UMASS DONAHUE INSTITUTE

Business and Organizations Located in Devens, Massachusetts

Profile and Economic Contributions

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Summary of Key Findings

As home to a thriving community of high-tech and related businesses, Devens, Massachusetts, is a significant employment center and contributor to the Commonwealth's high-tech economy.[1] Advanced manufacturing, government services, wholesale trade, and transportation and warehousing are all strongly represented in Devens. In 2014, firms in Devens employ 4,030 people, and the economic activities of firms and nonprofit organizations in Devens support employment of an additional 4,159 people in Massachusetts. An estimated $919 million in direct economic activity by private and nonprofit organizations in Devens supports additional spending of $665 million in local supply chains for a total contribution of more than $1.5 billion to the Massachusetts economy.[2]

Business Profile

- Of the 91 Devens establishments, 74 percent are private businesses, 20 percent are nonprofits, and the remainder consists of governmental entities.
- Devens businesses employ 4,030 people in 2014, an increase of 396 over the comparable 2013 figure of 3,634.[3] Most of this growth occurred in the private sector in manufacturing; transportation and warehousing; and professional and technical services.
- Devens hosts a diverse group of businesses, with the top three industries as follows:

[1] This report accounts for the spending activities of the commercial, nonprofit, and governmental entities located in Devens commercial districts (Barnum Business Park, Devens Business Services District, Devens Industrial Park, Innovation Technology Center District, and Jackson Technology Park). This report does not include the spending of recreational visitors to Devens, spending associated with residential development, or military spending associated with Fort Devens.
[2] Following standard practice, government expenditures (transfers) are not modeled as economic contributions in this report.
[3] University of Massachusetts Donahue Institute. *Business and Organizations Located in Devens, Massachusetts: Profile and Economic Contributions*. 2013.

  - professional and technical services (17 businesses);
  - manufacturing (15 businesses); and
  - wholesale trade businesses, and transportation and warehousing (each with seven businesses).

- Of the 4,030 people that businesses, nonprofits, and government organizations in Devens employ, the private sector employs 3,002, or nearly three-quarters of the total. The five most significant individual employers in Devens are Quiet Logistics (high-tech order fulfillment services), the Federal Medical Center (a facility housing prisoners needing medical care), Bristol-Myers Squibb (biologics manufacturing), Johnson Matthey Pharma Services (specialized chemistry for drug development), and Patterson Veterinarian Supply (wholesaler of veterinarian products, formerly known as Webster Veterinarian Supply).
- Total estimated annual employee wages in Devens top $300 million in 2012, the most recent year of annual data available.
- Due to the mix of firms and organizations in Devens, average wages there are high relative to the Commonwealth: $74,473 versus $60,892.

Devens Establishments: Employment, Total Wages, and Average Annual Wages

Type	Total Employment	Percent of Total Employment	Total Wages	Average Annual Wages
Government	683	17%	$48,573,134	$71,117
Nonprofit	345	9%	$17,328,711	$50,228
Private Sector	3,002	74%	$234,223,799	$78,023
Totals	**4,030**	**100%**	**$300,125,644**	**$74,473**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent annual data available) and reported in nominal 2012 dollars.

Economic Contributions

- Devens private sector and nonprofit establishments had estimated combined sales of more than $918 million and employed 3,347 people.[4]
- Spending by Devens private and nonprofit entities supported an additional estimated $665 million in spending throughout Massachusetts supply chains and an additional estimated 4,159 Massachusetts employees.

Devens Private and Nonprofit Economic and Employment Contributions in Massachusetts

	Direct	Indirect and Induced Contributions	Total Contributions
Output	$918,548,208	$664,529,960	$1,583,078,169
Employment	3,347	4,159	7,506

Sources: Dun & Bradstreet, MassDevelopment, and MIG, Inc. IMPLAN System.

- Private firms in Devens paid an estimated $3.84 million in state corporate profits tax.
- Employees of private and nonprofit firms in Devens paid an estimated $16.59 million in personal income tax.

[4] Following standard practice for economic contribution analyses, governmental entities were not included in the economic contribution analysis based on the assumption that these contributions would be more likely to continue in the form of alternate economic activity if the specific government entities left Devens. We assume that if a governmental entity were not spending the money on services in Devens, then that government entity would likely spend the money elsewhere.

Introduction

Devens, a 4,400-acre community managed by MassDevelopment, is an important center for commercial, industrial, and residential activities in north-central Massachusetts. MassDevelopment has commissioned the University of Massachusetts Donahue Institute to study the employment and economic contributions of Devens businesses, nonprofits, and governmental entities. This report includes analysis of Devens establishments, employment, and estimated wages by sector type (private, nonprofit, and government) as well as by industry. This report also presents an analysis of the indirect and induced economic effects on the rest of Massachusetts attributable to the effects of the direct economic activities in Devens. Organizations in Devens operate largely in the private sector, although 17 percent of Devens employees work for the government or MassDevelopment (a quasi-governmental organization). Manufacturing; professional and technical services; transportation and warehousing; and wholesale trade employee the most Devens workers.

This report accounts for the spending activities of the commercial, nonprofit, and governmental entities in Devens commercial districts (Barnum Business Park, Devens Business Services District, Devens Industrial Park, Innovation Technology Center District, and Jackson Technology Park). This report excludes the spending of recreational visitors to Devens, spending associated with residential development, and military spending associated with Fort Devens.

