



The CEWD Get Into Energy Career Pathways Project

Supply-Demand Gap Analysis and Demographic Evaluation

Executive Summary

The Center for Energy Workforce Development (CEWD), in conjunction with support from the Bill and Melinda Gates Foundation, is seeking to provide a stable and secure energy future for America. Because a disproportionate number of America's energy workforce will be retiring soon, and due to the nation's growing and changing energy demands, the CEWD has launched its "Get into Energy" campaign. This effort is intended to promote awareness of energy occupations and provide pathways into these essential careers for America's youth.

To this end, a supply and demand analysis and demographic evaluation is performed for a sample of nine states: California, Florida, Georgia, Indiana, Minnesota, North Carolina, Ohio, Texas, and Washington. The existing supply and demand situation is assessed by compiling industry needs and college graduations for five select energy occupations: lineworkers, technicians, plant operators, pipefitters/pipelayers, and engineers. This is done at the county level, and results are mapped to geographically display patterns and areas of potential concern. Secondly, population growth and poverty rates in the education age (16 to 22 years of age) and early career (23 to 26 years of age) cohorts are examined by county. This is done to inform recruitment efforts and help end the cycle of poverty.

The analyses uncover some nationwide trends deserving attention:

- Far more lineworkers and plant operators are needed than are currently supplied. A continued shortage of these critical energy industry-specific occupations would be a huge impediment to economic growth and foreshadow profound national security issues.
- Although the early career cohort is expected to increase in size in every state in the sample, slightly more than half of the states in the sample are expected to experience declines in the education age cohort. Further, states with expected declines in the education age cohort also have the lower poverty rates today. This ironically suggests the potential for demand-side price deflation in these regional economies since there will be fewer people demanding goods and services than today—leading to less capital investment, fewer jobs, lower wages, and decreased purchasing power outside the regional economy.

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Introduction

The Get Into Energy (GIE) Career Pathways Model provides a roadmap for entry into skilled utility technician positions in the energy sector with pathways to higher-level jobs in a variety of work settings. This career pathways model focuses on the needs of the following three stakeholder groups: students and potential applicants; educators; and employers. The system is divided into key modules that support these stakeholders. These modules include GIE Outreach and Career Coaching; Career Pathways Curriculum and Stackable Credentials; and Employer Collaboration and Support.

The initiative is receiving support from a Bill and Melinda Gates Foundation planning grant given to the Center for Energy Workforce Development (CEWD). The purpose of the Gates Foundation Initiative is to double the number of people aged 26 or younger who graduate with a postsecondary degree or certificate that has value in the marketplace. The GIE Initiative will help the Bill and Melinda Gates Foundation and CEWD to achieve their shared goals.

The purpose of the planning grant is to evaluate the readiness of state energy workforce consortia for implementing Get Into Energy Career Pathways. Currently, there are nine state consortia to be evaluated, which are as follows: Ohio, Texas, North Carolina, Washington, Georgia, Florida, California, Indiana, and Minnesota. The target audience for GIE is low-income young adults aged 16 through 26.

In support of this initiative, Economic Modeling Specialists LLC has developed a gap analysis for the education supply and the occupation demand in the above-listed states. The analysis also includes demographic and poverty estimates. Through analysis of these data perspectives, CEWD and other supporting partner organizations can gain a deeper understanding of where the supply gaps and opportunities for the target population exist. This work seeks to aid in narrowing the list of nine state consortia down to a selection of specific pilot states.

Background and Overview

Energy jobs offer promising opportunities to both experienced and new workers. The industry as a whole is projected to experience growth in the coming years, particularly with the increase in public investments in renewable energy, clean energy generation, energy efficiency, and the Smart Grid. The growth in demand coincides with the large number of retirements projected in the industry. Energy employers will need skilled workers for traditional energy jobs as well as future positions related to energy generation, transmission, and distribution. These are jobs that are active, hands-on, rewarding, and available in every state in the country. In addition, they are jobs in an industry where adding new skills translates into additional opportunities to make more money. As new technologies are created, workers will need new skills to install and operate the new energy systems, and this means new job opportunities in a stable and growing industry.

The GIE Career Pathways Model is built on the following principles:

- Targeted outreach and support for students and potential applicants through recruiting and employment.
- Pathway-based curricula leading to a flexible portfolio of credentials and degrees.
- Employer involvement in all phases of workforce development, ultimately leading to employment.

In order to understand the requirements for occupations and needs for workers in the energy sector, detailed data must be gathered at both the education and occupation levels. These data must also give a narrow geographic picture; i.e., the energy occupation needs of one state are particular to that state and are not likely to be relevant anywhere else. Furthermore, in support of both the GIE Initiative and Gates Foundation Initiative, specific focus must be given to low-income 16- to 26-year-olds.

To achieve these data goals, a process was developed that estimates the demand for key energy sector occupations and compares those occupations to corresponding education programs. This occupation demand versus education supply analysis is known as a *gap analysis* and can lead to the derivation of many important conclusions. Moreover, a comparison of demographics and poverty estimates in conjunction with local gaps can highlight areas of opportunities for accomplishing the objectives of the GIE initiative and working with state consortia and regional stakeholders. In order to do this, geographic information systems (GIS) are heavily used to interpret the massive quantity of geographical data developed for this project.

This report consists of the following sections: 1) a main body summary, which outlines the methodology and key findings and describes how to read and interpret the data and maps; 2) nine state sections, providing detailed maps and data for each of the evaluated states; and 3) a summary of the data sources used to compile the necessary information.

Methodology

Five occupations were selected that are critical to the production of energy and infrastructure maintenance. These are lineworkers, technicians, plant operators, and pipefitters/pipelayers, and engineers.

To understand the current supply and demand situations of these five occupations, data were collected by industry, occupation, and state sources where available.

For industry data, EMSI combines the employment data covered by the Department of Labor's Quarterly Census of Employment and Wages (QCEW) with the total employment data in the Regional Economic Information System (REIS), which is produced by the Bureau of Economic Analysis (BEA). The data are then augmented with information from County Business Patterns (CBP) and Nonemployer Statistics (NES), published by the U.S. Census Bureau. Projections are based on the latest available EMSI industry data, local trends in each industry for the past fifteen years, growth rates in statewide and (where available) sub-state area industry projections published by individual state agencies, and (in part) growth rates in national projections from the Bureau of Labor Statistics.

For occupation data, a workforce-oriented view of the regional economy is made possible through organizing the regional employment information by occupation. EMSI's occupation data are based on EMSI's industry data as well as the regional staffing patterns taken from the Occupational Employment Statistics program (U.S.

Bureau of Labor Statistics). Wage information is partially derived from the American Community Survey. The occupation-to-program (SOC-to-CIP) crosswalk is based on one done by the U.S. Department of Education, with customizations by EMSI.

Interpreting the GIS Maps for Workforce Supply and Demand

For each state, GIS maps show the estimated workforce demand, supply, and gap for each of the following key occupations: lineworkers, technicians, plant operators, pipefitters /Pipelayers, and Engineers. The states' demographic and poverty makeup are also included.

Demand Maps:

The demand maps represent new and replacement job openings for energy occupations. New jobs are calculated by converting industry projections into occupations through the use of a national staffing pattern matrix for the various energy industries. Replacement jobs were determined from an extensive survey conducted by CEWD on retirement and job attrition for the five major occupation categories. Both replacement jobs and new jobs were projected out five years and divided by five to develop an average annual occupation demand.

On the maps, demand estimates for the different occupations begin at 0, which is colored in white and shows that in certain counties, supply is balanced with demand. In other counties, demand increases upward, going from yellow to orange to red. By definition, demand cannot be negative.

Supply Maps:

The supply maps show the number of individuals who have completed a post-secondary program of study at an institution which reports to the National Center for Education Statistics (NCES). The database used to compile this information is the Integrated Post-Secondary Education Data System (IPEDS). Publicly funded community colleges, technical colleges, and four-year universities report their program completion data to NCES. In addition, many private technical schools and other private schools report their program completion numbers to NCES. The supply maps do not capture internal industry training, nor do the maps include apprenticeship workforce pipelines. The data portrayed in each map represent 2008 education program completers.

On the maps, supply estimates begin at 0, colored in white, and increase upward, going from lighter blue to darker blue. As with demand, by definition, supply cannot be negative.

Workforce Supply Gap Maps:

The purpose of this analysis is to gauge county-level workforce needs and future availability of jobs across the evaluated states.

The supply gap maps mesh both supply and projected annual demand to determine whether an education program's output of completions results in a surplus or deficit in the state's workforce. Counties where supply and demand are balanced, i.e., where supply equals demand, are shaded in white. Counties with more demand than supply are shaded in yellow, progressing to red as the severity of the demand increases in counties where

is a significantly higher level of occupation demand relative to program supply. Conversely, counties with more supply than demand are shaded in light green and progress to a darker green wherever there is a significantly higher rate of program completion relative to occupation demand. Thus, areas with a darker red color likely have an energy workforce shortage, whereas areas with darker green could have an excess of potential skilled workers.

Additionally, a table providing numbers indicating surplus or deficit is given at the beginning of the section for each state. A black positive number shows that supply is greater. It indicates that a large number of program completers may be available to fill the necessary energy workforce demand. A red negative number shows that demand is greater, indicating the degree to which a deficit is estimated.

The reader must note that a positive number does not necessarily guarantee that program completers will enter the energy workforce. Many programs offered at post-secondary institutions allow for multiple career pathways that do not involve the energy sector. This analysis only evaluates occupation demand in the energy sector, not in all the industries in the states' and regions' economies. The reader should understand that many program completers will likely seek employment in similar occupations outside of the energy sector. For example, in Illinois, a chemical technician could enter into a number of alternative industries, including pharmaceuticals, testing laboratories, or paint manufacturing.

Interpreting the GIS Maps for Demographics and Poverty

There are three sets of maps for each state under this category. The first set shows the projected population changes from 2010-2015 for 16- to 22-year-olds, and the second set shows the same changes for 23- to 26-year-olds. For all of these maps, the darker red counties are projected to see the biggest decrease in the key demographic from 2010-2015, while darker green counties are projected to see the biggest increase.

The third set of maps displays counties where the target demographic may be concentrated. The total population aged 16 to 26 years in 2010 is displayed in green by county. The larger this age group is in a particular county, the darker the shading of green. Overlaid atop this is the total percentage of people in the county who are in poverty. Unfortunately, the percentage in poverty is only available for the population at large—not by age group. Hence it is assumed that the overall count poverty rate accurately reflects the true poverty rate of the 16 to 26 year old age group. This assumption is conservative in that younger people who are just starting out on their own tend to be among the least wealthy age groups.

