

Abstract

While energy policy has become a talking point for everything from national security to rural economic expansion to job stimulation, the environmental community has had rather little success in effectively engaging these stakeholders in climate policy discussions. One group, called the Apollo Alliance, has attempted to bring together labor and environmental interests to shape climate policy in the U.S., however no such alliance currently exists in North Carolina. This analysis proposes to gauge the potential for a labor-environmental coalition to influence North Carolina energy policy and identify policy-making institutions and opportunities for such a coalition.

Original interviews from labor and environmental organizations throughout the state are analyzed using the Advocacy Coalition Framework and general alliance formation theory. In addition, the Obach model predicting the health of blue/green relations is applied to North Carolina through the examination of significant independent variables. Findings suggests moderate potential for a blue/green alliance to shape the energy policy of North Carolina. A variety of proposals are suggested as initial targets of such a coalition including renewable fuel tax exemptions, energy conservation retrofits in state-owned facilities, and strengthened lobbying reforms. The North Carolina General Assembly is identified as the primary target for such a coalition due to the existing legislative presence of relevant organizations. Given the recent formation of state-sponsored climate advisory groups and mounting public attention to energy issues nationally, the time ripe for such an alliance to affect change in North Carolina's energy policy.

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Introduction

Recently the energy policy discourse has become a lightning rod for spokespeople of environmental protection, national security, rural economic expansion, and job stimulation. Seemingly endless proposals abound for prescribe everything from how we derive our energy to how we use it, and the implications of these policy decisions are incredibly complex and far-reaching. While those in environmental circles view energy and climate policy as inseparable, this link may not be as obvious to others. Despite the breath and strategic importance of these diverse energy interests, the environmental community has had limited success in effectively engaging other stakeholders in the climate policy discussion. In the much talked about essay, “The Death of Environmentalism” the authors claimed that:

The marriage between vision, values, and policy has proved elusive for environmentalists. Most environmental leaders, even the most vision-oriented, are struggling to articulate proposals that have coherence. This is a crisis because environmentalism will never be able to muster the strength it needs to deal with the global warming problem as long as it is seen as a “special interest.” And it will continue to be seen as a special interest as long as it narrowly identifies the problem as “environmental” and the solutions as technical (Shellenberger, 2004, p. 27).

In light of environmentalists’ aforementioned deficiency of a comprehensive policy vision and an effectively mobilized political base, the essay’s authors went on to articulate hope in a then-nascent alliance between labor and environmental interests called the Apollo Alliance (AA) (*see Appendix 1*). Officially launched in June of 2003, the AA reframes the energy policy discussion around an optimistic vision of “creating the next generation of American industrial jobs and treating clean energy as an economic and security mandate to rebuild America.” The initiative, which derives its name from JFK’s national challenge to send a man to the moon, presents America’s energy policy questions not as a predicament but as an opportunity for economic expansion and environmental protection. The AA articulates a ten-point plan which,

while not an explicitly environmental agenda, calls for policies such as energy efficiency, renewable technology, and smart growth planning. In this way, energy and by extension climate policy, resonates with both labor and environmental groups, broadening the political capital needed to influence policy change. Apollo coalitions have formed in dozens of states and cities around the country, but currently no such program exists in North Carolina.

This analysis focuses on the state of North Carolina for a few reasons. First, as a student in and resident of the state, I have a vested interest in the direction of North Carolina's energy policy. Second, while other regions of the country contain examples of relatively progressive energy policies, the Southeast lags behind in regards to these initiatives. Implementing effective energy policy in North Carolina could set a precedent in the region and may pave the way for other states in the region to follow suit. Lastly, the state's wealth of technological expertise, located principally in the Research Triangle, offers ample opportunity to capitalize off a high-tech, clean energy policy agenda.

While climate change policy inches along at the federal level, many states are making headway by crafting state law and joining regional initiatives. The Southeast has been reticent in joining this state climate policy trend; however, North Carolina has recently opened discussion of climate policy at the state level with the formation of its Climate Action Plan Advisory Group and its Legislative Commission on Global Climate Change.