Profile and Contributions

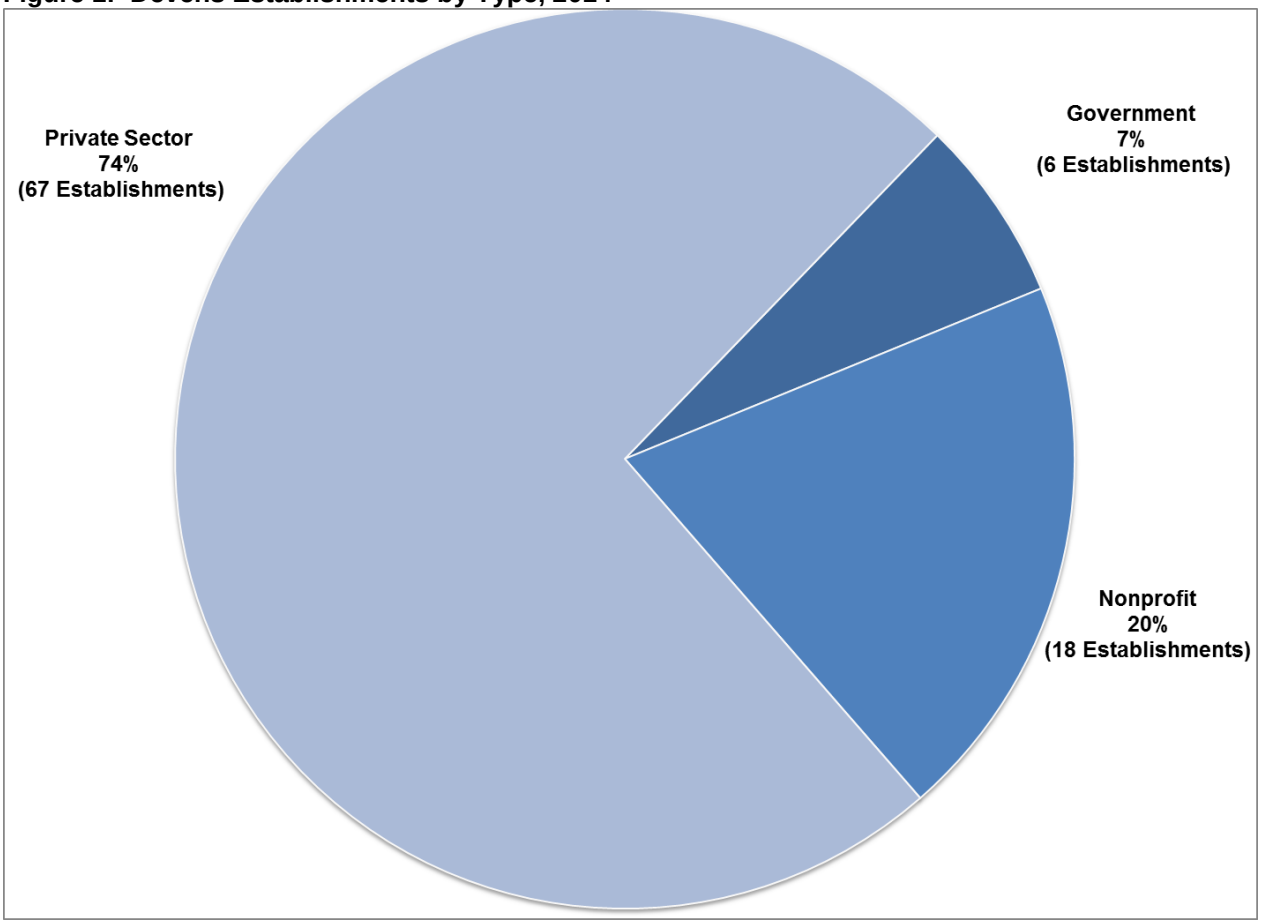
Overview and Profile of Businesses and Organizations

Aggregate Business Profile Analysis

Establishment Type and Count

Of the 91 Devens establishments, 74 percent are in the private sector, 20 percent are nonprofits, and seven percent are government entities (totals exceed 100 percent due to rounding). A complete list of businesses and organizations appears in Appendix B (alphabetical) and Appendix C (by industry type/NAICS code).

Figure 1: Devens Establishments by Type, 2014



Sources: Dun & Bradstreet and MassDevelopment.

Aggregate Employment and Wages

Devens businesses and organizations employ 4,030 people, with the private sector employing 3,002, nearly three-quarters of the total. Total estimated employee wages in Devens top $300 million. Due to the mix of firms and organizations, estimated average wages in Devens are high relative to those in the Commonwealth: $74,473 versus $60,892. In Devens, the estimated average annual employee wage in the private sector is more than $78,000, in government more than $71,000, and in nonprofit organizations more than $50,000.

Figure 2: Devens Establishments: Employment, Total Wages, and Average Annual Wages

Type	Total Employment	Percent of Total Employment	Total Wages	Average Annual Wages
Government	683	17%	$48,573,134	$71,117
Nonprofit	345	9%	$17,328,711	$50,228
Private Sector	3,002	74%	$234,223,799	$78,023
Totals	**4,030**	**100%**	**$300,125,644**	**$74,473**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Aggregate Industry Analysis

The mix of industries present has an influence on Devens' economic and employment effects. Many of the strongest industries in Devens are overrepresented compared to the Massachusetts economy as a whole: professional, scientific, and technical services (18.7 percent of Devens establishments versus 13.3 percent statewide); manufacturing (16.5 percent versus 3.2 percent); wholesale trade (7.7 percent versus 6.4 percent); and transportation and warehousing (7.7 percent versus 1.9 percent). Public administration (including both government and nonprofit entities in Devens) is also overrepresented in Devens at 6.6 percent versus 1.5 percent. Likewise, some businesses types

appear in lower concentrations in Devens, namely, retail (2.2 percent of Devens establishments versus 10.7 percent in Massachusetts) and construction (1.1 percent vs. 8.6 percent).[5]

Figure 3: Industry Sector Proportions and Wages in Devens versus Massachusetts

Industry Description	Devens			Massachusetts		
	Establishments	Percent of Establishments	Average Annual Wages	Establishments	Percent of Establishments	Average Annual Wages
Professional, Scientific, and Technical Services	17	18.7%	$109,151	29,313	13.3%	$107,900
Manufacturing	15	16.5%	$83,954	7,153	3.2%	$79,560
Transportation and Warehousing	7	7.7%	$68,097	4,223	1.9%	$49,036
Wholesale Trade	7	7.7%	$83,544	14,171	6.4%	$82,472
Accommodation and Food Services	6	6.6%	$26,692	16,108	7.3%	$20,072
Educational Services	6	6.6%	$53,481	3,941	1.8%	$55,068
Public Administration	6	6.6%	$71,649	3,413	1.5%	$64,272
Arts, Entertainment, and Recreation	4	4.4%	$22,492	3,520	1.6%	$35,048
Health Care and Social Assistance	4	4.4%	$28,346	16,978	7.7%	$53,768
Other Services (except Public Administration)	4	4.4%	$40,742	44,718	20.2%	$28,652
Administrative and Support and Waste Management and Remediation Services	3	3.3%	$48,761	11,679	5.3%	$40,976
Finance and Insurance	3	3.3%	$84,298	9,782	4.4%	$125,528
Information	3	3.3%	$79,075	4,407	2.0%	$93,132
Retail Trade	2	2.2%	$33,003	23,589	10.7%	$28,288
Construction	1	1.1%	$66,157	18,990	8.6%	$64,324
Management of Companies and Enterprises	1	1.1%	$115,735	1,286	0.6%	$115,752
Real Estate and Rental and Leasing	1	1.1%	$57,135	6,295	2.8%	$66,300
Utilities	1	1.1%	$59,241	423	0.2%	$96,304
Agriculture, Forestry, Fishing & Hunting	N/A	N/A	N/A	957	0.4%	$52,156
Mining, Quarrying, and Oil and Gas Extraction	N/A	N/A	N/A	94	0.0%	$57,564
Totals	**91**	**100%**	**$74,473**	**221,040**	**100%**	**$60,892**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Average annual wages and MA establishments data as of 2012 (most recent available) and reported in nominal 2012 dollars.