Interpreting the Summary Data Tables

For each selected state, key employment in the energy sector and population projections for the cohort population by gender and ethnicity are also discussed. We compare the estimated projected annual demand to supply (i.e., the energy field completers for 2008) in order to estimate the supply gap in the energy field. A positive value under the 'Gap' variable shows excess supply, and a negative value shows excess demand for that occupation. Readers should know that supply is estimated based on the total number of energy-related program

completers, whereas the demand is projected based on actual energy field employment. Thus, it is possible that the supply might be overestimated for the energy field since some of the completers seek employment in similar occupations, though not in the energy field. The supply-demand ratio tells us how many program completers are estimated to be supplied for every individual job demanded in a particular energy-related employment. For example, the 5.1 supply-demand ratio for technicians in California (Table 3) tells us that California supplied 5.1 technicians for every one technician needed in the energy sector.

The 16-through 26-year-old population was considered for every state. The 16-22-year-old population is classified as the “Education Age” cohort, and the 23-26-year-old population is classified as the “Early Career” cohort for the analysis.

Individual State Evaluations

Table 1 shows energy field employment by selected states. For each state, we use 2010-2015 data. The estimate shows that California, Florida, Georgia, and Texas shows positive job growth in the next five years. Indiana, Minnesota, North Carolina, Ohio, and Washington show the decline in projected jobs in 2015. North Carolina has the highest decline with 11% followed by Ohio (-5%). The projected annual demand is estimated based on current actual energy field employment.

Table 1 - Electrical and Natural Gas Utilities, Key Employment – by State

State	2010 Jobs	2015 Jobs	Change	% Change	2010-2015 Projected Annual Demand
California	54,893	56,002	1,109	2%	25,808
Florida	20,966	21,235	270	1%	9,609
Georgia	20,223	20,612	389	2%	9,261
Indiana	12,887	12,393	(495)	(4%)	5,284
Minnesota	12,421	12,136	(285)	(2%)	5,212
North Carolina	11,288	10,009	(1,278)	(11%)	3,728
Ohio	20,383	19,280	(1,103)	(5%)	8,009
Texas	42,708	43,400	692	2%	19,684
Washington	4,082	4,052	(30)	(1%)	1,821

Table 2 shows the population projections for the Education Age and Early Career cohorts by state, along with state overall poverty estimates. Even though the poverty estimates are for the entire state population, we can assume that each of the two cohort populations also have the same poverty percentages. Texas has the highest poverty rate, followed by Georgia and North Carolina. As for the Education Age population, California, Indiana,

Minnesota, Ohio, and Washington show decline. Minnesota has the largest decline in that population (-6.7%), followed by Ohio (-5.6%) and Washington (-3.9%). The projected Early Career cohort population shows positive growth for all the states. The highest growth is projected in California (14.7%), followed by Florida (11.6%). Minnesota projected the least growth (1.7%) for the next five years.

Table 2 - Population Projection by Cohort

State	Poverty		2010 Population		2015 Projection		Change (%)	
	Total Population under Poverty	Poverty %	Education Age	Early Career	Education Age	Early Career	Education Age	Early Career
California	4,781,201	13.3%	4,000,143	2,265,821	3,938,177	2,598,495	(1.5%)	14.7%
Florida	2,375,225	13.3%	1,667,508	991,246	1,679,177	1,106,467	0.7%	11.6%
Georgia	1,388,959	14.7%	969,671	554,896	1,010,888	602,118	4.3%	8.5%
Indiana	799,567	12.9%	623,999	342,550	611,701	354,421	(2.0%)	3.5%
Minnesota	489,714	9.6%	504,723	291,292	470,863	296,194	(6.7%)	1.7%
N Carolina	1,301,882	14.6%	912,613	519,893	927,699	550,064	1.7%	5.8%
Ohio	1,489,314	13.3%	1,102,515	607,081	1,040,887	629,955	(5.6%)	3.8%
Texas	3,755,944	15.8%	2,518,815	1,477,854	2,640,152	1,587,668	4.8%	7.4%
Washington	727,156	11.3%	614,037	377,945	590,087	385,742	(3.9%)	2.1%

North Carolina State Report

North Carolina has an estimated excess demand for lineworkers and plant operators and an excess supply of technicians, pipefitters, and engineers (Table 18). The state's average annual projected demand for plant operators is 38, whereas it supplied only 1 plant operator in 2008. The state supplied 50 pipefitters and 27 engineers for every projected job in those occupations. Overall, the state supplied 6 jobs for every projected job in the energy field per year. Readers should be aware that the numbering of the tables and maps in this report matches the numbering in the main report and thus does not flow sequentially.

Table 18 - Electrical and Natural Gas Utilities, Key Occupation Employment - North Carolina

SOC Code	Description	2010-2015 Projected Annual Demand	2008 Supply	Gap	Supply- Demand Ratio	2009 Median Annual Earnings
Lineworkers		149	12	(137)	0.1	\$51,189
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	34	n/a	(34)	n/a	\$52,458
49-9051	Electrical power-line installers and repairers	115	12	(103)	0.1	\$45,635
Technicians		130	1,259	1,129	9.7	\$34,840
19-4031	Chemical technicians	2	1	(1)	0.6	\$37,128
19-4051	Nuclear technicians	18	28	10	1.6	\$51,126
47-2073	Operating engineers and other construction equipment operators	10	0	(10)	0.0	\$31,387
47-2111	Electricians	16	615	599	37.8	\$35,422
49-2095	Electrical and electronics repairers, powerhouse, substation, and relay	49	615	566	12.6	\$53,747
49-9012	Control and valve installers and repairers, except mechanical door	36	n/a	(36)	n/a	\$41,163
Plant / Field Operators		38	1	(37)	0.0	\$50,606
51-8011	Nuclear power reactor operators	20	0	(20)	0.0	\$54,746
51-8092	Gas plant operators	18	1	(17)	0.1	\$46,342
Pipefitter / Pipelayer / Welder		19	968	949	50.0	\$32,760
47-2151	Pipelayers	1	149	148	108.0	\$30,992
47-2152	Plumbers, pipefitters, and steamfitters	11	149	138	13.4	\$35,714

47-3015	<i>Helpers, pipelayers, plumbers, pipefitters, and steamfitters</i>	1	149	148	215.7	\$25,397
51-4121	Welders, cutters, solderers, and brazers	6	521	515	84.6	\$33,821
Engineers		27	736	709	27.1	\$70,741
17-2041	Chemical engineers	0	146	146	439.4	\$77,230
17-2071	Electrical engineers	15	545	530	35.3	\$74,984
17-2161	Nuclear engineers	11	45	34	3.9	\$54,808
TOTAL*		363	2,063	1,700	5.7	

Note: (i) Italics SOC code refers to the overlapping of '2008 Supply' across employment category

(ii) * Values may not total exactly due to double counting in "2008 Supply."

- [North Carolina Demand Maps](#)

Figures 91-95 depict the estimated demand for lineworkers, technicians, plant operators, pipefitters/pipelayers, and engineers for each county in North Carolina. By definition, demand can never be negative. Demand estimates for the different employment types begin at 0 (colored in white) and go from yellow, to orange, to red as demand increases.

Figures 91 and 92 show demand for lineworkers and technicians. Demand is scattered across the state. Figures 93, 94, and 95 show demand for plant operators, pipefitters, and engineers. Demand is again scattered, but lower than that for lineworkers and technicians.

- [North Carolina Supply Maps](#)

Figures 96-100 show the estimated supply of lineworkers, technicians, plant operators, pipefitters/pipelayers, and engineers for each county. By definition, supply can never be negative, so estimates begin at 0 (colored in white) and increase (from lighter blue to darker blue).

Figure 96 shows the supply of lineworkers. Supply is slight and located in just one county. Figure 97 shows the supply of technicians. Here, supply is strong across the state. Figure 98 shows the supply of plant operators. Just one is produced in the entire state. Figure 99 maps the supply of pipefitters/pipelayers. Like the supply of technicians, supply is strong and scattered across the entire state. Finally, Figure 100 maps the supply of engineers, which is strong and highly localized.

- [North Carolina Workforce Supply Gap Maps](#)

Figures 101-105 show the gap between the estimated supply and estimated demand for the five occupations. The gap is simply the estimated demand for a particular occupation in a given county minus the estimated supply of that occupation from that same county. Counties are shaded in white where supply and demand are balanced, i.e., where supply equals demand. Counties with more demand than supply are shaded in yellow and progress in severity to red. Conversely, counties with more supply than demand are shaded in light green and progress to a darker green.

Figure 101 shows the gap in lineworkers. Slight deficits exist in most counties. Figure 102 shows the supply of technicians, where a general surplus is had across the state. Figure 103 maps the gap in plant operators. Neutral

to small deficits are the norm in all counties. Figure 104 shows the gap in pipefitters/pipelayers. Oversupply is generally the case in most counties. Finally, Figure 105 maps the gap in engineers, where heavy localized surplus is seen.

- [North Carolina Population Growth](#)

Tables 19 and 20 show the population growth for the Education Age and Early Career cohorts by gender and ethnicity in North Carolina. The estimates show that both the Education Age and Early Career cohort population are expected to grow about 1.7 percent and 5.8 percent, respectively, over the next five years. Even with the decline in the projected White and Black populations, the Education Age cohort is projected to register positive growth in the future.

Table 19 - Education Age Cohort (16-22 Years) by Gender and Ethnicity - North Carolina

Ethnicity	2010			2015 Projection			Change (%)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
White	292,181	265,650	557,831	288,515	262,406	550,922	-1.3%	-1.2%	-1.2%
Black	121,096	119,158	240,254	112,520	111,148	223,668	-7.1%	-6.7%	-6.9%
Hispanic	40,760	31,262	72,023	58,301	45,393	103,694	43.0%	45.2%	44.0%
Asian	8,201	7,332	15,533	9,401	9,075	18,476	14.6%	23.8%	18.9%
Other	13,949	13,024	26,972	16,159	14,781	30,939	15.8%	13.5%	14.7%
TOTAL	476,187	436,426	912,613	484,896	442,804	927,699	1.8%	1.5%	1.7%

Table 20 - Early Career Cohort (23-26 Years) by Gender and Ethnicity - North Carolina

Ethnicity	2010			2015 Projection			Change (%)		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
White	169,333	157,505	326,838	173,146	161,560	334,706	2.3%	2.6%	2.4%
Black	62,966	63,878	126,844	70,012	71,255	141,268	11.2%	11.5%	11.4%
Hispanic	25,997	17,465	43,462	27,731	20,869	48,600	6.7%	19.5%	11.8%
Asian	4,866	4,441	9,307	5,266	4,888	10,154	8.2%	10.1%	9.1%
Other	6,855	6,586	13,441	7,960	7,377	15,337	16.1%	12.0%	14.1%
TOTAL	270,017	249,875	519,893	284,116	265,948	550,064	5.2%	6.4%	5.8%

Figures 106 and 107 show the estimated five-year population change for those aged 16 to 22 and 23 to 26. Each county is shaded to reflect the absolute population change in each cohort. Counties with only slight positive or

negative absolute change are colored in white. Decreases in absolute cohort population are colored in red with the highest decreases colored in bright red. Positive absolute cohort population change is colored in green with the highest increases colored in bright green. It should be emphasized that because absolute numbers are plotted, counties with relatively smaller total populations may have far larger percent changes than their larger counterparts. Therefore, the local impacts of population change on the supply and demand for energy workers may be much more pronounced in counties with smaller populations.

