportunities.

[TABLE 7]

PROJECTED IT WORKFORCE NEEDS (2008-2018)

IT Occupations	% Growth	Number of Openings	Annual			
			Average Wage	High Wage	High Demand	High Skill
Network Systems and Data Communications Analysts	50%	210	\$59,163	Y	Y	Y
Computer Software Engineers, Applications	29%	256	\$65,613	Y	Y	Y
Operations Research Analysts	23%	45	\$53,453	Y		Y
Computer Systems Analysts	22%	382	\$62,343	Y	Y	Y
Network and Computer Systems Administrators	20%	174	\$51,660	Y	Y	Y
Computer and Information Systems Manager	19%	173	\$79,999	Y	Y	Y
Computer Science Teachers, Postsecondary	18%	43	\$53,336		Y	Y
Computer Support Specialists	18%	685	\$37,345		Y	
Computer Programmer	-11%	102	\$50,637	Y		Y
Total	21%	2,070	\$57,061			

Source: Job Service North Dakota

EXPANDING & ATTRACTING BUSINESSES

A number of programs and incentives are available to current North Dakota IT businesses looking to grow or expand, businesses looking at locating within the state and innovative entrepreneurial ventures.

North Dakota Department of Commerce | www.ndcommerce.com

Centers of Excellence invest in the infrastructure and research capacity at North Dakota's colleges and universities and encourage students and scientists to find ways to commercialize new ideas into products, skills and services that can create and attract new businesses and career-path jobs. Seventeen new or expanded businesses currently operate in North Dakota as a result of the Centers of Excellence program, and three of these businesses are IT-related.

Innovate ND is a competition looking for entrepreneurs who want to turn ideas into new ventures. It brings together entrepreneurs, investors and educators and works with participants from both new and existing companies to identify the tools and resources needed to create a successful business venture in North Dakota. Of the 300 teams that have participated in this competition, 47 have been IT-related ventures. Eight IT-related businesses, out of 103 businesses, are currently operational or under development in North Dakota as a result of this program.

Technology-Based Entrepreneurship Grant Program provides up to \$1 million in grants to entrepreneur centers providing business incubator services such as mentors, shared services, relationships with educational institutions, marketing assistance, accounting/financial management, training and regulatory compliance.

North Dakota Tax Department | www.nd.gov/tax

North Dakota has some of the most aggressive income and sales tax incentives in the nation. The state offers tax incentive programs to encourage business development, expansion and research, and provides the strong economic climate and workforce to draw companies to North Dakota.

Angel Fund Investment Credit provides individuals, estates, trusts and corporations an income tax credit for investing in an angel fund certified by the North Dakota Department of Commerce Division of Economic Development and Finance. The credit is equal to 45% of the investment, up to a maximum of \$45,000 per year.

Computer and Telecommunications Equipment Credit provides primary sector businesses (other than manufacturers and recyclers) with a tax credit for the purchase of computer and telecommunications equipment. The equipment must be an integral part of a new primary sector business or create an economic expansion of an existing business, and does not extend to the purchase of replacement equipment. The primary sector business must be certified by the North Dakota Department of Commerce Division of Economic Development and Finance.

Research Expense Credit provides an individual, estate, trust, partnership, corporation or limited liability company an income tax credit for conducting research in North Dakota. The credit is equal to a percentage of the excess of qualified research expenses in North Dakota over the base amount in the state.

Telecommunications Infrastructure Credit provides a sales use and tax exemption through June 2011 for the purchase of tangible personal property used to construct or expand telecommunications service infrastructure within the state. To qualify, the property has to be incorporated into a telecommunications service infrastructure owned by a telecommunications company.

Wage and Salary Credit provides an income tax credit to a corporation doing business in North Dakota for the first time. The credit is equal to 1% of the wages and salaries paid during the tax year for each of the first three tax years of operation and a half-percent of wages and salaries paid during the fourth and fifth tax years.

Workforce Recruitment Credit provides an individual, estate, trust, partnership, corporation or limited liability company an income tax credit for employing extraordinary recruitment methods and hiring employees for hard-to-fill positions in North Dakota. The credit is equal to 5% of the compensation paid to the employee during the first 12-consecutive-months of employment and is allowed in the first tax year following the tax year in which the employee completes the 12-consecutive-month employment period.

