INTRODUCTION

BW Research finds that the U.S. clean energy sector has lost 358,000 clean energy workers since February of this year – a 10 percent decline over pre-COVID-19 employment levels. While the nation’s overall jobs recovery has stalled over the last several months, the clean energy sector has been particularly slow to rebound. Concerns raised in memoranda from prior months continue, including record-breaking levels of new and continuing unemployment claims and the exhaustion of many programs from earlier stimulus.

The November 6th jobs report, which showed that the U.S. economy created 638,000 new jobs over the previous month, covers the first two weeks of October. While these new jobs primarily fall in industries unrelated to clean energy (leisure and hospitality and retail trade), job gains are also seen in clean energy adjacent industries, such as construction and professional and business services. While the recent jobs report shows some positive trends for the economy, alarming trends remain.

Driven by job losses at the federal level, public sector employment dropped significantly in this month’s jobs report, continuing last month’s dramatic decline. Public sector unemployment continued its decline likely due to Census work concluding, state economies straining under falling revenues, and increased COVID-related expenses. Weekly unemployment claims continue at an historic high pace. The November 5th weekly claims data showed a slight decline in initial jobless claims, but is still at a level higher than any week in the data’s recorded history prior to March, when new programs such as the Pandemic Unemployment Assistance Program are included.1 At the same time, the long-term unemployment rate – defined as 27 weeks of consecutive unemployment – has risen sharply since March to 3.6 million, representing about one third of the 11.1 million currently unemployed overall. Also alarming is the rise in permanent unemployment over the same period, which was a tiny fraction of the initial job losses in the spring but now represents 3.7 million job losses, one third of the total unemployed.2 Further, the “official” unemployment claims do not include people not currently looking for work, including, notably, parents who must remain home due to remote schooling of their children.

Impacts of this pandemic are not being felt evenly throughout worker demographics. Black and Hispanic workers continue to suffer from disproportionately high levels of unemployment.3

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3 Ibid.
IMPACTS

Several recent analyses suggest that unemployment claims economy-wide do not represent the entirety of job losses, as many workers who are furloughed temporarily or are beneficiaries of the Paycheck Protection Program are not seeking other employment and therefore do not qualify for benefits. The data also do not include workers who had their hours slashed and are now significantly underemployed.

The unemployment data show total job losses no less than seven percent for each of the clean energy sectors:

- Energy efficiency, the largest clean energy sector, suffers from 252,400 job losses impacting almost 11 percent of its workforce. For more information on state level energy efficiency impacts, see Appendix D: Cumulative State Energy Efficiency Job Losses Since Pre-COVID.
- A total of 56,500 renewable electric power generation workers (10 percent of the sector’s workforce) remain unemployed due to the pandemic.
- The complete impact of the pandemic on clean fuels and clean transmission, distribution, and storage totals 7,500 and 16,000 lost jobs from their respective, pre-pandemic employment levels. Clean fuels jobs have dropped 7 percent since March, while clean transmission, distribution, and storage jobs have dropped 11 percent thus far.
- The clean vehicles sector continues to experience a nearly 10 percent decline in jobs over its pre-COVID-19 employment levels. This translates to 25,600 ongoing job losses.

California experienced the largest job loss, with 60,300 jobs lost since pre-COVID-19, or 11 percent of its clean energy workforce. Georgia, Florida, Michigan, and Texas all suffered more than 15,000 job losses since March. Georgia saw the highest percentage of clean energy workforce decline at 24 percent. South Dakota, Wyoming, and Alaska saw the smallest declines, all with less than 1,000 jobs lost over the pandemic. For total losses by state, see Appendix A: Cumulative State Clean Energy Job Losses Since Pre-COVID.

This low level of job growth is especially concerning given the dramatic decline in clean energy jobs since the onset of COVID-19. Over 25 states continue to suffer double digit job losses in clean energy with six states facing 15 percent or greater unemployment.

Counties that have lost more than 4,500 clean energy jobs since the beginning of March include Los Angeles County, CA; King County, WA; Oakland County, MI; San Diego County, CA; Harris County, TX; Wayne County, MI; and Orange County, CA. The counties that suffered hardest as a percent of their workforce are Kern County, CA; Fulton County, GA; and DeKalb County, GA. For losses by county, see Appendix B: Cumulative County Clean Energy Job Losses.

The MSAs that have lost the most clean energy jobs are among the largest economic hubs in the US: Los Angeles-Long Beach-Santa Ana, CA MSA; New York-Northern New Jersey-Long Island, NY-NJ-PA MSA; Chicago-Naperville-Joliet, IL-IN-WI MSA; and San Francisco-Oakland-Fremont, CA MSA. MSAs that have been hit hard as a percentage of their workforce include Cleveland-Elyria-Mentor, OH MSA; Las Vegas-Paradise, NV MSA; Pittsburgh, PA MSA; and New Orleans-Metairie-Kenner, LA MSA. For losses by MSA, see Appendix C: Cumulative MSA Clean Energy Job Losses.
METHODOLOGY

BLS employment reports for February through October, as well as the DOL unemployment weekly summaries, were used to calculate the labor impacts for the month. This memorandum differs from previous memoranda due to revisions in underlying BLS employment data and DOL unemployment claims data. Please see prior months’ memoranda for a more complete explanation of the methodology.