These forums, comprised of members of the state's electric utilities, trade associations, environmental groups, and research institutions, represent an opportunity to engage ostensibly unrelated interests in the state's emerging energy and climate policy dialogue. Of particular interest to this analysis is the potential for the state's labor community to identify relevance in

such discussions. Given that labor trends in North Carolina are changing amidst an exodus of manufacturing plants and environmental groups are bringing climate change dialogue to the attention of state policy makers, an alliance of labor and environmental groups could be a promising force to influence the direction of North Carolina energy policy.

Background

Much of the American public currently holds a misconception that there is a trade-off between jobs and environmental protection. Often times, this situation is portrayed by the media and industry as a conflict between the working class who are made to suffer as a consequence of upper-middle class green interests (Cooper, 1992; Gray, 1995). This class conflict portrayal is misrepresented as demonstrated from environmental justice experience and public opinion polls. Research has shown that working class people suffer disproportionately more from environmental problems affecting health and quality-of-life concerns (Baumol & Oates, 1979; Lester, Allen, & Hill, 2001). Furthermore, public concerns about the environment are not divided along class lines. Lower income individuals are actually more willing to sacrifice economic expansion for environmental protection than their upper-class counterparts (Gallup Poll Monthly, 1995). Examples of these aligned interests are demonstrated by the widespread instances of Green political parties throughout Europe that advocate simultaneously for labor and environmental interests.

Linkages between Environmental Policy and Jobs

When debating the costs and benefits of a proposed environmental policy, opponents often allude to the job losses which would result from a given policy. These claims are frequently made amidst politically motivated situations without supporting evidence (Goodstein, 1999; Meyer, 1992). Quite to the contrary, environmental regulation has actually been responsible for creating a net increase of jobs in the U.S. economy (Goodstein, 1999; Meyer, 1992). A logical follow-up question to this assertion may ask, “what types of jobs has environmental protection created?” If these jobs rest primarily in the hands of upper-middle

class economists and policy analysts, blue-collar workers may not see the employment gains of such regulation. However, the proportion of blue-collar jobs created through environmental policy is disproportionately large. Take for instance the traditionally blue-collar jobs in the manufacturing and construction sectors. While positions in these fields account for 1 in 5 jobs in the overall U.S. economy, they make up nearly a third of the jobs related to environmental protection (Goodstein, 1999).

Public employees constitute another group of workers who have significantly benefited from environmental regulation. Twenty to forty percent more jobs are created by each public dollar spent on environmental protection compared to average government dollars spent in other program areas (Meissner, 1986). This job creation potential is especially significant in North Carolina where the proportion of workers employed by the government is higher than that of the national average (U.S. Bureau of Labor Statistics, 2004).

History of Labor/Environmental Alliances

Despite the job versus the environment myth, the U.S. has been the stage for numerous labor/environmental alliances. The first notable collaborations between labor and environmental groups focused on public health. Upon the release of Rachel Carson's *Silent Spring* in 1962, the issue of toxic substances earned a place in American consciousness. The result was not only a flurry of environmental advocacy but also an expanded concern over working conditions among the nation's labor groups. The labor/environmental alliance which grew out of these concerns was instrumental in placing workplace health and safety at the top of political agendas, eventually culminating in the passage of the 1970 Occupational Safety and Health Act. The shared successes of this law fortified relations between the two movements. In fact, the United

Auto Workers (UAW), one of the most prominent and powerful American labor unions, was a sponsor of the first Earth Day in 1970.

One of the most significant examples of the environmental movement supporting labor was the 1973 strike launched against Shell Oil by the Oil, Chemical, and Atomic Workers International Union (OCAW) over workplace safety in which eleven prominent environmental organizations supported the workers (Gordon, 1998). At the conclusion of the strike, some of the most involved organizations formed the Environmentalists for Full Employment (EFFE) with a mission “to publicize the fact this it is possible simultaneously to create jobs, conserve energy, and natural resources and protect the environment” (Grossman, 1985, p. 63). While the EFFE remained active for nine years, the political landscape of the 1980s caused labor to concentrate on their more narrow labor agenda at the sacrifice of wider EFFE goals.