Manufacturing is a significant force in Devens, with 15 establishments and the largest number of employees, with more than 1,170 working in the sector. The largest manufacturing employers in Devens include Bristol-Myers Squibb (biologics manufacturing), Parker Hannifin Corp. (Nichols Aircraft Division; aircraft component manufacturing), RockTenn (paper product manufacturing), and Laddawn Inc. (plastic bag and packaging film manufacturing). The professional, scientific, and technical services industry includes 17 businesses employing 375 people. The largest professional,

[5] Industries are those defined by the North American Industrial Classification System, or NAICS. NAICS is the standard coding system used by federal statistical agencies, including the Bureau of Labor Statistics, in classifying business establishments for collecting, analyzing, and publishing data related to the U.S. economy.

scientific, and technical services employers are Johnson Matthey Pharma Services (specialized chemical development) and MagneMotion (engineering services). Quiet Logistics, in the transportation and warehousing industry, has grown to become the single largest private-sector business, employing 576 people. While the large majority of businesses and employment in Devens are in the private sector (discussed in detail in the next section), the Federal Medical Center (FMC) Devens falls under Public Administration and, along with Quiet Logistics, is one of the two largest employers in Devens.

Figure 4: Total Establishments in Devens by Industry

Description	Establishments	Total Employment	Total Wages
Professional, Scientific, and Technical Services	17	375	$40,931,441
Manufacturing	15	1,177	$98,814,021
Transportation and Warehousing	7	630	$42,900,987
Wholesale Trade	7	306	$25,564,441
Accommodation and Food Services	6	133	$3,550,096
Educational Services	6	255	$13,637,562
Public Administration	6	671	$48,076,156
Arts, Entertainment, and Recreation	4	48	$1,079,609
Health Care and Social Assistance	4	62	$1,757,472
Other Services (except Public Administration)	4	12	$488,908
Administrative and Support and Waste Management and Remediation S	3	32	$1,560,354
Finance and Insurance	3	18	$1,517,368
Information	3	96	$7,591,228
Retail Trade	2	73	$2,409,185
Construction	1	40	$2,646,296
Management of Companies and Enterprises	1	30	$3,472,055
Real Estate and Rental and Leasing	1	65	$3,713,775
Utilities	1	7	$414,690
Totals	**91**	**4,030**	**$300,125,644**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Analysis of Private Establishments

Three-quarters of both the establishments and employees in Devens are in the private sector. Devens particularly appeals to companies focusing on technology-based manufacturing; medical and

biological product manufacturing; professional and technical services; consulting; transportation-related services; wholesale trade; and accommodation and food services.

Employment, Wages, and Sales

Private companies located in Devens account for 74 percent of the jobs there (more than 3,000 employees). Estimated average annual wages in this sector exceed $78,000. Together, these companies account for estimated annual sales of more than $890 million.

Figure 5: Private Sector in Devens: Establishments, Employment, Sales, Wages, and Average Wages

Establishments	67
Employment	3,002
Sales	$890,404,373
Total Wages	$234,223,799
Average Wages	$78,023

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Industry Analysis

More than 29 percent of employment in Devens comes from its 15 manufacturers. Manufacturing employment in Devens has grown from 906 employees in 2010 to a peak of 1,216 employees in 2013 driven by Bristol-Myers Squibb, RockTenn, and Laddawn. Several manufacturers have cut employment, and Saint-Gobain has left Devens, but growing and new manufacturers have offset almost all of the employment decrease. Currently, Devens manufacturers employ 1,177 people.

Quiet Logistics drove almost all employment growth in transportation and warehousing. Transportation and warehousing businesses now employ 626 people in Devens; more than nine in ten work at Quiet Logistics.

Devens' 16 private professional, scientific, and technical services firms employ 373 people at larger companies like Johnson Matthey Pharma Services and MagneMotion as well as at smaller firms and

start-ups. The largest employers in wholesale trade include Patterson Veterinarian Supply and AMSC.

Industries that typically employ high-skill workers and pay high wages dominate the Devens private sector: manufacturing and wholesale trade have average annual wages of more than $83,000, while professional, scientific, and technical services have average wages of more than $109,000. The lowest average annual wages among Devens industries are in arts, entertainment, and recreation ($21,594); educational services ($22,046); and accommodations and food services ($26,692). Together, the private businesses in Devens in industries with an average wage less than the statewide average of $60,892 account for only 347 employees, or 11.6 percent of private sector employment in Devens.

Figure 6: Private-Sector Establishments in Devens by Industry

Description	Establishments	Employment	Direct Output	Total Wages	Average Annual Wages
Professional, Scientific, and Technical Services	16	373	$62,073,851	$40,700,859	$109,118
Manufacturing	15	1,177	$609,024,500	$98,814,021	$83,954
Wholesale Trade	7	306	$68,760,754	$25,564,441	$83,544
Transportation and Warehousing	6	626	$73,538,258	$42,660,227	$68,147
Accommodation and Food Services	6	133	$14,159,215	$3,550,096	$26,692
Arts, Entertainment, and Recreation	3	45	$2,276,268	$971,730	$21,594
Administrative and Support and Waste Management and Remediation	2	20	$4,403,528	$1,026,457	$51,323
Construction	1	40	$6,121,722	$2,646,296	$66,157
Educational Services	1	2	$108,496	$44,091	$22,046
Finance and Insurance	1	7	$2,962,254	$590,088	$84,298
Information	3	96	$23,065,882	$7,591,228	$79,075
Management of Companies and Enterprises	1	30	$7,036,603	$3,472,055	$115,735
Other Services (except Public Administration)	1	2	$103,349	$54,560	$27,280
Real Estate and Rental and Leasing	1	65	$13,213,814	$3,713,775	$57,135
Retail Trade	2	73	$1,549,019	$2,409,185	$33,003
Utilities	1	7	$2,006,859	$414,690	$59,241
Totals	**67**	**3,002**	**$890,404,373**	**$234,223,799**	**$78,023**

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Analysis of Government Establishments

Devens government-related entities include large federal organizations and public services available to Devens residents and businesses, such as those provided by MassDevelopment and the U.S. Postal Service.

