Texas Solar Jobs Census 2014

The Solar Foundation

GW Solar Institute

FEBRUARY 2015
Texas Solar Jobs Census

Acknowledgements

The Solar Foundation® (TSF) is a national 501(c)(3) nonprofit organization whose mission is to increase understanding of solar energy through strategic research that educates the public and transforms markets. In 2010, TSF conducted its first National Solar Jobs Census report, establishing the first credible solar jobs baseline and verifying that the solar industry is having a positive impact on the U.S. economy. Using the same rigorous, peer-reviewed methodology, TSF has conducted an annual Census in each of the last five years to track changes and analyze trends.

This Texas Solar Jobs Census 2014 report is an offshoot of TSF’s National Solar Jobs Census 2014 effort. Research partners for the Census 2014 effort include:

- The George Washington University Solar Institute;
- Solar Energy Industries Association (SEIA);
- U.S. Department of Energy's SunShot program and the National Renewable Energy Laboratory (NREL) and;
- Interstate Renewable Energy Council (IREC).

Other sponsors and key contributors to this year’s Census include: Energy Foundation, William and Flora Hewlett Foundation, Tilia Fund, SolarCity, SunPower, SunEdison, GTM Research/SEIA for providing survey respondents with the U.S. Solar Market Insight: 2013 YIR report, and Cornell University’s School of Industrial Labor Relations for validating the original Census methodological framework.

We also want to thank all the Texas solar employers that participated in the survey. Your responses were critical in providing us with accurate and timely data.

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About the Texas Solar Jobs Census 2014
This report includes information about all types of Texas companies engaged in the analysis, research and development, production, sales, installation, and use of all solar technologies – ranging from solar photovoltaics (PV), to concentrating solar power (CSP), to solar water heating systems for the residential, commercial, industrial, and utility market segments.

The findings presented herein are based on rigorous survey efforts throughout the month of November 2014 that include 7,635 telephone calls and 1,342 emails to known and potential solar establishments across Texas, resulting in a margin of error of +/-2.34% at a 95% confidence interval. Unlike economic impact models that generate employment estimates based on economic data or jobs-per-megawatt (or jobs-per-dollar) assumptions, The Solar Foundation’s Solar Jobs Census series provides statistically valid and current data gathered from actual employers. This analysis also purposefully avoids artificially inflating its results with questionable multiplier effects often found in analyses of other industries.

About The Solar Foundation®
The Solar Foundation® (TSF) is an independent 501(c)(3) nonprofit organization whose mission is to increase understanding of solar energy through strategic research that educates the public and transforms markets. TSF is considered the premier research organization on the solar workforce, employer trends, and the economic impacts of solar. It has provided expert advice to leading organizations such as the National Academies, the Inter-American Development Bank, the U.S. Department of Energy, and others during a time of dynamic industry growth and policy and economic uncertainty.

While TSF recognizes that solar energy is a key part of our energy future, it is committed to excellence in its aim to help people fairly and objectively gauge the value and importance of these technologies.

About BW Research Partnership
BW Research is widely regarded as the national leader in labor market research for emerging industries and clean energy technologies. In addition to the Census series, BW Research has conducted rigorous solar installation and wind industry labor market analysis for the National Renewable Energy Laboratory, wind energy and energy retrofit studies for the Natural Resources Defense Council, a series of comprehensive clean energy workforce studies for the Commonwealth of Massachusetts, Illinois, Vermont, Florida, Pennsylvania, Iowa, and California and numerous skills and gap analyses for community colleges, workforce investment boards, state agencies, and nonprofit organizations.

BW Research provides high-quality data and keen insight into economic and workforce issues related to renewable energy, energy efficiency, transportation, recycling, water, waste and wastewater management, and other environmental fields. The principals of the firm are committed to providing research and analysis for data-driven decision making.
The U.S. solar industry has recently experienced a steep, positive growth trajectory. This growth is well documented in previous editions of the National Solar Jobs Census and other leading market research reports. By the end of the 2014, over 7,200 megawatts (MW) of new solar capacity was expected to have been installed, representing an increase of 40% over the capacity added in 2013. As annual installed capacity continues to grow, so too does the number of jobs in the solar industry. The Solar Foundation’s fifth annual National Solar Jobs Census found 173,807 solar workers nationwide, a figure which represents 21.8% growth over the previous year, and an 86% increase in employment since the inaugural Census was conducted in 2010. As in previous years, employers expressed optimism about growth in the near term – expecting to add over 36,000 solar jobs over the next twelve months – but are concerned about the impact planned changes in key federal incentives for solar will have on employment after 2016.