[ITCND IT Award Winners 2009-2010]

Premier IT Business

2009 - Echelon Corporation, Fargo

2010 - Intelligent InSites, Fargo

Technology Innovator

2009 - Utility Bill Pay, a service of National Information Solutions Cooperative (NISC), Mandan

2010 - TMI Systems Design Corporation, Dickinson

North Dakota IT Innovator

2009 - Ray Hintz, North Dakota Department of Career and Technical Education, Bismarck

2010 - Catherine Dalzell, Center for Technology and Business, Bismarck

BUILDING THE WORKFORCE

Through the collaborative efforts of industry, education and government, North Dakota is working to inform students of IT career opportunities, provide industry-driven secondary and post-secondary IT education, and offer incentives for pursuing an IT career path. The state also offers aggressive workforce training programs to meet the ever-changing skill demands of the IT industry.

Educational Opportunities

IT Career Awareness | www.discoverndit.com

ITCND, in cooperation with industry stakeholders, launched the first-ever North Dakota IT Career Awareness Program in 2007. The goal of the program is to address future IT workforce needs by informing students, parents and educators of IT career opportunities in North Dakota and encouraging students to enroll in IT-related classes and degree programs at the secondary and post-secondary education levels.

Through a partnership with the North Dakota Department of Career and Technical Education, the program completed its first year of implementation in 2009-2010 and reached more than 600 students, 1,000 parents and 75 educators at 13 pilot schools across the state. Additional program partners are the Bank of North Dakota, Basin Electric Power Cooperative, Bismarck State College, Dakota Carrier Network, MDU Resources Group, Microsoft Fargo, National Information Solutions Cooperative, Office of North Dakota Governor John Hoeven, Rasmussen College and Valley City State University.

Secondary IT Education

Once students are aware of the state's IT opportunities, the next step is learning the skill sets required for a successful IT career. Through the North Dakota Department of Career and Technical Education, high schools across the state can offer elective IT courses, which continue to grow in popularity and availability.

Post-secondary IT Education

North Dakota offers more than 70 IT programs at the post-secondary level. These are offered through the 11 colleges and universities making up the North Dakota University System, four tribal colleges and two private colleges. In 2007-2008, 160 college students graduated with two or four-year IT-related degrees offered at these colleges and universities. In 2008-2009, that number increased by 22% to 195.

STEM Occupations Student Loan Forgiveness Program

Recognizing the need for high-quality employees in the areas of science, technology, engineering and mathematics (STEM), the state established the STEM Occupation Student Loan Program. The intent of the program is to reduce student loan indebtedness for individuals who have graduated in a STEM-related field and have been employed in a STEM occupation in North Dakota for one year.

Funding recipients are eligible to receive up to \$1,500 per year in continued loan forgiveness for each year they are employed in an approved STEM occupation in North Dakota, subject to a maximum of 48 months of eligible employment. Individuals must apply or re-apply annually for new or continued funding. Qualifications and additional information is available at www.ndus.edu.

Operation Intern

Administered by the North Dakota Department of Commerce, Operation Intern provides a valuable way for students to make connections with businesses and identify career options in North Dakota. The program is designed to expand the number of new internship, work experience and apprenticeship positions provided. Employers in the state's targeted industries, including IT, can access up to \$6,000 in matching funds for each new position created. During the 2009-2011 biennium, 31 IT-based businesses participated in Operation Intern. Additional information is available at www.operationintern.com.

Workforce Training Programs

Job Service North Dakota | www.jobsnd.com

New Jobs Training was created to assist new or expanding businesses in filling hourly job positions.

Training costs are paid with income tax withheld from new employees, and funded projects must emphasize job and basic skills training. During the program's 16-year history, 14% of the 260 companies receiving New Jobs Training funding have been IT-based. The use of the program by new and expanding IT companies remains steady.

Workforce 20/20 assists North Dakota businesses and industries in retraining and upgrading workers' skills to meet the demands of new technologies and work methods. The funding is available to offset training costs for current and new employees, and requires a funding match from participating businesses. Over the past five years, an average of 10 IT training funding requests were approved annually, and the total number of IT funding requests have accounted for 21% of all training.

