

Stakeholder Priorities in Wind Energy



Eric Lantz, NREL

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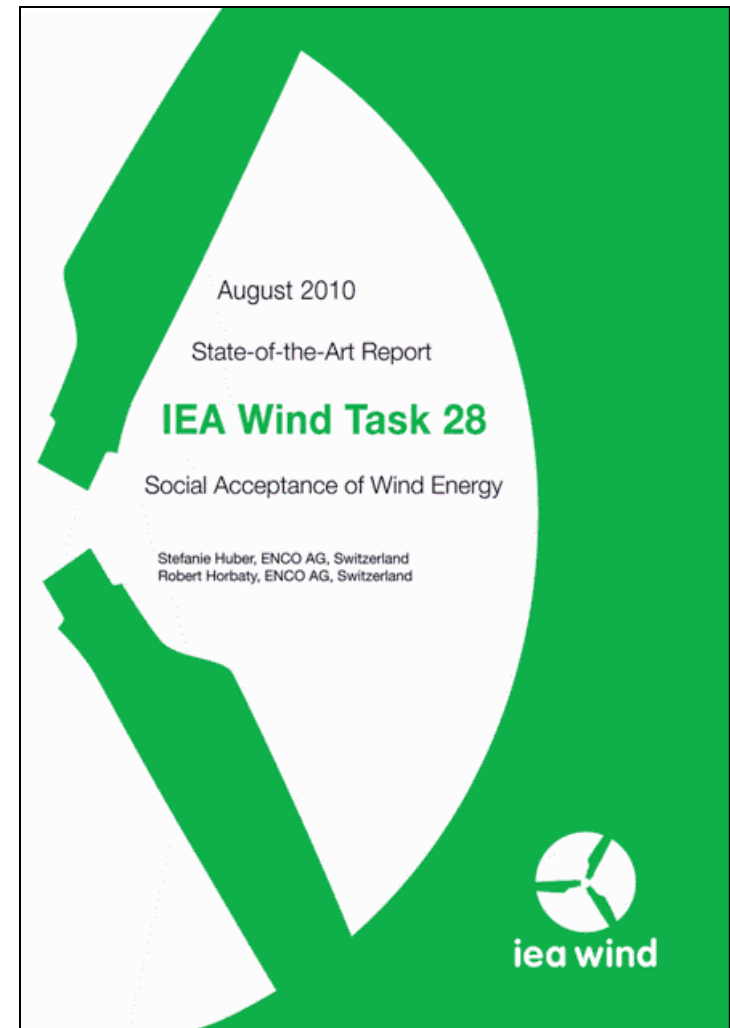
Presentation Overview

- 1) Premise/Background
- 2) Basic Approach
- 3) Primary Takeaways
- 4) Priorities by Region
- 5) Priorities by Type



Understanding Stakeholder Values and Concerns is Critical to Wind Project Success

- Project success depends on one's ability to manage varied community interests.
- Knowledge of stakeholders and their values allows space to develop a strategy that solves potential problems before they emerge.



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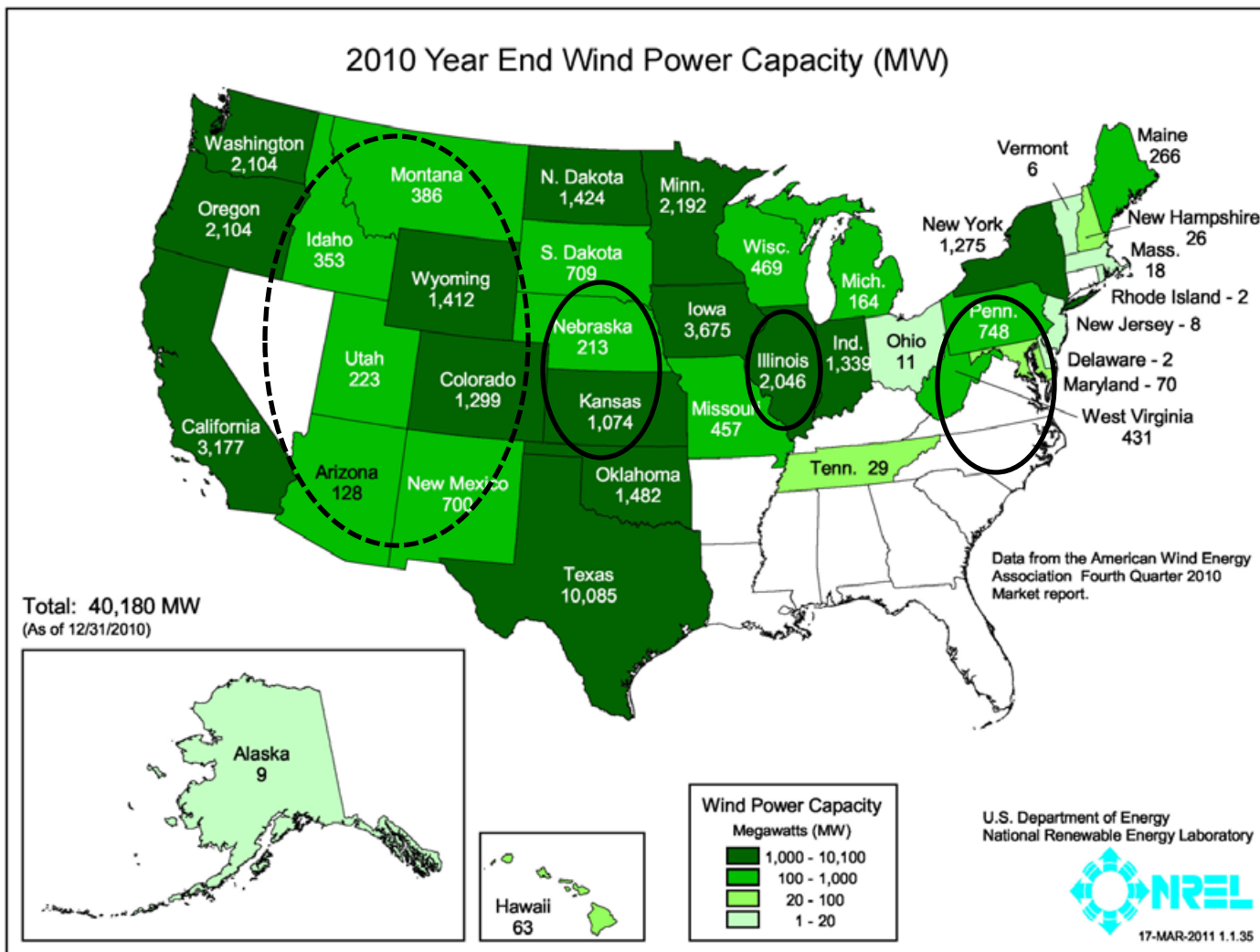
Basic Approach to Understand Stakeholder Values