Figure 106 shows the estimated change in the Education Age cohort (those aged 16 to 22). State-wide, growth is expected to be positive. Geographically positive growth is expected in a central corridor through major urban areas. Figure 107 maps the Early Career cohort. A net positive growth of 5.8% is expected, and geographically, this is expected to occur almost statewide.

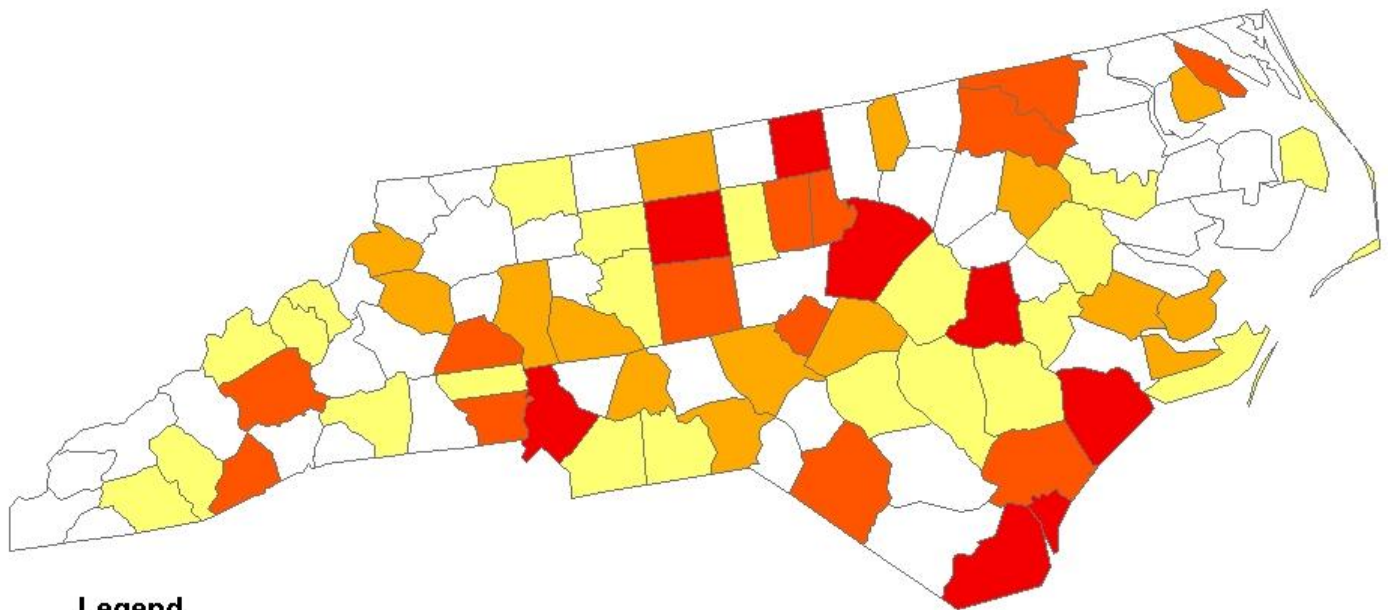
- [North Carolina Poverty Map](#)

This map was created to show where the population aged 16 to 26 in lower income brackets currently live. To this end, the total estimated population of people aged 16 to 26 for 2010 is overlaid with the estimated county poverty rates for 2010. Note that estimated poverty rates could only be obtained for the entire population of the county. It is thus assumed that the percentage of people in poverty in the 16- to 26-year age bracket is the same as the percentage for the entire county population. In reality, this may be a conservative estimate.

The map shows the total population of all county residents 16 to 26 years of age in green. The higher the population of the group is, the darker the shade of green will be. The percent of the total county population in poverty is shown by a red dot for each county. The smaller green dots represent lower percentages of people in poverty; this percentage increases as the size of the dot increases.

Figure 108 shows these relationships. The urban areas tend to have the lowest poverty rates, whereas the more rural counties tend to have the highest poverty rates.

Figure 91. Demand for lineworkers in North Carolina,
by county



Legend

Number of lineworker jobs
demanded, by county

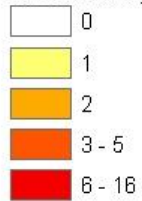
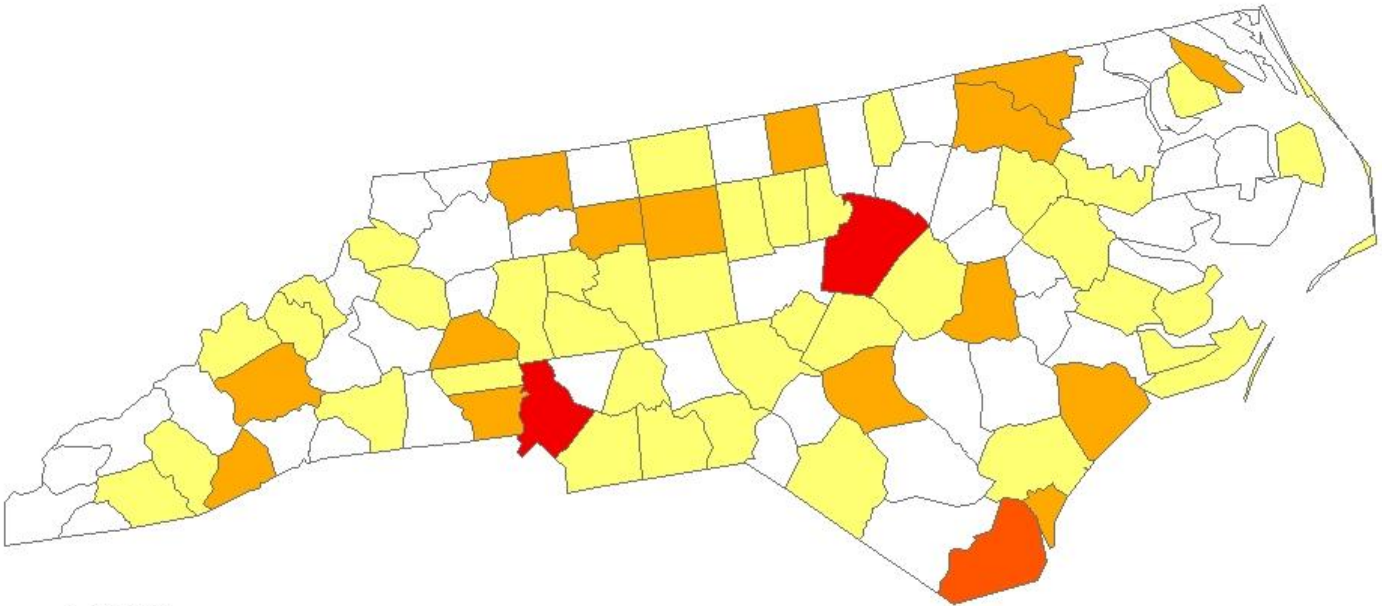


Figure 92. Demand for technicians in North Carolina,
by county



Legend

Number of technician jobs
demanded, by county

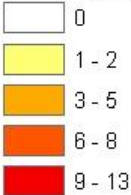
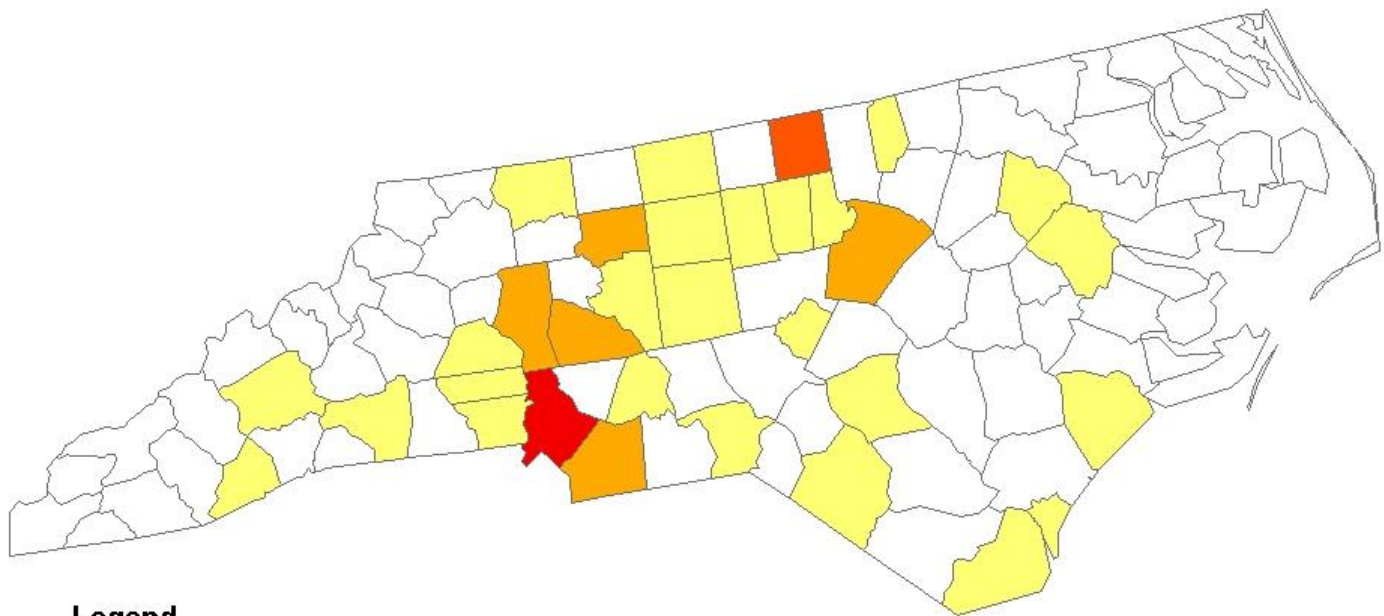


