



Iowa Wind Power & Solar Energy Supply Chain Businesses:

Good for Manufacturing Jobs, Good for Economic Growth
and Good for Our Environment



ENVIRONMENTAL LAW & POLICY CENTER



Iowa Wind Power & Solar Energy Supply Chain Businesses

Report Findings At-A-Glance:

- 75 Iowa companies are engaged in the wind industry supply chain
- 47 Iowa companies are engaged in the solar industry supply chain
- 4,000 jobs are supported by Iowa's clean energy supply chain, according to the American Wind Energy Association
- 680 jobs in Iowa are in solar installation, manufacturing and supply, according to the Solar Foundation

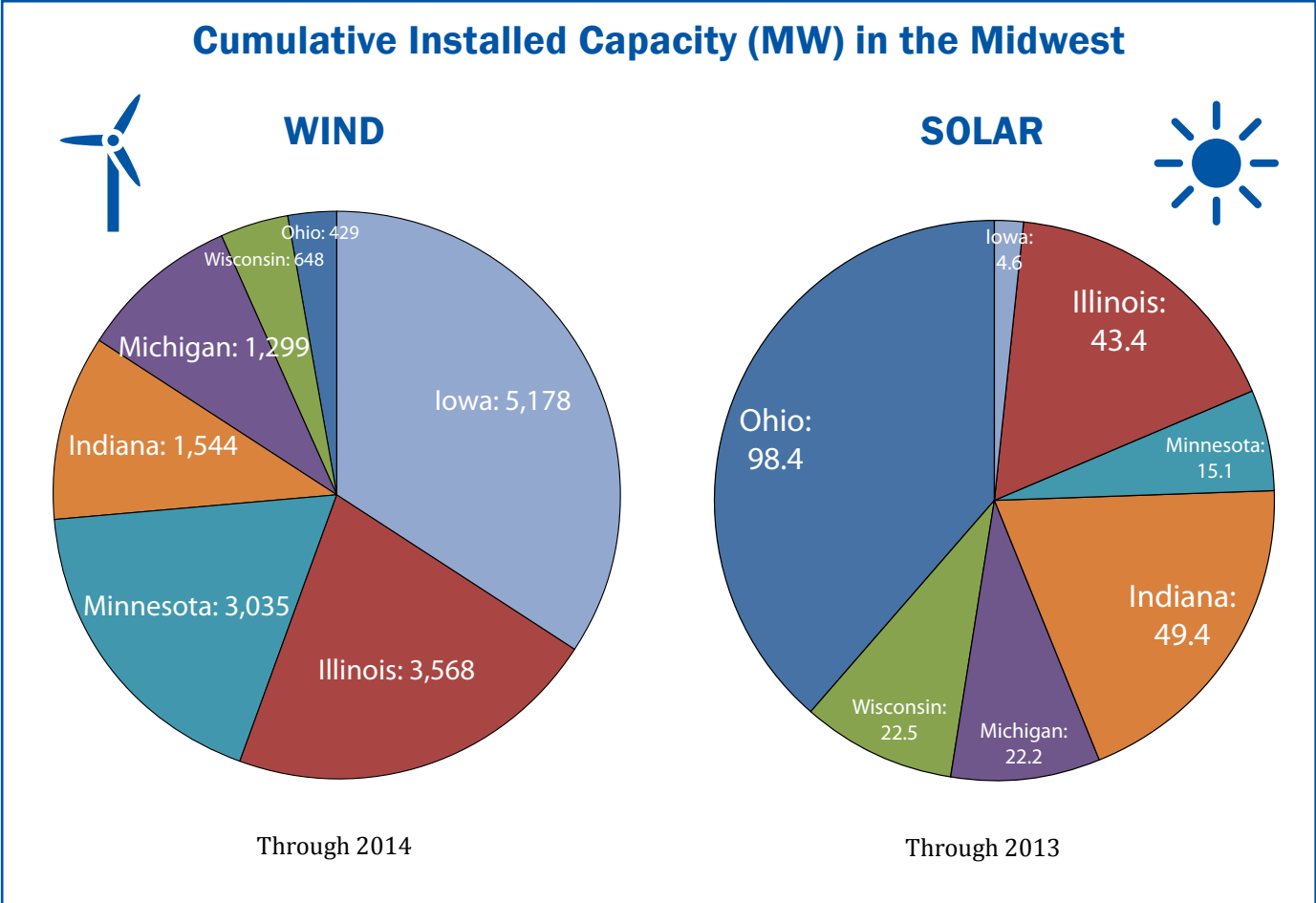


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Introduction: Renewable Energy Is Powering Manufacturing Jobs & Economic Growth



Iowa is a leading wind energy producer, with the highest percentage of electricity generated by wind of any state — over 27% in 2013, and preliminary numbers indicate that the percentage will be over 28% in 2014. Iowa has 106 wind installations with 3,438 turbines capable of producing 5,177 megawatts of power, ranking it third among the 50 states in total MW generation and first per capita. The Iowa wind industry supports 4,000 wind energy sector jobs, and there are more than 600 Iowa jobs related to manufacturing, installation and supply of solar energy.