Variables should be ranked from 1 to 10, with 1 being the most important.

	Local economic impacts
	Cost of electricity
	Emissions reductions and water savings
	Wildlife impacts
	Energy security
	Human health and safety
	Electricity reliability
	Land use
	Aesthetics and property values
	Noise and property values

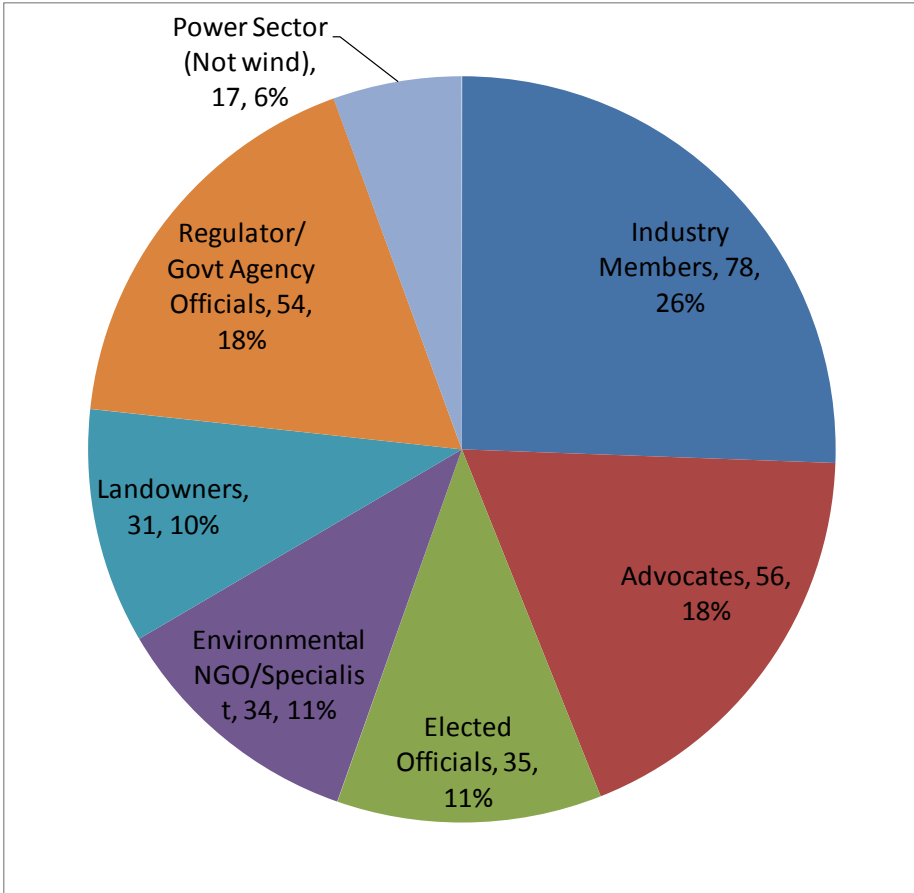
- Develop a simple survey instrument
- Distribute to the Wind for Schools/Wind Application Centers
- Distribute voluntary survey at WWG meetings, energy fairs/events, to conference mailing lists, etc.
- Stakeholders engage in two activities:
 - **Force ranking of 10 wind-specific variables by “importance to you”**
 - **Rating the relative significance of aesthetics, noise, and wildlife in the industry’s ability to achieve 20% wind by 2030.**

Data Represent the Midwest, Great Plains, Mid-Atlantic (and Alaska)