Employment and Wages

Devens' six government entities account for 683 employees. Average annual wages exceeded $71,000, with total annual wages topping $48 million.

Figure 7: Government Sector in Devens: Establishments, Employment, Wages, and Average Annual Wages

Establishments	6
Employment	683
Total Wages	$48,573,134
Average Annual Wages	$71,117

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Industry Analysis

Government employment is largely categorized in public administration (667 employees in Devens) except in the case of the U.S. Postal Service and the Nashoba Valley Regional Dispatch District, which together employ 16 employees. Public administration establishments in Devens include the Federal Medical Center, MassDevelopment, and the Massachusetts State Police. The vast majority of Devens' public-sector employees work at the Federal Medical Center (575 employees, or about 84 percent of total government employment in Devens). Average annual wages for the industries represented in Devens' government sector are $71,117, well above the state average.

Figure 8: Government Establishments in Devens by Industry

Description	Establishments	Employment	Total Wages	Average Annual Wages
Administrative and Support and Waste Management and Remediation Services	1	12	$533,897	$44,491
Public Administration	4	667	$47,798,477	$71,662
Transportation and Warehousing	1	4	$240,760	$60,190
Totals	**6**	**683**	**$48,573,134**	**$71,117**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Analysis of Nonprofit Establishments

Nearly one in five entities in Devens is a nonprofit organization, with educational and social assistance organizations most common. Devens educational organizations include childcare centers; private and charter schools; a community college; and graduate schools. Additionally, social-service providers, a museum, and credit unions are a part of this sub-sector.

Employment and Wages

The 18 nonprofit sector entities in Devens account for employees with an annual average wage of more than $50,200 and total annual wages of more than $17 million.

Figure 9: Nonprofit Sector in Devens: Establishments, Employment, Wages, and Average Annual Wages
Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.

Establishments	18
Employment	345
Total Wages	$17,328,711
Average Annual Wages	$50,228

Note: Wages as of 2012 (most recent available) reported in nominal 2012 dollars.

Industry Analysis

Educational services organizations are home to nearly three-quarters of total nonprofit employment in Devens and include the Shriver Job Corps, Francis W. Parker Charter Essential School, and R3 Education Inc., which includes Saba University and the Medical University of the Americas. Social-service organizations like Seven Hills Family Services, Guild of St. Agnes Day Care, and Transitions at

Devens round out this sector. Average annual wages for the industries represented in the Devens nonprofit sector are $50,228, largely due to the mix of industries represented, with average annual wages of $53,729 in educational services and $28,346 in health care and social assistance.

Figure 10: Nonprofit Establishments in Devens by Industry

Description	Establishments	Employment	Total Wages	Average Annual Wages
Educational Services	5	253	$13,593,470	$53,729
Health Care and Social Assistance	4	62	$1,757,472	$28,346
Other Services (except Public Administration)	3	10	$434,348	$43,435
Finance and Insurance	2	11	$927,281	$84,298
Public Administration	2	4	$277,679	$69,420
Arts, Entertainment, and Recreation	1	3	$107,879	$35,960
Professional, Scientific, and Technical Services	1	2	$230,582	$115,291
Totals	**18**	**345**	**$17,328,711**	**$50,228**

Sources: Dun & Bradstreet, MassDevelopment, and MA Labor Market Information ES-202.
Note: Wages as of 2012 (most recent available) and reported in nominal 2012 dollars.

Economic Contributions of Commercial and Nonprofit Activities

The research team calculated economic contributions for private and nonprofit organizations in Devens.[6] This analysis estimates economic contributions in two major categories – Devens organizations' spending on goods and services, and their employees' spending – and the resulting support of related industries and services. Direct contributions are the estimated total expenditures of Devens entities. Indirect and induced contributions represent entities' support of Massachusetts businesses via spending for goods and services, as well as spending by employees in the local economy. Researchers estimated economic contributions using the well-regarded IMPLAN

[6] Following standard practice for economic contribution analyses, governmental entities were not included in the economic contribution analysis based on the assumption that these contributions would be more likely to continue in the form of alternate economic activity if the specific government entities left Devens. We assume that if a governmental entity were not spending the money on services in Devens, then that government entity would likely spend the money elsewhere.

proprietary data and software, basing contributions for private-sector and nonprofit firms on employment figures of those firms.

While the induced effects of visitors' spending is not explicitly included in the economic model, IMPLAN data implicitly capture the habits and trends of all types of spending that occur in Massachusetts, including tourism. Devens is home to two large hotels, the Hilton Garden Inn and the Springhill Suites by Marriott, which have 118 and 120 guest rooms, respectively. The Hilton Garden Inn features its own lobby bar and restaurant.[7] Both hotels promote the other dining establishments in Devens such as Pizza Bella Two, The Devens Grill, and Dunkin' Donuts on their websites.[8]

Total Economic Contributions

Devens firms' estimated direct spending of $919 million supports an additional estimated $665 million in spending in Massachusetts for a total economic contribution of more than $1.5 billion, 97 percent of which comes from private-sector firms. More than $48 million of the total economic contribution came from nonprofit firms.

Figure 11: Massachusetts Economic Contributions of Devens Private-Sector and Nonprofit Firms, 2014

	Direct Contribution	Indirect and Induced Contributions	Total Contributions
Private Sector	$890,404,373	$644,367,871	$1,534,772,244
Nonprofit	$28,143,836	$20,162,089	$48,305,925
Totals	**$918,548,208**	**$664,529,960**	**$1,583,078,169**

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.

[7] Information on the number of rooms and restaurants at the hotels was obtained through telephone conversations with the hotel personnel on July 9, 2014.
[8] See http://hiltongardeninn3.hilton.com/en/hotels/massachusetts/hilton-garden-inn-devens-common-ORHDCGI/about/amenities.html and http://www.marriott.com/hotels/local-things-to-do/bossd-springhill-suites-devens-common-center/

Employment Contributions

The private-sector and nonprofit entities in Devens employ 3,347 people, and their spending supports an additional 4,159 workers for a total employment contribution to the Massachusetts economy of 7,506. Of the total supported employment, spending of private-sector entities supports 7,027 employees, and spending of nonprofit entities supports 479 employees.