Texas has done its part to contribute to this growth, and has continued to realize significant gains in solar employment as a result. As of November 2014, the Texas solar industry employs 6,965 solar workers, representing 68.4% growth in employment over the previous year. As seen at the national level, this employment growth is largely the result of increases in annual installed capacity, which is expected to have grown 73% year over year in 2014.¹ Looking ahead in the near term, annual capacity additions in 2016 are expected to be approximately 250% greater than that installed last year. Given the strong relationship between installed capacity and job growth, this projected demand can be expected to drive expansion in the state solar workforce. Texas solar employers are optimistic about job growth, expecting to add over 2,100 solar workers over the next twelve months, representing a growth rate of 31.1%.

¹ SEIA/GTM Research Solar Market Insight Q3 2014
As shown in Figure 1 above, Texas’ solar growth has been – and is expected to continue to be – driven by rapid increases in utility-owned solar capacity. Since 2013, the utility market segment has accounted for at least 75% of the state’s total annual installed capacity, a trend which is projected to continue for the foreseeable future. Notable utility-scale projects in 2014 include Phase 1 of the Barilla Solar Project in Pecos County, an 18 MW thin-film facility constructed and operated by First Solar. This installation represents the first-ever solar project in the state to sell electricity to the wholesale power market, rather than to a utility through a power purchase agreement – a sign of solar energy’s growing ability to be price competitive with other forms of electricity.2 Last year also saw the completion of the Alamo 4 Solar Project, a 39 MW facility that is part of a larger effort by CPS Energy and OCI Solar Power to add 400 MW of solar capacity in the San Antonio area by 2016.3 During construction, this project supported approximately 550 solar workers.4

As the state with the largest technical potential for solar energy,5 it is not surprising that this trend toward more utility-scale solar is expected to continue. According to the Electric Reliability Council of Texas (ERCOT), the entity responsible for operating the electric grid for the majority of the state, there are currently nearly 6,500 MW of solar projects with

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3 See “Solar – Capturing South Texas Sun for San Antonio Power” from CPS Energy at wwwcpsenergy.com/Services/Generate_Deliver_Energy/Solar_Power/
pending interconnection requests, suggesting a great deal more solar capacity may materialize in the next several years. As an example of what the future holds for Texas solar, Austin Energy recently signed a power purchase agreement with Recurrent Energy for a 150 MW solar project expected to be completed in 2016. This project is a further reflection that solar is becoming more competitive with conventional sources of electricity, as the rate paid under the PPA is expected to be less than the amount the utility would pay for electricity generated from natural gas, coal, or nuclear projects.

Despite this success, solar job growth in Texas was not restricted to the installation, sales and distribution, and project development sectors (those most closely tied to solar demand), as manufacturing jobs in the state posted strong numbers, as well. In a move rarely seen in the U.S. over the past several years, a new solar manufacturing facility – owned by Mission Solar Energy – opened in 2014. When first opened, the facility employed 240 workers; a number which is expected to grow to 400 in 2015.

Looking ahead, efforts at the local level to increase the use of solar across Texas will help the state industry continue to thrive. At the end of 2014, the Austin City Council approved a new electricity generation plan for Austin Energy. Through the new plan, the utility will aim to derive 55% of its electricity from renewable energy by 2025. As part of a broad generation mix, the plan calls for 950 MW of solar energy, approximately 80% of which will be utility-scale solar. The remainder will be acquired locally, with 100 MW reserved for customer-owned projects. The targets in the new plan represent a significant increase from the previous version, through which the City was aiming for 35% renewables by 2020 and 200 MW of solar. The City of San Antonio has its own renewable energy requirements for its municipal utility, CPS Energy, which appears on track to achieve its goal of having 1,500 MW of renewables by 2020.

