



55 Summer Street, 9th Floor

Boston, MA 02110

TO: Tom Regh

FROM: Martha Broad, Director of Knowledge Development

DATE: May 13, 2013

RE: Your 3/7/13 request for information concerning the 2012 Massachusetts Clean Energy Industry Report

I am sending the following documents in response to your information request:

- A. On the attached pages please find a table with each item listed in your data request in the left column and the information gathered by MassCEC's Industry Report consultant listed in the right hand column.
- B. An excel spreadsheet providing information in response to item 3 provided as a separate document.
- C. You had previously requested, and I provided, a copy of the 2012 Massachusetts Clean Energy Industry report phone survey. To provide a comprehensive response, I am again providing (as a separate document).

Thank you and please contact me if you have additional questions.

Tom Regh March 7, 2013 Information Request	Information Provided by MassCEC
1. Electronic copy of 2012 Employer Survey response database.	Due to confidentiality assurances we made to 2012 Report survey participants (see first sentence on attached phone survey), this information is held solely by our consultant BW Research, not MassCEC. However, we are able to provide summary data (see below).
2. Listing of “known universe” clean energy companies.	
3. Listing of all companies that received CEC funding since July 2009 and the amounts received.	Please see the attached excel spreadsheet entitled “MCEC Net Awarded Funds Awards 1-1-09 - 7-15-12 v5.xls”
4. Response data pertaining to survey question #8 concerning categorization of reported new clean energy workers.	<p>Question 8 reads as follows: “Thinking of these additional [insert Q4-Q5] clean energy workers over the last 12 months, how many were in the following occupational categories?</p> <p>(Please only assign one category to each employee that supports the [clean energy/ QC] portion of your business. If they fall into more than one category, please assign them to the category in which they devote more of their time.)”</p> <p>Below is the summary of data received:</p> <p>46% - Production Technicians 13% - Administrative Positions 31% - Management or Professional Positions 10% - Sales Positions</p>

<p>5. Response data pertaining to survey question #13 concerning % of revenue related to clean energy.</p>	<p>Question 13 reads as follows: “Approximately how much of your firm’s work in Massachusetts, in terms of total revenue, is related to [clean energy/ QC] products or services?”</p> <p>On page 6 of the 2012 report we provide the following summary of responses to question #13:</p> <ul style="list-style-type: none"> 35% - All revenue (100%) 20.4% - Half to most of revenue (50% to 99%) 10.4% - A quarter to almost half of revenue (25% to 49%) 27.8% - Less than a quarter (1% to 24%) 6.1% - Don’t know/no answer
<p>6. Response data pertaining to survey question #17 concerning \$ amount of gross revenue.</p>	<p>Question 17 reads as follows: “Including the funding received from MassCEC, what was your firm’s total gross revenue in 2011?”</p> <p>Below is the summary of data received</p> <ul style="list-style-type: none"> 1 Less than \$1 million (41.1%) 2 Between \$1 million and \$10 million (27%) 3 Between \$10 million and \$25 million (4.3%) 4 Between \$25 million and \$100 million (5.9%) 5 More than \$100 million (4.9%) 6 Don't know/ Refused (16.8%) <p>The total 2011 gross revenue of all respondents to the survey was \$2,976,381,970. (n=91)</p>
<p>7. Response data pertaining to survey question #18 concerning \$ amount of CEC funding spent directly on labor costs.</p>	<p>Question 18 reads as follows: “Of the \$(Insert Figure 1) that you received related to (Insert Program 1 Name) over the past three years, about how much would you estimate your firm spent directly on labor costs?”</p> <p>The total spent directly on labor was estimated to be \$17,268,805. (n = 118)</p>

<p>8. Response data pertaining to survey question #19 concerning # of full-time and part-time jobs created as a result of CEC funding.</p>	<p>Question 19 reads as follows: “Thinking of the \$(Insert Figure 1) that you received related to (Insert Program 1 Name) over the past three years, please report the number of permanent full-time and part-time jobs that were created or retained as a result of that funding.”</p> <p>Survey respondents reported that 690 full-time or part-time jobs were created as a result of MassCEC funding. (n=150)</p>
<p>9. Response data pertaining to survey question #20 concerning # hours worked as a result of CEC funding.</p>	<p>Question 20 was in reference to each of FY 2010, 2011 and 2012 and reads as follows: “Thinking of the \$(Insert Figure 1) that you received related to (Insert Program 1 Name), how many total hours of work were performed directly as a result of the funding? Please do not include any hours that were funded by any other source of revenue. Please note that one full time worker (40 hours per week x 52 weeks) is 2,080 labor hours per year and one half-time worker is 1,040 hours per year.”</p> <p>Fiscal Year 2010 Total Labor Hours = 193,340 Fiscal Year 2011 Total Labor Hours = 177,737 Fiscal Year 2012 Total Labor Hours= 91,116* (n = 149)</p> <p>*Note: this result did not look reliable to our consultant. He felt that there was likely confusion between fiscal year and calendar year [survey was performed during May and June 2012] and the 2012 FY was not complete at time of survey [MassCEC FY2012 ended 6/30/12].</p>

10. Response data pertaining to survey questions #21 through #23.

The following questions were asked only of firms that received funding from multiple MassCEC programs. This was a relatively small number and resulted in low response rates. Due to low response rates, the data was not used.

21. Of the \$(Insert Figure 2) that you received related to (Insert Program 2 Name) over the past three years, about how much would you estimate your firm spent directly on labor costs?

\$126,963 (n = 9)

22. Thinking of the \$(Insert Figure 2) that you received related to (Insert Program 2 Name) over the past three years, please report the number of permanent full-time and part-time jobs that were created or retained as a result of that funding.

23 (n = 11)

23. Thinking of the \$ (Insert Figure 2) that you received related to (Insert Program 2 Name), how many total hours of work were performed directly as a result of the funding? Please do not include any hours that were funded by any other source of revenue. Please note that one full time worker (40 hours per week x 52 weeks) is 2,080 labor hours per year and one half-time worker is 1,040 hours per year.

8,218 hours (n = 6)