



Minnesota Wind Power & Solar Energy Supply Chain Businesses:

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



ENVIRONMENTAL LAW & POLICY CENTER



Minnesota Clean Energy Supply Chain

Report Findings At-A-Glance:

- 82 Minnesota companies supplying the solar industry
- 49 Minnesota companies supplying the wind industry
- 16 Minnesota companies supplying both industries

Minnesota Clean Energy Leadership

Minnesota is a clean energy leader in the Midwest and nationally. The state ranks 7th nationally and 3rd regionally for installed wind power, with more than 3,000 MW online. Solar energy is just starting to take off in the state, which installed 13 of its 37 MW in 2015 alone.

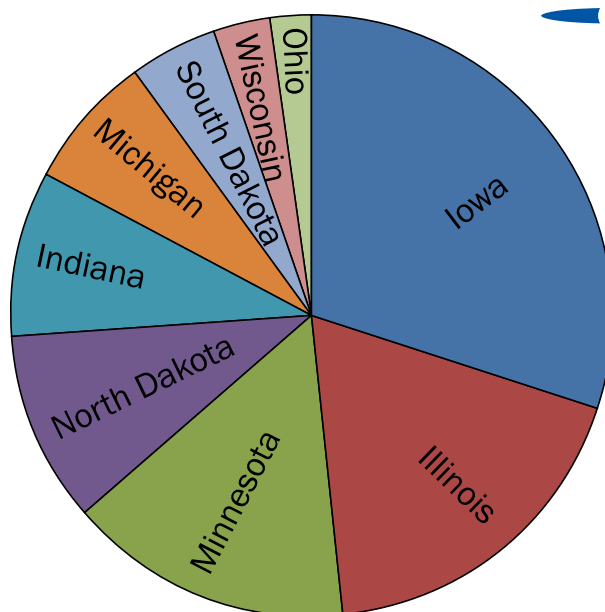
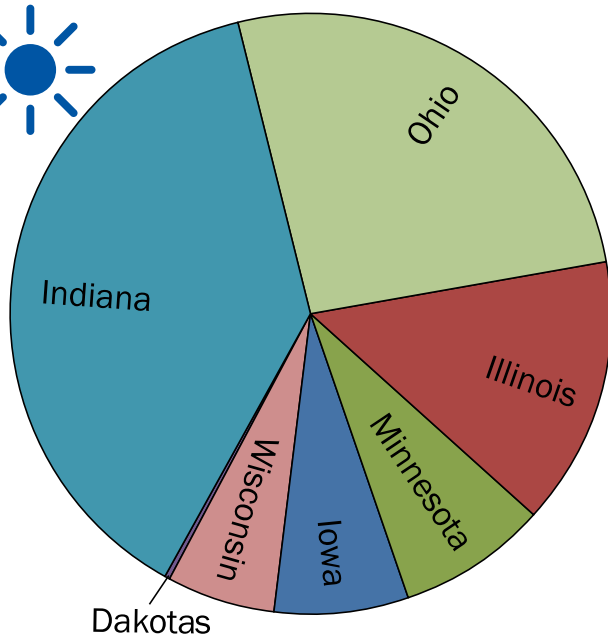


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About the Supply Chain Businesses Series ---

The Environmental Law & Policy Center’s *Clean Energy Supply Chain Businesses* series examines the breadth of the wind power and solar energy industries in Midwest states. From manufacturing and system design to site planning, engineering, construction and installation, there are hundreds of businesses that employ thousands of workers in the clean energy sector. Each report includes company listings, maps and profiles as well as detailed information about the state and federal policies that can help accelerate clean energy development. To view all of ELPC’s *Clean Energy Supply Chain Businesses* state reports and interactive maps, visit www.ELPC.org/SupplyChain.