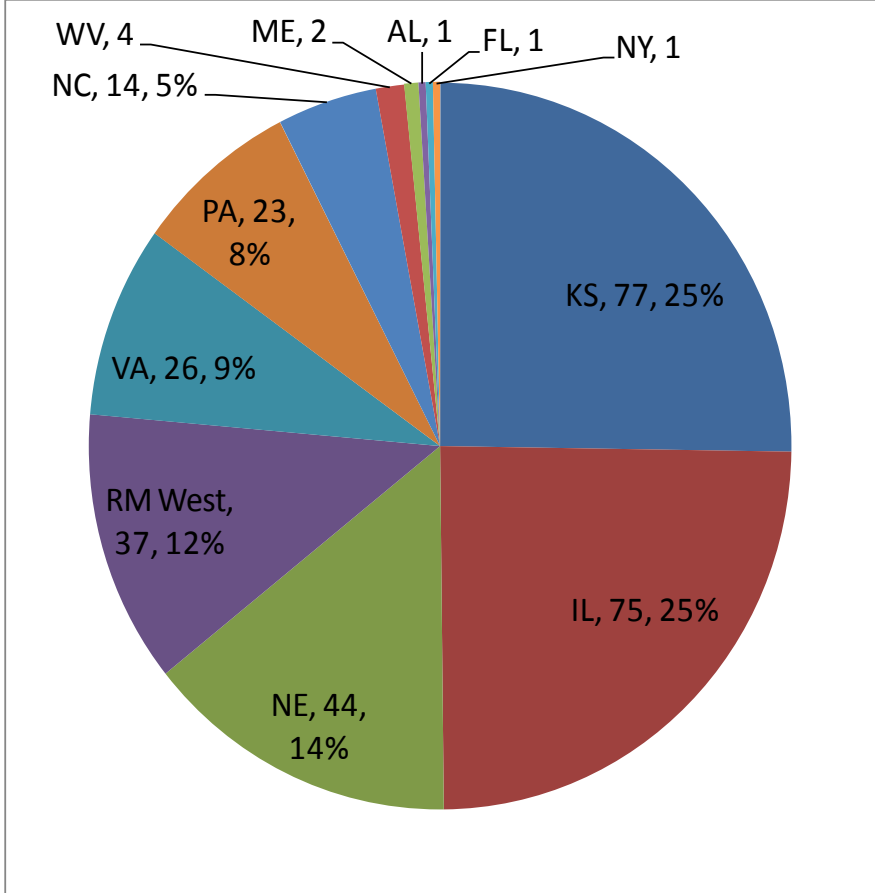


Data are Weighted toward Industry and the Midwest

Responses by Group



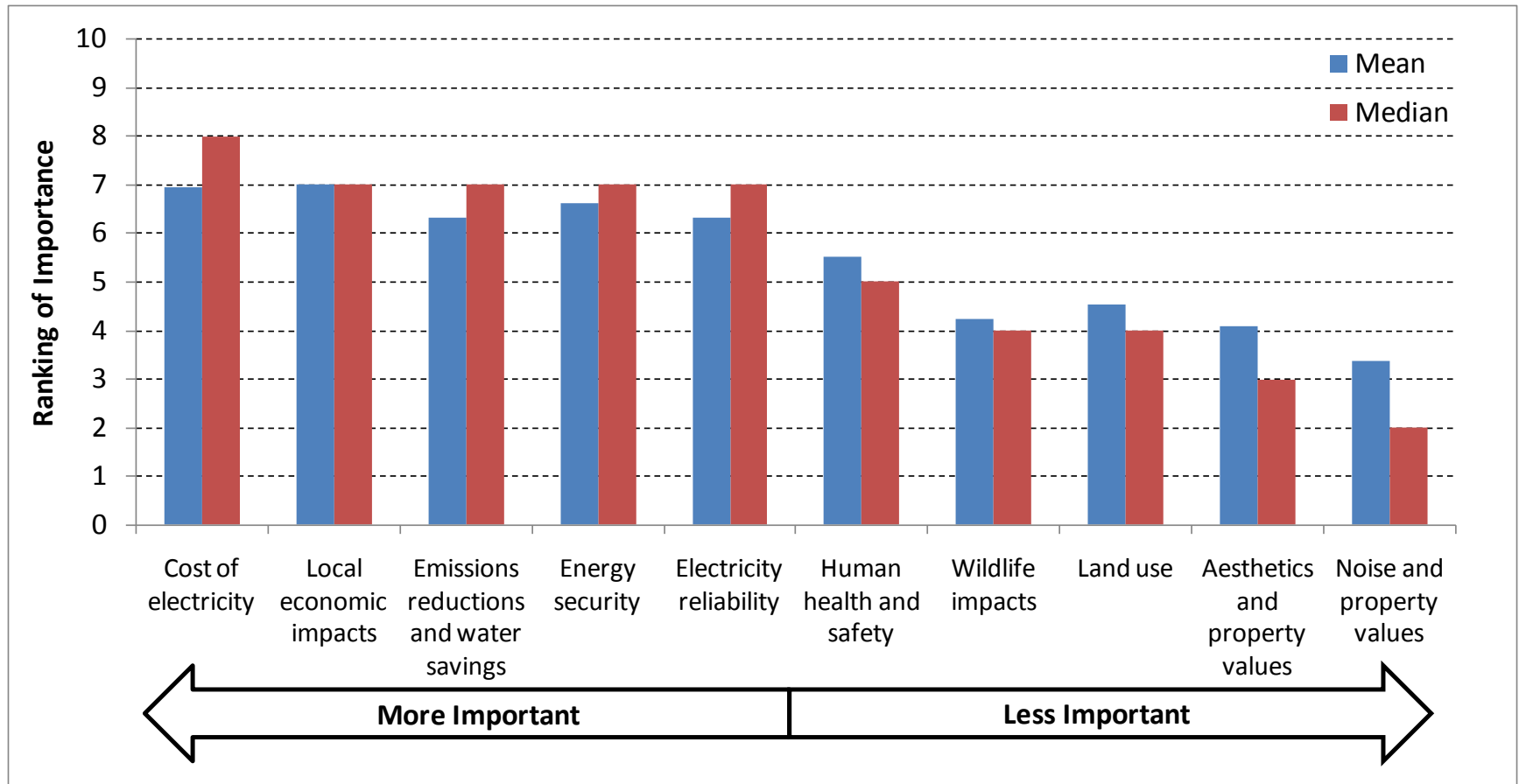
Responses by State



Primary Takeaways

- **Stakeholders are difficult to generalize... even within specific groups, opinions often vary widely.**
 - Recognizing diversity between and within groups requires attention to local context (e.g., Kansas).
 - A pre-development stakeholder assessment is likely to be valuable.
- **The most important issues to individuals were benefits (e.g., economic development, energy security), but the challenges resulting from perceptions of noise, aesthetics, and wildlife impacts cannot be dismissed.**