During the Reagan Administration, joint efforts between the AFL-CIO and the Sierra Club went to forming state coalitions to defend against rollbacks of workplace and environmental health. Among the victories of these state alliances were the right-to-know laws which required industry to notify workers and neighboring communities of hazardous substances being used on site.

In the years to come, conflicts surrounding the Endangered Species Act, the northern spotted owl, and the timber industry proved detrimental to labor/environmental alliance building. Media accounts reporting Earth First! activists sabotaging logging equipment and estimates of job losses approaching 100,000 laid the foundation for the public myth of a zero-sum-game between labor and environmentalists.

Concerns about free trade provided labor and environmentalists a reason to unite once again in their quest to slow the proverbial “race to the bottom.” The most recognized backdrop of this collaboration came at the 1999 WTO meeting in Seattle. The “Teamsters and Turtles,” as they came to be called, staged a massive demonstration protesting the meeting’s free-trade agenda which they thought would erode labor and environmental standards around the globe. A group called the Alliance for Sustainable Jobs and the Environment (ASJE) was responsible for much of the protests. The group found a common foe in multi-national corporations as reflected in the ASJE’s founding principles:

Corporations have become more powerful than the government entities designed to regulate them...Recognizing the tremendous stakes, labor unions and environmental advocates are beginning to recognize our common ground... While we may not agree on everything, we are determined to accelerate our efforts to make alliances as often as possible (Alliance for Sustainable Jobs and the Environment, 1999, p. 2).

Energy-Related Conflict and Collaboration

While energy conservation served as one of the founding principles of the aforementioned EFFE, nuclear energy was ultimately one the coalition’s dissolving issues. The coalition advocated decentralized, renewable power, a vision which did not include highly-controversial nuclear power. Labor, on the other hand, generally saw nuclear power as a necessary step to maintain economic growth in the wake of the early 1970s energy crisis (Logan & Nelkin, 1980). The disagreement over this weighty policy issue eroded the common ground once held between the two movements.

Energy-related policy again became a point of contention between labor and environmental interests during the passage of the 1990 Clean Air Act amendments. Interestingly, the very aspect of the 1990 amendments that has since garnered praise, the

flexibility permitted for compliance, was also once the source of opposition from labor unions. The 1977 amendments applied a command-and-control policy mechanism by requiring pollution emitters to install scrubbers. Technology-based mandates were supported by the unionized coal miners of the Appalachians, the source of high-sulfur coal, because they did not want industry to switch to low-sulfur coal mined in the rarely-unionized western U.S. Unlike those in 1977, the 1990 amendments gave industry a variety of options to comply with the sulfur standard. One of the cheapest and widely adopted means of compliance involved switching to Western coal which contained less sulfur, jeopardizing the unionized interests of the Appalachians. Unsurprisingly, the 1990 amendments did result in the loss of approximately 7,000 coal mining jobs in the East (Obach, 2004). However, the flexibility permitted by the law resulted in lower than expected compliance costs.

In 2001, Corporate Average Fuel Efficiency (CAFE) standards made their way to the Congressional floor for the first time since their inception decades earlier. The push to strengthen the standards was met by fierce opposition from U.S. automakers who, in turn, enlisted the political pull of the UAW to thwart their tightening. Interestingly, the UAW supported the initial CAFE standards in 1975 in hopes that the measure would help keep U.S. automobiles competitive in an energy-constrained world. However, the shrinking membership of the UAW was swayed by industry which warned of the massive job losses that would occur if CAFE standards were increased. Needless to say, CAFE standards remain unchanged still today.

The same year, President George W. Bush revealed an energy plan which called for drilling in the Alaskan National Wildlife Refuge. As expected, the environmental community was opposed to the measure. However, prospects of job creation helped motivate the labor

community to support Bush's plan (Alvarez & Kahn, 2001; Greenhouse, 2001). Once again, energy issues had brought industry interests between labor and environmental communities.

Throughout the industrial expansion of the global economy, the two primary substitutions for human labor have been energy and capital, usually in machine form (Miller, 1980). As a general rule, the lower the energy use of a given industry, the more human labor is required. In light of this connection, it is logical that labor would favor energy efficiency. However, a common misconception holds that as greater amounts of energy are used, more jobs are created and employment security is increased.