ABOUT BW RESEARCH

BW Research is a full-service applied research firm that is focused on supporting our clients with economic & workforce research, customer & community research, as well as strategic planning and evaluation services. For more information and analysis on economic impacts related to COVID-19, please visit: http://bwresearch.com/covid
APPENDIX A: CUMULATIVE STATE CLEAN ENERGY JOB LOSSES SINCE PRE-COVID

<table>
<thead>
<tr>
<th>State</th>
<th>CE Jobs Lost</th>
<th>Percent Decline</th>
<th>State</th>
<th>CE Jobs Lost</th>
<th>Percent Decline</th>
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<td>US TOTAL</td>
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## APPENDIX B: CUMULATIVE COUNTY CLEAN ENERGY JOB LOSSES

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<th>% Decline</th>
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<td>State</td>
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<td>Percentage</td>
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## APPENDIX C: CUMULATIVE MSA CLEAN ENERGY JOB LOSSES

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<td>15.5%</td>
</tr>
<tr>
<td>Columbus, OH MSA</td>
<td>3,093</td>
<td>18.3%</td>
</tr>
<tr>
<td>Indianapolis-Carmel, IN MSA</td>
<td>3,069</td>
<td>12.4%</td>
</tr>
<tr>
<td>Salt Lake City, UT MSA</td>
<td>2,939</td>
<td>16.2%</td>
</tr>
<tr>
<td>Milwaukee-Waukesha-West Allis, WI MSA</td>
<td>2,705</td>
<td>13.2%</td>
</tr>
<tr>
<td>Orlando-Kissimmee, FL MSA</td>
<td>2,698</td>
<td>16.0%</td>
</tr>
<tr>
<td>Louisville/Jefferson County, KY-IN MSA</td>
<td>2,696</td>
<td>19.0%</td>
</tr>
<tr>
<td>Virginia Beach-Norfolk-Newport News, VA-NC MSA</td>
<td>2,662</td>
<td>14.5%</td>
</tr>
<tr>
<td>Nashville-Davidson-Murfreesboro-Franklin, TN MSA</td>
<td>2,530</td>
<td>10.5%</td>
</tr>
<tr>
<td>City and Region</td>
<td>Population</td>
<td>Percent of Total</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>------------</td>
<td>------------------</td>
</tr>
<tr>
<td>New Orleans-Metairie-Kenner, LA MSA</td>
<td>2,523</td>
<td>23.8%</td>
</tr>
<tr>
<td>Memphis, TN-AR-MS MSA</td>
<td>2,505</td>
<td>16.8%</td>
</tr>
<tr>
<td>Raleigh-Cary, NC MSA</td>
<td>2,281</td>
<td>14.1%</td>
</tr>
<tr>
<td>Richmond, VA MSA</td>
<td>2,251</td>
<td>13.7%</td>
</tr>
<tr>
<td>Hartford-West Hartford-East Hartford, CT MSA</td>
<td>2,173</td>
<td>14.6%</td>
</tr>
<tr>
<td>Reno-Sparks, NV MSA</td>
<td>2,164</td>
<td>22.1%</td>
</tr>
<tr>
<td>Jacksonville, FL MSA</td>
<td>2,074</td>
<td>18.7%</td>
</tr>
<tr>
<td>Buffalo-Niagara Falls, NY MSA</td>
<td>1,688</td>
<td>19.1%</td>
</tr>
<tr>
<td>Birmingham-Hoover, AL MSA</td>
<td>1,664</td>
<td>12.5%</td>
</tr>
<tr>
<td>Albuquerque, NM MSA</td>
<td>1,553</td>
<td>21.6%</td>
</tr>
<tr>
<td>Rochester, NY MSA</td>
<td>1,452</td>
<td>17.5%</td>
</tr>
<tr>
<td>Providence-New Bedford-Fall River, RI-MA MSA</td>
<td>1,262</td>
<td>17.5%</td>
</tr>
<tr>
<td>Des Moines-West Des Moines, IA MSA</td>
<td>957</td>
<td>14.6%</td>
</tr>
<tr>
<td>Oklahoma City, OK MSA</td>
<td>851</td>
<td>9.9%</td>
</tr>
<tr>
<td>Flint, MI MSA</td>
<td>606</td>
<td>15.9%</td>
</tr>
<tr>
<td>Honolulu, HI MSA</td>
<td>600</td>
<td>6.3%</td>
</tr>
</tbody>
</table>
APPENDIX D: CUMULATIVE STATE ENERGY EFFICIENCY JOB LOSSES SINCE PRE-COVID