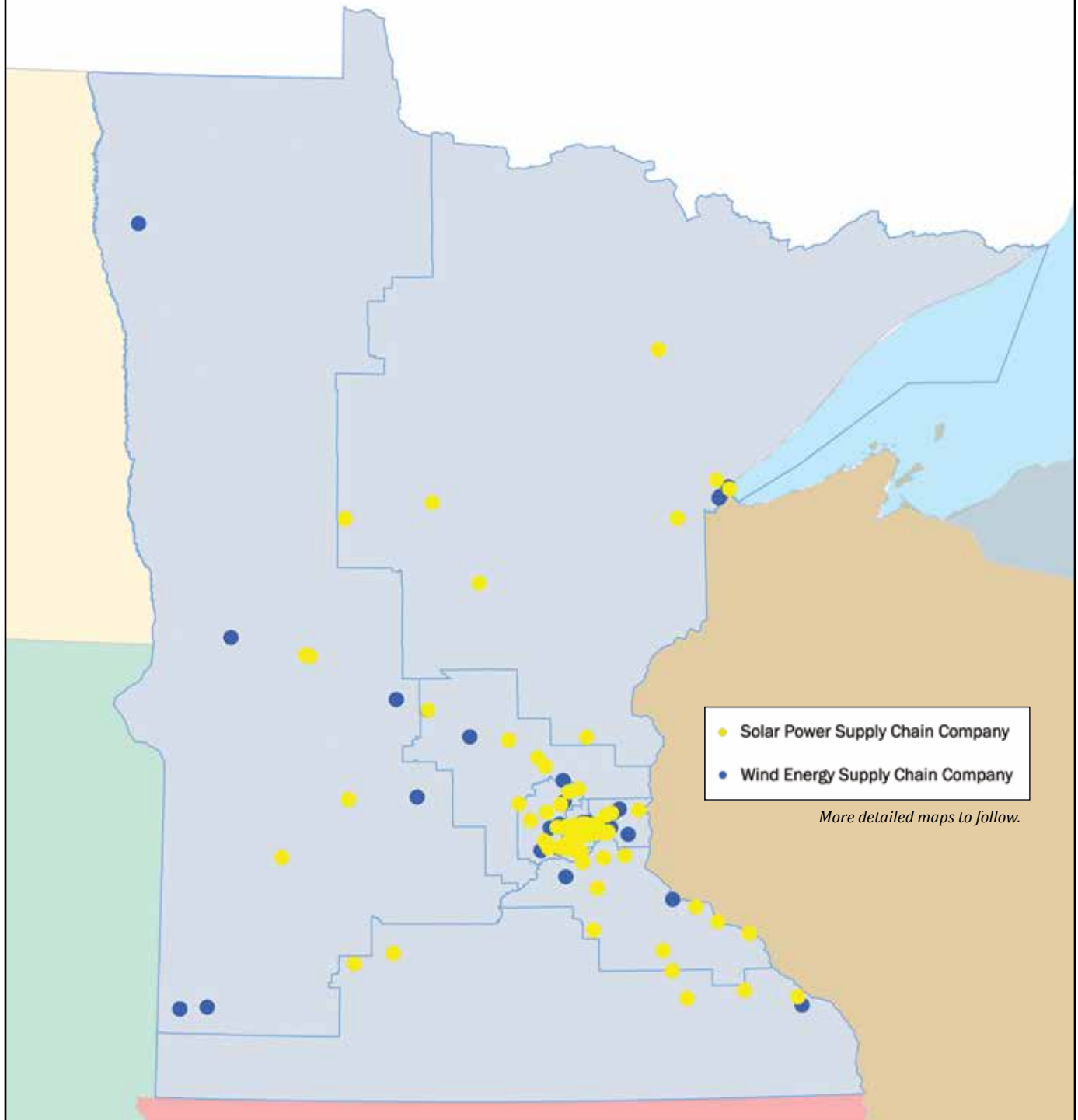
Introduction: Renewables Are Powering Manufacturing Jobs & Economic Growth

Minnesota has adopted strong clean energy policies, developed sound planning processes for the future of their electric grid, and is implementing new wind power and solar energy policies. The state has already achieved 21% renewables toward its goal of 25% renewables by 2025. It is establishing more aggressive goals with utilities and announced coal plant closures would achieve +100% of Minnesota's carbon pollution reduction goals under the Clean Power Plan. This report demonstrates the job creation and economic development potential of Minnesota's wind and solar energy industries.

Minnesota is a leader in the wind energy industry, ranking 7th nationally and 3rd regionally for installed wind power capacity. The state is now quickly moving to become a leader in the solar energy industry. Several factors have helped Minnesota become a clean energy leader:

- **Strong Electricity Planning Process.** Minnesota has a particularly strong regulatory framework to set concrete plans and goals for a cleaner energy future. The Minnesota Public Utilities Commission, Minnesota utilities, environmental groups and other stakeholders participate in multiple coordinated planning processes to chart a course toward a cleaner, more efficient and stronger electricity system. These processes help determine what sources of electricity are used, how they are generated, and how they are distributed along the electric grid. Topics of discussion include distribution system planning, grid modernization and integrated resource plans to diversify the energy generation portfolio beyond coal to include both utility-scale and distributed renewable energy.
- **Utility Innovation.** Xcel Energy has committed to developing 1,400 MW of wind and 1,800 MW of solar, which would nearly double Minnesota's current clean energy capacity. The Minnesota Public Utilities Commission approved this plan unanimously in October 2016. In that same plan, Xcel also committed to retiring 1,400 MW of coal-fired generation, which they will likely replace with a combination of natural gas and renewables. Over the next several months, the Commission will review the utility's specific development plans, providing an opportunity to assure that more renewables, and less natural gas, play a role in achieving Xcel's overall goals.
- **Policy Support.** Minnesota has a suite of supportive clean energy policies that help drive the development of both wind power and solar energy. Key policies include a strong Renewable Energy Standard, the Midwest's first "Value of Solar" methodology, and one of the nation's top community solar programs.
- **Established Manufacturing Base With Access to Worldwide Port Shipping.** Many of Minnesota's long-standing manufacturers have retooled to supply the clean energy market. The sector has benefited from its proximity to key waterways such as the Mississippi River, Lake Superior and the St. Lawrence Seaway. This port access to worldwide shipping plays a significant role in connecting Minnesota's manufacturing base to customers throughout the country and world.
- **Corporate Headquarters and Research Centers.** Several Fortune 1000 companies based in Minnesota, including 3M and Donaldson, are developing the latest in energy solutions that are translating to reduced costs and energy savings. General Mills has invested \$100 million in renewable energy and energy efficiency. Minnesota is also home to several world-class research institutions driving the development of the renewable energy industry. The University of Minnesota's Energy Transition Lab brings together leaders in government, business and non-profit organizations to develop new energy policy pathways, institutions and regulations. Carleton College also has a robust sustainability program.