Historically, industry has sought to substitute energy for human labor. The amount each working person could produce has therefore increased steadily. But after substitution of energy for labor in each process, the total number of workers needed decreased. What has kept the 'more energy leads to more jobs' myth alive has been that accompanying a growing population has been a very large increase in the use of goods and services per person (Grossman & Daneker, 1977, p. 1).

Determinants of Collaboration

According to Yandle's "Bootleggers and Baptists" theory, labor unions and environmentalists have a good deal to gain by working with one another (Yandle, 1983). Generally, unions have substantial resources with which to advance their interests; yet, their interests are often perceived as narrowly self-interested, hence the "bootlegger" label. On the other hand, environmentalists may have fewer resources at their disposal, but their interests are viewed as benefiting the welfare of the wider public, hence the "Baptist" tag. Bringing together this combination of resource accessibility and broader interest appeal can net such duos significant political influence.

There are two conflicting ways in which an interest group's political power could affect their desire to collaborate with other coalitions. If groups are politically weak, they may be more likely to align with other groups, consistent with a strength-in-numbers strategy (Hojnacki, 1997). Conversely, if groups are strong enough to successfully capture policy makers' ears and bring to fruition their immediate policy priorities, they may be more inclined to widen their issue scope as often required by collaboration.

The AFL-CIO plays a complex role in determining the potential for a joint labor/environmental alliance. As the federation representing almost all U.S. labor unions, it must appeal to a wide spectrum of labor interests in order to retain affiliate members. As a result, the AFL-CIO's political agenda is often watered down to the least common denominator. When member unions' interests conflict, the federation usually remains silent on the issue and allows the individual unions to pursue their agendas independently (Obach, 2004). Often environmental agendas fall within this contested area, as has been the case with CAFE standards.

There is however evidence that the AFL-CIO is increasingly encouraging more local and state level alliances through community outreach (Brecher & Costello, 1994). State level policy making is often more accessible and less fragmented than that done at the federal level, presenting more opportunity for labor/environmental interaction (Obach, 2004).

Researchers of such coalitions advise environmental leaders looking to collaborate with labor to be persistent and to include union reformers in their coalition-building efforts. For example, a reform movement in the 1990s called "New Directions" was founded to challenge the UAW, the dominant auto-workers union in the U.S. Such a group may prove a valuable partner

to environmental organizations in cases where the mainstream union movement is not interested in collaboration (McClure, 1992).

Objectives and Methodologies

This analysis proposes to tackle two broad objectives: *1) to gauge the potential for a labor-environmental coalition to influence North Carolina energy policy; and 2) to identify policy-making institutions and opportunities for such a coalition.*

To accomplish these objectives, this analysis relies on a variety of research methods. Initially, a thorough **literature review** helped develop background knowledge of historical labor/environmental alliances as well as coalition forming behavior. Understanding the evolution of relations between the two groups, both generally and surrounding energy issues specifically, was useful in gauging the likelihood of future collaboration. Examination of coalition formation theory helped distinguish the strengths and strategies which may influence the predilections of labor and environmental groups to collaborate.

This analysis also applies the **Advocacy Coalition Framework** (ACF) developed by Drs. Sabatier and Jenkins-Smith. The ACF was designed as an alternative to more linear policy analysis frameworks which examined a limited number of policy elites under static conditions. A stakeholder analysis conducted through the ACF examines subsystem-wide dynamics by multiple actors who are motivated by defined tiers of beliefs and who try to influence policy by acting as coalitions using a variety of venues and resources. The ACF divides an organization's beliefs into three tiers: deep core, policy core, and secondary.

Deep core beliefs are normative, fundamental beliefs that are very resistant to change such as feelings towards distributive justice. Policy core beliefs, while still normative, are not as entrenched as deep core beliefs and include opinions such as the appropriate balance of market

freedom and government intervention. The bottom tier, secondary beliefs, are empirically-based and related to specific subcomponents of the policy subsystem. Unlike deep core and policy core beliefs which stay largely stable over time, secondary beliefs are susceptible to change in response to new information and external events. According to the theory, groups who share the same deep and policy core beliefs will be more likely to form coalitions, even at the expense of their secondary beliefs. The ACF is an especially appropriate methodology for this analysis because it is sufficiently fluid to account for the various stakeholders, interests, and venues of North Carolina energy policy.