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7 See “Austin Energy Switches from SunEdison to Recurrent for 5-Cent Solar” from Greentech Media at www.greentechmedia.com/articles/read/Austin-Energy-Switches-From-SunEdison-to-Recurrent-For-5-Cent-Solar
There are nearly 7,000 employees at 966 establishments in the solar industry in Texas; the state is ranked 6th in jobs and 34th in percentage of all state jobs. **Statewide solar employment grew by 68.4% since Census 2013, representing the addition of over 2,800 jobs over the twelve months covered by the survey.** Employers are very hopeful about the future, expecting to add nearly 2,200 new solar workers in 2015, at an annual growth rate of 31.1%. A majority (82.6%) of these 6,965 solar workers spend all of their time focused on solar work, though this is still slightly lower than the national average of 90.6%.

Figure 2: Texas Solar Employment: 2013 – 2015\(^{12}\)

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\(^{12}\) 82.6% of solar workers in 2014 spent 100% of their time on the solar portion of the business.
The state growth rate (68.4%) for solar jobs from 2013 to 2014 is over three times that of the national average (where solar employment grew by 21.8%). The solar industry grew at a rate nearly 25 times faster than the overall economy in Texas (2.8%) over the 12 month time period covered by the Census. In terms of future growth, the manufacturing sector is forecasted to grow the fastest (42.3% projected growth), with the addition of over 280 jobs expected in 2015. Many of these jobs may be tied to Mission Solar Energy, which is reportedly expecting to add approximately 120 workers by mid-year at its recently-opened cell and module manufacturing facility in San Antonio.

Table 1: Texas Solar Employment by Sector: 2014 – 2015

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation</td>
<td>4,378</td>
<td>5,608</td>
<td>28.1%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>667</td>
<td>949</td>
<td>42.3%</td>
</tr>
<tr>
<td>Sales &amp; Distribution</td>
<td>1,069</td>
<td>1,464</td>
<td>37.0%</td>
</tr>
<tr>
<td>Project Developers</td>
<td>592</td>
<td>836</td>
<td>41.2%</td>
</tr>
<tr>
<td>All Other</td>
<td>259</td>
<td>271</td>
<td>4.6%</td>
</tr>
<tr>
<td>Total</td>
<td>6,965</td>
<td>9,129</td>
<td>31.1%</td>
</tr>
</tbody>
</table>

In the survey for the national and state Census 2014 reports, solar establishments were asked about the percentage of their revenues attributed to solar. More than 40% of Texas solar companies receive all of their revenues from solar, and a majority of firms (54%) receive at least half of their revenues from solar activities. By both measures, Texas firms sit below the national averages, where 46% of national firms receive all revenue and 66% receive at least half of their revenue from solar.

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As part of the 2014 Census, employers were asked what employment changes they are expecting once the 30% federal Investment Tax Credit (ITC) reduces to 10% for commercial projects and is eliminated for residential installations after 2016. Half of all solar firms in Texas anticipate no employment impact related to the ITC expiration, which is somewhat higher when compared to their national peers (40%). Approximately 39% of Texas solar employers expect to lay off staff and/or contractors in 2017.
Texas solar employers are generally hiring people from diverse backgrounds, though hiring of African-Americans and women is lower than the average for the overall state workforce. Nearly a quarter of new hires were women, while employers added Latino or Hispanic workers at a proportion comparable to overall Latino or Hispanic employment in Texas. Just over one in ten workers hired were veterans of the U.S. Armed Forces. Certain demographic groups – including Latino/Hispanic, women, and veterans – represent a larger percentage of the Texas solar workforce as compared with averages from the national solar industry.