Solar & Wind Supply Chain Businesses in Minnesota Congressional Districts



Smart Renewable Energy Policies Make A Difference



Minnesota's policy support leadership for clean energy development is generating wind and solar growth and providing a good model for other states to follow.

Minnesota Policies

Renewable Energy Standard. Minnesota's renewable energy standards require all Minnesota utilities, including municipal power agencies and rural electric cooperatives, to generate 20% of their retail energy sales from renewable energy resources, such as wind and solar energy, by 2020, and 25% by 2025. Investor-owned utilities must also provide an additional 1.5% of solar energy resources by 2020. Xcel Energy, the state's largest utility, not only has to meet the 1.5% solar mandate, but must achieve 30% of its retail energy sales coming from renewables by 2030.

Community Solar Program. Minnesota law has created one of the nation's leading "community solar" programs, which expands access to solar energy to those who can't otherwise develop their own projects. The program provides bill credits to customers who subscribe to shared solar facilities developed by third parties. By October 2016, Xcel had received applications for more than 850 MW of community solar projects. The company anticipates a significant portion of the current solar energy development in process to be completed in 2017, with at least 100 MW online by the end of 2016.

Value of Solar Methodology. In 2014, Minnesota became the first state to approve a statewide "value of solar" methodology that utilities could use instead of net metering. The methodology quantifies the value of operating distributed solar generation systems

interconnected to the grid to the utility, its customers and society. The value of solar tariff takes into account the value of energy and its delivery, generation capacity, transmission capacity, transmission and distribution line losses, and environmental value. To date, no eligible utility has voluntarily implemented a value-of-solar tariff, but Minnesota regulators recently required Xcel Energy to offer a value of solar-based credit for subscribers to their community solar program.

Interconnection Standards. Minnesota's interconnection standard for distributed generation systems contains technical requirements related to engineering studies, mandatory minimum insurance levels, equipment certification definitions, a dispute resolution process and standard application fees. While Minnesota's standards were path-breaking when adopted in 2004, they are now outdated and are slowing down project development. Clean energy advocates have filed a proposal to overhaul Minnesota's interconnection standard that would ensure the safety and reliability of the distribution grid and make the interconnection process more efficient, affordable and faster for distributed generation customers.

Net Metering Standard. Net metering allows customers with distributed energy systems to receive a credit for any excess energy supplied to the public grid, effectively running their meter backward. Projects must be less than 1 MW for investor-owned utilities and less than 40 kW at municipal utilities and rural electric co-ops.

“Made in Minnesota” Solar PV Incentive Program.

The Department of Commerce administers this program, which provides incentives for projects that use products manufactured in Minnesota. Each incentive contract lasts 10 years, with an incentive value recalculated annually. For 2016, the incentive rates range from \$.13-\$.30/kWh.

Cost-of-Pollution Docket. The cost of pollution impacts are often externalized to the public rather than absorbed by the utility that profits from selling the energy. The Minnesota Public Utilities Commission and utilities are considering updates to their standard for determining “externality values” — essentially, the way they calculate the true cost of carbon and other pollution impacts from different sources of energy generation. The Commission is currently considering a proposal to use the federal Social Cost of Carbon, which is valued between \$11 and \$57 per ton of carbon dioxide for 2016. That is a substantial increase from Minnesota’s original estimates valued between \$0.44 and \$4.53 per ton of carbon dioxide. If adopted and implemented well, this updated policy could lead to less coal and more clean energy generation, stimulating Minnesota’s solar and wind industries.

Grid Modernization Planning. The Minnesota Public Utilities Commission has initiated an ongoing docket on grid modernization and distribution system planning. A modernized grid would enable Minnesota to meet its energy policy goals by promoting the integration of variable renewable and distributed energy resources to optimize value. An integrated, modern grid would improve system efficiency, reliability and enable clean energy innovation by providing customers with the necessary information and tools to integrate clean energy into their energy choices.

Federal Policies

Federal Tax Credits. In December 2016, Congress passed multi-year extensions of several renewable energy tax credits that are important to Minnesota’s success:

- *Production Tax Credit (PTC).* The PTC currently provides a credit of 2.3 cents per kWh for wind projects. The PTC will ramp down to 80% in 2018, 60% in 2019, 40% percent in 2020 and, then, expire in 2021.
- *Investment Tax Credit (ITC).* In lieu of the PTC, the ITC offers an immediate tax credit equal to 30% of the expenditures for solar and small wind projects with no maximum credit for the years 2017 through 2019. The credit ramps down to 26% in 2020 and 22% in 2021. Thereafter, the credit will decrease to 10% and become permanent.
- *Residential Renewable Energy Tax Credit.* Homeowners can receive a personal income tax credit for up to 30% of the cost of a solar thermal or photovoltaic system (100 kilowatts or less) installed on their residence. This credit decreases to 26% in 2020, 22% in 2021, and then expires.