The Environmental Law & Policy Center identified 75 companies that are part of the Iowa wind industry supply chain and 47 companies that are part of the Iowa solar industry supply chain. Iowa is now home to seven international wind manufacturing companies. Several factors have helped Iowa become a leading wind energy generator and component manufacturer:

- **Tax Incentives.** Iowa has been aggressive in offering tax credits to encourage business retention and development within the state, including the Renewable Energy Production Tax Credit, Solar Income Tax Credit, New Jobs Tax Credit and High Quality Jobs Program.

- **Strong Wind Resources.** Iowa has some of the best wind energy potential in the country, ranking 7th in annual generation potential, according to the National Renewable Energy Laboratory. Strong wind resources and a commitment from the state and private sector to

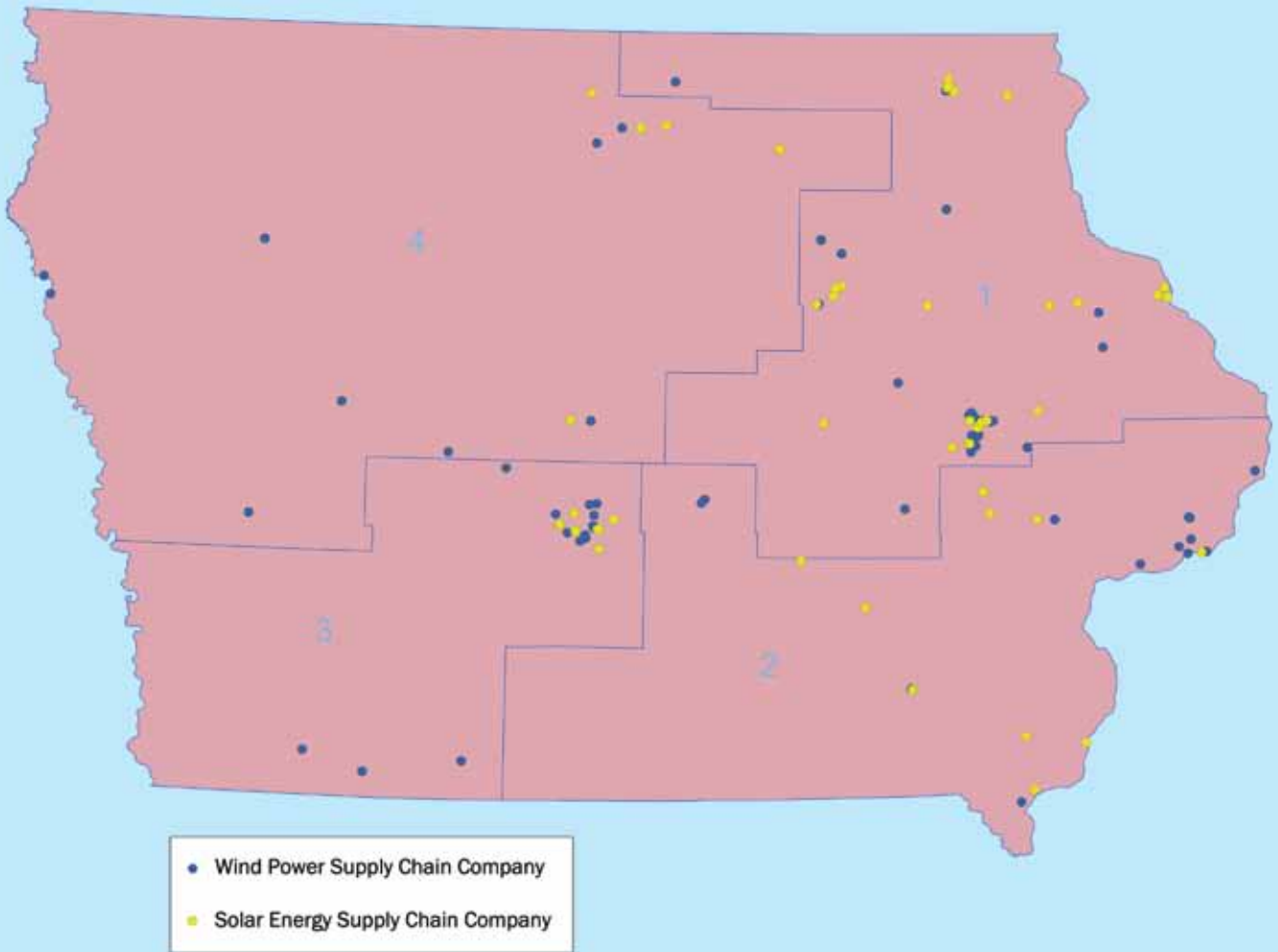
developing these resources have drawn many businesses to the state to support the booming industry.

- **Excellent Multi-Modal Transportation System.** Iowa's central location and transport infrastructure make the state a good location for manufacturers to ship and receive wind components. The Iowa Department of Transportation works closely with the Iowa Economic Development Authority to attract businesses by streamlining permitting, overcoming transportation constraints and making staff available to discuss freight movements and logistics.