This analysis also draws upon the work of Dr. Brian Obach, a prolific researcher in the field of labor and environmental interaction, who created a model to estimate the quality level of relations between labor and environmental organizations. In developing this model, Obach interviewed relevant parties in all 50 states and ran an ordinary least squares regression to determine the likelihood of collaboration or conflict. Tested independent variables include the percentage of workers employed in the construction, timber, primary metal, paper, chemical, and service sectors (chosen because environmental regulations have been associated with job losses in these fields); partisan control of state government; state party systems as gauged by degree of class division; union strength as measured by the percentage of unionized workers in the workforce; state citizen conservative/progressive ideology; and past union-industry cooperation. He found that only three variables significantly affected the quality of relations between environmental and labor organizations. Higher percentages of workers employed in timber industry, Republican control of state government, and past union-industry collaboration on environmental issues were all associated with reduced likelihood that labor and environmental interests would collaborate. This analysis uses the significant independent variables in the

Obach model to assess the potential for a labor/environmental alliance to influence North Carolina energy policy.

Information collected through interviews with policy elites in the state's environmental and labor organizations is central to this analysis. Twenty interviews were conducted with ten interviewees throughout the fall of 2006. First, **phone interviews** consisting of nine open-ended questions were conducted to ascertain groups' organizational dimensions such as organizational range, goal orientation, membership interests, policy strategies, and collaboration history (*see Appendix 2*). Then, after initial familiarity was established, I asked the interviewees to complete an **electronic interview** consisting of 12 close-ended questions (*see Appendix 3*). Respondents were asked both orally and in writing to answer the questions from the perspective of their organization as best as possible, instead of overtly inserting their personal feelings towards the questions. This second interview posed more theoretical questions designed to probe the organizations' belief systems. Deep core, policy core, and secondary aspect beliefs were all surveyed for use in the ACF stakeholder analysis.

The interview sample included representatives from nine environmental organizations active at various policy levels in North Carolina. Some groups were local, such as Clean Energy Durham, and some were regional, such as the Southern Environmental Law Center, but all were active in the energy policy discussion. The sample did not include environmental groups with specific non-energy foci, such as those dealing with coastal issues. In regards to labor interviewees, the North Carolina AFL-CIO (NC AFL-CIO) was selected as the sole target of the interview for multiple reasons. First, due to the centralized nature of the labor movement, the NC AFL-CIO is an appropriate representative of the collective labor interests in the state.

Second, due to the relatively weak financial and membership support of organized labor in the state, the NC AFL-CIO is the only significant political voice the movement can currently maintain. Individual interviewees included presidents, executive directors, and policy analysts among others. In accordance with Duke University's Institutional Review Board policies, the interviewees were provided full disclosure regarding the purpose of the interview as well as the intended use of the data collected (*see Appendix 4*).

Lastly, a **review of public documents** helped delineate the energy policy landscape in the state. General Assembly legislation, Utility Commission hearing transcripts, and Environmental Commission meeting notes are among the sources reviewed.

NC Environmental and Labor Group Landscape

Environmental groups

North Carolina's diverse ecosystems, prolific research institutions, and historical connection with the land are some of the factors that cultivate its fertile ground for an active environmental community. Development pressures have given rise to 23 land trusts, the state's coastal resources have motivated numerous coastal protection groups, and national and regional environmental institutions (e.g. Environmental Defense, Southern Environmental Law Center) have established offices in the state. One measure of the green community's size is the North Carolina Conservation Network (NCCN), a statewide network of environmental, community, and environmental justice organizations focused on protecting the state's environment and public health. Over 120 groups are currently members of the NCCN. While not all of these members focus exclusively on environmental issues, their environmental membership base alone was too broad to draw a manageable interview sample from.