 - A substantial minority expect these issues to limit development to some degree.
- **A gap exists between the priority/important issues for the industry and advocates and those of landowners, project neighbors, and land managers.**
 - Landowners and neighbors are much more concerned with aesthetics, noise, and wildlife.
 - Increased emphasis on developing and adhering to best practices may be merited.
- **Economic development is clearly valued by all stakeholders.**
 - Projects must find ways to ensure that *local host communities* realize substantive economic development from projects.

Midwest Results: Force Ranking by Importance

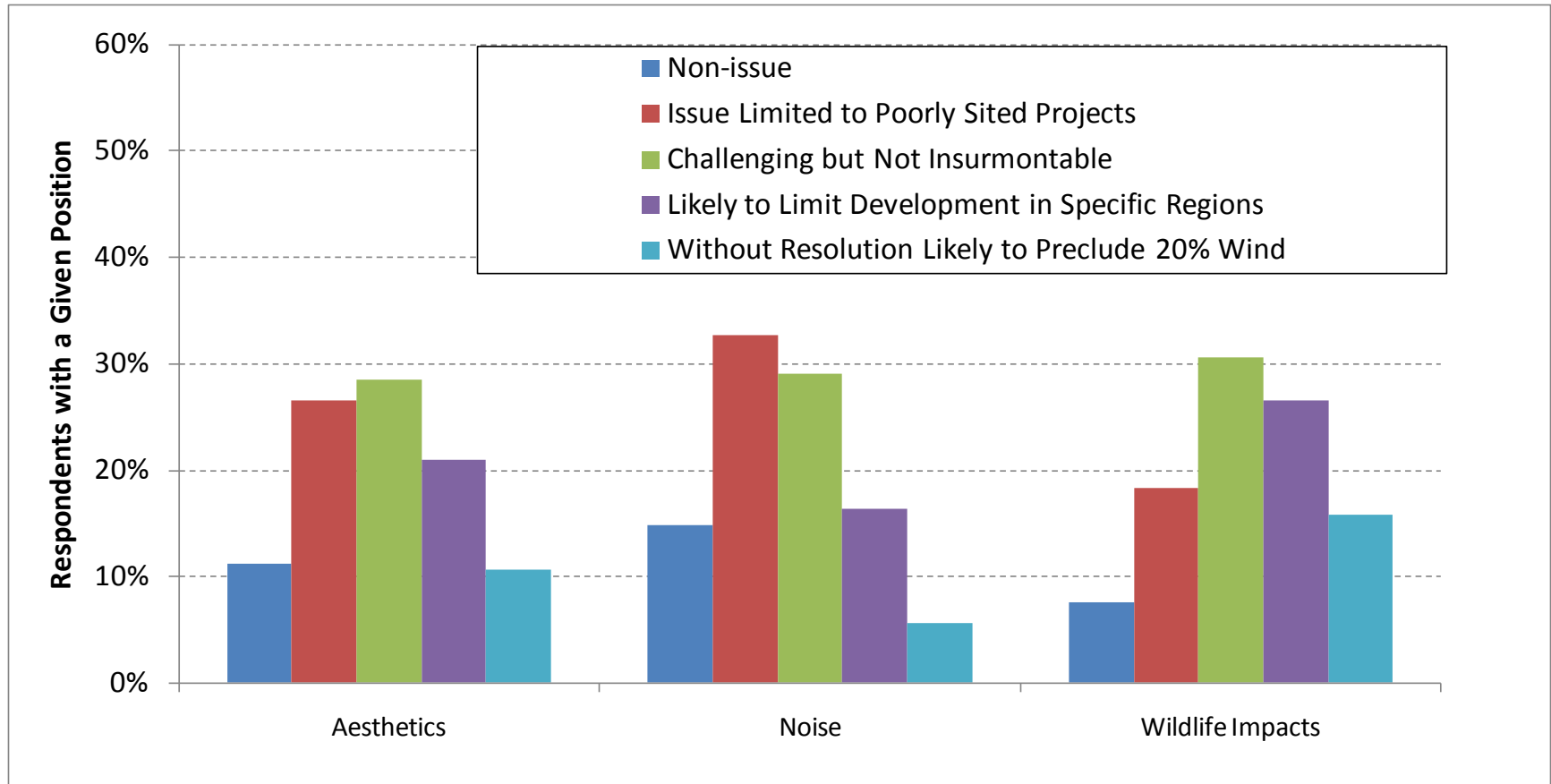


On average: Midwest respondents tend to think *cost of electricity is most important.*