- **Educational Institutions and Skilled Workforce.** Iowa has high-ranking public schools, colleges and universities. Iowa provides state-sponsored employee training programs for some businesses and is recognized for its skilled workforce.

The wind and solar industries mean real jobs and real economic opportunity for Iowa.

Wind & Solar Supply Chain Businesses in Iowa Congressional Districts



More detailed maps to follow

Smart Renewable Energy Policies Make A Difference



Federal and state policies are key to encouraging investment that can grow the wind industry. Iowa has used incentives related to taxes, job development and transportation to attract and retain wind industry jobs in the state. While Iowa was among the first states with a renewable energy standard, the initial requirement has long been met and more policy action should support wind power development.

Jobs are growing in the Iowa renewable energy sector. Improving the policies and programs that support wind power and solar energy will help these businesses expand. Iowa's growing renewable energy sector is advanced by strong federal and state policies.

Federal Policy Support

Federal Production Tax Credit (PTC) & Investment Tax Credit (ITC). The PTC provides a credit of 2.3 cents per

kilowatt hour for wind projects beginning construction before January 1, 2015. In lieu of the PTC, the ITC offers a credit equal to 30 percent of expenditures for solar and small wind projects, with no maximum credit, for projects beginning construction by December 31, 2016.

USDA Rural Energy for America Program (REAP) Grants. REAP is a competitive grant and loan guarantee program to promote renewable energy and energy efficiency for agricultural producers and rural small businesses. REAP grants range from \$1,500 to \$500,000 and cover up to

25 percent of eligible project costs. In 2014, Congress reauthorized mandatory funding for REAP — \$250 million over 5 years.

Clean Power Plan. The U.S. Environmental Protection Agency proposed Clean Power Plan standards to help cut carbon pollution from the power sector by 30 percent below 2005 levels. The proposed standards allow states the flexibility to use a range of policy mechanisms in their compliance plans. Investments and policies supporting renewable energy and energy efficiency can help achieve compliance.

Residential Renewable Energy Tax Credit. Homeowners can receive a personal income tax credit for up to 30 percent of the cost of a solar thermal, photovoltaic or small-wind system (100 kilowatts or less) installed on their residence. The credit expires at the end of 2016.

Iowa Policy Support

Renewable Energy Production Tax Credit. Iowa offers two varieties of 10-year production tax credits: (1) 1.0 cent per kilowatt-hour for energy sold or generated for on-site consumption, not exceeding 50 MW, and in service before July 2012, or (2) 1.5 cents per kilowatt-hour for energy sold for projects built after July 1, 2012, not exceeding 363 MW. The credit can be applied toward state tax payments.

Solar Income Tax Credit. Iowa offers taxpayers up to \$5,000 for the installation of residential solar systems and \$20,000 for commercial solar systems. This credit is based on the federal Residential Renewable Energy Tax Credit and provides additional incentives for installation and equipment costs.

New Jobs Tax Credit. Corporate income tax credits are available to companies that enter into New Jobs Training Agreements and expand their Iowa employment base by at least 10 percent. The amount of the one-time credit depends on the wages paid.

State Sales Tax Exemption. The total cost of wind energy equipment and all materials used to build wind energy projects are exempt from sales tax.

Renewable Electricity Standard. Iowa's early adoption of a modest RES helped spur wind industry development in the state. However, Iowa is now ready for a targeted solar standard, which will help the state's solar industry grow and complement its leadership position in wind development.