Table 2: Demographics of Recent Texas Solar Hires

<table>
<thead>
<tr>
<th>Demographic</th>
<th>2014</th>
<th>TX Workforce(^{15})</th>
</tr>
</thead>
<tbody>
<tr>
<td>Latino or Hispanic</td>
<td>27.0%</td>
<td>29.2%</td>
</tr>
<tr>
<td>Women</td>
<td>23.5%</td>
<td>48.1%</td>
</tr>
<tr>
<td>Veterans of the U.S. Armed Forces</td>
<td>10.2%</td>
<td>n/a</td>
</tr>
<tr>
<td>African-American</td>
<td>5.9%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Asian or Pacific Islanders</td>
<td>5.6%</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

The following pages include detailed breakdowns of employment by industry sector. While there are a number of firms and workers in manufacturing, project development, and other activities, these sectors had insufficient responses to provide statistically significant data.

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\(^{15}\) Economic Modeling Specialists, International, 2014:3
Installation

In Texas, the installation sector represents 63% of total solar employment, with 4,378 workers. Employers in Texas are more optimistic than firms nationally, with annual projected employment growth from 2014 to 2015 expected to be 28.1%, equal to the addition of over 1,200 workers.

Figure 5: Employment Growth, Installation Sector

The majority of these firms work with photovoltaic products. Solar water heating installers are at a lower concentration in Texas when compared to the national average of 28.4%.
Table 3: Solar Firms by Technology – Installation

<table>
<thead>
<tr>
<th>Technology</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photovoltaic</td>
<td>83.0%</td>
</tr>
<tr>
<td>Water heating</td>
<td>19.1%</td>
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<tr>
<td>Concentrating solar power</td>
<td>4.3%</td>
</tr>
<tr>
<td>Other</td>
<td>8.5%</td>
</tr>
</tbody>
</table>

Photovoltaic installers report that they primarily work on residential systems. Approximately three out of ten are involved in commercial projects, and 3% install utility-scale systems.

Figure 6: Solar Firms by Size of Project

<table>
<thead>
<tr>
<th>Primary PV Project</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Residential</td>
<td>64.1%</td>
</tr>
<tr>
<td>Commercial</td>
<td>28.2%</td>
</tr>
<tr>
<td>Utility-Scale</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

The expected actions of firms in this solar sector for the scheduled ITC decline at the end of 2016 did not differ significantly from the overall figures in Texas.
The Sales and Distribution sector currently employs 1,069 solar workers, representing 15% of the total Texas solar workforce. Employment in this sector is projected to grow by 37.0% from 2014 to 2015, representing the addition of almost 400 workers.

Figure 8: Sales and Distribution Employment Growth

Similar to their installer counterparts, Sales and Distribution firms primarily focus on photovoltaic systems. A larger proportion of these firms work with “other” solar technologies in Texas compared to their peers nationally (16.9%). These “other” technologies seem to be connected most often with component or materials manufacturing.
(and such respondents may not consider themselves as working with a specific technology) or sell goods and services related to manufacturing processes (i.e., machinery sold to solar manufacturers).

Table 4: Establishments by Technology – Sales and Distribution

<table>
<thead>
<tr>
<th>Technology</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photovoltaic</td>
<td>56.0%</td>
</tr>
<tr>
<td>Water heating</td>
<td>4.0%</td>
</tr>
<tr>
<td>Concentrating solar power</td>
<td>8.0%</td>
</tr>
<tr>
<td>Other</td>
<td>44.0%</td>
</tr>
</tbody>
</table>

The expected actions of firms in this solar sector for the scheduled ITC decline at the end of 2016 did not differ significantly from the overall figures in Texas.
Workforce Development

Approximately 3,200 solar workers were hired in Texas, with about 1,750 newly created jobs, 1,050 to replace retiring workers, and 400 were existing employees that were given new solar responsibilities. This section includes detailed findings from the survey, including profiles of these new hires.

Solar establishments in Texas report moderate difficulty finding the workers they need, with 56% reporting that it is “somewhat difficult” to find qualified workers and only 13% reporting that it is “very difficult.” Employers in Texas are having less difficulty finding workers than their peers across the nation, where over 17% report having a “very difficult” time hiring new employees.

Figure 10: Employer Difficulty Hiring
There were no significant differences regarding Texas employers’ reported difficulty hiring by sector from the national averages.

Simultaneously, installer wages are significantly lower in Texas as compared to the national average, with a difference of more than four dollars per hour. Also, Texas employers are likely to use on-the-job training (77% report having formal OJT programs), and 76% report that they value credentials for solar workers.

