

Think Business. Think Chicago.



Growing Chicago's Clean Energy Economy

Wednesday, May 18, 2011

Our Mission

World Business Chicago (WBC) leads Chicago's business retention, attraction and expansion efforts and raises Chicago's position as a premier global business destination, fostering private sector growth through the advancement of a business-friendly environment that attracts world-class talent.



Our Goals

- Grow the Chicago regional economy through targeted business attraction and expansion efforts.
- Brand Chicago on a global scale as an international center of products, services and ideas.
- Lead the collection, analysis and dissemination of data critical to our clients and partners.



Green Chicago Hub

- #1 City in Green Innovation
- Largest urban solar power plant in the US
- More LEED registered & certified buildings than any other city
- #5 metro for most energy efficient buildings in 2010
- Over 2,600 LEED-credentialed employees
- #1 for 5 years running for sq ft of green roofs installed annually



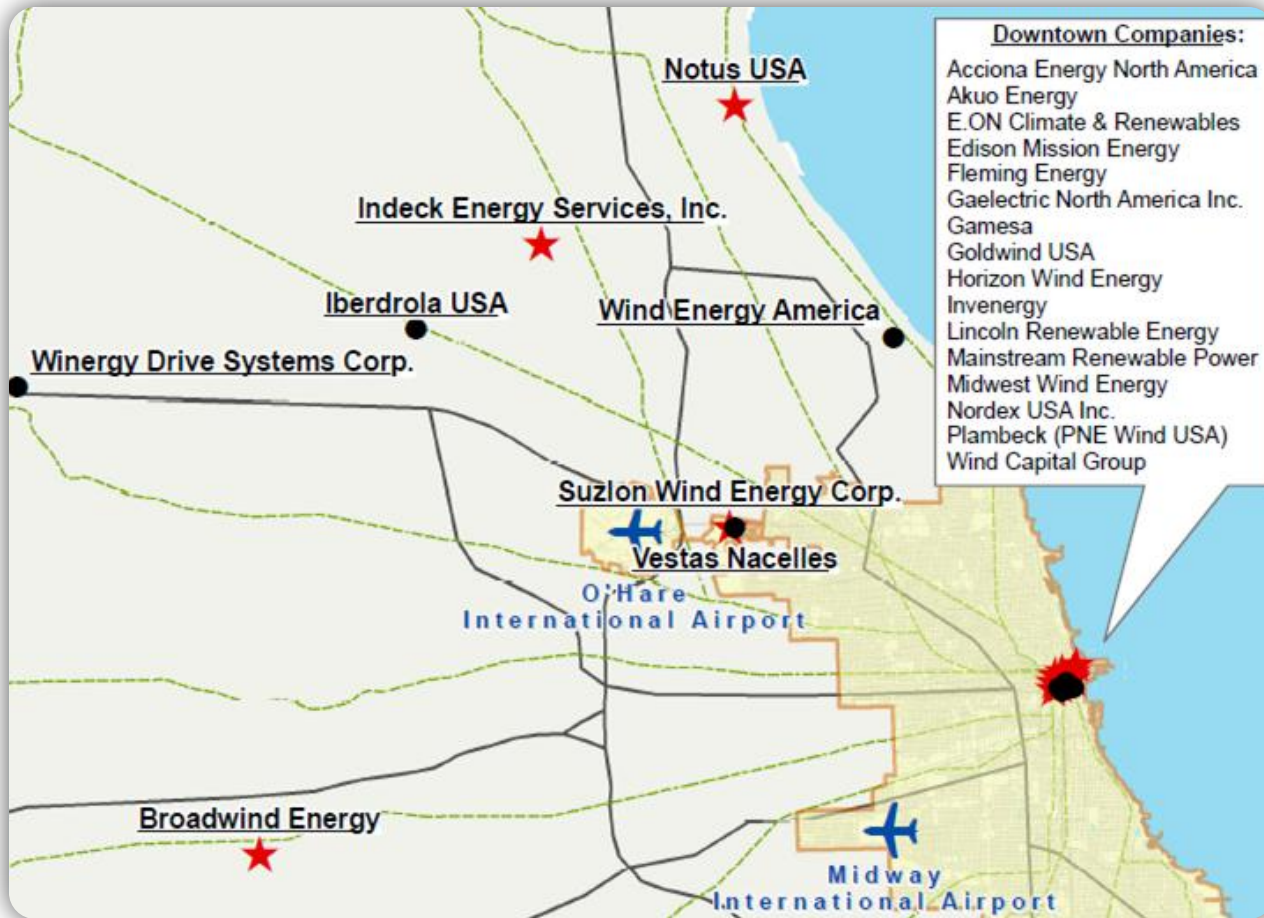
Chicago City Hall

Chicago is home to INVENERGY, one of the Top 5 owners of wind generation assets in the US

