

POTENTIAL WIND POWER COMPONENT MANUFACTURERS



10,260 NEW JOBS

POTENTIAL SOLAR POWER COMPONENT MANUFACTURERS



7,532 NEW JOBS

Summary of Findings: Renewable Energy Policy Project Technical Report

MISSOURI'S ROAD TO ENERGY INDEPENDENCE

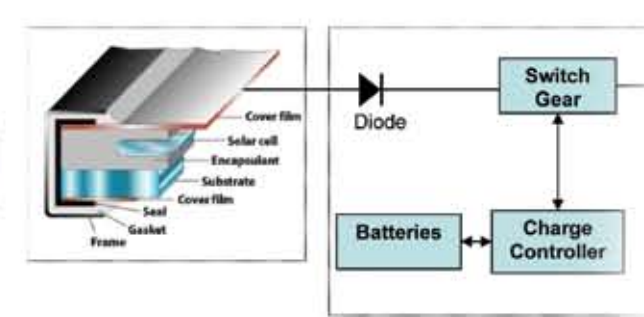
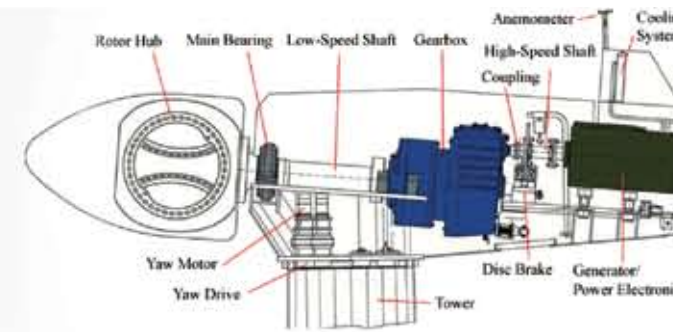
**Building on
Job Growth in
Renewable Energy
Component
Manufacturing**



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NEW CLEAN ENERGY JOB GROWTH



As a report developed by the Renewable Energy Policy Project clearly demonstrates, a major commitment to renewable electric generation will reduce our national security exposure, stabilize climate and provide a multi-billion dollar investment and reindustrialization program that will lead to new job growth in Missouri.

Analyzing the Demand for Components

The Renewable Energy Policy Project recently completed a state-by-state analysis of the job-creating potential of renewable energy technologies. The results of this analysis were very encouraging both for the country as a whole and for Missouri in particular.

A national program to develop renewable energy will benefit the regions and states that have the best renewable resource base – solar, wind, biomass and geothermal. It will also create a demand for billions of dollars of components, the parts that make up the finished renewable plants. This demand could, if accompanied by appropriate incentives, provide important new markets for domestic manufacturers that are already manufacturing equipment similar to the components that go into new renewable generation.

More than 75% of the potential new demand can be expected to flow to the 20 states that have suffered the greatest job losses. A program that supported the development of renewable energy projects while simultaneously supporting the development of a strong, advanced component manufacturing industry would benefit many states and regions.

The report breaks renewable generation technologies down into their component parts and then examines where traditional industries exist that could, if provided with appropriate incentives, become suppliers of the billions of dollars of new parts that will be necessary.

The Report analyses the renewable energy industry assuming that the United States moves to stabilize carbon emissions. Stabilizing emissions of carbon requires adding 18,500 MW of new renewable projects each year for the next ten years. The Report looks at the total demand generated by this ten-year stabilization program and tracks that demand down to the individual industries capable of manufacturing the components.

Revitalizing Missouri's Manufacturing

The national demand is allocated to individual states and eventually to the county level. This report outlines the potential for Missouri from a national commitment to accelerate renewable energy development.

In all, there are more than 457 firms in Missouri that are currently active in the industrial sectors that could supply the component parts to meet the demand necessary to deliver a 15% reduction in global warming emissions.

A major program to develop renewable energy will create a demand for the component parts that go into the

renewable developments. A major portion of the potential benefits flowing from the development of renewable energy will go to the manufacturers who supply the component parts. In order to capture as much of that potential as possible for domestic industry, the first step is to understand where the potential manufacturers are located and then devise the incentives that allow them to move efficiently into the industry.