Workforce Investment Act provides funding for on-the-job training, youth employment and training, and adults and dislocated worker assistance. Funding is available for a maximum of three years of training. In 2008, the Workforce Investment Act provided 19 individuals with training opportunities in IT-related careers. In 2009, the number grew by 89% to 36 individuals.

North Dakota Department of Commerce | www.ndcommerce.com

Workforce Enhancement Grant Program was created by the 2007 North Dakota Legislature to address the workforce training needs of North Dakota businesses and industries. Institutions of higher education apply for funding to develop curriculum, purchase equipment and technology, and train or certify instructors to help meet the short-term needs of the state's target industry employers and employers with high-skill and high-wage job opportunities. Five grants totaling \$1 million were awarded to the state's higher learning institutions during the 2009-2011 biennium.

North Dakota University System | www.ndus.edu

TrainND offers comprehensive, customized adult learning and employee training. With the largest network of academic and vocational specialists and regional offices located in each of the program's four Workforce Training Quadrants, TrainND covers a full range of beginning and advanced workshops. TrainND is not limited to a set list of classes, as new classes are developed upon request. In 2009, a total of 1,527 businesses were served by the program with 11,028 employees participating in training activities.

MEASURING UP

Wages

The wages North Dakota IT employees receive are competitive with several surrounding states, including South Dakota and Montana. However, North Dakota's average median hourly wage for IT-related occupations lags behind Minnesota and the national average (Table 9). North Dakota is closing this wage gap as the median hourly wage has increased 7% more than that of the nation from 2003 to 2009 (Table 8).

[TABLE 8]

MEDIAN HOURLY WAGE CHANGES (2003-2009)

O*NET	Occupational Title	U.S. % Change	ND % Change
11-3021	Computer and Information Systems Manager	26%	11%
15-1021	Computer Programmers	16%	8%
15-1031	Computer Software Engineers, Applications	N/A	N/A
15-1032	Computer Software Engineers, Systems Software	23%	N/A
15-1041	Computer Support Specialists	12%	28%
15-1051	Computer Systems Analysts	20%	4%
15-1061	Database Administrators	23%	50%
15-1071	Network and Computer Systems Administrators	21%	16%
15-1081	Network Systems and Data Communications Analysts	24%	26%
15-1099	Computer Specialists, All Other	N/A	N/A
Total		21%	28%

Source: Occupational Employment Statistics

[TABLE 9]

MEDIAN HOURLY WAGES (2009)

O*NET	Occupation	Median Hourly Wage				
		ND	SD	MT	MN	Nation
11-3021	Computer and Information System Manager	\$36	\$43	\$41	\$54	\$55
15-0000	Computer and Mathematical Occupations	\$24	\$24	\$24	\$35	\$35
15-1021	Computer Programmers	\$23	\$23	\$24	\$32	\$34
15-1031	Computer Software Engineers, Applications	\$29	\$32	\$28	\$42	\$42
15-1032	Computer Software Engineers, Systems Software	\$42	\$33	\$35	\$46	\$45
15-1041	Computer Support Specialists	\$16	\$17	\$17	\$22	\$21
15-1051	Computer Systems Analysts	\$29	\$29	\$28	\$36	\$37
15-1061	Database Administrators	\$31	\$31	\$23	\$39	\$34
15-1071	Network and Computer Systems Administrators	\$24	\$24	\$24	\$33	\$33
15-1081	Network Systems and Data Communications Analysts	\$27	\$25	\$27	\$40	\$35
15-1099	Computer Specialists, All Other	\$29	\$34	\$26	\$35	\$37
Total		\$28	\$29	\$27	\$38	\$37

Source: U.S. Bureau of Labor Statistics

IT Occupational Shift Share

Shift share analysis compares the local economy of interest to the larger economy. For the purpose of this document, the “local” economy refers to North Dakota IT occupations and the comparison is to the national IT job market. The timeframe reflected is 2003-2009.