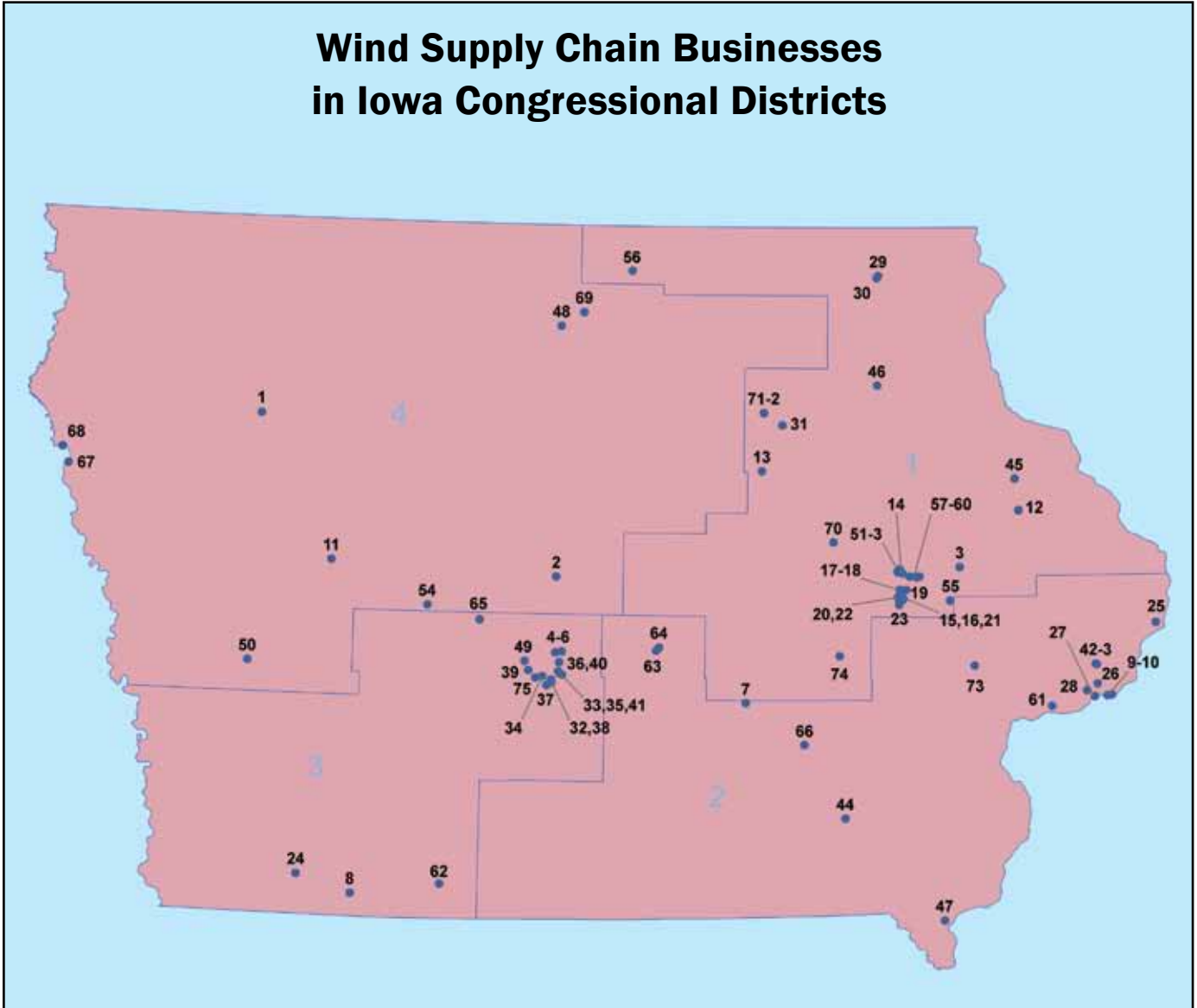
New Jobs Training Program. Businesses expanding their Iowa workforce can receive funding through the Iowa Economic Development Authority to meet related training and development needs.

High-Quality Jobs Program. Qualifying companies can receive tax credits for locating, expanding or modernizing an Iowa plant. This assistance is targeted primarily toward manufacturing businesses. The business must meet wage threshold requirements, and the award amount is determined based on need, job quality and the economic impact of the project.

Third-Party Power Purchase Agreement. Iowa law allows third-party power purchase agreements to finance renewable energy systems, such as solar. Instead of paying all the system costs up front or getting a loan to pay those costs, a third-party — such as a solar company — owns the system on the customer's property and charges the customer on an ongoing basis for the energy the system produces. This gives customers another choice for financing renewable energy projects on their property.

Net Metering. Iowa investor-owned utility customers who build solar or other on-site generation can have their electricity net metered. During times when the solar system produces more energy than the customer uses, energy goes back to the grid, and the customer's meter rolls backward. When the system doesn't produce as much energy as the customer uses, the meter rolls forward. The customer is only charged for the balance of energy used from the grid.

Wind Industry Supply Chain Companies in Iowa



In Iowa, ELPC identified 75 companies that engage in the wind industry. Please see the following company listing (alphabetical by city).

COMPANY	CITY	MAP #		
Anemometry Specialists	Alta.....	1	Snyder & Associates.....	Ankeny
Custom Steel Service	Ames	2	Iowa Energy Alternatives	Barnes City
Energy Consultants Group LLC.....	Anamosa.....	3	MG Machining.....	Bedford
Goian North America.....	Ankeny	4	Heston Wind	Bettendorf.....
Ingersoll-Rand.....	Ankeny	5	Rogan Incorporated	Bettendorf.....
			IES Commercial.....	Caroll.....