Figure 93. Demand for plant operators in North Carolina,
by county



Legend

Number of plant operator jobs
demanded, by county

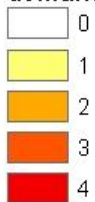
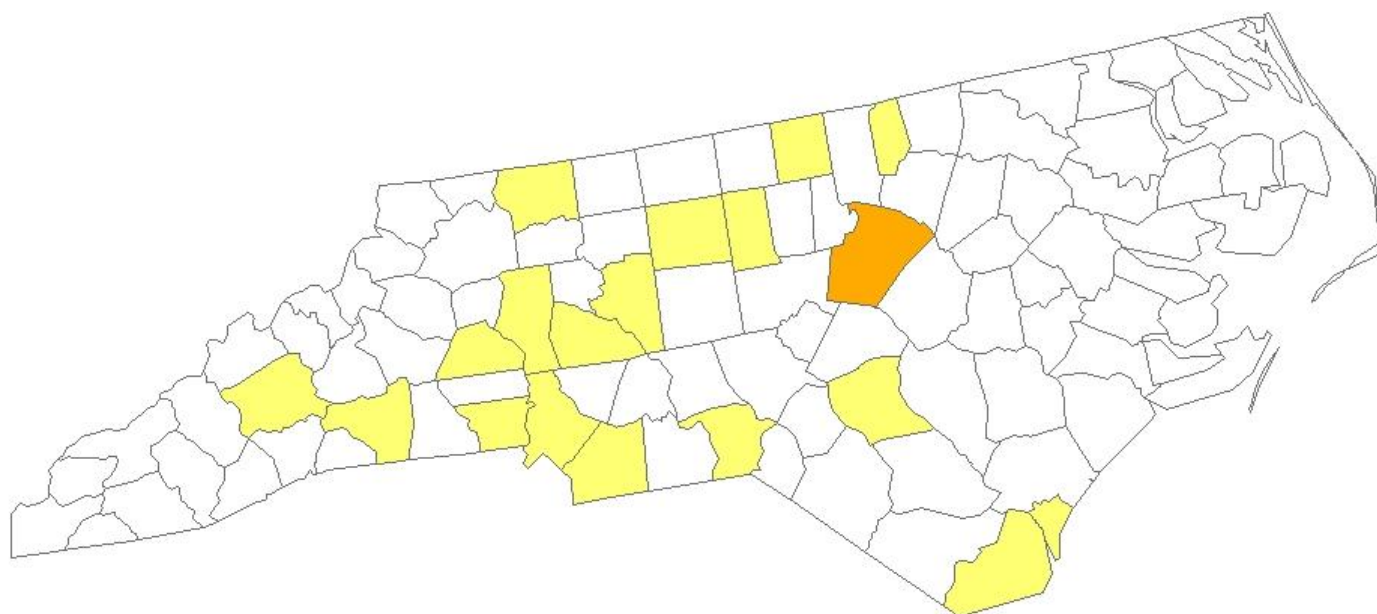


Figure 94. Demand for pipefitters/pipelayers in North Carolina,
by county



Legend

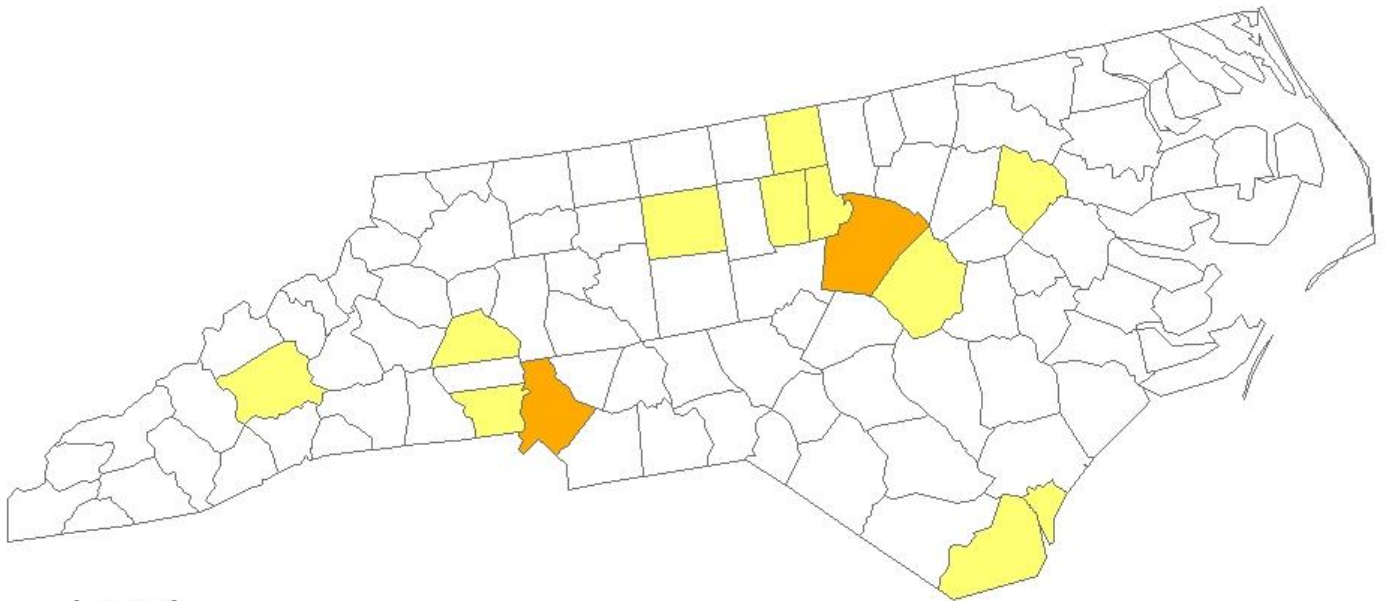
Number of pipefitter/pipelayer jobs
demanded, by county