USDA Rural Energy for America Program (REAP)

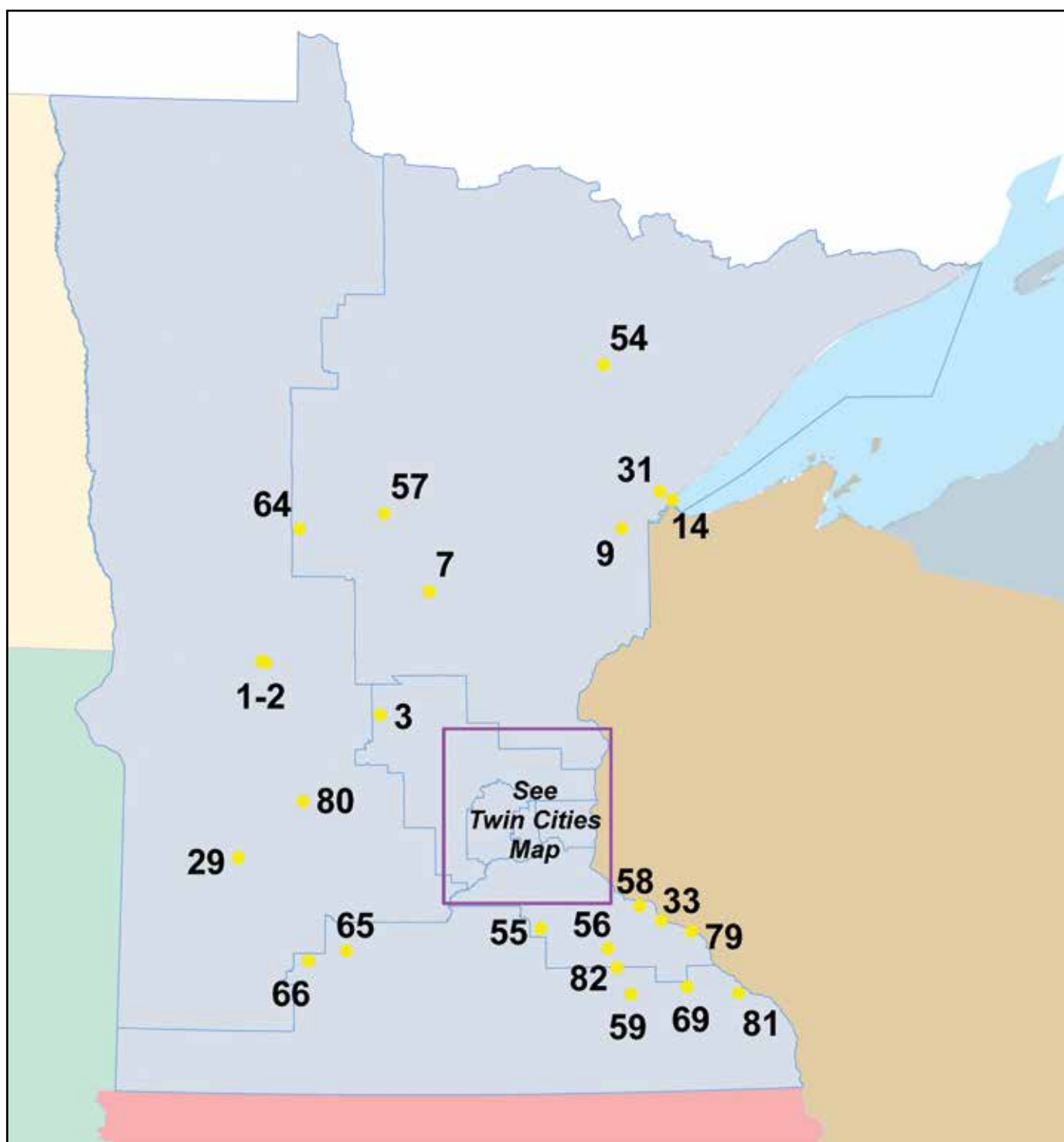
Grants and Loans. REAP is a competitive grant and loan guarantee program to promote renewable energy and energy efficiency for agricultural producers and rural small businesses. REAP grants range from \$2,500 to \$500,000 and cover up to 25% of eligible project costs. In 2014, Congress reauthorized mandatory funding for REAP — \$250 million over 5 years. Minnesota received \$41.7 million in grants and \$16.4 million in loan guarantees under the program in 2003-2016. Those federal investments, in turn, leveraged more than \$240 million in total investments in Minnesota.

Clean Power Plan. The U.S. Environmental Protection Agency’s Clean Power Plan calls on the power sector to reduce its nationwide carbon pollution by 32% over 2005 levels. To reach the national target, the EPA issued state-level pollution reduction targets based on each state’s unique energy profile. Minnesota has already reached 128% of its goal — which was to reduce its power sector carbon pollution from 28.3 million tons to 22.7 million tons by 2030. The state’s early compliance demonstrates that carbon pollution reductions can be achieved through cost-effective and job-creating strategies.

The fate of the Clean Power Plan remains uncertain in light of the U.S. Supreme Court’s stay, legal challenges before the D.C. Circuit Court of Appeals, and the incoming Trump Administration’s views. Regardless of this outcome, however, energy efficiency and renewable energy are the key elements of sound energy policy for the future.

Solar Industry Supply Chain Companies in Minnesota

There are 82 Minnesota companies engaged in the solar industry. Please see the following company listing (alphabetical by city) and maps.