Webber Metal Products..... Cascade	12	Siemens Blades	Fort Madison	47
Iowa Laser Technology..... Cedar Falls	13	NextEra Energy..... Garner.....	48	
Allied Electronics..... Cedar Rapids	14	Availon..... Grimes	49	
AMTek..... Cedar Rapids	15	Conductix-Wampfler..... Harlan.....	50	
Clipper Windpower..... Cedar Rapids	16	Crystal Group..... Hiawatha	51	
Coonrod Wrecker & Crane Service..... Cedar Rapids	17	D.A.D. Manufacturing..... Hiawatha	52	
IPL (Alliant Energy)..... Cedar Rapids	18	Dowding Industries..... Hiawatha	53	
Kieck's Career Apparel..... Cedar Rapids	19	Wind Utility Consulting..... Jamaica.....	54	
Mid-Iowa Tools..... Cedar Rapids	20	D.A.D. Manufacturing..... Lisbon.....	55	
Sadler Machine Company..... Cedar Rapids	21	Iowa Northern Railway..... Manly	56	
Van Meter..... Cedar Rapids	22	Acterra Group..... Marion.....	57	
Williams Fastener and Supply..... Cedar Rapids	23	Barnes Manufacturing..... Marion.....	58	
NSK Americas..... Clarinda	24	P&D Welding..... Marion.....	59	
Metal Tech..... Clinton.....	25	Timberline Manufacturing Co..... Marion.....	60	
Quad City Safety..... Davenport.....	26	SSAB..... Montpelier	61	
Ryan Companies..... Davenport.....	27	Heartland Energy Solutions..... Mount Ayr.....	62	
Treiber Construction Company..... Davenport.....	28	TPI Composites..... Newton.....	63	
EcoEnergy..... Decorah.....	29	Trinity Structural Towers..... Newton.....	64	
Infastech Decorah..... Decorah.....	30	Van Wall Energy..... Perry	65	
Seegers Truck Line..... Denver.....	31	Atwood Electric..... Sigourney.....	66	
Acme Tools..... Des Moines	32	Sabre Towers and Poles..... Sioux City	67	
DMB Supply..... Des Moines	33	Triview Steel & Supply..... Sioux City	68	
EcoWise Power..... Des Moines	34	Vestas..... Ventura.....	69	
Electrical Power Products..... Des Moines	35	Ideal Industries..... Vinton.....	70	
Jensen Crane Services..... Des Moines	36	GMT Corporation..... Waverly.....	71	
Keystone Electrical Mfg Co..... Des Moines	37	United Equipment Accessories..... Waverly.....	72	
MidAmerican Energy..... Des Moines	38	ACCIONA Windpower NA..... West Branch.....	73	
Optimum Renewables..... Des Moines	39	Hummer Of Iowa..... Williamsburg.....	74	
Rasmussen Group..... Des Moines	40	Electrical Engineering & Equipment Co... Windsor Heights..	75	
The Energy Group..... Des Moines	41			
Gerdau Ameristeel..... Eldridge	42			
Mehta Tech..... Eldridge	43			
Schaus-Vorhies Manufacturing..... Fairfield.....	44			
East Iowa Machine Company..... Farley	45			
Blessing Industries..... Fayette.....	46			

Wind Industry Supply Chain Company Profiles



Iowa is home to 106 wind installations and 75 companies in the wind supply chain, including two large turbine assemblers, two blade manufacturers and three tower and lift manufacturers. Professional service businesses throughout the state have also expanded to meet demand from the wind industry.

Anemometry Specialists—Alta: Anemometry employs 27 staff and has 20 years of experience installing and maintaining wind assessment meteorological (“met”) towers. Anemometry’s technicians have installed more than 2,100 met towers in 35 states and 16 international locations. Anemometry also provides data collection, data analysis, site assessment, tower repair and maintenance, tower relocation and project management services.

Conductix-Wampfler — Harlan: Conductix-Wampfler employs 1,000 workers globally and 95 workers at its 110,000-square-foot manufacturing facility in Harlan, IA. The company supplies two components to the wind industry: slip ring assemblies, designed to provide rotor pitch control; and the Towerbuss, a rigid conductor alternative to copper cable for feeding power down the tower. The Towerbuss aluminum conductor eliminates the need for multiple cable connections, which is especially



useful for the tall towers of large wind turbines. Conductix-Wampfler estimates that Towerbuss saves 20-30 percent of material and labor costs over standard cable solutions. This product is now being customized for megawatt-class offshore turbines, and Conductix-Wampfler anticipates significant increase in demand for Towerbuss in the coming years. The company also recently began manufacturing wireless charging modules for electric buses using Inductive Power Transfer technology.

EDF Renewable Services — Forest City:

The operations and maintenance division and Midwest regional office of EDF Renewable Energy is located in Forest City, IA. EDF provides a full range of O&M services for wind turbines, including routine and emergency maintenance, retrofits and spare parts procurement. EDF is the largest provider of third party O&M in North America and services 6,650 wind turbines generating over 8,000 MW. The company employs 450 wind technicians and 50 supervisors, managers and support staff.

Electrical Power Products — Des Moines:

This company provides relay panels and complete control buildings to wind farm facilities. Electrical Power Products has 180 employees, and the wind sector comprises about 40 percent of its business. The company also supplies equipment for medium voltage collector stations and for interconnection facilities. Since 2012, the company has completed two major expansions to its main building, adding a total of 24,000 square feet to its manufacturing capabilities.

Goian North America — Ankeny:

Goian manufacturers lifts for people and equipment inside wind turbine towers and support systems. Goian is a Spanish company that selected Iowa for its U.S. manufacturing facility due, in part, to the Iowa Economic Development Authority's responsiveness to the company's questions about suppliers and professional support services.

