



## NHA Study Highlights

### Job Creation Opportunities in Hydropower

#### Key Highlights

##### Capacity by 2025

- 60,000MW of new capacity
- 160,000MW installed
- 400,000MW potential capacity

##### Jobs by 2025

- 700,000 new jobs
- 1 million employed by U.S. hydro industry

#### Approach

The study examined hydropower’s growth under a “business as usual” scenario and under a national policy of 25% renewable generation.

Both cases: **Big gains for American consumers and workers.**

#### Background

In early 2009, the National Hydropower Association commissioned Navigant Consulting, Inc., to conduct a study examining the hydropower industry’s job-creation and capacity-growth potential.

Relying on information from industry experts, government officials, and existing data, Navigant assessed the industry’s potential and confirmed what Energy Secretary Stephen Chu recently described as an “incredible opportunity” to develop America’s “lowest-cost energy option.”

The results demonstrate the industry’s extraordinary potential to expand its contribution to the country’s energy, environmental, and economic goals: Hydropower can create 700,000 new jobs and add 60,000 megawatts of affordable, domestic, renewable energy by 2025.

#### Findings

The study examined the industry’s potential under two different scenarios:

- “Business as usual” where renewables generate 10% of total U.S. electricity
- “Accelerated case” where national policies mandate 25% renewable generation

Both scenarios also assume that hydropower continues to provide about 7% of total U.S. electricity and that electricity demand grows by approximately 2% annually.

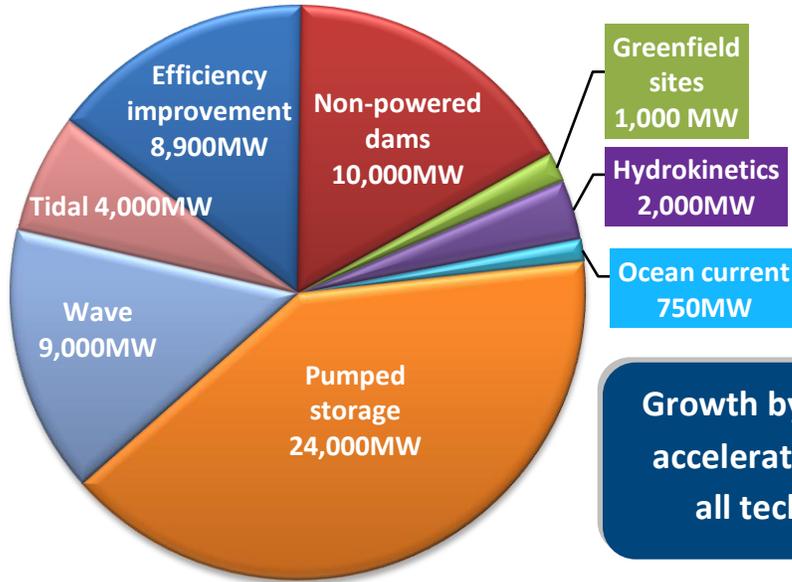
Under both scenarios, the U.S. hydropower industry has the potential for developing significant new clean energy resources and creating thousands of new jobs:

| U.S. hydro growth       | New hydro capacity | U.S. hydro capacity total by 2025 | New jobs | U.S. hydro industry jobs by 2025 |
|-------------------------|--------------------|-----------------------------------|----------|----------------------------------|
| "Business as usual"     | 23,300 MW          | <b>123,300 MW</b>                 | 238,000  | <b>538,000</b>                   |
| <b>Accelerated case</b> | 60,000 MW          | <b>160,000 MW</b>                 | 700,000  | <b>1,000,000</b>                 |

## Technologies

Although hydropower is America's oldest and largest renewable resource, new technologies, efficiency, and energy storage will lead growth – often without large new dams.

## Capacity Growth by Technology



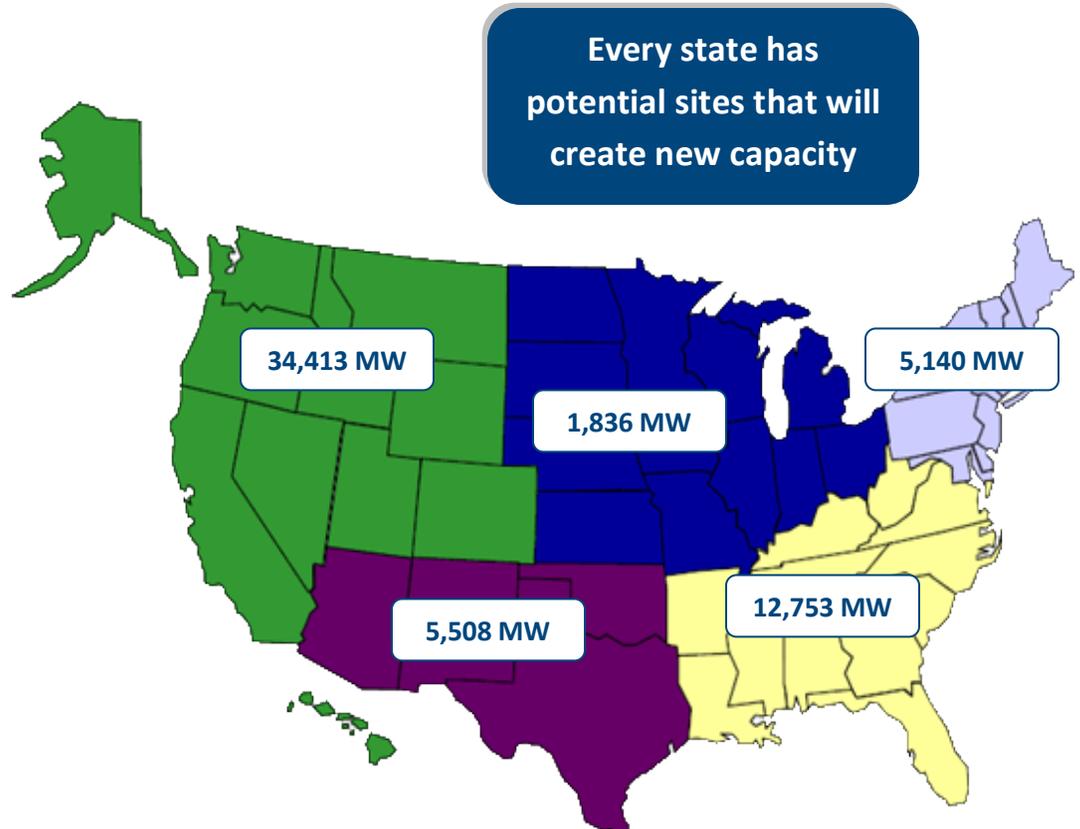
**Growth by 2025 under accelerated scenario, all technologies**

## All Regions Benefit

New technologies are unlocking the waterpower potential of every region of the country.

As new technologies become available, the U.S. hydropower industry will consider development at additional environmentally and economically feasible sites.

## Capacity Growth by Region



**Every state has potential sites that will create new capacity**

## Nationwide job growth

The U.S. hydropower industry will create new, long-term, family-supporting jobs in every region of the country.

Between the industry's 300,000 existing jobs and 700,000 new jobs, more than 1 million Americans will work in the hydropower industry by 2025.

## Job Growth by Region