0

1

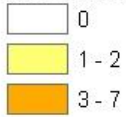
2 - 3

Figure 95. Demand for engineers in North Carolina,
by county

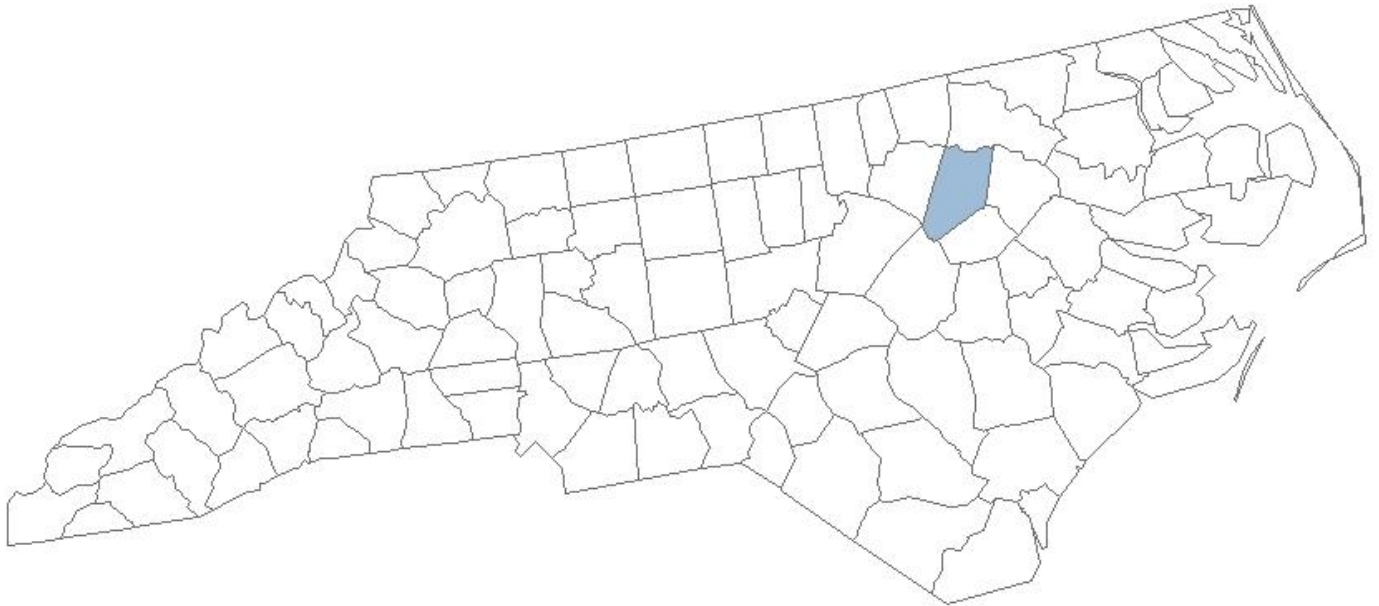


Legend

Number of engineering jobs
demanded, by county



**Figure 96. Supply of lineworkers in North Carolina,
by county**



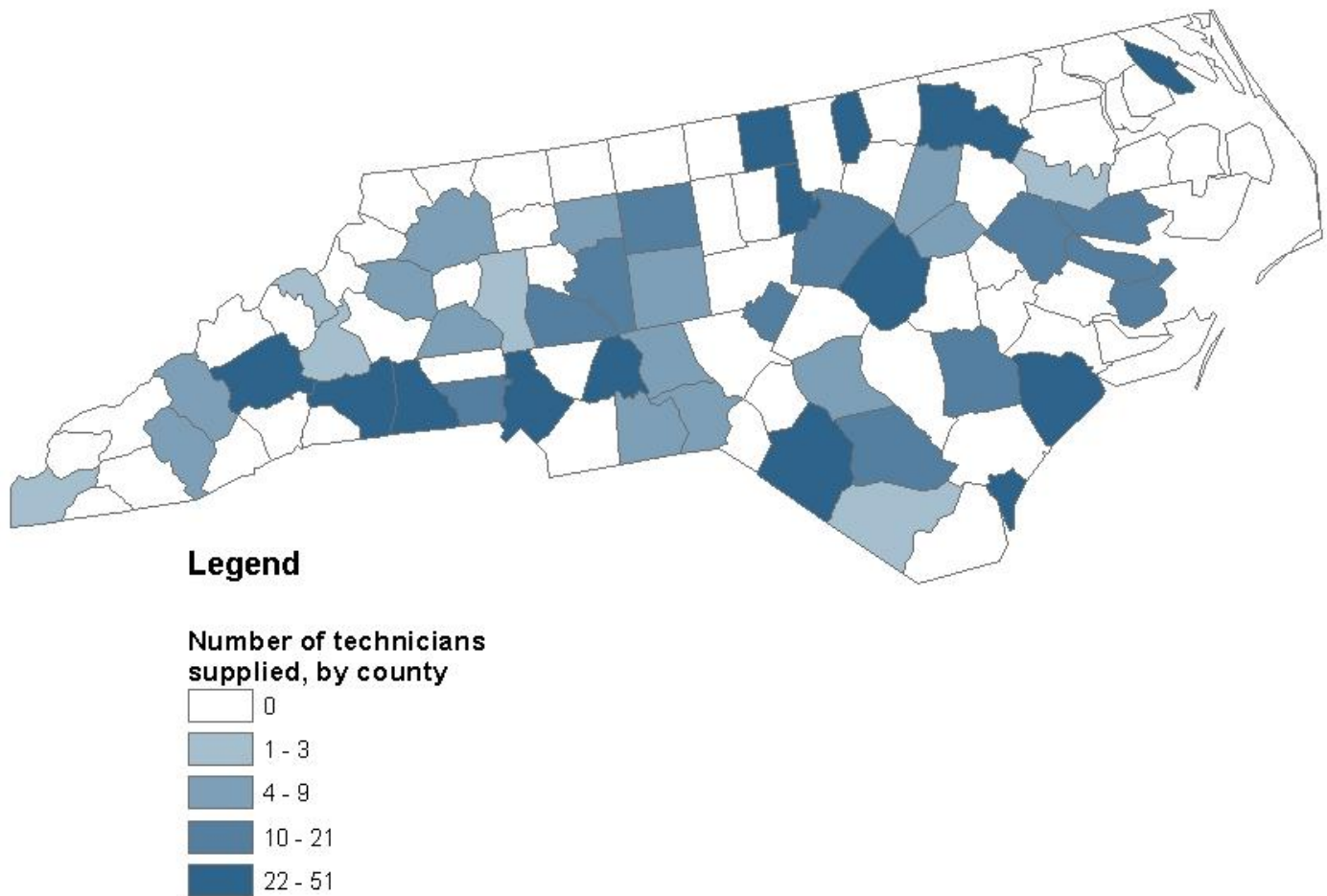
Legend

**Number of lineworkers
supplied, by county**

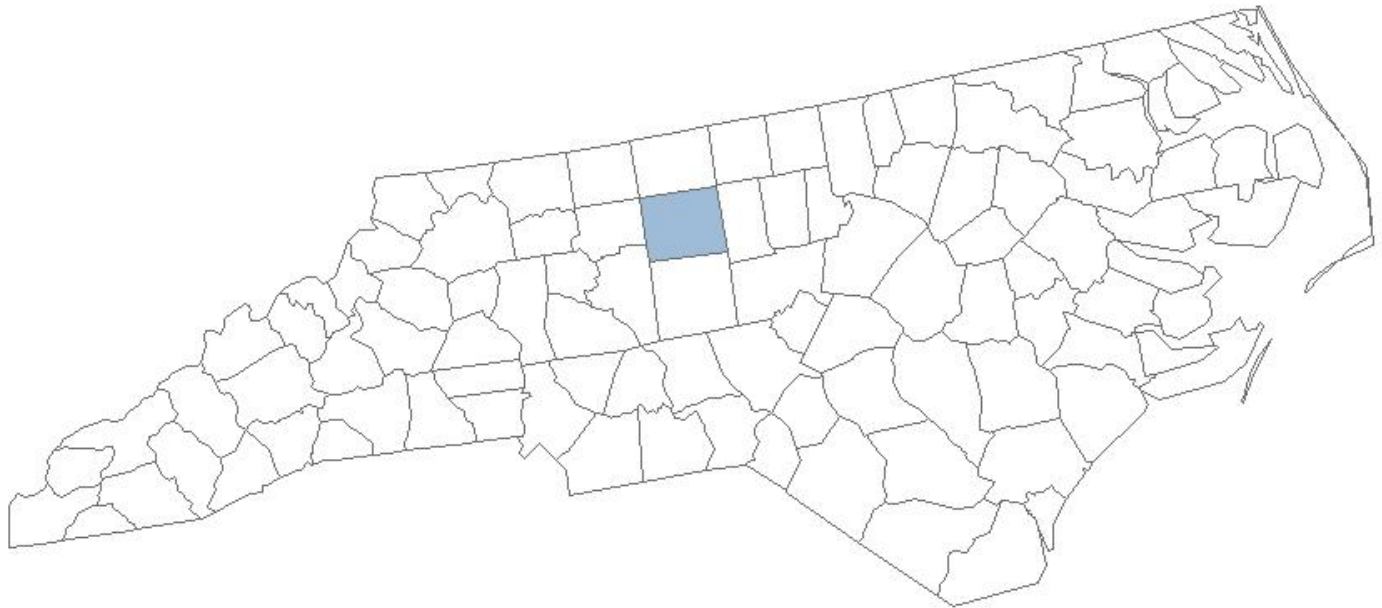
0

1 - 12

Figure 97. Supply of technicians in North Carolina,
by county



**Figure 98. Supply of plant operators in North Carolina,
by county**



Legend