Table 5: Solar Wages

<table>
<thead>
<tr>
<th></th>
<th>Texas</th>
<th>U.S.</th>
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<tbody>
<tr>
<td>Installer</td>
<td>$19.33</td>
<td>$24.01</td>
</tr>
<tr>
<td>Salesperson</td>
<td>$37.61</td>
<td>$36.25</td>
</tr>
<tr>
<td>Production/ Assembly</td>
<td>$17.29</td>
<td>$17.60</td>
</tr>
<tr>
<td>Designer</td>
<td>$34.31</td>
<td>$36.16</td>
</tr>
</tbody>
</table>

Experience is important to Texas employers, as 63.7% of the workers hired in 2014 were reported to have prior work experience. About 30.5% of workers hired over the period had a bachelor’s degree or higher, while 11.7% had an associate’s degree. Both education requirement figures were higher in Texas when compared to the national averages, where 21.4% of new hires had a bachelor’s degree or higher and 5.9% had an associate’s degree. Some of this may be explained by the low cost of living in Texas.16

Table 6: Solar Workforce Profiles

<table>
<thead>
<tr>
<th></th>
<th>Difficulty hiring</th>
<th>OJT</th>
<th>Credentials</th>
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<td></td>
<td>%very/some/not</td>
<td>%yes/no</td>
<td>%yes/no</td>
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<tr>
<td>Texas</td>
<td>13/65/22</td>
<td>77/23</td>
<td>76/24</td>
</tr>
<tr>
<td>United States</td>
<td>17/60/23</td>
<td>79/21</td>
<td>61/39</td>
</tr>
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</table>

Figure 11: Map of State House District Employment (cont. on next page)
Table 7: State House District Employment

<table>
<thead>
<tr>
<th>District</th>
<th>Representative</th>
<th>2014 Emp.</th>
<th>Women</th>
<th>African American</th>
<th>Latino/Hispanic</th>
<th>Asian/Pacific Islander</th>
<th>Veterans</th>
<th>Members of a Union</th>
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<td>7</td>
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<td>3</td>
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<td>54</td>
<td>12</td>
<td>3</td>
<td>15</td>
<td>3</td>
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| % of Total | 100.0% 23.0% 5.6% 26.7% 5.8% 10.2% 7.6% |

Figure 13: Map of Congressional District Employment
Table 9: Congressional District Employment

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| Total    | 6,965               | 1,599     | 393   | 1,857            | 401              | 712                     | 532      |
| % of Total| 100%                | 23.0%     | 5.6%  | 26.7%            | 5.8%             | 10.2%                   | 7.6%     |

Note: Due to a larger margin of error, overlapping geographic boundaries may not total to overall demographic figures.
Conclusions

Growth in the Texas solar industry in 2014 outpaced that in the national solar industry in two key respects. Annual solar capacity additions last year were expected to have reached 130 MW, representing a 73% increase over the previous year. By comparison, new 2014 solar capacity nationwide is expected to have grown by a lower – though still impressive – 40%. Given the strong connection with solar job growth, this increased capacity drove a 68% expansion of the Texas solar workforce, which is over three times the growth rate observed in the national industry over 2014 (where solar employment grew by 21.8%). This growth in capacity and employment remains primarily driven by a robust utility-scale market segment, which accounted for over 75% of the new solar capacity installed across the state in 2014. Owing to a large pipeline of utility-scale solar projects, this market segment is anticipated to represent at least two-thirds of annual installed capacity in each of the next several years.

While the utility market segment is expected to continue to represent the majority of new solar for the foreseeable future, the looming expiration of the 30% ITC is projected to result in a sharp decline in annual installed capacity in 2017, both in the utility market segment and overall. What this will ultimately mean for solar jobs is unclear. However, nearly 40% of Texas solar employers expect to lay off staff and/or contractors after the ITC reduces to 10% for commercial projects and is eliminated for residential installations after 2016.