This analysis breaks down the local employment change into three components:

- National Growth Share: The local job growth that is attributed to national economic growth.
- Occupational Mix Share: The effect specific trends at the national level have had on the change in the number of jobs at the local level.
- Local Share: The extent to which unique local factors relate to local occupational growth or decline.

National Growth Share

If the state’s IT jobs had grown at the same rate as those in the rest of the nation, 124 jobs would have been created. The actual number of jobs created during this timeframe was 1,699, indicating that North Dakota is performing well above the national average (Table 10).

Occupational Mix Share

North Dakota has 623 more jobs than it would have if its structure were identical to the nation, indicating the state’s economy grew faster than the national average. Overall, North Dakota is outperforming the nation; however, the computer programming and postsecondary computer teacher occupations are growing slower than the national average (Table 10).

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Local Share

According to the local share component, 1,184 of North Dakota's 1,699 new IT jobs can be attributed to the state's relative competitive position. This indicates the state itself created a greater share of employment growth than the nation did on average. However, several occupations performed under the national average, including computer and information system managers, computer programmers, network systems and data communication analysts, and postsecondary computer teachers (Table 10).

[TABLE 10]

SHIFT SHARE (2003-2009)

O*NET	Occupation	National Growth Share	Occupation Mix Share	Local Share	Shift Share
11-3021	Computer and Information System Managers	15	41.91	-67.33	-10
15-1021	Computer Programmers	21.3	-83.53	-150.77	-213
15-1031	Computer Software Engineers, Applications	15	88.41	468.01	571
15-1041	Computer Support Specialists	36.3	114.89	579.17	730
15-1051	Computer System Analysts	15	12.79	276.55	304
15-1061	Database Administrators	N/A	232.69	N/A	N/A
15-1071	Network and Computer Systems Administrators	11.1	131.51	153.39	296
15-1081	Network Systems and Data Communication Analysts	7.5	104.18	-66.23	45
25-1021	Computer Teacher, Postsecondary	3.6	-19.29	-8.31	-24
Total		124.8	623.56	1,184.48	1,699

Source: Job Service North Dakota

Location Quotient

Location quotients (LQ) compare an area's business composition to that of a larger area (Table 11). For the purposes of this document, the IT occupations at the state and national level are compared. A LQ greater than one (1) indicates the state has proportionally more workers than the nation employed in that occupation. This implies the state is producing more of a product or service than consumed by area residents. A LQ significantly less than one (1) may indicate an opportunity to develop businesses in the state to meet demand.

[TABLE 11]

IT OCCUPATION LQ (2003-2009)

O*NET	Occupation	LQ 2003	LQ 2009
11-3021	Computer and Information System Managers	0.79	0.6
15-1021	Computer Programmers	0.71	0.63
15-1031	Computer Software Engineers, Applications	0.49	0.45
15-1041	Computer Support Specialists	1.02	1.22
15-1051	Computer System Analysts	0.42	0.53
15-1071	Network and Computer Systems Administrators	0.61	0.49
15-1081	Network Systems and Data Communication Analysts	0.65	0.42
25-1021	Computer Teacher, Postsecondary	1.31	1.38
Total		0.69	0.55