Primary Responding Groups

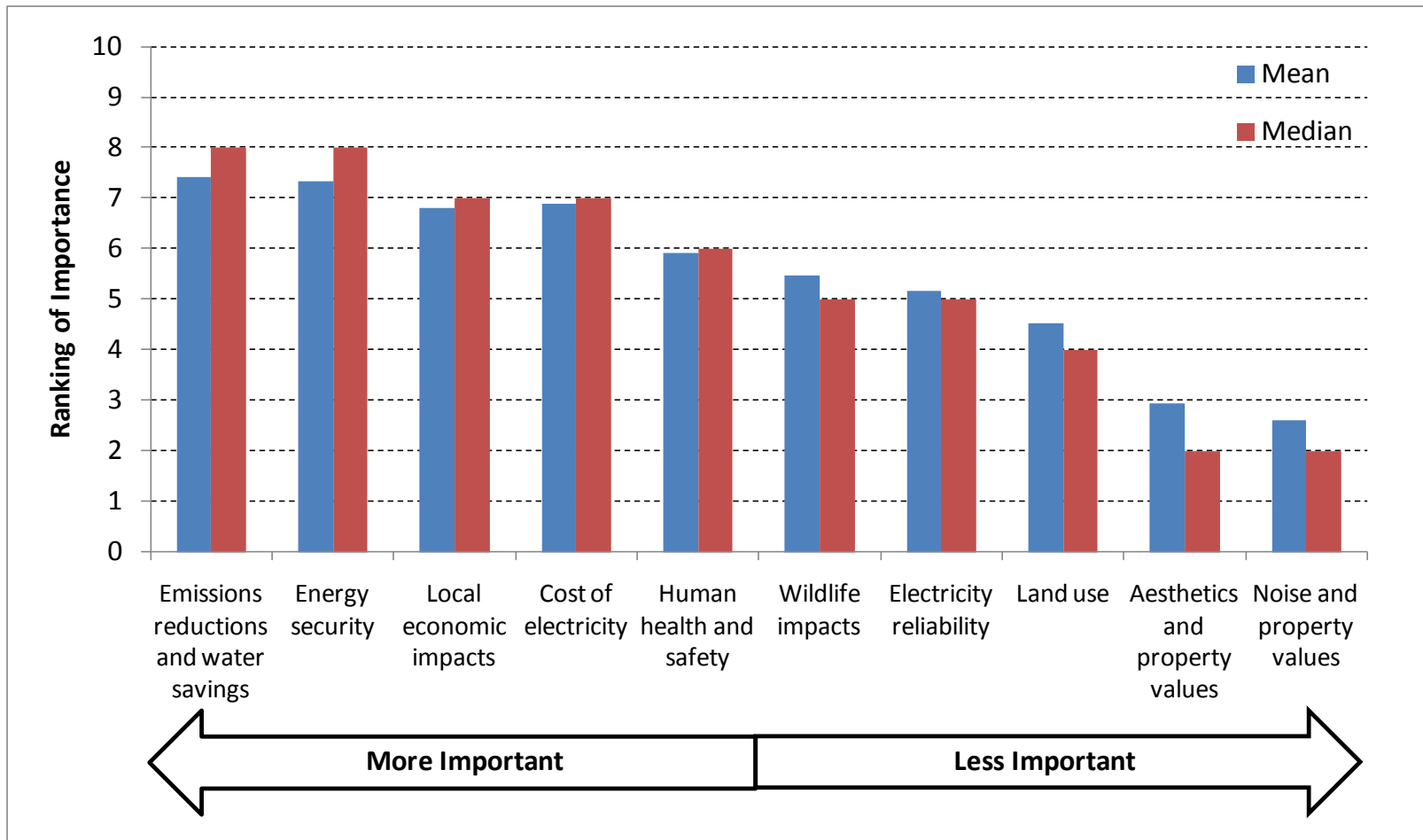
Industry Members	29%
Advocates	17%
Elected Officials	12%
Environmental NGOs/Specialists	10%

Midwest Results: Relative Importance of Commonly Cited Social Acceptance Issues



- 20% to 40% feel that these issues are likely to limit development in specific areas.
- Despite relatively low ranking in terms of personal importance, these issues are noted to be important for the long-term success of the industry.
 - *A notable majority (50% to 70%) see them as industry challenges.*