<table>
<thead>
<tr>
<th>State</th>
<th>EE Jobs Lost</th>
<th>Percent Decline</th>
<th>State</th>
<th>EE Jobs Lost</th>
<th>Percent Decline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>4,242</td>
<td>13.4%</td>
<td>Montana</td>
<td>1,008</td>
<td>11.4%</td>
</tr>
<tr>
<td>Alaska</td>
<td>777</td>
<td>16.5%</td>
<td>Nebraska</td>
<td>1,343</td>
<td>9.6%</td>
</tr>
<tr>
<td>Arizona</td>
<td>4,009</td>
<td>9.0%</td>
<td>Nevada</td>
<td>1,186</td>
<td>9.9%</td>
</tr>
<tr>
<td>Arkansas</td>
<td>1,458</td>
<td>9.4%</td>
<td>New Hampshire</td>
<td>759</td>
<td>6.4%</td>
</tr>
<tr>
<td>California</td>
<td>36,501</td>
<td>11.3%</td>
<td>New Jersey</td>
<td>4,896</td>
<td>12.9%</td>
</tr>
<tr>
<td>Colorado</td>
<td>2,164</td>
<td>6.0%</td>
<td>New Mexico</td>
<td>773</td>
<td>12.7%</td>
</tr>
<tr>
<td>Connecticut</td>
<td>3,272</td>
<td>9.1%</td>
<td>New York</td>
<td>8,262</td>
<td>6.5%</td>
</tr>
<tr>
<td>Delaware</td>
<td>1,277</td>
<td>10.2%</td>
<td>North Carolina</td>
<td>11,225</td>
<td>12.8%</td>
</tr>
<tr>
<td>District of Columbia</td>
<td>1,530</td>
<td>11.8%</td>
<td>North Dakota</td>
<td>629</td>
<td>11.3%</td>
</tr>
<tr>
<td>Florida</td>
<td>14,301</td>
<td>11.6%</td>
<td>Ohio</td>
<td>8,629</td>
<td>10.4%</td>
</tr>
<tr>
<td>Georgia</td>
<td>15,539</td>
<td>24.7%</td>
<td>Oklahoma</td>
<td>2,220</td>
<td>14.8%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1,238</td>
<td>20.3%</td>
<td>Oregon</td>
<td>3,851</td>
<td>9.0%</td>
</tr>
<tr>
<td>Idaho</td>
<td>765</td>
<td>8.5%</td>
<td>Pennsylvania</td>
<td>10,640</td>
<td>14.9%</td>
</tr>
<tr>
<td>Illinois</td>
<td>5,596</td>
<td>6.1%</td>
<td>Rhode Island</td>
<td>1,953</td>
<td>15.0%</td>
</tr>
<tr>
<td>Indiana</td>
<td>5,916</td>
<td>10.6%</td>
<td>South Carolina</td>
<td>3,295</td>
<td>10.7%</td>
</tr>
<tr>
<td>Iowa</td>
<td>2,027</td>
<td>9.6%</td>
<td>South Dakota</td>
<td>308</td>
<td>4.0%</td>
</tr>
<tr>
<td>Kansas</td>
<td>1,440</td>
<td>8.1%</td>
<td>Tennessee</td>
<td>3,971</td>
<td>7.4%</td>
</tr>
<tr>
<td>Kentucky</td>
<td>6,019</td>
<td>23.0%</td>
<td>Texas</td>
<td>11,757</td>
<td>6.9%</td>
</tr>
<tr>
<td>Louisiana</td>
<td>4,227</td>
<td>18.2%</td>
<td>Utah</td>
<td>1,562</td>
<td>4.8%</td>
</tr>
<tr>
<td>Maine</td>
<td>945</td>
<td>10.6%</td>
<td>Vermont</td>
<td>1,023</td>
<td>9.3%</td>
</tr>
<tr>
<td>Maryland</td>
<td>6,170</td>
<td>8.6%</td>
<td>Virginia</td>
<td>6,873</td>
<td>8.6%</td>
</tr>
<tr>
<td>Massachusetts</td>
<td>6,631</td>
<td>9.3%</td>
<td>Washington</td>
<td>10,343</td>
<td>15.9%</td>
</tr>
<tr>
<td>Michigan</td>
<td>11,682</td>
<td>13.7%</td>
<td>West Virginia</td>
<td>764</td>
<td>10.7%</td>
</tr>
<tr>
<td>Minnesota</td>
<td>5,462</td>
<td>11.6%</td>
<td>Wisconsin</td>
<td>5,254</td>
<td>8.3%</td>
</tr>
<tr>
<td>Mississippi</td>
<td>1,923</td>
<td>12.3%</td>
<td>Wyoming</td>
<td>535</td>
<td>7.1%</td>
</tr>
<tr>
<td>Missouri</td>
<td>4,214</td>
<td>9.9%</td>
<td>US TOTAL</td>
<td>252,384</td>
<td>10.7%</td>
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</tbody>
</table>