Figure 12: Massachusetts Employment Contribution of Private-Sector and Nonprofit Firms in Devens, 2014

	Direct Employment	Indirect and Induced Employment	Total Employment
Private Sector	3,002	4,025	7,027
Nonprofit	345	134	479
Totals	**3,347**	**4,159**	**7,506**

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.

Private Sector Detailed Economic Contributions

Spending by Devens' private-sector firms and their employees supports a wide array of other industries in Massachusetts that supply goods and services to Devens firms. The indirect and induced economic contributions of private sector firms in Devens to the Massachusetts economy include more than $82 million on professional, scientific, and technical services; $63 million on finance and insurance; $58 million in health care and social assistance; $57 million in wholesale trade; and $49 million in manufacturing.

Figure 13: Top Ten Industries Supported by Spending of Devens Private-Sector Firms, 2014

Industry	Indirect and Induced Contributions to Sector
Professional, Scientific and Technical Services	$82,528,521
Finance and Insurance	$63,662,305
Health Care and Social Assistance	$58,945,942
Wholesale Trade	$57,551,606
Manufacturing	$49,631,196
Management of Companies and Enterprises	$46,208,772
Real Estate and Rental and Leasing	$36,984,841
Information	$36,358,096
Retail Trade	$28,876,334
Administrative and Support and Waste Management and Remediation	$28,764,586

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.

Nonprofit Sector Detailed Economic Contributions

The indirect and induced economic contributions of Devens nonprofit entities to the Massachusetts economy include $3.1 million for finance and insurance; $2.4 million for health care and social assistance; $2.4 million for real estate and rental and leasing activities; $1.5 million for professional, scientific, and technical services; and $1.2 million for information. Compared to 2013, the economic contribution of nonprofit businesses decreased due to fewer reported employees in 2014.

Figure 14: Top Ten Industries Supported by Spending of Devens Nonprofit Firms, 2014

Industry	Indirect and Induced Contributions to Sector
Finance and Insurance	$3,122,824
Health Care and Social Assistance	$2,396,291
Real Estate and Rental and Leasing	$2,364,192
Professional, Scientific and Technical Services	$1,520,564
Information	$1,229,807
Retail Trade	$1,140,843
Accomodation and Food Services	$944,186
Administrative and Support and Waste Management and Remediation Services	$839,346
Wholesale Trade	$831,855
Manufacturing	$755,689

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.

Tax Contributions of Private and Nonprofit Firms

In addition to supporting the Commonwealth's economy through spending, Devens firms and their employees pay state corporate profit and personal income taxes. Corporate profit and personal income taxes were estimated using the IMPLAN software.

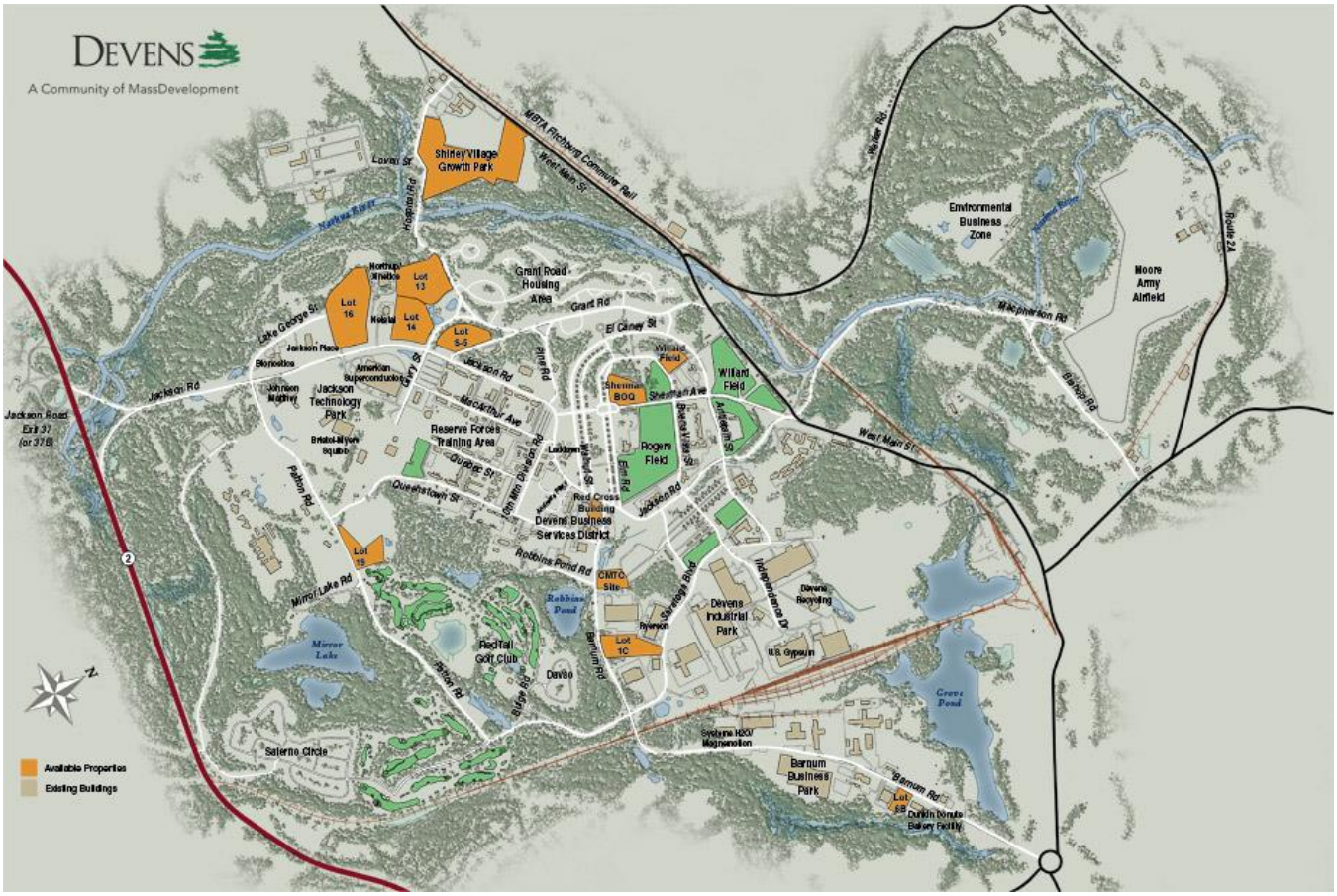
Private firms in Devens are expected to pay an estimated $3.84 million in corporate profits tax in 2014, while their employees will pay an estimated $15.9 million in personal income tax to Massachusetts. Additionally, nonprofit firm employees in Devens will pay an estimated $647,000 in state personal income tax.

