

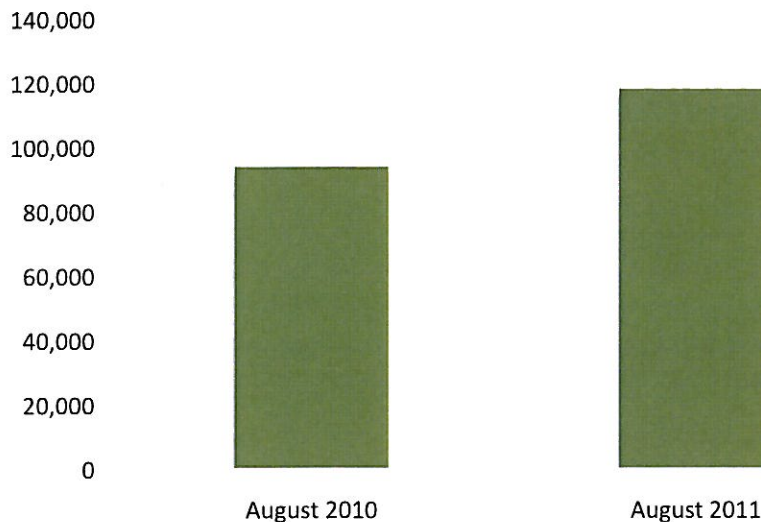
1. Executive Summary

The *National Solar Jobs Census 2010* is the first attempt to quantify the current employment and projected growth of the United States solar industry and is based on a statistically valid sampling of employers throughout the nation.¹ The rapid increase of solar energy generation has warranted a credible study that examines the size and scope of the industry that until now, has been lacking.

The Solar Foundation™, a 501(c)(3) nonprofit, non-lobbying organization funding solar research and education, recognized this gap and worked with Green LMI Consulting, Cornell University and others to bring this important information to the foreground. This report represents an unprecedented effort to understand the solar industry's labor market conditions and potential for growth.

In general, U.S. solar companies expect to add jobs at a pace that is much faster than the general economy, and are highly optimistic regarding their overall revenue growth over the near term. **Specifically, as of August 2010, the U.S. solar industry employs an estimated 93,000 solar workers** - defined as those workers who spend at least 50% of their time supporting solar-related activities. **Over the next 12 months, over 50% of solar firms expect to add jobs, while only 2% expect to cut workers.** This finding is especially relevant given that the overall expected 12-month growth rate for the entire U.S. economy is only about 2%.

Figure A: Current and Expected U.S. Solar Jobs



¹ The data contained in this report include information gathered from approximately 2,500 employers drawn from every state and from all types of companies; from those who manufacture solar components to those who install them. A rigorous research methodology and strong participation from solar employers allows us to draw more comprehensive conclusions from the data than from previous reports on the industry.

Solar companies can be found in every state, and solar companies of all kinds expect to experience employment growth over the coming year. As would be expected, California is home to about 30% of all solar companies in the U.S., but other states, such as Colorado, Pennsylvania, Texas, Michigan, and Arizona, report either large numbers of solar companies or large numbers of workers at solar-related firms.² On a regional basis, the majority of the solar jobs are located in the West, followed by the Northeast, but jobs are growing quickly in all regions.

By comparing the job growth expectations from our research and from existing secondary sources, we can draw several important conclusions.

As of the end of August 2010:

- **There are 93,502 solar workers in the United States, roughly double the number estimated for 2009.**
- **Solar job growth over the next 12 months is anticipated to be 26%, representing nearly 24,000 net new jobs. This expected growth rate is significantly higher than the U.S. economy-wide expectation of 2% growth over the same period.**
- **Nearly half of all firms expect their solar revenue to increase as a percentage of their overall revenue over the next year.**
- **Over half of all solar employers expect to increase their number of solar jobs in the next 12 months, while only 2% anticipate reducing solar staff.**
- **Solar jobs exist in all 50 states.**
- **Employers from all of the studied subsectors expect significant employment growth over the next 12 months.**
- **The average solar installation firm employs 8 solar workers.**
- **The average solar manufacturing firm employs 24 solar workers.**
- **The average solar wholesale trade company employs four solar workers.**
- **The average utility that generates solar electric power employs four solar workers.**

These findings clearly illustrate that the solar industry is a strong and growing cluster that is responsible for thousands of jobs across every state in the nation. The unprecedented growth of the industry is providing much needed job creation despite an historic economic and workforce downturn. The optimism of solar employers in the midst of these conditions illustrates that job growth should continue for years to come.

² See Appendix Section 5.4 for State-by-State data, where available.