**Number of plant operators
supplied, by county**



Figure 99. Supply of pipefitters/pipelayers in North Carolina, by county

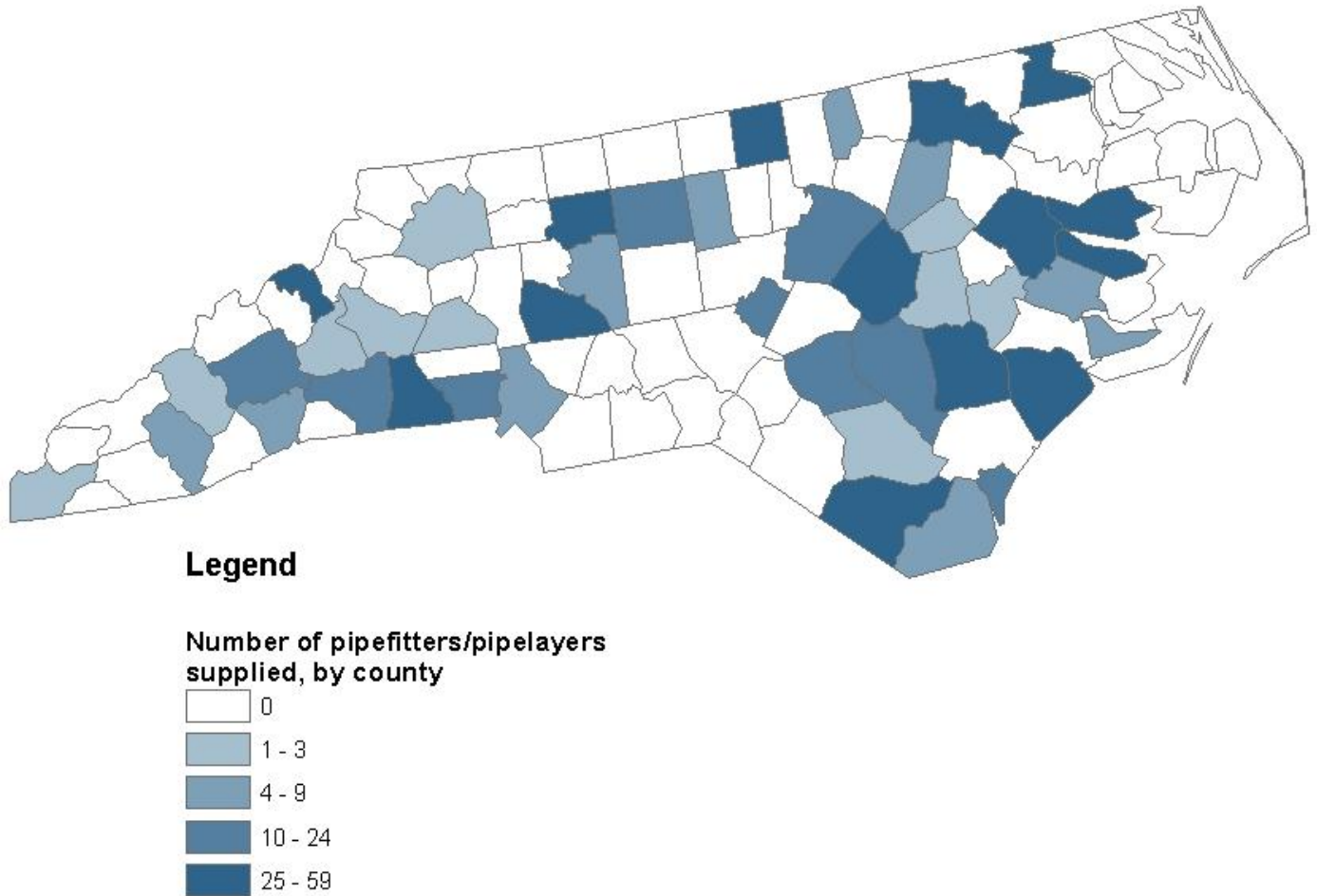


Figure 100. Supply of engineers in North Carolina,
by county

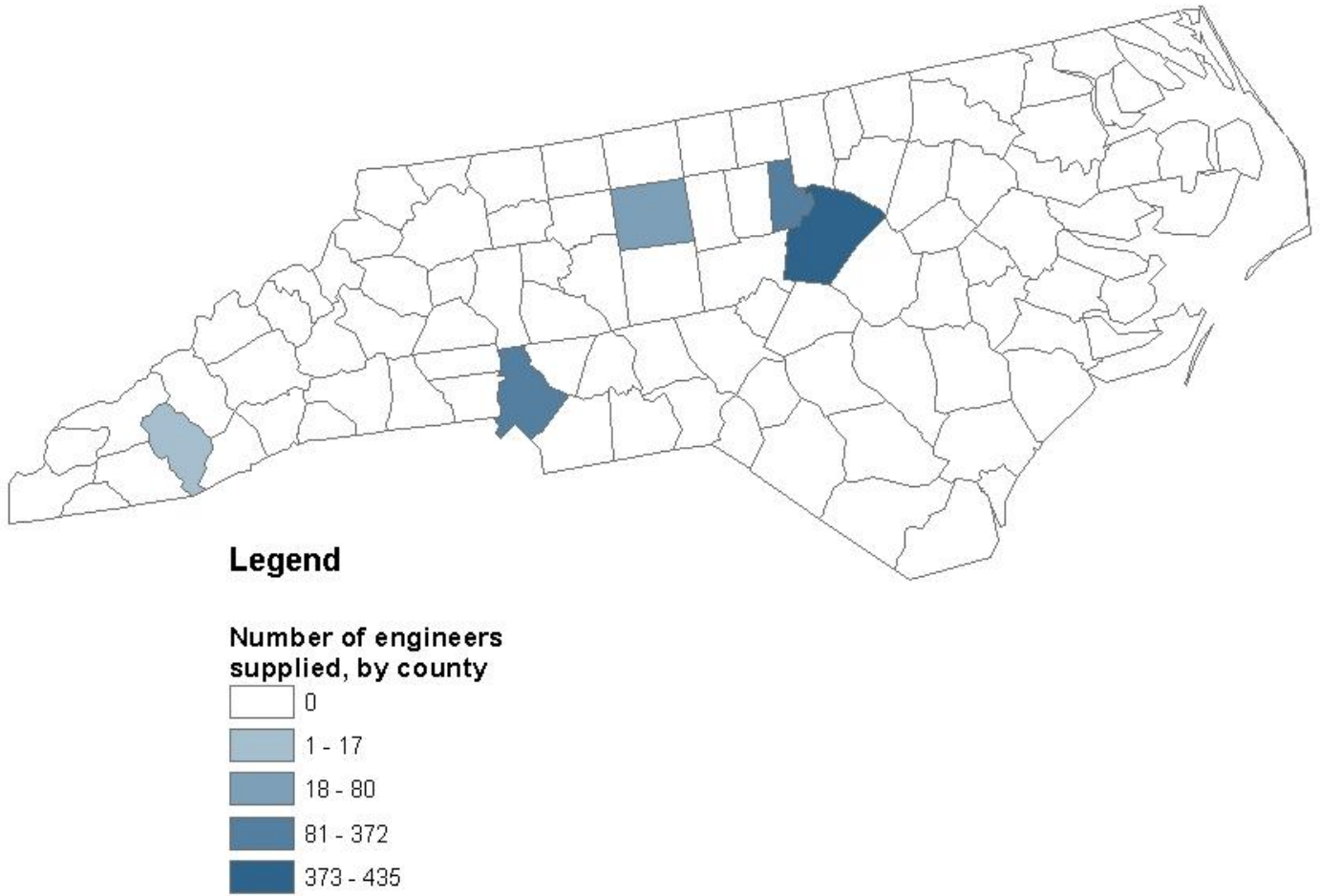


Figure 101. Gap between supply and demand for lineworkers in North Carolina, by county

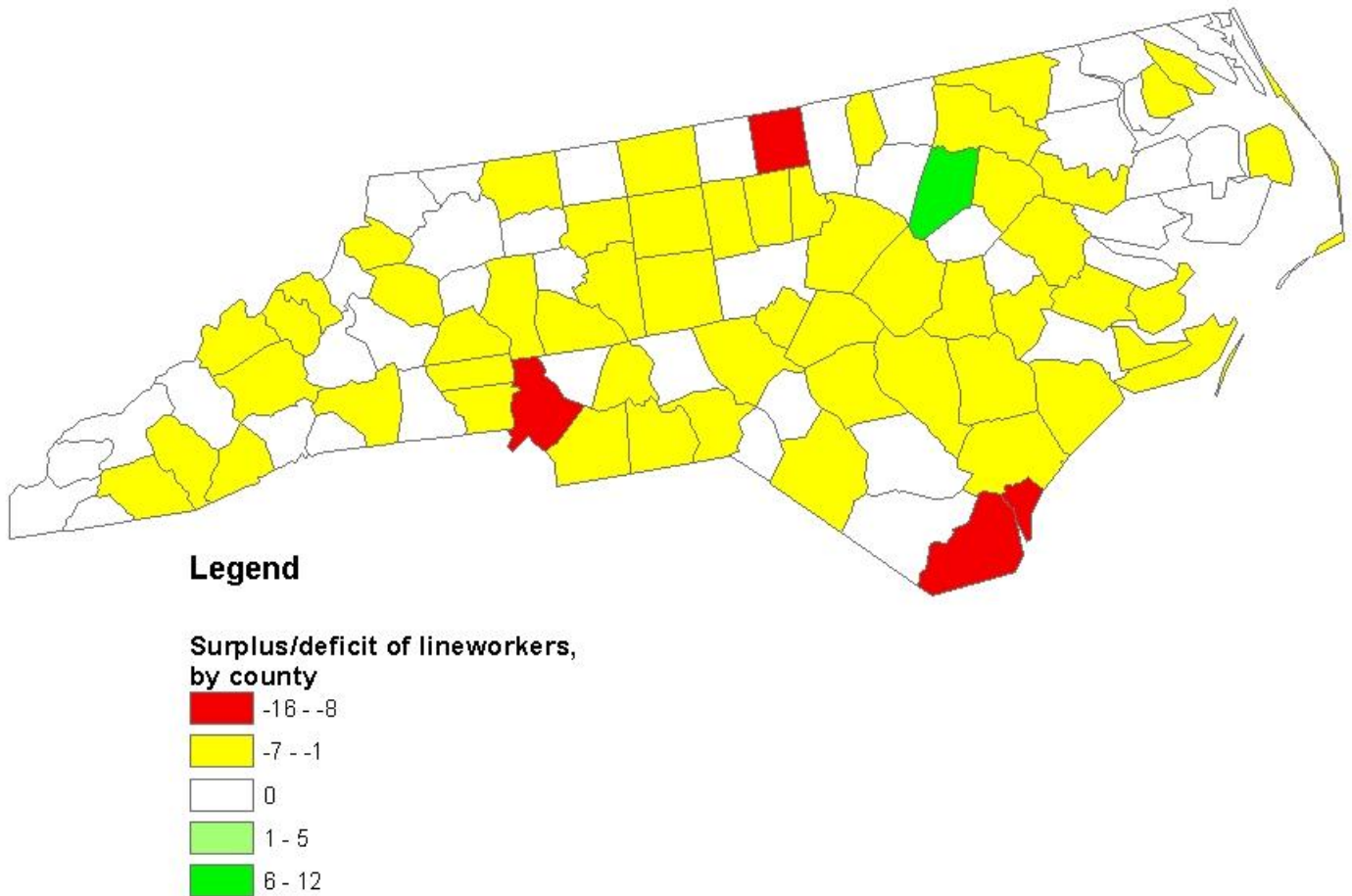


Figure 102. Gap between supply and demand for technicians in North Carolina, by county

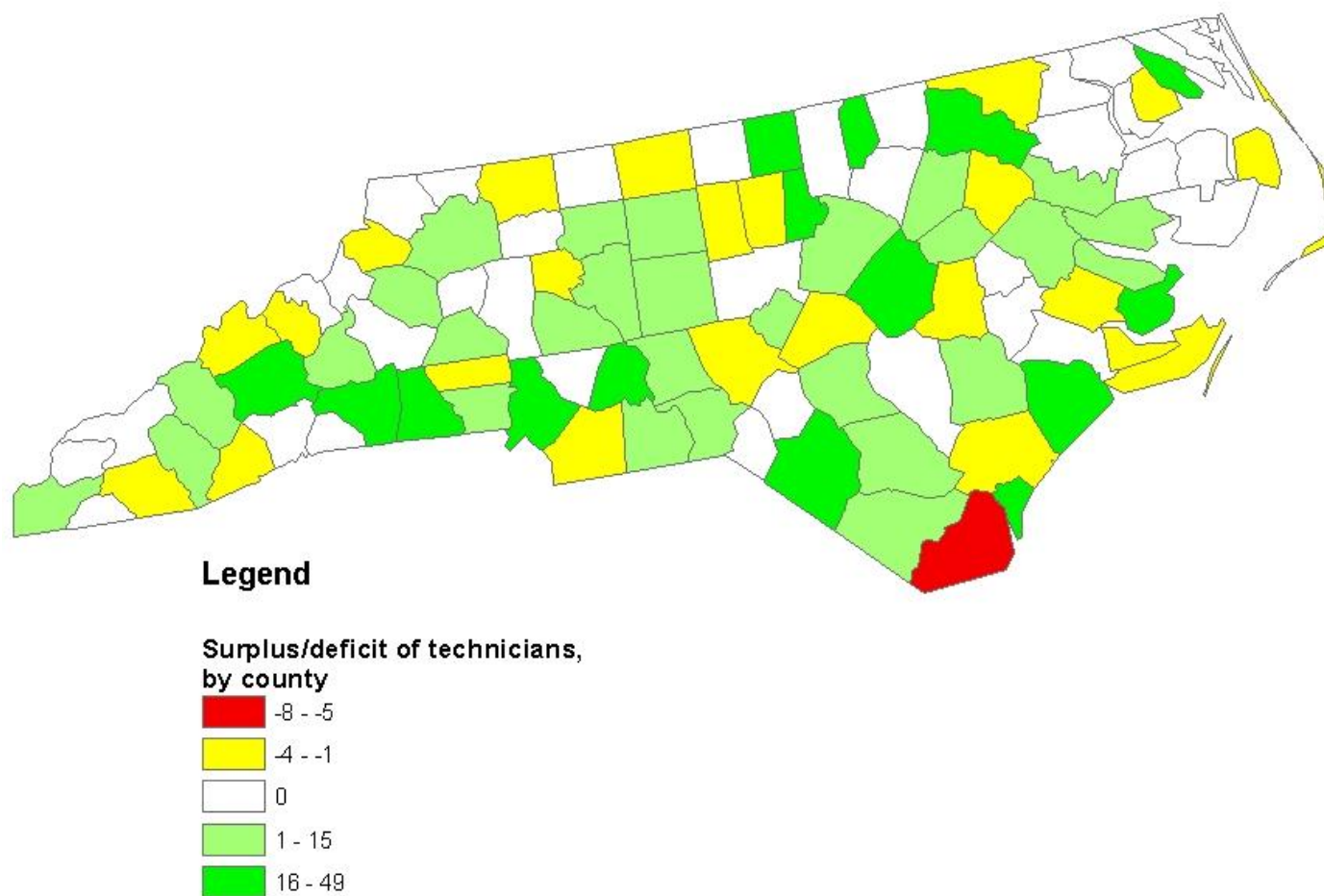


Figure 103. Gap between supply and demand for plant operators in North Carolina, by county