Figure 15: State Corporate Profits and State Personal Income Tax Supported by Private-Sector and Nonprofit Firms in Devens, 2014

	Corporate Profits Tax	Personal Income Tax	Employees	Tax per Employee
Private Sector	$3,841,367	$15,939,751	3,002	$5,310
Nonprofit	N/A	$647,176	345	$1,876
Totals	**$3,841,367**	**$16,586,927**	**3,347**	**$4,956**

Sources: Dun & Bradstreet, MassDevelopment, MA Labor Market Information ES-202, and MIG, Inc. IMPLAN System.

Appendix A: Map of Devens



Source: Devens Community Website (http://www.devenscommunity.com/business-industry/master-plan).

Appendix B: Devens Businesses and Organizations

Company Name	Address
Acorn Technology Systems	94 Jackson Road
Adaptive Optics Associates, Inc.	53 Jackson Road
Administration and Assessment, Inc.	94 Jackson Road
AMSC	64 Jackson Road
Anytime Fitness	20 Andrews Parkway
Axis Engineering Technologies, Inc.	100 Jackson Road
B13 Studio Web Design	
Bionostics	7 Jackson Road
Bristol-Myers Squibb	38 Jackson Road
Comrex	19 Pine Street
Cynthia Thomas, C.P.A.	94 Jackson Road
DCS Corp.	67 Buena Vista Street
Devens Common Center	31 Andrews Parkway
Devens Day Spa	12 Andrews Parkway
Devens Dry Cleaners	22 Andrews Parkway
Devens Eco-Efficiency Center	33 Andrews Parkway
Devens Enterprise Commission	33 Andrews Parkway
The Devens Grill	4 Ryans Way
Devens Recycling Center	45 Independence Drive
Devens United States Post Office	240 Barnum Road
Dunkin' Donuts	20 Andrews Parkway
Dunkin' Donuts Central Production Location	40 Barnum Road
Easysoft Corp	100 Jackson Road
ECO2 Office	10 Andrews Parkway
Eglomise Designs	4 Antietam Street
Evergreen Garden Playschool	270 Barnum Road
Federal Medical Center Devens	42 Patton Road
Fort Devens Museum	94 Jackson Road
Francis W. Parker Charter Essential School	49 Antietam Street
Freedom's Way Heritage Association	100 Sherman Avenue
Guild of St. Agnes Day Care	172 Jackson Road
Guilford Motor Express/Pan Am Railways	133 Barnum Road
Hanscom Federal Credit Union	24 Andrews Parkway
Hilton Garden Inn (Common Center)	59 Andrews Parkway
IMPACT Technology Development	100 Jackson Road
Integra Companies	29 Saratoga Boulevard

Company Name (Continued)	Address
Integrated Process Technologies, Inc.	8 Charlestown Street
Iron Stone Ventures	27 Quaker Road
J.P. Routhier & Sons, Inc.	256 Ayer Road
Johnson Matthey Pharma Services	25 Patton Road
Laddawn, Inc.	155 Jackson Road
Learning Express	29 Buena Vista Street
Loaves & Fishes Food Pantry	234 Barnum Road
MagneMotion	139 Barnum Road
Massachusetts State Police	59 Buena Vista Street
Massachusetts Veterans Inc.	14 Bates Street
MassDevelopment	33 Andrews Parkway
Media News Printing	68 Barnum Road
Media Power	94 Jackson Road
MegaWave	100 Jackson Road
Mount Wachusett Community College / Devens Learning Center	27 Jackson Road
N.B. Kenney	68 Barnum Road
Nashoba Publishing	78 Barnum Road
Nashoba Valley Chamber of Commerce	100 Sherman Avenue
Nashoba Valley Regional Dispatch District	270 Barnum Road
New England Sheets	36 Saratoga Boulevard
New England Studios	100 Studio Way
NFI Industries	66 Saratoga Boulevard
North Middlesex Savings Bank	6 Andrews Parkway
Northrop-Grumman, Xinetics Division	115 Jackson Road
Nypro, A Jabil Company	112 Barnum Road
Odic Incorporated	37 MacArthur Avenue
O'Reilly Automotive	15 Independence Drive
Oxbow Schoolhouse	270 Barnum Road
Parker Hannifin Corp., Nichols Aircraft Div.	14 Robbins Pond Road
Patterson (Webster) Veterinarian Supply	137 Barnum Road
PCI Synthesis	88 Jackson Road
Pizza Bella Two	8 Andrews Parkway
Quiet Logistics	66 Saratoga Boulevard
R3 Education, Inc.(includes Saba University and Medical University of the Americas)	27 Jackson Road
Red Tail Golf Club	15 Bulge Road
Regency Warehouse & Distribution Inc.	50 Independence Drive
Response Microwave	94 Jackson Road
RockTenn	51 Independence Drive
Rofin-Baasel, Inc.	68 Barnum Road
Ryerson (Thypin Steel)	45 Saratoga Boulevard

Company Name (Continued)	Address
SABIC Polymershapes	116 Queenstown Street
Seven Hills Family Services	22 Grant Road
Shell (Rapid Refill Gas Station)	4 Andrews Parkway
Shriver Job Corps	270 Jackson Road
Sirius Integrator, Inc.	100 Jackson Road
Springhill Suites by Marriott (Common Center)	27 Andrews Parkway
TekNewell Engineering	36 Walnut Street
Tighe Logistics Group	133 Barnum Road
Transitions at Devens	101 Sherman Avenue
Treehugger Catering	4 MacArthur Drive
United Native American Cultural Center	29 Antietam Street
United Water (formerly Earth Tech Inc.)	9 Cook Street
USG Corporation (Kenco Group, Inc.)	50 Independence Drive
W.H. Nichols Employees Federal Credit Union	14 Robbins Pond Road
Waiteco Machine, Inc.	18 Saratoga Boulevard

Sources: Dun & Bradstreet and MassDevelopment.