Source: Occupation Employment Statistics

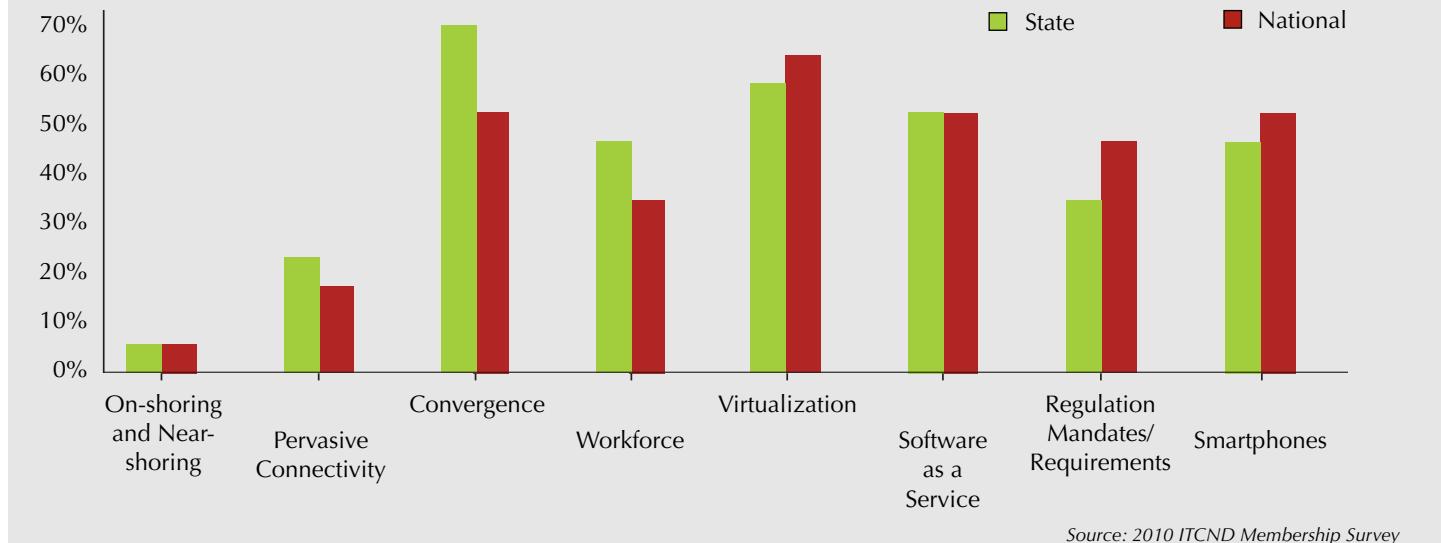
EMERGING IT TRENDS

The IT industry is a diverse field impacting virtually every business – from the service industry and trucking companies to manufacturing specialists and health care professionals and from large companies to small sole-proprietor businesses. As the industry changes and matures, new technologies and applications are being developed that have the potential to fuel economic growth and produce positive impacts for North Dakota businesses and workforce. Because of the diverse nature of the IT industry, the high level of competition and the rapidly evolving changes that characterize the industry, it is increasingly important to identify trends, challenges and advantages that have the potential to affect North Dakota business.

In a survey conducted by ITCND, IT businesses within the state identified convergence, virtualization and software as a service (SaaS) as the three emerging state trends most likely to impact their businesses. Virtualization and smart phones were identified as national trends with the greatest potential to impact their businesses (Figure 3).

[FIGURE 3]

STATE AND NATIONAL IT TRENDS (2010)



Source: 2010 ITCND Membership Survey

[DEFINITIONS]

Technological convergence is the tendency for different technological systems to evolve toward performing similar tasks.

Software as a service (SaaS) is a software distribution model in which applications are hosted by a vendor or service provider and made available to customers over a network, typically the Internet.

Virtualization is the creation of a virtual (rather than actual) version of something, such as an operating system, server, storage device or network resources.

A **smartphone** is a mobile phone that offers more advanced computing ability and connectivity than a contemporary basic feature phone.



DCN

DAKOTA CARRIER NETWORK

Taking Business Farther

Dakota Carrier Network is the recipient of a multi-million dollar grant for extending broadband services across North Dakota. Through the \$10.7 million grant, DCN will provide high-speed fiber connectivity to more than 175 largely rural and underserved North Dakota critical community anchor institutions, including public safety entities, schools, and government agencies. To receive access to the grant, DCN has committed to providing a cash match of \$4.6 million.

The grant is made possible through The American Recovery and Reinvestment Act of 2009, which provided funds to the National Telecommunications and Information Administration (NTIA). NTIA administers the Broadband Technology Opportunities Program (BTOP) within three project categories: comprehensive community infrastructure (CCI), public computer centers, and sustainable broadband adoption.

DCN's CCI broadband project involves a unique combination of public and private partnerships and collaboration with multiple Recovery Act broadband awardees to provide last-mile service. Given the largely rural, underserved nature of the proposed service area, in which many community anchor organizations lack access to necessary last-mile broadband speeds, DCN plans to deploy 169 miles of new fiber with backhaul speeds as fast as 1 Gbps to enable last-mile service across North Dakota. Additionally, the project will enhance e-health in the state by deploying a dedicated 10 Gbps healthcare network for more than 200 hospitals, clinics, and other healthcare providers to enable telemedicine, teleradiology, telepharmacy, and electronic health information exchange.