Chicago's Green Companies



Clean Energy Center











Clean Energy Center

Chicago is home to 24 clean and wind energy companies, including **16 headquarters**

Company	Location
<i>Acciona Energy North America*</i>	<i>Chicago, IL</i>
<i>Akuo Energy*</i>	<i>Chicago, IL</i>
<i>Broadwind Energy *</i>	<i>Naperville, IL</i>
<i>E.ON Climate & Renewables*</i>	<i>Chicago, IL</i>
Edison Mission Energy	Chicago, IL
<i>Fleming Energy*</i>	<i>Chicago, IL</i>
<i>Gaelectric North America Inc.*</i>	<i>Chicago, IL</i>
Gamesa	Chicago, IL
<i>Goldwind USA*</i>	<i>Chicago, IL</i>
Horizon Wind Energy	Chicago, IL
Iberdrola USA	Palatine, IL
<i>Indeck Energy Services, Inc.*</i>	<i>Buffalo Grove, IL</i>
<i>Invenergy*</i>	<i>Chicago, IL</i>
<i>Lincoln Renewable Energy*</i>	<i>Chicago, IL</i>
<i>Mainstream Renewable Power*</i>	<i>Chicago, IL</i>
<i>Midwest Wind Energy*</i>	<i>Chicago, IL</i>
<i>Nordex USA Inc.*</i>	<i>Chicago, IL</i>
<i>Notus USA*</i>	<i>Lake Forest, IL</i>
<i>Plambeck (PNE Wind USA)*</i>	<i>Chicago, IL</i>
<i>Suzlon Wind Energy Corp.*</i>	<i>Chicago, IL</i>
Vestas Nacelles	Chicago, IL
Wind Capital Group	Chicago, IL
Wind Energy America	Winnetka, IL
Winergy Drive Systems Corp.	Elgin , IL