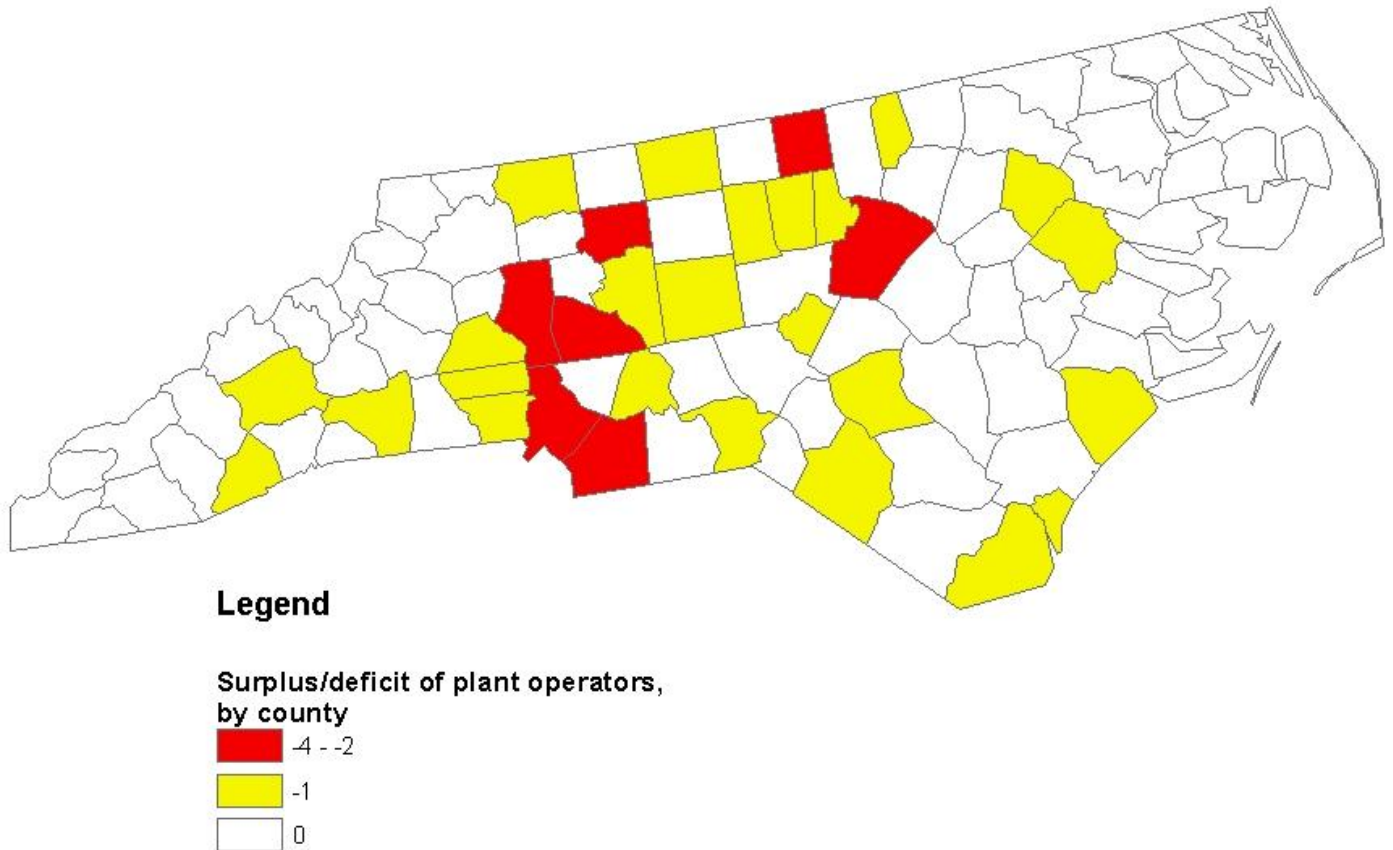
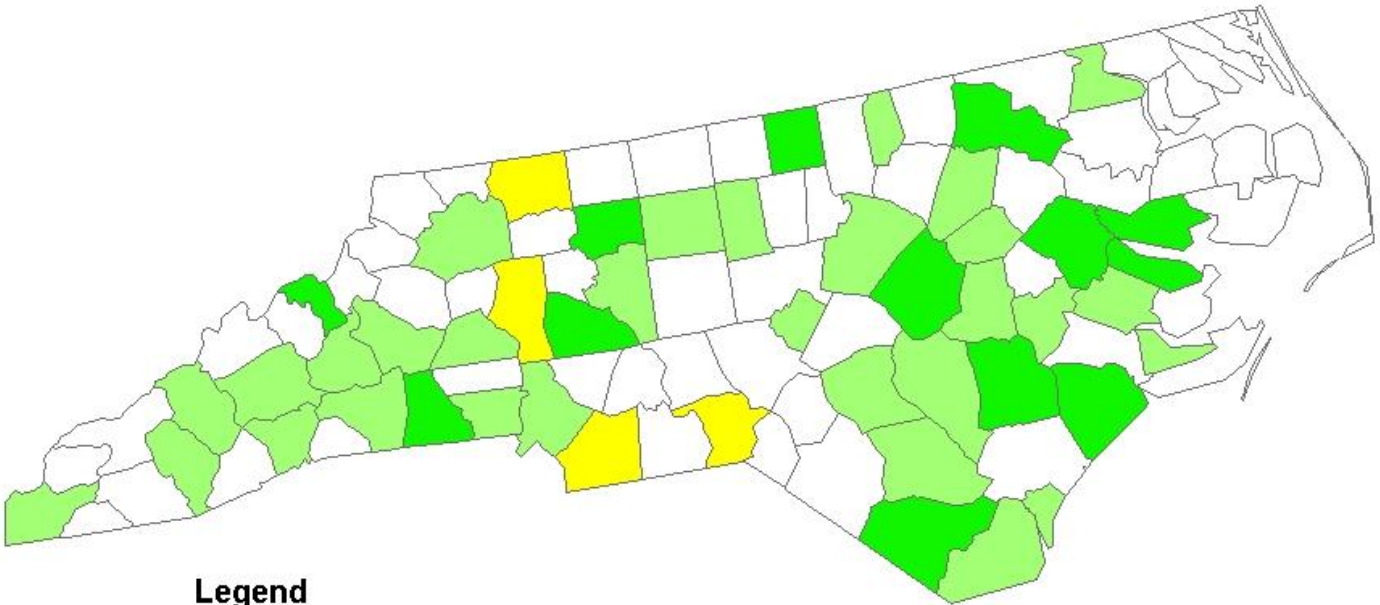


Figure 104. Gap between supply and demand for pipefitters/pipelayers in North Carolina, by county