In addition, the demand can support the creation of thousands more new jobs related to the expanded manufacturing activity.

Top 20 Counties in Missouri

County	Firms	Wind		Solar		Geothermal		Biomass		Total	
		Millions \$	Jobs	Millions \$	Jobs	Millions \$	Jobs	Millions \$	Jobs	Millions \$	Jobs
Jasper	20	\$24.30	156	\$412.50	2,161	\$11.20	79	\$39.90	284	\$487.90	2,680
Greene	58	\$75.00	480	\$52.10	289	\$216.00	1,542	\$72.50	511	\$415.60	2,822
Franklin	31	\$387.20	2,597	\$2.40	12	\$4.80	19	\$8.40	47	\$402.80	2,675
Jackson	104	\$129.70	870	\$113.50	653	\$7.50	53	\$40.90	261	\$291.60	1,837
St. Louis	145	\$147.90	1,002	\$49.70	232	\$22.80	115	\$20.10	117	\$240.50	1,466
Buchanan	11	\$0.50	3	\$200.60	1,054	\$0.30	2	\$15.70	108	\$217.10	1,167
Johnson	3	\$0.90	8	\$200.60	1,054	\$0.00	0	\$0.10	0	\$201.60	1,062
Barry	7	\$13.60	97	\$2.80	20	\$158.50	1,144	\$20.60	149	\$195.50	1,410
St. Charles	43	\$26.50	194	\$146.10	419	\$13.70	70	\$8.80	47	\$195.10	730
Laclede	12	\$30.90	196	\$61.20	444	\$4.50	23	\$2.80	15	\$99.40	678
St. Louis	56	\$79.90	545	\$4.40	28	\$0.30	2	\$6.50	42	\$91.10	617
Cape	14	\$23.30	152	\$57.00	359	\$0.00	0	\$3.70	18	\$84.00	529
Cole	6	\$78.70	507	\$0.10	1	\$0.00	0	\$3.60	20	\$82.40	528
Boone	11	\$26.90	187	\$22.60	88	\$0.00	0	\$26.80	197	\$76.30	472
Jefferson	21	\$48.50	345	\$23.70	180	\$1.00	5	\$1.60	7	\$74.80	537
Cedar	1	\$53.20	360	\$0.00	0	\$0.00	0	\$0.00	0	\$53.20	360
Clay	23	\$43.10	265	\$0.80	7	\$5.70	19	\$2.70	12	\$52.30	303
Christian	13	\$49.70	307	\$0.20	1	\$0.00	0	\$0.50	2	\$50.40	310
Newton	9	\$9.40	56	\$40.40	212	\$0.00	0	\$0.00	0	\$49.80	268
Howell	9	\$45.30	276	\$0.30	3	\$0.00	0	\$1.90	13	\$47.50	292

Manufacturing Jobs and Investment for 185,000 MW

Location	# of Firms	Jobs Wind	Jobs Solar	Jobs Geothermal	Jobs Biomass	Jobs Total
Illinois	2,289	30,010	19,298	3,396	3,875	56,579
Wisconsin	1,331	25,179	4,943	2,037	2,974	35,133
Missouri	785	10,260	7,532	2,907	2,097	22,796
Minnesota	1,070	9,246	5,238	1,477	2,444	18,405
Kansas	425	3,934	5,430	719	1,408	11,491
Oregon	655	2,805	6,403	645	1,338	11,191
Iowa	457	4,914	2,889	648	779	9,230
Washington	790	3,902	3,190	618	852	8,562
Nebraska	200	2,817	2,368	294	731	6,210
South Dakota	109	2,253	64	944	217	3,478
Idaho	197	820	1,347	155	153	2,475

REPP had recently completed a study of the labor that goes into renewables which included a detailed survey of employment related to wind and solar PV. The overall manufacturing jobs/MW numbers found using the NAICS census method and shown in the table above agree well

with the numbers found in the previous REPP study, giving confidence in the above method. Having obtained a jobs/MW number, the jobs are allocated geographically according to the census manufacturing in the exact same manner that the investment was allocated.