At least for the time being, solar job creation in Texas is benefitting people of all different backgrounds, including women, ethnic and racial minorities, and veterans of the U.S. Armed Forces. While professional experience matters to Texas solar companies about as much as to their peers nationally (where around two-thirds of new hires had prior work experience), employers here are more likely to also look at educational qualifications to help identify new solar workers. Though average wages in the state are lower than those paid at the national level, solar jobs in Texas still represent living wage opportunities for many.

Given the challenges and opportunities facing Texas solar businesses, the next few years promise to be a dynamic time for the state solar industry. Only continued reinvestigations of solar employment in Texas will reveal how solar companies – and workers – will fare.
Texas

6,965 Solar Jobs
6 No Change Solar Jobs Rank (Change since 2013)
144 Solar Companies
34 Solar Jobs Rank as Percent of Total State Employment

$302,608,129.00 2012-2014 Private Solar Investment, Project Finance Excluded
3 Private Solar Investment Rank, Adjusted for Gross Regional Product

$11,000,000.00 2012-2014 Private Project Finance
14 Private Project Investment Rank, Adjusted for Gross Regional Product

$500,000.00 2012-2014 Public Investments
15 Public Investments Rank, Adjusted for Gross Regional Product

38 2010-2014 Solar Patents
13 Solar Revenues Rank

24 Number of Homes Powered by Solar Rank
~8,230 Homes

36 Electricity Price Rank (Most Expensive)

5,880 MW by 2015 Renewable Portfolio Standard (RPS) Target

Double Credit for Non-Wind (Non-Wind Goal: 500 MW)

Allowed
Legal Status of Third-Party Ownership
N/A Net Metering Policy Grade
F Interconnection Policy Grade

Solar Employment Data as of October 2014
Investment Data Source: Cleantech Group’s i3 Data Platform
GDP Data Source: Economic Modeling Specialists International
Patents Source: USPTO PAIR System
Methodology

The *Texas Solar Jobs Census* methodology is most closely aligned with the Bureau of Labor Statistics’ methodology for its Quarterly Census of Employment and Wages (QCEW) and Current Employment Statistics (CES). Like BLS, this study uses survey questionnaires and employer-reported data, though ours are administered by phone and email, as opposed to mail.

Also like BLS, we develop a hierarchy of various categories that represent solar value chain activities (within their broader NAICS framework), develop representative sample frames, and use statistical analysis and extrapolation in a very similar manner to BLS. We also constrain our universe of establishments by relying on the most recent data from the BLS or the state departments of labor, depending on which is collected most recently. We believe that the categories that we have developed could be readily adopted by BLS should it choose to begin to quantify solar employment in its QCEW and CES series.

The survey was administered to a known universe of solar employers that includes approximately 501 establishments and is derived from the Solar Energy Industries Association’s *National Solar Database* as well as other public and private sources. Of these establishments, 126 provided information about their solar activities (or lack thereof), and 61 completed full or substantially completed surveys.

The Texas survey was also administered to a stratified, clustered, random sampling from various industries that are potentially solar-related that include a total of 18,955 establishments in Texas. After an extensive cleaning and de-duplication process, a sampling plan was developed that gathered information on the level of solar activity (including none) from 1,435 establishments. Of these, 36 establishments qualified for and completed full surveys. This level of sampling rigor provides a margin of error of +/-2.34% at a 95% confidence interval. For a fuller description of the methodology, please see the *National Solar Jobs Census 2014* available at [www.tsfcensus.org](http://www.tsfcensus.org).

It is of further importance to note that the figures provided in this report are estimates based on surveys administered only to employers in installation, manufacturing, sales and distribution, project development and “other” establishments in research and development, legal services, finance and accounting, academia, government agencies, nonprofit organizations, and other ancillary employers that do solar work. Data for the “other” category do not capture all jobs or establishments in the category. Although some “other” establishments are included in the “known universe,” accounting, legal, finance, and other ancillary establishments spend only a very small portion of their time on solar activities. Thus, full inclusion would lead to inflated employment counts.
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For questions about this report or to explore options for an in-depth solar jobs study for your state/region, please contact Andrea Luecke at The Solar Foundation, aluecke@solarfound.org.

Please cite this publication when referencing this material as “Texas Solar Jobs Census 2014, The Solar Foundation, available at: www.TSFcensus.org.”