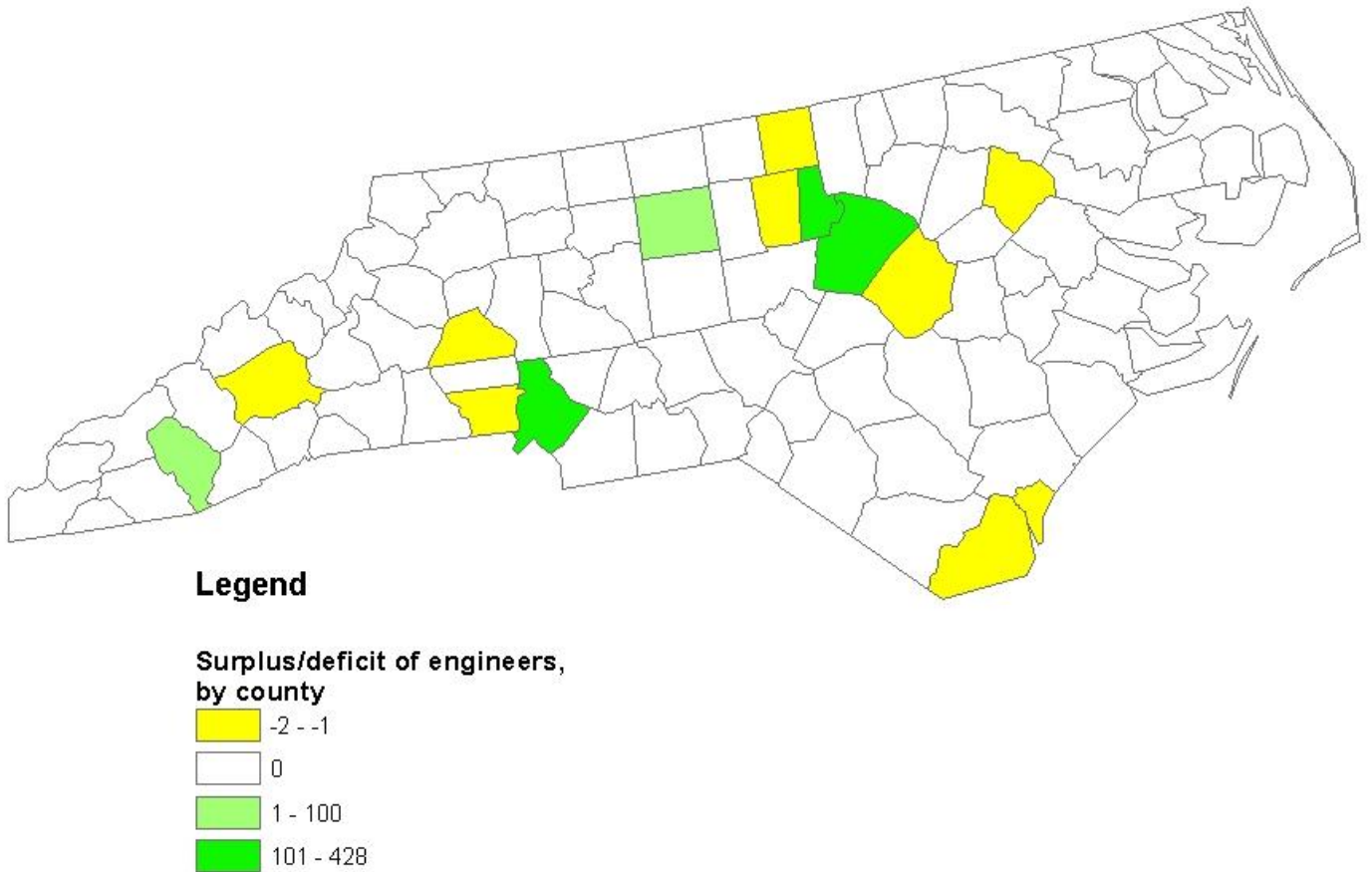


Legend

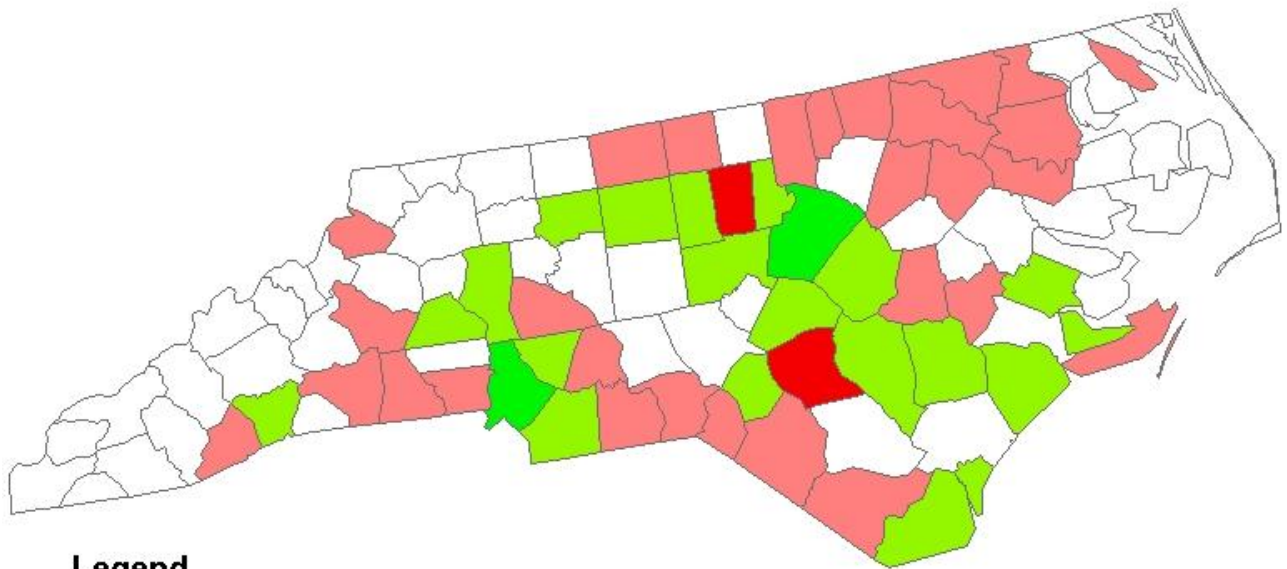
Surplus/deficit of pipefitters/pipelayers,
by county

- 1
- 0
- 1 - 25
- 26 - 59

Figure 105. Gap between supply and demand for engineers in North Carolina, by county



**Figure 106. Projected five-year change (from 2010 to 2015)
in total population aged 16 to 22 years in North Carolina**

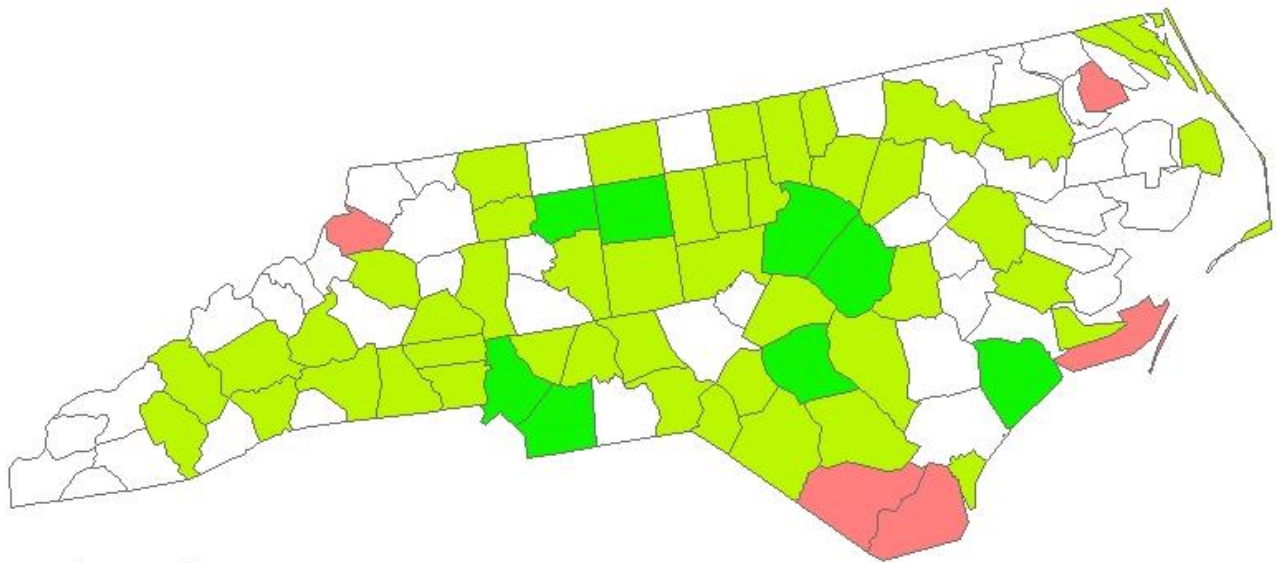


Legend

Change in target population, by county



Figure 107. Projected five-year change (from 2010 to 2015) in total population aged 23 to 26 years in North Carolina



Legend

Change in target population, by county

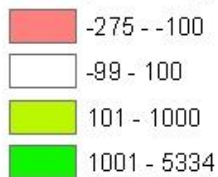
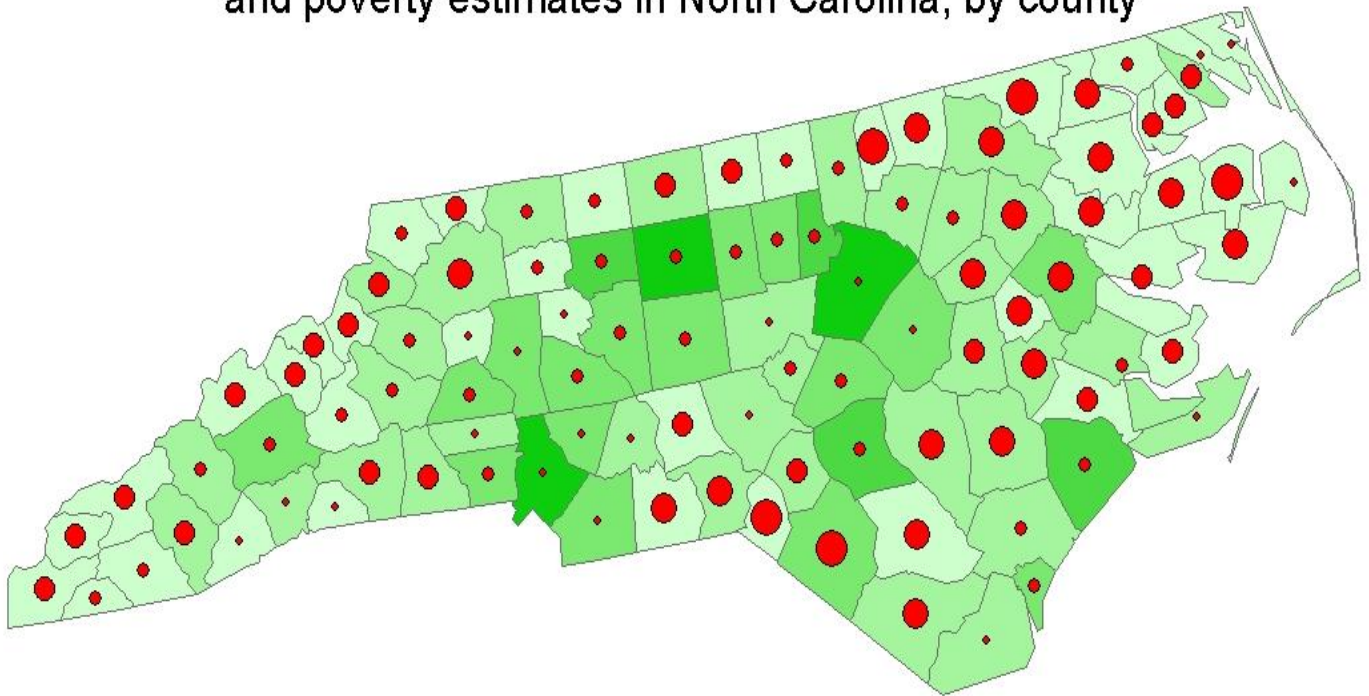


Figure 108. Total population in 2010 aged 16 to 26 and poverty estimates in North Carolina, by county

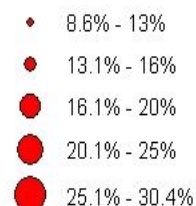


Legend

Total population aged 16 to 26



Percent of all individuals in the county in poverty



Conclusions

An exhaustive enumeration of the supply and demand situations within each county in each state will not be attempted. The interested reader can perform detailed comparisons and assessments they deem informative for their region. Instead, macro-level trends will be summarized.

Perhaps the most immediately apparent trends are those relating to the education age (16 to 22 year olds) and early career (23 to 26 year olds) cohorts. All states are expected to experience a rise in the early career cohort by 2015. The rate of increase varies between 1.7% and 14.7%. Yet for the education age cohort, roughly half the states are expected to experience declines. The rate of change varies from -6.7% to 4.8%. States with lower increases in the early career cohort tend to have decreases in the education age cohort. Further, states with lower poverty rates today are expected to have lower—if not negative—population growth in both age cohorts. Therefore, states with lower poverty rates today may experience demand-side price deflation in the future, whereas the opposite trend may occur for states with relatively higher poverty rates today. Demand-side price deflation may occur simply because of the smaller total population size. Thus the total amount of goods and services demanded in the regional economy would be less—leading to less capital investment, fewer jobs, lower wages, and decreased purchasing power outside the local economic region. Demand-side price deflation is thought to be undesirable and may lead to a deflationary spiral.

Macro trends for the five occupations might best be seen when comparing the gap maps across states. The largest occupational deficits exist for lineworkers (Washington state is the only exception), while technicians are estimated to be in surplus in every state. However, it needs be noted that the analysis only accounts for demand from the energy sector. Certainly demand for the occupational types exists from other sectors, so estimates that result in surpluses may be odious. Estimates resulting in deficits are more reliable, since a deficit is reported when the total supply from educational institutions is less than the total demands of just the energy sector alone. Plant operators are also at a large occupation deficit (with Texas as the only exception). Even though demand for plant operators is the lowest among the five occupations modeled, the low supply of such highly-skilled positions may prove critical. For pipefitters/pipelayers, large surpluses exist in every state, but again the impact on the energy sector is unknown at this level of analysis. Lastly, for engineers, the situation varies greatly by state, so no macro trends can be discerned.

The occupational gaps suggest areas where additional college educational programs, industry-sponsored education and training, and recruitment and retention efforts are lacking—or are overly successful. From this nine state sample, it can be inferred that there will be nationwide shortages of lineworkers and plant operators, and nationwide surpluses of technicians and pipefitters/pipelayers. A reallocation of educational training and recruitment efforts is needed in order to meet the future demands of the energy section and society.