A more meaningful sample population was found in the North Carolina Clean Air Coalition (NCCAC), an informal group formed in the fall of 2005 during a brainstorm session of groups concerned with energy policy. Since that time, the group has met semi-regularly to collaborate on advocacy, organizing, and litigation efforts. This provided for a more relevant sample population than the general pool of North Carolina's environmental organizations and excluded environmental groups with more narrow, non-energy foci such as land trusts and watershed groups. At the time of sampling, eleven of the NCCAC's participating organizations were environmental groups somehow involved with energy issues. All 11 groups were contacted with information about this analysis and asked if they would participate. In the end, all but three

of the relevant NCCAC groups agreed to interviews. A ninth organization, Clean Energy Durham, agreed to participate but was not active in the NCCAC at the time.

Labor Groups

The depth of North Carolina's labor community is markedly different than that of its environmental interests. The state consistently vies with South Carolina as the least unionized state in the union. In 2004, North Carolina's unionization rate, the number of unionized workers per 100 workers, was 2.7, the lowest in the nation. In contrast, most of the states with active Apollo Alliance chapters are among the most unionized - New York (25.3), Michigan (21.6), Washington (19.3) (Bureau of National Affairs, 2004).

North Carolina's posture as a right-to-work state, meaning state law prohibits requiring workers to become union members, is a major contributor to this low unionization rate. Alternatively, non right-to-work states, primarily located in the Northeast and Midwest, are permitted to have union-shop policies requiring workers in certain trades to pay union membership fees as a condition of employment.

The NC AFL-CIO is made up of local affiliate unions from across the state and acts as organized labor's collective voice. While some unions are required to join the state AFL-CIO as part of their own national constitution, others are recruited through outreach efforts at the local level. The basic principle of collective strength and power in numbers is central the AFL-CIO's function. Because the state's unions are small, often with few financial resources, the NC AFL-CIO provides strength in numbers by funding a legislative presence which is otherwise infeasible for its individual affiliates.

The NC AFL-CIO is made up of 23 affiliate unions which, in turn, are comprised of many local union chapters. Twelve of these 23 (*see Appendix 5*) have national affiliates who have signed on to the national Apollo Alliance. According to both formal and informal interviews, the NC AFL-CIO is quite progressive and very willing to sit down and discuss issues beyond those directly affecting its membership. In addition, the group often seeks membership in coalitions because of their relatively small size.

As of fall 2006, the NC AFL-CIO's top three policy goals as identified by its President ranked: 1) defense against worker's compensation rollbacks; 2) equal workplace protection for immigrant workers; and 3) bolstering unemployment benefits. Each year, policy objectives are prioritized at annual conventions where resolutions are passed to dictate the broad scope of work for the upcoming year. The leadership sees importance in both defensive poises, to guard against what they may feel are bad proposals from the business community, as well as offensive opportunities to make what they see as improvements.

Interview Trends

Data collected from the close-ended electronic interviews were used to gauge the belief systems of the organizations represented by the respondents. The ACF calls on organizational belief systems to predict the likelihood of coalition-forming behavior. The deep core and policy core beliefs are of principle interest to this analysis. While some electronic interview questions returned more varied responses, a few significant trends surfaced in interview data dealing with these more fundamental beliefs.

First, all organizations interviewed had identical responses on distributive justice, a deep core belief. Question three of the electronic interview asked:

What type of distribution pattern does your organization find most just?

Gains should be enjoyed:

- *most by the general public*
- *most by deserving portions of society*
- ***most by especially deserving individuals***

Every respondent found the most just distribution called for gains to be enjoyed most by the general public. Question nine of the electronic interview asked:

Whose welfare should count when evaluating a potential government policy?

- *only those directly and materially affected*
- *those indirectly affected*
- *all members of society*
- ***all members of society and future generations***

Again, every respondent was in agreement that the welfare of all members of society as well as future generations should be considered when evaluating government policy.

Second, respondents all considered humans to have some responsibility to protect nature.

The first question of the electronic survey asked:

How would your organization characterize the relationship between humans and nature? 1-5 Scale

1 = humans completely dominant nature

5 = humans mainly responsible to protect nature

While not every response was assigning the highest value, all were given either a 4 or a 5 on the 1-5 scale (including the NC AFL-CIO which responded with a 5).