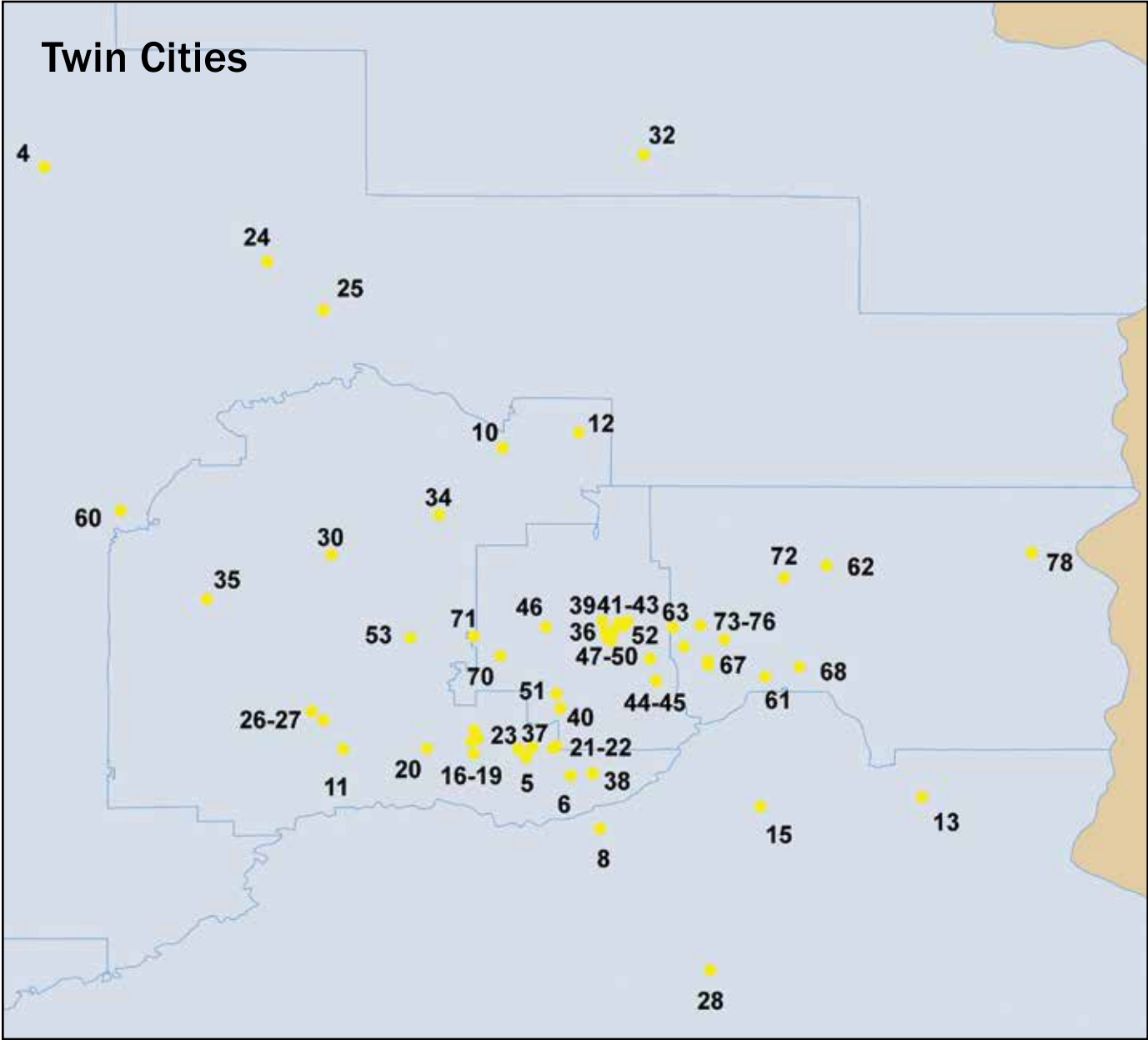


CITY COMPANY MAP #

Alexandria.....	Alexandria Industries	1
Alexandria.....	Solar Skies Mfg., LLC.....	2
Avon.....	Blattner Energy, Inc.	3
Becker	Gary Hammer Electric	4
Bloomington.....	Burns & McDonnell.....	5
Bloomington.....	tenKSolar Inc.	6
Brainerd	Winkelman's Enviro Responsible Const.	7
Burnsville	Beckhoff Automation	8
Carlton	Energy Conserv. Products & Services... ..	9
Champlin.....	Powerfully Green, LLC.....	10
Chanhassen.....	Juhl Energy	11
Coon Rapids.....	Cedar Creek Energy	12
Cottage Grove	Werner Electric Supply	13
Duluth	Harvest Energy Solution.....	14
Eagan.....	Mouli Engineering Inc.	15
Eden Prairie.....	Ameresco	16
Eden Prairie.....	Blue Horizon Energy	17
Eden Prairie.....	Enhanced Home Systems Inc.....	18
Eden Prairie.....	EVS, Inc.	19
Eden Prairie.....	Westwood Renewables.....	20
Edina.....	Geronimo Energy.....	21
Edina.....	Sundial Solar Energy	22
Edina.....	TruNorth Solar.....	23
Elk River.....	Boe Electrical Contractors, Inc.	24
Elk River.....	Solar Attic, Inc.....	25
Excelsior.....	Aladdin Solar	26
Excelsior.....	JJR Power.....	27
Farmington	Consulting Engineers Group.....	28
Granite Falls.....	Fagen, Inc.	29
Hamel.....	Delve Energy Group, LLC.....	30
Hermantown.....	Conservation Technologies	31
Isanti.....	A & J Industries.....	32
Lake City	Freiers Electric & Alt. Energy	33
Maple Grove.....	Great River Energy.....	34