Through the CCI broadband project, DCN will:

- Connect more than 175 community anchor institutions with speeds between 10 and 100 Mbps, including 27 K-12 public schools, 33 public safety entities, 79 healthcare facilities, and 36 government buildings.
- Facilitate more affordable and accessible broadband service for approximately 2,700 households and 600 businesses by enabling local Internet service providers to utilize the project's open network.
- Improve public safety by connecting or upgrading service to public safety entities statewide, including the North Dakota Department of Emergency Services E911 Public Safety Access Point and the National Guard.
- Interconnect with BTOP award recipient South Dakota Network, LLC to facilitate a regional middle-mile network across the upper Midwest.

Meeting Expanding Network and Customer Needs

With more than 16,000 miles of fiber optic cable in service, the 15 companies that own Dakota Carrier Network represent all the major local independent telephone companies and serve more than 164,000 customers in 250 communities – more than 90 percent of the state's total surface area. To accommodate the company's expanding network and growing customer needs – and provide even greater assurance of business survivability – DCN is building a new Network Operations Center in Bismarck, North Dakota.

"We appreciate the great public-sector, private-sector partnership we have forged with DCN, which has helped to make the latest communication technology available to the people of North Dakota," said Governor John Hoeven.

The new DCN Network Operations Center (see rendering above) will act as a "Fort Knox" for network connectivity, support and monitoring purposes. The building will be a carrier grade hardened facility, meaning that it will be extremely reliable, well tested and proven in its capabilities. Carrier grade systems are tested and engineered to meet or exceed high availability standards, and the facility is being built to ensure 99.999 percent network uptime.

"DCN provides network connectivity to North Dakota's most critical institutions, including health care, public safety, state government and financial organizations. While business continuity and survivability in the face of a catastrophe is important for any organization, it is especially critical for those entities that provide vital services," said Evan Hass, general manager of DCN.

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VCSU partners with SAP to offer powerful combination of business and IT

It used to be that students planning on a career in business would only focus on business classes, and students working towards a career in IT would focus on programming languages and databases.

But no more.

"In modern enterprises, information technology has so permeated the business environment that just about all employees need skills in both business and IT," said Kerry Gregoryk, chair of the Division of Business and Information Technology at Valley City State University.

Similarly, Gregoryk says IT professionals need to understand modern business principles. "Today's enterprise systems, such as ERP and CRM systems, are squarely based on sophisticated business strategies. IT strategy is now directly driven by business strategy."

With these trends in mind, VCSU has become a leader in equipping its students with a unique combination of business skills and IT skills.

"We've taken VCSU's history of developing high-end technology skills much further," said VCSU's SAP Faculty Coordinator, Sue Pfeifer. For example, students compete as teams to be the most profitable business using SAP ERP simulation software and

they demonstrate the various business and IT roles that exist in a business. According to Pfeifer, "Business and IT students at VCSU learn to collaborate in the classroom just as they would in a real business environment. We acknowledge this is an important skill to learn before they move into the workplace."



VCSU hosted a meeting of regional SAP users, providing students with a unique opportunity to meet and network with representatives from companies all over the midwest.

Today, VCSU offers a certificate in Customer Relationship Management (CRM) and a certificate in Enterprise Applications. These programs are great for traditional students working to launch a career in these specialized and high-demand areas.

Certificates require far fewer courses than a full degree program, so they are also attractive to working professionals interested in moving their career into these areas. In addition, VCSU's Center of Excellence Enterprise University provides customized training to employers.

With support from Enterprise University, VCSU formed a partnership with SAP, the world's largest provider of business software. SAP products are collaborative business solutions for all types of industries that are used by over 40,000 customers worldwide. VCSU is the only university in the upper Midwest to be a member of the SAP University Alliance.

Like many software user groups, Americas' SAP Users' Group (ASUG) members network and share their experiences by attending regional meetings. As a University Alliance member of ASUG, VCSU sends faculty and students to participate in these meetings, providing unique opportunities to interact with business professionals who use SAP software. In fact, VCSU recently hosted the first regional meeting that attracted representatives from 14 companies from four states. "We're constantly looking for ways to extend the education we provide beyond the classroom," said Gregoryk. "Meeting face-to-face with professionals that are running large enterprises is a fantastic way to do that."