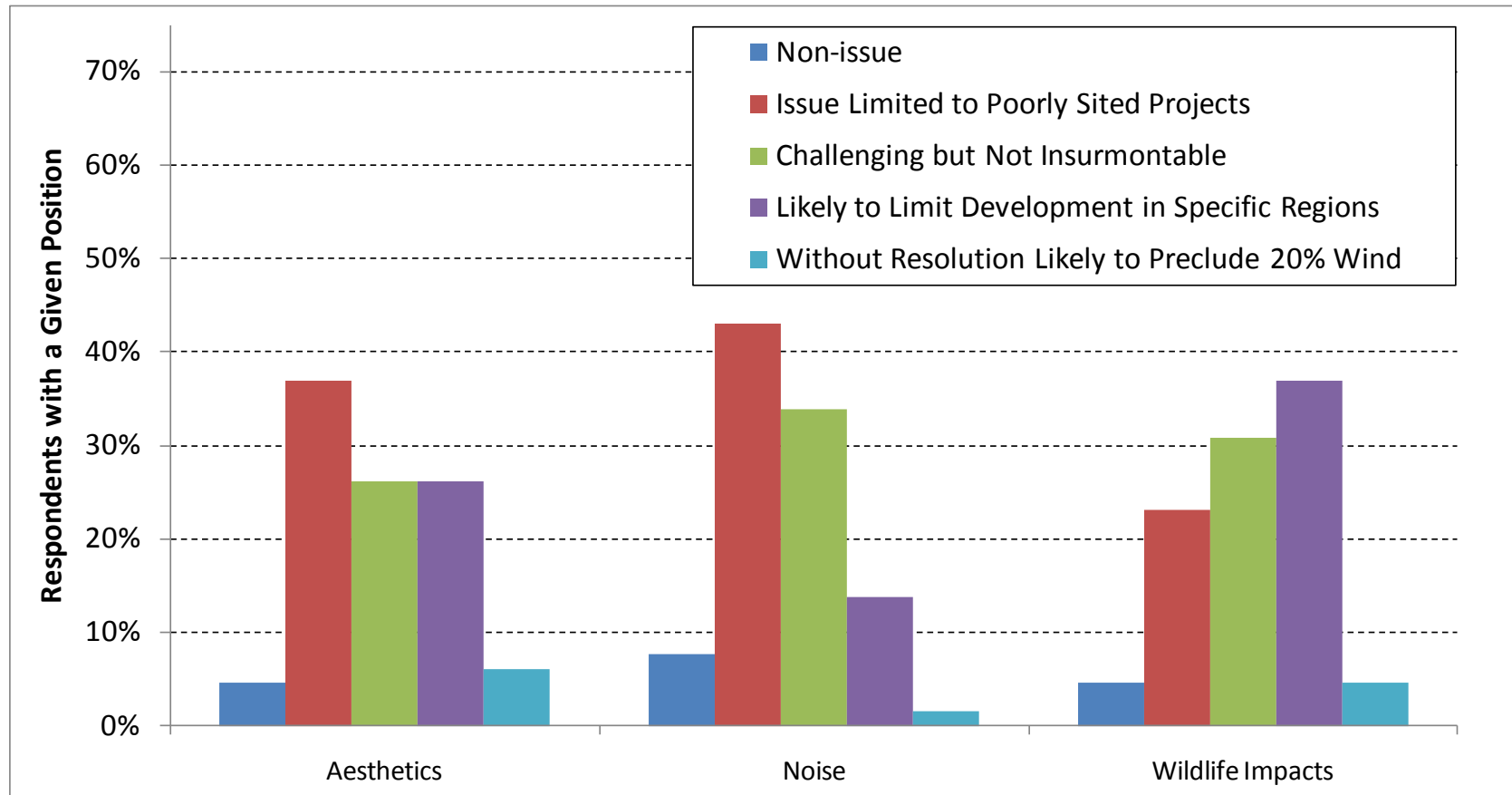
Mid-Atlantic Results: Force Ranking by Importance



On average: Emissions reductions and water savings are personally important.

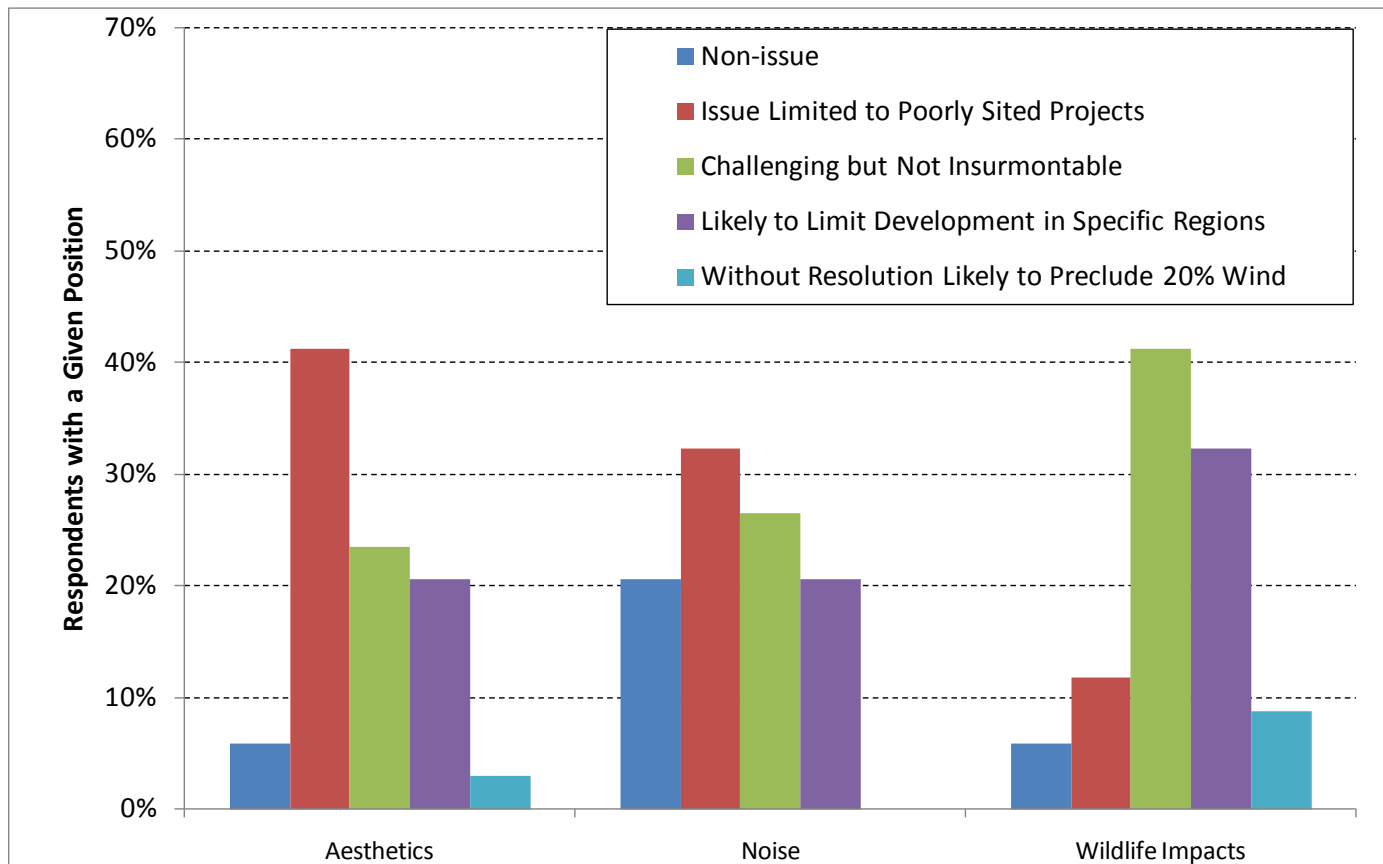
Primary Respondents	
Advocates	31%
Industry Members	27%
Environmental NGOs/Specialists	19%