Maple Plain	Wenck.....	35
Minneapolis.....	AEC Engineering	36
Minneapolis.....	Barr Engineering Company.....	37
Minneapolis.....	Dalsin Industries Inc.	38
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Springfield.....	Green Energy Products LLC	66
St Paul	45 North Solar, Inc.....	67
St Paul	Peoples Electric Company, Inc.	68
St. Charles.....	Novel Energy Solutions.....	69

Solar Industry Supply Chain Companies in Minnesota



St. Louis Park	American Solar Electric, LLC	70	St. Paul	American Resource and Energy	77
St. Louis Park	Kilowatt Solar	71	Stillwater	American Polywater Corporation	78
St. Paul	3M Renewable Energy Division	72	Wabasha	Aquilla Solar Corporation	79
St. Paul	All Energy Solar	73	Willmar	Paul's Electric of Willmar, LLC	80
St. Paul	Hunt Electric Corporation	74	Winona	Winona Renewable Energy, LLC	81
St. Paul	Solar Farm, LLC	75	Zumbrota	Concast, Inc.	82
St. Paul	WindLogics	76			

Solar Industry Supply Chain Company Profiles



American Polywater Corporation —

Stillwater: American Polywater manufactures and distributes adhesives, lubricants, sealants, and cleaners. The company's Polywater Solar Panel Wash effectively cleans a variety of solar panels without harming aluminum rails and mounting apparatuses. This solar panel wash is biodegradable and free of harmful chemicals.

Green Energy Products LLC.—Springfield:

Green Energy Products is a family-owned and -operated company that provides planning, financing and installation services for clean energy projects in Minnesota. The company's solar and small wind projects span the residential, commercial and agricultural sectors. The company has installed more than 50 clean energy projects throughout Minnesota since its inception in 2008.

Itek Energy — Minneapolis: Itek Energy began manufacturing solar PV modules in 2012; since then, it has produced enough panels to power more than 4,000 homes. Its flagship facility is located in the state of Washington, but it opened a second 22,000-square-foot manufacturing facility just outside downtown Minneapolis. That location formerly housed a machine shop and paint factory, and the company boasts that the rehabbed facility — re-branded "GRID," the Greenway Resource for Integrated Design — is near bike paths, the Mississippi River and the University of Minnesota. The Minnesota facility manufactures the Itek Energy HE Module, a 280-watt panel.

Minnesota Community Solar —

Minneapolis: This non-profit company works to develop community solar gardens, which people subscribe to throughout Minnesota in order to have clean energy and reduce their utility bills. End users of community solar gardens can save about 5%-30% on their energy bills. Minnesota Community Solar started in 2013 and has several community garden projects constructed and running with an expected 10 MW in future projects.