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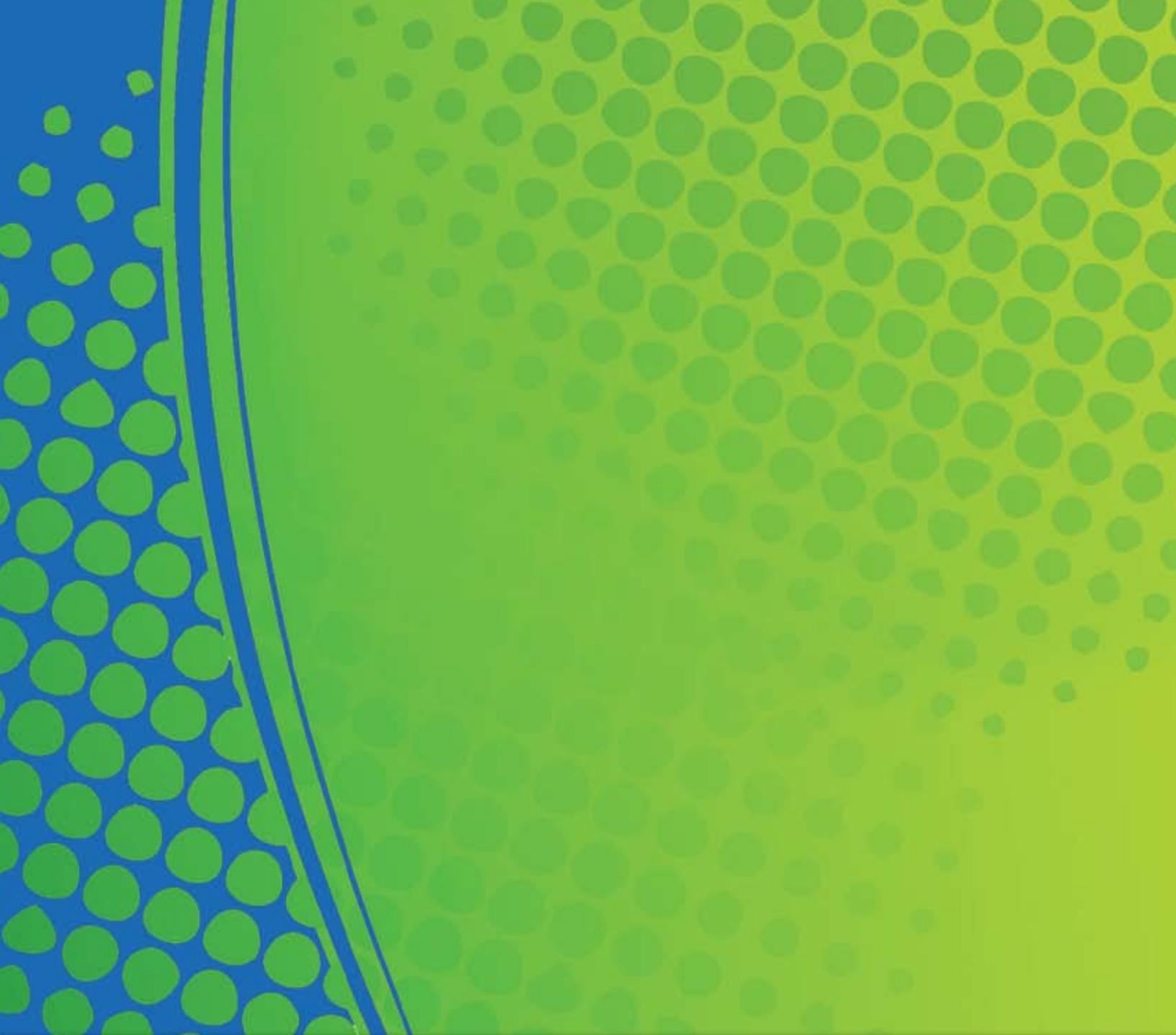
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