Mid-Atlantic Results: Relative Importance of Commonly Cited Social Acceptance Issues



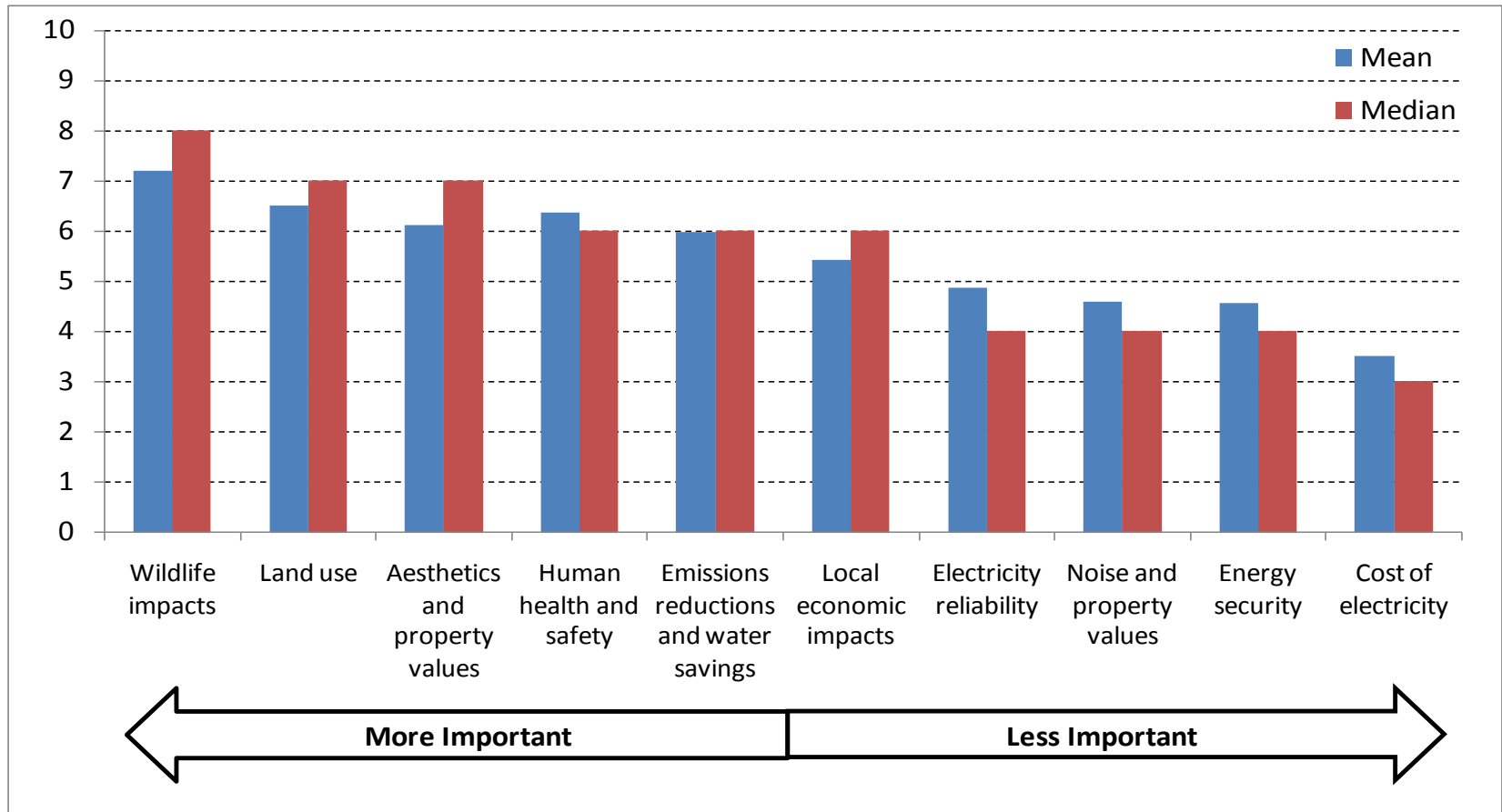
- This sample contains fewer extreme views but consistently demonstrates that a large minority (30% to 40%) are concerned about aesthetic and wildlife impacts.
- Noise is generally characterized as a problem limited to “a small percentage of poorly sited projects,” but nearly 50% think it’s a challenge.