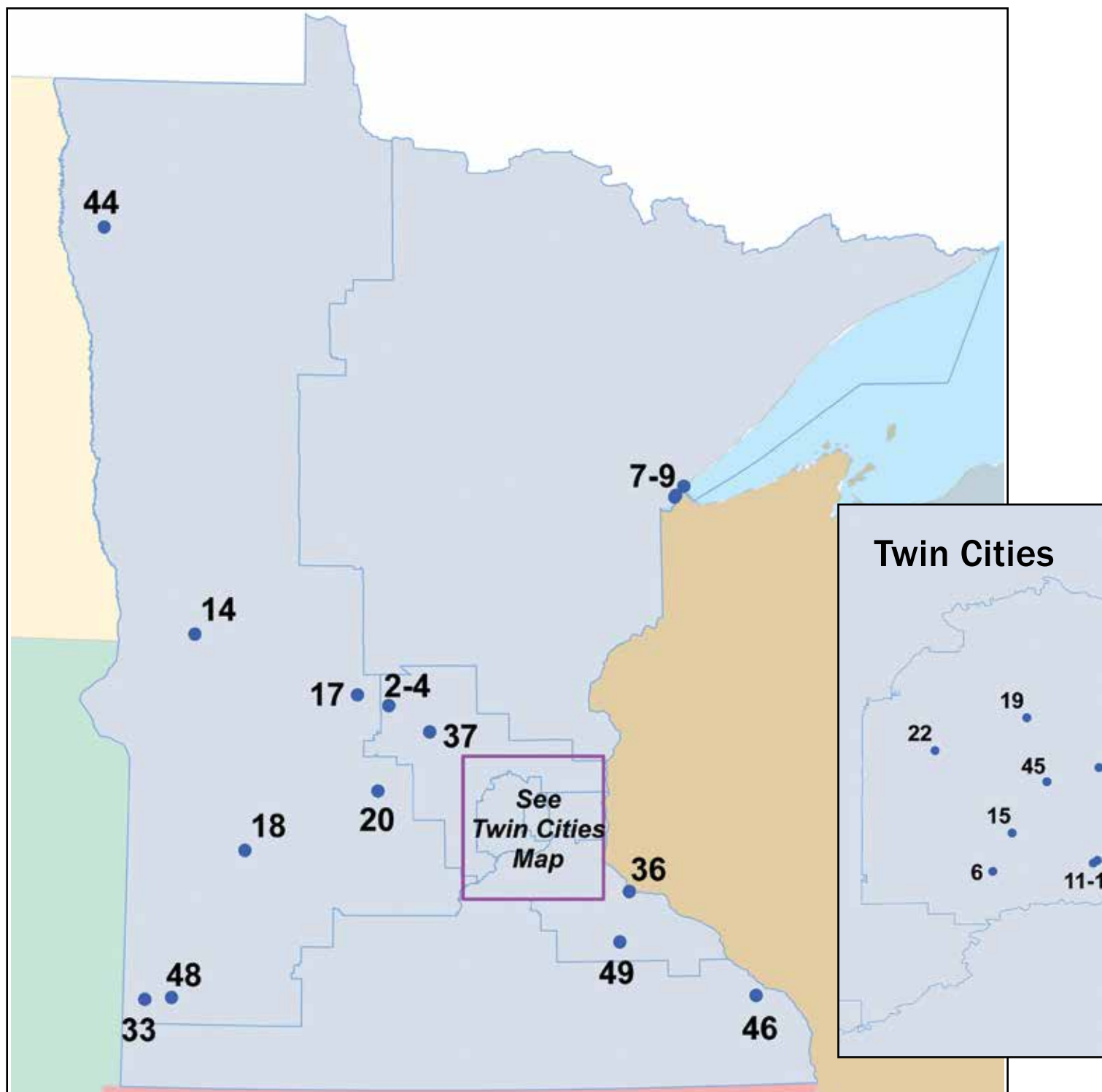
Rural Renewable Energy Alliance —

Backus: This company includes both for-profit RREAL Solar & non-profit RREAL. RREAL Solar provides solar installations to residential and commercial sectors while RREAL works to provide solar energy systems in low-income communities. This 10-person company has installed more than 400 solar energy systems and received multiple recognitions including the 2015 Environmental Initiative Award for Climate & Energy. Thus far, RREAL and RREAL Solar have installed 1.5 MW of capacity.

TruNorth Solar — Edina: TruNorth Solar was founded in 2009 and installs solar energy systems for residential, commercial, and utility customers. This 15-employee company has installed nearly 100 systems and saved its clients over \$108,000 in energy costs. With supportive governmental policies and incentive programs to encourage solar installations, TruNorth Solar has installed over 800 KW of capacity.

Wind Industry Supply Chain Companies in Minnesota

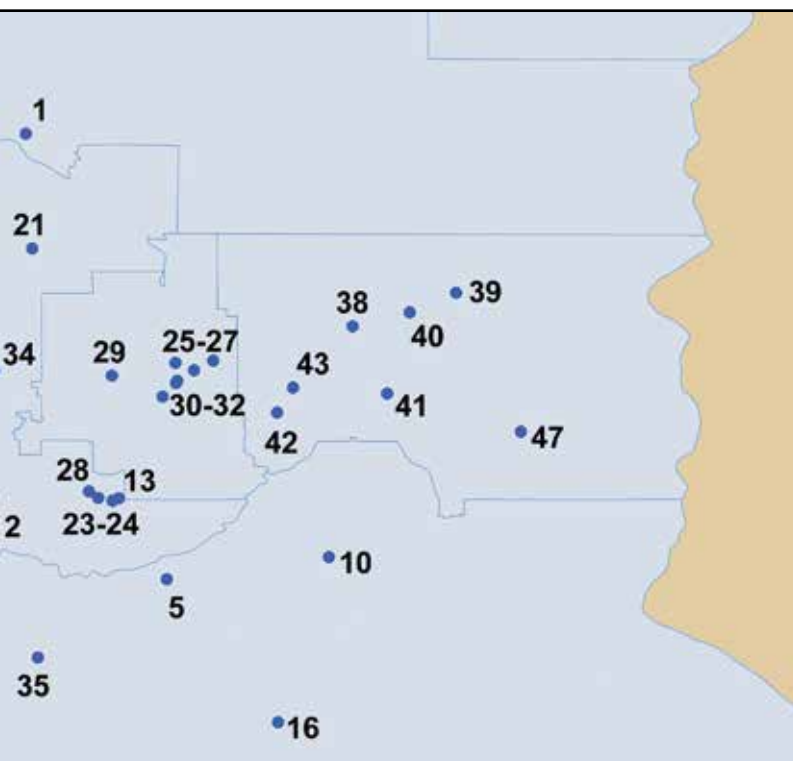
There are 49 Minnesota companies engaged in the wind industry. Please see the following company listing (alphabetical by city) and maps.





CITY COMPANY MAP #

Anoka	Graco.....	1
Avon.....	Blattner Energy, Inc.....	2
Avon.....	Columbia Gear Corporation.....	3
Avon.....	D.H. Blattner and Sons, Inc.....	4
Burnsville	Beckhoff Automation.....	5
Chaska.....	Sheer Wind, Inc.....	6
Duluth	ALLETE / Minnesota Power	7
Duluth	Ventura Energy.....	8
Duluth	Ventura Wind	9
Eagan.....	Mouli Engineering Inc.....	10
Eden Prairie.....	MTS Systems Corporation	11
Eden Prairie.....	Westwood Renewables.....	12
Edina.....	Geronimo Energy	13
Elbow Lake	Renewtech.....	14
Excelsior.....	Terraform Power	15



Farmington	Consulting Engineers Group	16
Freeport	Millwood Metalworks.....	17
Granite Falls.....	Fagen, Inc.....	18
Hamel.....	Delve Energy Group, LLC	19
Litchfield.....	Trico Tcwind.....	20
Maple Grove.....	Wurth Industry of North America	21
Maple Plain	Wenck.....	22
Minneapolis.....	Barr Engineering Company	23
Minneapolis.....	EWT Americas Inc.	24
Minneapolis.....	Fredrickson & Byron, PA.....	25
Minneapolis.....	Graco.....	26
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Zumbrota.....	Concast, Inc.....	49

Wind Industry Supply Chain Company Profiles in Minnesota



APRS World, LLC – Winona: APRS World manufactures digital tools used by the clean energy industry to monitor and evaluate data produced by wind turbines and solar panels. For example, the company’s popular Wind Data Logger records wind speed, gust, and direction, as well as time and date, temperature, battery voltage, and other important wind parameters. APRS World also offers both off-the-shelf and custom software to other renewable energy manufacturers.