Heartland Energy Solutions — Mount Ayr:

Heartland designs, builds, installs and services wind turbines for the moderate wind speed market. Heartland's

"Freedom" wind turbine is designed to be easier to repair, more economical and more efficient, while creating electricity at wind speeds as low as 6 miles per hour versus the more typical 8-10 miles per hour. The Freedom 100 turbine model has a 100 kW power rating and is produced at Heartland's 30,000-square-foot manufacturing and assembly plant, while blades are made in an adjacent 9,000-square-foot facility.

Keystone Electrical Manufacturing — Des Moines:

Keystone has been in business since 1964 and manufactures control and relay panels and turnkey control centers for the wind industry. In 2010, Keystone won a \$2.2 million contract for the construction of seven wind farm substation control centers in Oregon, Pennsylvania and Washington. "This is a positive indication of the economic benefit the wind industry can provide to manufacturing," said Keystone President Fred Buie.

MidAmerican Energy Company — Des Moines:

MidAmerican Energy is Iowa's largest energy company. In May 2013, MidAmerican Energy announced plans to invest \$1.9 billion in developing 1,050 MW of wind power in Iowa in 2015. In October 2014, MidAmerican announced plans to invest an additional \$280 million to add 67 wind turbines in two Iowa locations. Siemens Wind Power is supplying 515 turbines for these projects, the blades for which are being manufactured at Siemens's Fort Madison, IA, facility. The largest wind farm involved is the 500 MW Highland project in O'Brien County, IA. With the completion of the announced projects, MidAmerican Energy will have nearly 3,500 MW of wind generation capacity and will be able to provide roughly half of their customers' electricity needs from wind energy.

Mid-Iowa Tools — Cedar Rapids:

Mid-Iowa Tools was founded in 1974 to help customers reduce inefficiencies and redundancies in their supply chains and provide technical service and application support to manufacturers in the Upper Midwest. Mid-Iowa Tools provides assembly tools, cutting and abrasive tooling, gauges and calibrations both to original equipment manufacturers and to wind farm operators.



RPM Access — De Soto: RPMA is a Midwest regional developer of utility-grade wind projects. The company has 16 employees and satellite offices in Chicago, IL, and Jupiter, FL. RPMA has developed over 1,000 MW of operational wind farms in Iowa, including partnerships with Facebook (Wellsburg 138 MW farm) and Google (Rippey 50 MW farm). These tech giants have specifically cited the feasibility of local wind projects as a reason for locating their data centers in Iowa. RPMA has set a goal of developing an additional 1,000 MW of energy projects by 2020, expanding beyond wind to solar, natural gas and energy storage. RPMA's most recent project is a 74 MW wind project in Marshall County, KS.

Sabre Towers & Poles — Sioux City: Sabre is one of the largest tower manufacturers in the world and has the highest volume manufacturing capacity in the tower industry. Sabre's 450,000-square-foot facility in Sioux City produces towers used for meteorological evaluations, as well as supported ("guyed") and self-supporting towers for small wind turbines. Sabre also produces components for larger wind turbine towers and transmission line support systems that help deliver the power generated by wind farms.

Siemens Wind Power — Fort Madison: Siemens operates a 600,000-square-foot wind turbine blade manufacturing plant in Fort Madison with 360 employees. Siemens laid off 407 of its 660 workers in September 2012, citing uncertainty with Congress's extension of the wind energy Production Tax Credit as the main factor, but has since rehired many, though not all, of those workers in response to Congress's extension of the tax credit. In 2013, MidAmerican Energy started construction on projects in five Iowa counties using 448 Siemens wind turbines totaling 1,050 MW of installed capacity. In 2014, the company announced two additional projects with 67 Siemens turbines in the state for another 162 MW of capacity. The Fort Madison plant will manufacture all of the blades, while Siemens's Hutchinson, KS, facility will manufacture the nacelles. All of the projects will be using Siemens's 2.3 MW, G2 platform turbines. Approximately 1,000 construction jobs will be added to Iowa's economy

for the next two years, and 40 permanent jobs will be added once the projects are completed.

Trinity Structural Towers — Newton: Trinity Structural Towers fabricates tubular wind towers for turbines up to 2.5 MW and, through its parent and affiliated companies, provides steel turbine components, concrete and aggregates, product transportation and specialized coatings. The company was opened in 2008 at the site of a former Maytag manufacturing plant.