Appendix C: Devens Businesses and Organizations by Industry Type

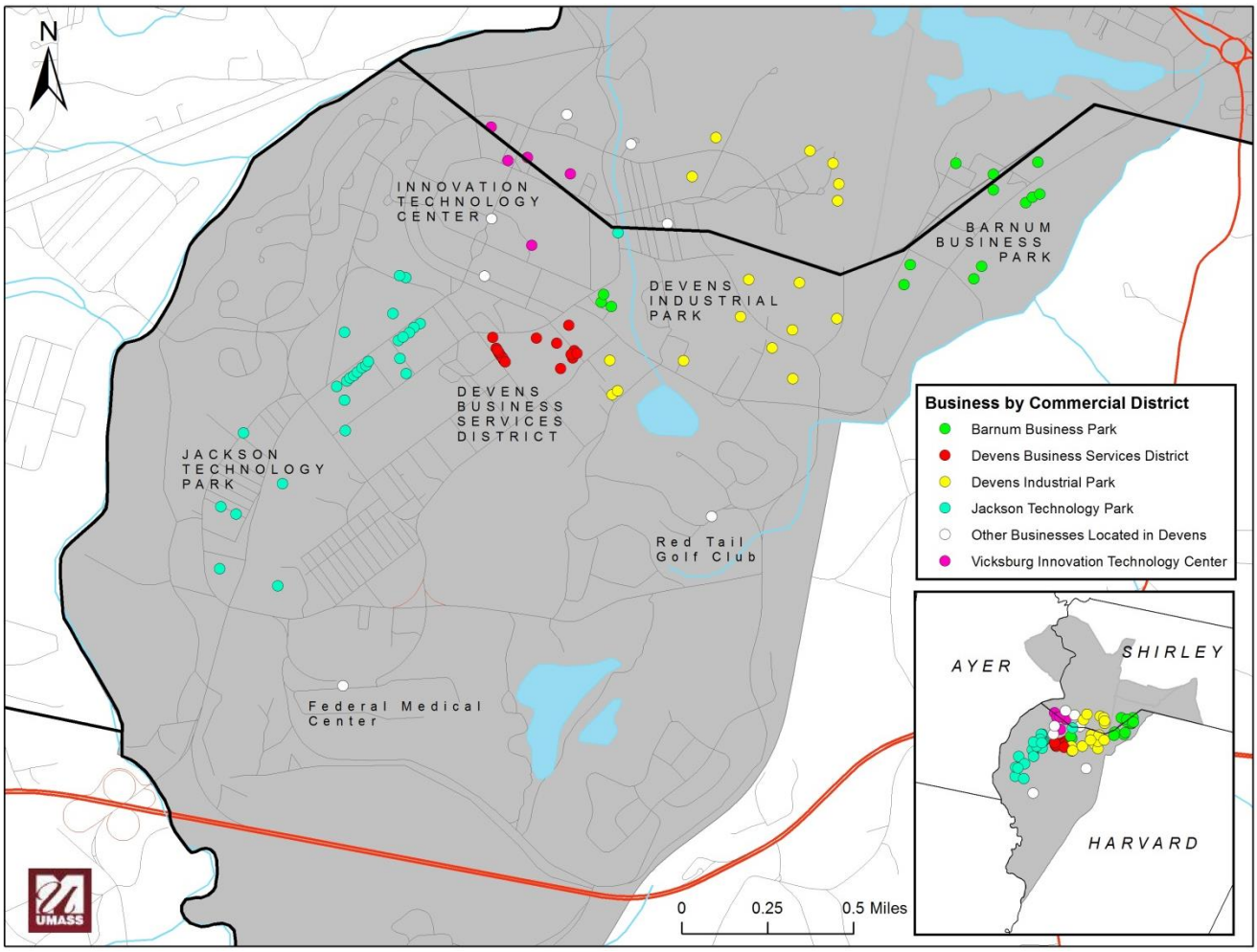
Industry / Establishment	Establishments	Employees
Government	**6**	**683**
Administrative and Support and Waste Management and Remediation Services	**1**	**12**
Nashoba Valley Regional Dispatch District		
Public Administration	**4**	**667**
Devens Enterprise Commission		
Federal Medical Center Devens		
Massachusetts State Police		
MassDevelopment		
Transportation and Warehousing	**1**	**4**
Devens United States Post Office		
Nonprofit	**18**	**345**
Arts, Entertainment, and Recreation	**1**	**3**
Fort Devens Museum		
Educational Services	**5**	**253**
Francis W. Parker Charter Essential School		
Mount Wachusett Community College / Devens Learning Center		
Oxbow Schoolhouse		
R3 Education, Inc.(includes Saba University and Medical University of the Americas)		
Shriver Job Corps		
Finance and Insurance	**2**	**11**
Hanscom Federal Credit Union		
W.H. Nichols Employees Federal Credit Union		
Health Care and Social Assistance	**4**	**62**
Evergreen Garden Playschool		
Guild of St. Agnes Day Care		
Seven Hills Family Services		
Transitions at Devens		
Other Services (except Public Administration)	**3**	**10**
Loaves & Fishes Food Pantry		
Massachusetts Veterans Inc.		
Nashoba Valley Chamber of Commerce		
Professional, Scientific, and Technical Services	**1**	**2**
Devens Eco-Efficiency Center		
Public Administration	**2**	**4**
Freedom's Way Heritage Association		
United Native American Cultural Center		

Industry / Establishment	Establishments	Employees
Private Sector	**67**	**3002**
Accommodation and Food Services	**6**	**133**
The Devens Grill		
Dunkin' Donuts		
Hilton Garden Inn (Common Center)		
Pizza Bella Two		
Springhill Suites by Marriott (Common Center)		
Treehugger Catering		
Administrative and Support and Waste Management and Remediation Services	**2**	**20**
Devens Recycling Center		
ECO2 Office		
Arts, Entertainment, and Recreation	**3**	**45**
Anytime Fitness		
Devens Day Spa		
Red Tail Golf Club		
Construction	**1**	**40**
N.B. Kenney		
Educational Services	**1**	**2**
Iron Stone Ventures		
Finance and Insurance	**1**	**7**
North Middlesex Savings Bank		
Information	**3**	**96**
Easysoft Corp		
Nashoba Publishing		
New England Studios		
Management of Companies and Enterprises	**1**	**30**
Learning Express		
Manufacturing	**15**	**1,177**
Adaptive Optics Associates, Inc.		
Bionostics		
Bristol-Myers Squibb		
Comrex		
Dunkin' Donuts Central Production Location		
Eglomise Designs		
Laddawn, Inc.		
Media News Printing		
New England Sheets		
Northrop-Grumman, Xinetics Division		
Nypro, A Jabil Company		
Parker Hannifin Corp., Nichols Aircraft Div.		
RockTenn		
SABIC Polymershapes		
Waiteco Machine, Inc.		
Other Services (except Public Administration)	**1**	**2**
Devens Dry Cleaners		