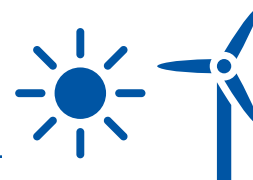
Juhl Energy – Woodstock: Juhl Energy began as Juhl Wind, focused on community-based wind power projects in partnership with local farmers in southwest Minnesota. The company has grown to provide a full range of clean energy solutions for wind, solar, biomass and natural gas systems in multiple states. Juhl Energy now encompasses five subsidiaries working across the clean energy sector and employing more than 60 people in three states. Its development wing offers feasibility studies, financing, construction and installation services, while another division provides day-to-day operations and maintenance services. The company has invested more than \$425 million in capital and owns and operates more than \$28 million in wind farm assets.

National Renewable Solutions LLC – Wayzata:

National Renewable Solutions is a wind energy developer emphasizing its “community development” model to design, develop and manage wind farms. The company started out by working with a group of rural Minnesota farmers who wanted to invest in wind energy, but did not want to sign away their land use rights to a faceless corporation for two generations. The company has since developed more than 760 MW of wind power at seven sites throughout the country, each with its own local Advisory Board. The company now has another 1,200 MW of projects in the pipeline.

Renewtech LLC – Elbow Lake: Renewtech operates as a mid-size wind turbine manufacturer and offers consultation, turn-key installations and commissioning of its 100 kW wind turbines. The company also manages operations and maintenance after installation. Renewtech primarily offers wind services to the industrial, business and agricultural sectors. For over 20 years, the 25-person company has successfully provided wind turbine services, installing between 1 to 100 wind turbines for projects.

Businesses Working in Both Solar & Wind Supply Chains



American Resource and Energy—St. Paul:

American Resource and Energy specializes in designing, engineering, manufacturing and delivering products specifically suited for small wind turbines providing up to 100 kW. Its main product lines are mono-pole wind towers, assembled foundation systems and tower-raising systems. The company also manufactures solar panel mounts for 2 kW hybrid systems and 10 kW freestanding solar arrays. ARE employs eight people and has supplied wind turbine manufacturers such as Bergey Windpower, Southwest Windpower and Evance.

Blattner Energy — Avon: Blattner Energy is an engineering, procurement and construction contractor that focuses solely on power generation projects — wind, solar, energy storage and power delivery. The company was established in 2008 as a sister entity to the long-standing D.H. Blattner & Sons, which has served the civil construction industry since 1907. Blattner has over 1,500 MW of solar power installed or under construction, as well as more than 30,000 MW of wind power installed across North America, including the five largest projects in the U.S. Blattner Energy employs more than 1,500 people and is one of Minnesota's largest private companies.

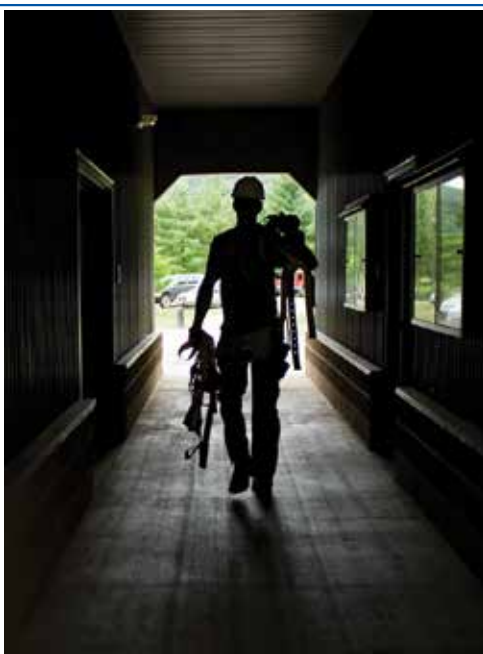


Mortenson Construction — Minneapolis:

Mortenson Construction has offered a broad range of integrated development and construction services since 1954 and is now the 151st largest private company in America. The Minneapolis-based, family-owned organization expanded into the renewable energy industry in 1995 and has since installed more than 15,000 MW of wind energy capacity and 2,100 MW of solar energy capacity throughout the country. The company is also working in the energy storage and high-voltage transmission sectors.

Westwood Renewables — St. Cloud:

Westwood is a multi-disciplinary surveying and engineering company that serves the wind and solar industries. The company provides site evaluation and permitting, pre-construction development and construction support for renewable energy projects. For example, Westwood provided permit fulfillment, natural resources assessments, land surveys, aerial mapping, civil engineering design, construction staking, and transmission line permitting for the 50 MW Lakeswind Wind Power Plant in west-central Minnesota. The company's corporate offices are located in Minneapolis with another full-service office in St. Cloud and seven other offices throughout the country.



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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recycled paper
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