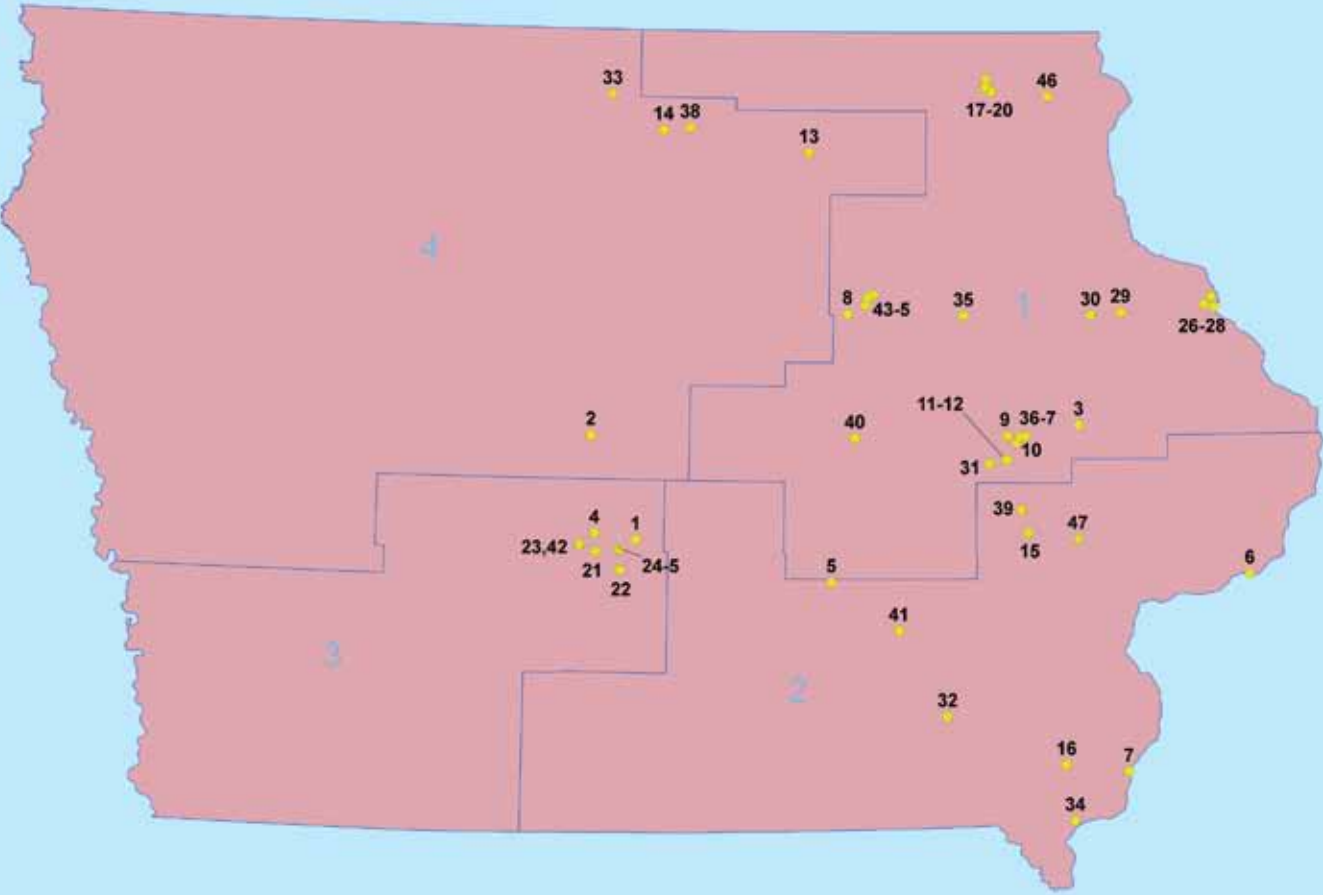
TPI Composites — Newton: TPI Composites is a leading global supplier of composite wind turbine blades. TPI's Newton plant opened in November 2008 and has more than 800 employees, making it one of Iowa's largest employers. TPI has supplied more than 10,000 turbine blades to its customers, including Mitsubishi and GE. TPI blades utilize patented SCRIMP® vacuum infusion technology to create composite structures with near-zero emissions.

United Equipment Accessories (UEA) — Waverly: UEA manufactures slip rings, which are used in wind turbine pitch control systems or towers-to-ground power transfer. Founded 1952 out of a garage, UEA now has 115 employees, and the wind sector is a significant part of the company's customer base. UEA has grown significantly since 2003, largely due to supplying the wind industry.

Solar Industry Supply Chain Companies in Iowa



Solar Supply Chain Businesses in Iowa Congressional Districts



In Iowa, 47 companies engage in the solar industry. Please see the following company listing (alphabetical by city).