Industry / Establishment	Establishments	Employees
Private Sector (Cont.)		
Professional, Scientific, and Technical Services	**16**	**373**
Acorn Technology Systems		
Administration and Assessment, Inc.		
Axis Engineering Technologies, Inc.		
B13 Studio Web Design		
Cynthia Thomas, C.P.A.		
DCS Corp.		
IMPACT Technology Development		
Integrated Process Technologies, Inc.		
Johnson Matthey Pharma Services		
MagneMotion		
Media Power		
MegaWave		
Odic Incorporated		
PCI Synthesis		
Response Microwave		
TekNewell Engineering		
Real Estate and Rental and Leasing	**1**	**65**
Devens Common Center		
Retail Trade	**2**	**73**
O'Reilly Automotive		
Shell (Rapid Refill Gas Station)		
Transportation and Warehousing	**6**	**626**
Guilford Motor Express/Pan Am Railways		
NFI Industries		
Quiet Logistics		
Regency Warehouse & Distribution Inc.		
Tighe		
USG Corporation (Kenco Group, Inc.)		
Utilities	**1**	**7**
United Water (formerly Earth Tech Inc.)		
Wholesale Trade	**7**	**306**
AMSC		
Integra Companies		
J.P. Routhier & Sons, Inc.		
Patterson (Webster) Veterinarian Supply		
Rofin-Baasel, Inc.		
Ryerson (Thypin Steel)		
Sirius Integrator, Inc.		
Grand Total	**91**	**4,030**

Sources: Dun & Bradstreet and MassDevelopment.

Appendix D: Devens Business Map



Source: UMass Donahue Institute, produced with ESRI Community Analyst & Open Space Maps, June 2014.

Appendix E: Methodology

Introduction and Scope of Work

At the request of MassDevelopment, the UMass Donahue Institute (UMDI) conducted an analysis to provide a current look at enterprises in Devens, including an assessment of the economic value of Devens business activities. The work involved collecting data to provide an updated inventory of firms and organizations in Devens and researching typical wages for the represented industries. The economic analysis, based on the existing employment base in Devens, includes private, nonprofit, and governmental activities. UMDI worked with MassDevelopment to collect up-to-date employment counts for each establishment in Devens. Employment data populated an economic impact model designed to assess economic contributions flowing from private and nonprofit organizations. UMDI conducted a similar study of Devens businesses in 2013.[9] The methods used in the current study differ slightly from those used in the prior study in that Dun & Bradstreet Million Dollar Directory was the key data source consulted rather than ReferenceUSA. UMDI has maintained its goal of streamlining the methodology for reproducibility in future studies.

[9] University of Massachusetts Donahue Institute, *Business and Organizations Located in Devens, Massachusetts: Profile and Economic Contributions*, 2013.

Devens Establishment Database Development

UMDI created a comprehensive inventory of businesses, organizations, and other entities in Devens. Staff created an initial list of companies and organizations using data collected from www.devenscommunity.com/business-industry/business-listing and a location-based search in Dun & Bradstreet. MassDevelopment reviewed the list of organizations for accuracy and completeness. Employment counts and industrial classifications were retrieved from Dun & Bradstreet or, where not available or where data quality was a consideration, were obtained directly from the establishments by MassDevelopment. Average wages for each industry came from the Massachusetts Labor Market Information ES-202 series. Direct, indirect, and induced economic contributions were estimated based on employment using the IMPLAN input-output system. Each of these data sources is described in greater detail below.

Data Sources

D&B® Million Dollar Directory

The Dun &Bradstreet Million Dollar Directory is a proprietary data source providing business information on more than 34 million businesses, including name, address, employment, and industry classification among other pieces of information. Business listings are updated from public and private sources. Business information is updated by phone on a rolling basis, and therefore timeframes for measurement using this source are approximate. UMDI used the Dun & Bradstreet Million Dollar Directory as one of a number of data sources to contribute to a complete company listing, employment count, and industrial classification for Devens businesses.

QCEW/ Massachusetts Labor Market Information ES-202

Quarterly Census of Employment and Wage (QCEW/ES-202) is a cooperative program between the U.S. Bureau of Labor Statistics and state agencies. Data are derived from reports filed by all employers subject to federal and state unemployment compensation laws. Industry employment and payroll information is produced both quarterly and annually for the state, labor market areas, workforce investment areas, municipalities, and counties. UMDI used Massachusetts ES-202 data to provide average annual wages and total wages by industrial classification for Massachusetts. The most recent annual data available at the time of the preparation of this report covered 2012.

MIG, Inc. IMPLAN Systems

The IMPLAN modeling system, a widely used proprietary software, combines the U.S. Bureau of Economic Analysis' Input-Output Benchmarks with regional employment and wage data. The software then constructs quantitative models of the flow of goods and services among businesses that purchase materials and services from one another and from employees who use increased earnings to purchase additional goods and services from local businesses. UMDI used IMPLAN to estimate direct, indirect, and induced economic contributions and state income and corporate profits tax payments by sector (private and nonprofit) for Devens. The most recent IMPLAN model and data representing trade flows between industries available at the time of the preparation of this study was 2011. Employment inputs for the IMPLAN model were from January 2014.

Economic and Tax Contributions Methodology

This study provides estimates of economic contributions from all spending for both private and nonprofit firms. Following standard practice, we excluded government firms since we assumed these contributions would be more likely to continue in the form of alternate economic activity if the specific government entities in Devens relocated.

UMDI coded firms in Devens according to IMPLAN's proprietary industry sector scheme among the 440 available sectors based on their assigned NAICS codes. The model used employment by industry to estimate economic and tax contributions, including indirect and induced contributions and employment.

Key model assumptions include:

1. Devens firms purchase goods and services from within Massachusetts in the same share as other businesses in the same IMPLAN sector.
2. The share of Devens employees who live in the Commonwealth is the same as the IMPLAN model default for all industries in Massachusetts (resulting in a negligible portion of wages from Devens leaving the Commonwealth because they are spent primarily in neighboring states by residents of neighboring states who work in Devens).
3. Employee output (productivity) is similar for Devens businesses as for other Massachusetts businesses in the same industry sector.