****Headquarters***

8 Criteria Were Used to Evaluate Green Tech Categories for WBC

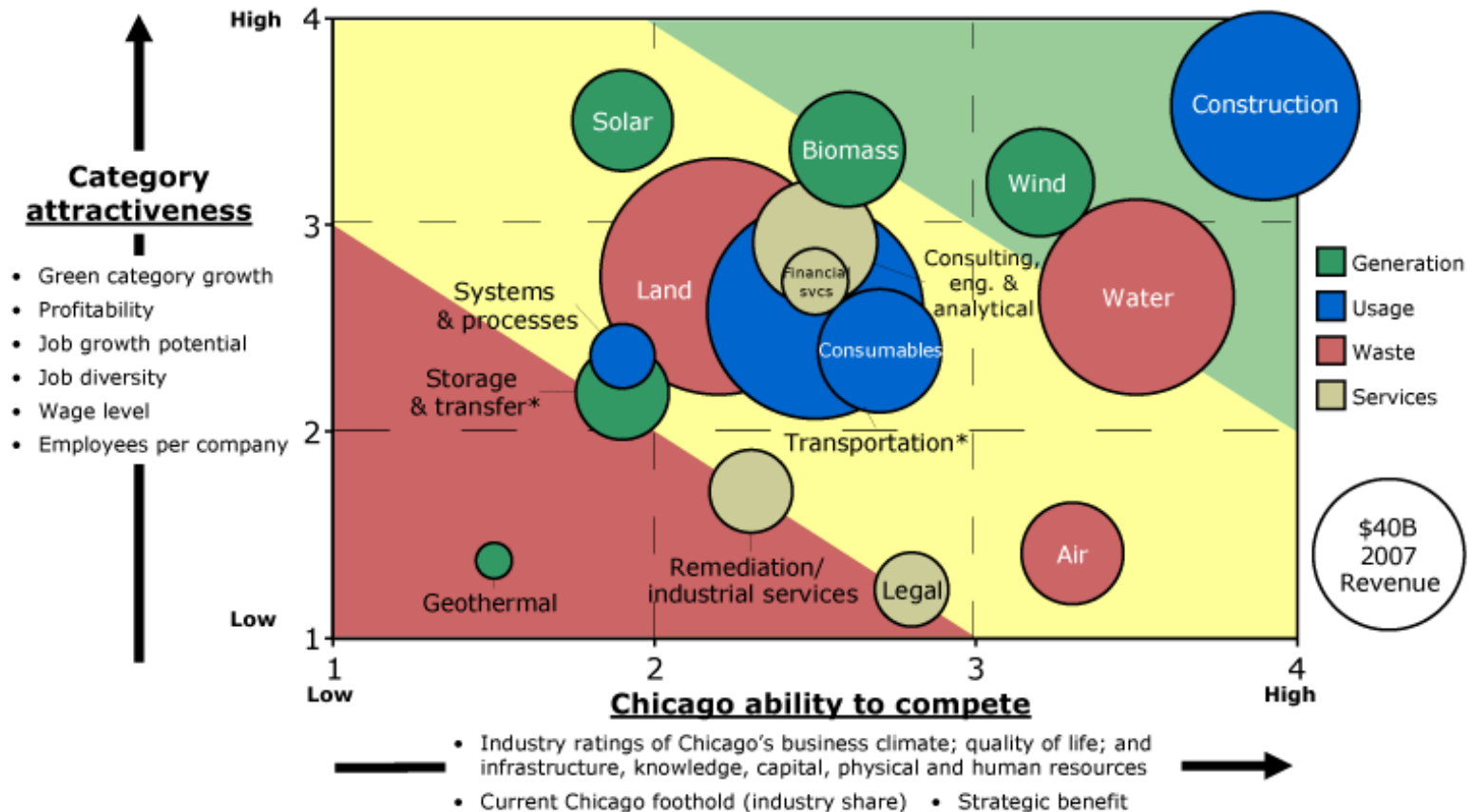
Category attractiveness						Chicago ability to compete		
Category characteristics		Economic development						
Category growth	Category profitability	Green Tech future job potential	Job diversity	Wage level	Employees per company	Chicago capabilities & resources	Strategic benefits	
Description:	<ul style="list-style-type: none"> Future projected growth (CAGR 2007 – 2012E) with consideration for long-term growth potential 	<ul style="list-style-type: none"> 2007 Green tech revenue x profitability of category (2007 average margin across broader industry*) 	<ul style="list-style-type: none"> Change in total no. of jobs in workforce across broader industry* (forecast through 2030) 	<ul style="list-style-type: none"> Measure of job type diversity within each category (2007) 	<ul style="list-style-type: none"> Weighted average annual wage level per job created across broader industry* (2007) 	<ul style="list-style-type: none"> Weighted average number of employees per company across broader industry* (2007) 	<ul style="list-style-type: none"> Industry ratings of Chicago's business climate; quality of life; and infrastructure, knowledge, capital, physical and human resources Level of effort required to augment capabilities and resources Chicago footprint 	<ul style="list-style-type: none"> Ability to benefit existing Chicago businesses Excitement/ hype
Rationale:	<ul style="list-style-type: none"> Growth in category size 	<ul style="list-style-type: none"> Bottom line impact to companies in that market Sustainability 	<ul style="list-style-type: none"> Job market health 	<ul style="list-style-type: none"> Job creation for population with diverse skills and experience 	<ul style="list-style-type: none"> Economic benefit to jobs created 	<ul style="list-style-type: none"> Jobs created per company win 	<ul style="list-style-type: none"> Chicago's current ability to compete in given category Chicago's level of effort required to be competitive 	<ul style="list-style-type: none"> Marketing/ PR benefits Existing Chicago economy benefits
Priority:								



*Note: "Broader industry" includes both green and non-green subsegments

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Green Technology Strategy



Note: *On watch list; Chicago capabilities for Remediation/ Industrial services used as proxy for Land waste

Source: Bain analysis and interviews

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WBC Should Focus on 6 Categories for Additional Research and Action Planning

Highest priority categories for WBC	
Category	Key next steps
1 Construction (Usage)	<ul style="list-style-type: none"> • Determine job, wage, revenue, and other economic impacts of the green technology categories for Chicago economy • Deep-dive on category characteristics (e.g. category attractiveness and Chicago capabilities) across value chain for the highest priority categories • Quantify the investment required to develop Chicago as the leader for economic development in these priority categories • Build an implementation plan (e.g. high-level activities, owners, timeframe, company target list) for priority categories • Develop tracking mechanism (e.g. company growth, jobs created) to determine effectiveness of Chicago penetration into priority markets • Develop public policies aimed at enhancing the overall competitive advantages of the highest priority categories
2 Wind (Generation)	
3 Biomass (Generation)	
4 Water (Waste)	
Watch list categories for WBC	
Category	Key next steps
5 Storage and transfer (Generation)	<ul style="list-style-type: none"> • Follow industry trends (e.g. market dynamics, industry breakthroughs, administration policy changes) to determine if the category metrics have changed • Re-prioritize if necessary
6 Transportation (Usage)	

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