COMPANY	CITY	MAP #		
GWA International.....	Altoona	1	Solar Planet.....	Dubuque..... 28
PowerFilm.....	Ames	2	Alternate Energy Systems	Dyersville..... 29
Energy Consultants Group LLC.....	Anamosa	3	EIP Manufacturing.....	Earlville
CB Solar	Ankeny.....	4	Novak Electric.....	Fairfax
Iowa Energy Alternatives	Barnes City.....	5	Ideal Energy	Fairfield
Heston Wind & Renewable Energy	Bettendorf	6	EDF Renewable Energy	Forest City
Frank Millard & Company	Burlington	7	DuPont Photovoltaic Solutions	Fort Madison..... 34
EPo Energy.....	Cedar Falls.....	8	Impact 7G	Independence 35
Big Dog Renewable Energy.....	Cedar Rapids.....	9	Pfaff Electric.....	Marion..... 36
D.C. Taylor Company.....	Cedar Rapids.....	10	RJ Construction.....	Marion..... 37
Paulson Electric	Cedar Rapids.....	11	Spatial Designs Energy Division.....	Mason City..... 38
Van Meter	Cedar Rapids.....	12	Moxie Solar	North Liberty 39
D A White Residential Designs.....	Charles City.....	13	Solar Dynamics	Ottumwa
SunRackSolar	Clear Lake.....	14	Atwood Electric	Sigourney..... 41
Cville Clean Power	Coralville.....	15	G6 Solutions	Urbandale..... 42
Geode Energy.....	Danville.....	16	Baird Mounting Systems.....	Waterloo
Decorah Bank and Trust Company	Decorah	17	Big Dog Renewable Energy.....	Waterloo
Decorah Electric	Decorah	18	Power Engineering & Manufacturing....	Waterloo
Go Solar!.....	Decorah	19	Blake Electric	Waukon
Tom Massman Construction.....	Decorah	20	Acciona Energy North America.....	West Branch
EcoWise Power	Des Moines.....	21		
GWA International.....	Des Moines.....	22		
Optimum Renewables	Des Moines.....	23		
The Energy Group.....	Des Moines.....	24		
The Solar Consultants	Des Moines.....	25		
Blue Sky Solar	Dubuque.....	26		
Eagle Point Solar	Dubuque.....	27		

Solar Industry Supply Chain Company Profiles



This 360-panel solar array in northeast Iowa generates enough power to reduce the poultry farm's utility bills by 90%.

Baird Mounting Systems — Waterloo:

Baird designs, tests and manufactures mounting systems for antennas, satellite dishes, wireless masts and solar PV arrays. Employing 15 people at its Waterloo facility, Baird has been in business since the 1920s. It expanded from antenna to satellite and wireless applications in the 1980s. More recently, Baird has adapted its mounts for solar PV arrays up to 250 square feet, which can be used in either roof- or ground-mounted systems.

Decorah Bank & Trust Company — Decorah, IA:

Decorah Bank & Trust has financed 38 photovoltaic solar system projects totaling more than \$1.3 million in loans. These solar panels were installed on residential, commercial and agricultural facilities around the Decorah area in Northeast Iowa. According to Decorah Bank & Trust, the bank began formally offering special financing — which includes flexible terms and low interest rates — for solar projects in 2005.

DuPont Photovoltaic Systems — Fort Madison:

DuPont's Fort Madison plant produces a component for its Tedlar® polyvinyl fluoride film, a critical material used in backsheets that protect solar panels from harsh weather conditions. Once the component is made in Fort Madison, it is shipped to Yerkes, NY, for further production. DuPont employs approximately 85 people

at the Fort Madison facility, which also makes digital printing inks. In 2007, the Fort Madison site underwent an expansion to meet growing demand for Tedlar® film, a result of increasing demand for solar panels.

Eagle Point Solar — Dubuque:

Eagle Point Solar is a developer and installer that works throughout Iowa, Illinois and Wisconsin. With 22 employees, the company has thus far installed 140 arrays totaling over 3.2 MW of capacity. For some of its projects, Eagle Point Solar will own the array and enter into a long-term power purchase agreement with the customer, an arrangement that the Iowa Supreme Court upheld in a landmark decision in July 2014. Barry Shear, President and CEO of Eagle Point Solar, notes that the business originally started doing general electrical contractor work, but quickly saw solar as the way to grow business. Says Shear: "Energy efficiency and renewable energy, particularly wind and solar, are the industrial revolution of the 21st Century."

PowerFilm — Ames:

PowerFilm is a developer and manufacturer of thin-film solar modules. PowerFilm's manufacturing process uses a flexible plastic substrate and printed interconnections, which allows for flexible, low-cost modules on a high-volume basis. PowerFilm was founded in 1988, and its panels are mounted on golf carts, RVs and battery-powered systems.



Environmental Law & Policy Center

The Environmental Law & Policy Center is the Midwest's leading public interest environmental legal advocacy and eco-business innovation organization. We develop and lead successful strategic advocacy campaigns to improve environmental quality and protect our natural resources. We are public interest environmental entrepreneurs who engage in creative business dealmaking with diverse interests to put into practice our belief that environmental progress and economic development can be achieved together. ELPC's multidisciplinary staff of talented and experienced public interest attorneys, environmental business specialists, public policy advocates and communications specialists brings a strong and effective combination of skills to solve environmental problems.

ELPC's vision embraces both smart, persuasive advocacy and sustainable development principles to win the most important environmental cases and create positive solutions to protect the environment. ELPC's teamwork approach uses legal, economic and public policy analysis, and communications advocacy tools to produce successes. ELPC's strategic advocacy and business dealmaking involves proposing solutions when we oppose threats to the Midwest environment. We say "yes" to better solutions; we don't just say "no."

ELPC was founded in 1993 and has achieved a strong track record of successes on national and regional clean energy development and pollution reduction, transportation and land use reform, including high-speed rail development, and natural resources protection issues. ELPC's creative public advocacy effectively links environmental progress and economic development together and improves the quality of life in our Midwestern communities.

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