Elected Officials' Opinions on Aesthetics, Noise, and Wildlife



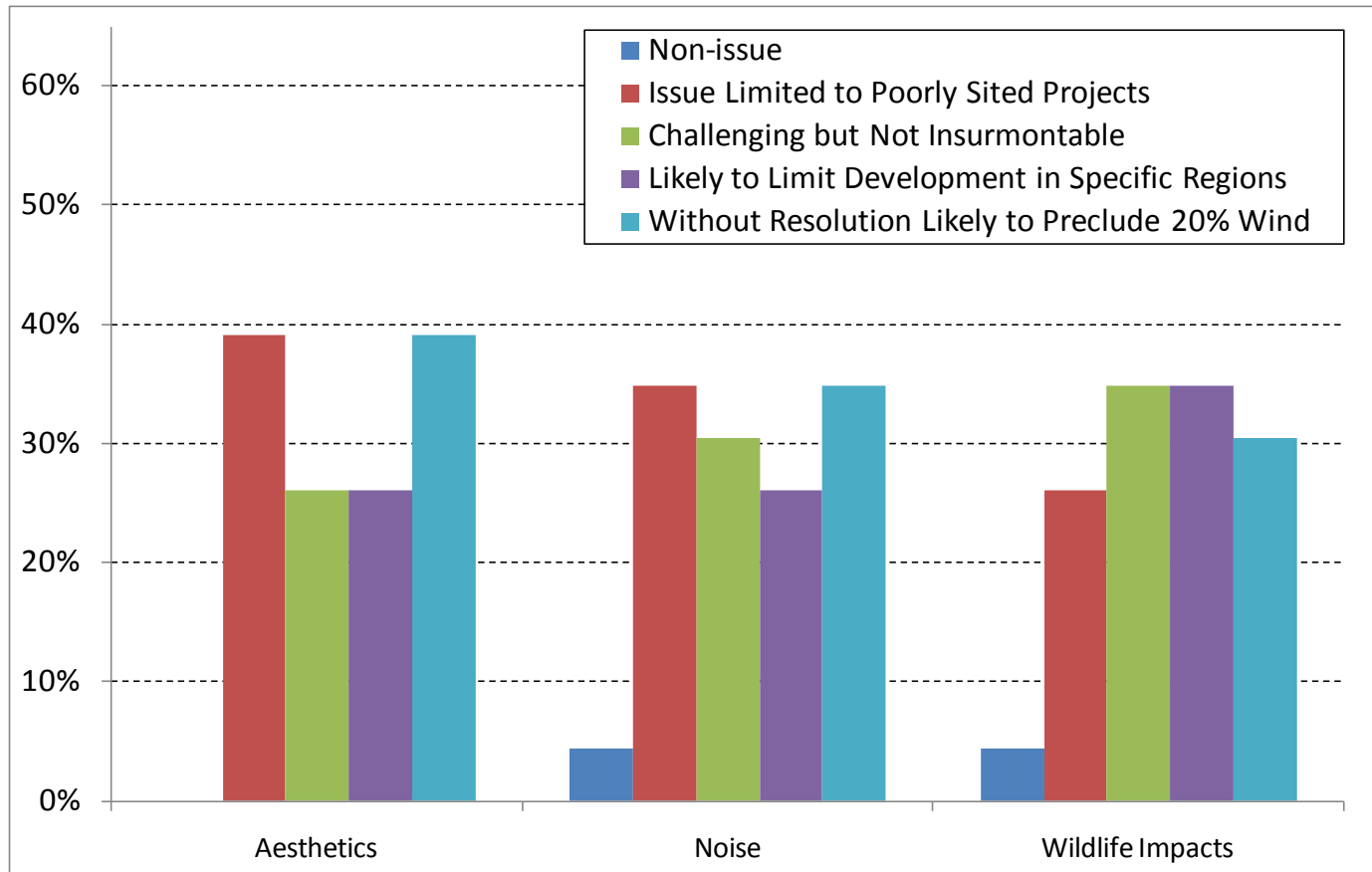
- Wildlife impacts are seen as a *formidable challenge* for the industry.
- Aesthetics and noise are expected to limit deployment (20% to 25% of respondents).
- Elected officials tend to view economic development and electricity costs as most important.

Federal Land Management Officials' Priorities



- *Wildlife and land use* are of much greater importance for these individuals.
- Data indicate that *local impacts* are high priorities among land managers, more so than among most other groups.

Landowner and Neighbor Perspectives



- This pivotal stakeholder group sees these issues as of fundamentally greater value than any other group.
 - 30% to 40% see that these issues could prevent the industry from achieving 20% wind by 2030.
- Common industry level drivers (e.g., energy security, economic development, electricity costs) are also relatively important for individuals in this group.

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Questions

Eric Lantz

Research Analyst

Strategic Energy Analysis Center

National Renewable Energy Laboratory

<http://www.nrel.gov/analysis/>

<http://www.windpoweringamerica.gov/>

1617 Cole Blvd.

Golden, CO 80401-3393

P: (303) 384-7418

E-mail: Eric.Lantz@nrel.gov