Third, the overwhelming majority of organizations felt that government intervention was a positive thing. Question four of the electronic interview asked:

What does your organization think is the best mix of government and private sector activity? 1-5 Scale

1 = more private market freedom

3 = status quo

5 = more government intervention

Eight out of ten respondents assigned either a 4 or 5 to question four; the remaining two interviewees responded with a three. Not one respondent thought that more market freedom would improve the mix of government and private sector activity.

Fourth, organizations interviewed consistently reported long, as opposed to shorter, term goal orientation. Question eight of the electronic interview asked:

How would your organization characterize your willingness to accept short-term costs for long-term benefits? 1-5 Scale

1 = unwilling to sacrifice in short term regardless of long-term benefits

5 = willing to make large sacrifices today for long term benefits

Every one of the respondents gave this question a 4 or a 5, making the item average a 4.7.

All four of these trends, preference for broad distributive justice, perceived responsibility to protect nature, favorable attitudes toward government intervention, and long-term goal orientation involve deep core or policy beliefs. According to the ACF, the similarities of organizational beliefs reported suggest that the respondents would be likely coalition partners.

One question probing deep core and policy beliefs which returned less uniform responses was question two of the electronic interview which asked:

How would your organization rank the following values in order of priority?

Rank 1-7

- *individual liberty*
- *beauty*
- *security*
- *wise stewardship of natural resources*
- *fairness*
- *economic well-being*
- *knowledge*

While the priority order assigned by those respondents representing environmental organizations were roughly similar, they varied significantly from those of the NC AFL-CIO, the survey's only labor representation. Apart from *beauty* which was consistently ranked lowest at seventh, responses of environmental groups were nearly opposite those of the labor representation (*see Table 1*). For example, labor ranked liberty and security as their first and second highest priority values respectively. Environmental groups, on the other hand, assigned liberty and security as the lowest and second lowest priority values respectively outside of beauty. The values ranked highest for environmental groups, stewardship and knowledge, fell in the lower rankings for labor at fourth and sixth respectively.

Table 1: Averaged Responses to Question Two about Value Priorities

	Liberty	Beauty	Security	Stewardship	Fairness	Economic	Knowledge
Environment Average Rank	6	7	5	1	3	4	2
Labor Average Rank	1	7	2	4	5	3	6
Total Average Rank	5	7	5	1	3	3	2

Another more specific set of questions asking interviewees about energy and employment related issues was designed to probe the secondary beliefs of interviewed organizations. First, I asked interviewees to what degree their organizations would support the following ten government policies, which are adapted from the Apollo Alliances ten-point plan:

1-5 Scale (1= strongly oppose, 3= no opinion, 5= strongly support)

- *create incentives for advanced technology and hybrid cars that use less fuel*
- *subsidize factories that are energy efficient*
- *mandate energy efficiency standards for factories*
- *mandate energy efficiency standards for homes and office buildings*
- *create incentives for energy efficient appliance use*
- *subsidize clean and renewable energy sources*
- *use government funds to expand alternative transportation options (bus systems, bicycle routes, rail infrastructure)*
- *plan cities according to “smart growth” strategies*
- *expand regulation protecting clean air standards*
- *limit the emissions of global warming-causing gases*

The ten responses were then averaged to find the highest scoring. The NC AFL-CIO’s responses acted as a threshold criterion, in that if they did not report organizational support for the policy (scoring their response at either a four or five), the policy was not included in the high-scoring group. The following three policies (all with an average score of 4.9) received a four out of five from the NC AFL-CIO and a five out of five from each of the environmental groups: *city*

planning according to “smart growth”, expand clean air regulations, limit emissions of greenhouse gases. Two others, *subsidies for clean and renewable energy* and *funding alternative transportation options* were assigned fours by labor and all but one five by environmental groups. Together these five policies would likely receive the most organizational support from a coalition comprised of the interviewed organizations. While these secondary beliefs are not the focus of AFC coalition-building theory, gauging their relative support helps demarcate what policies such a coalition may choose to engage in.

Obach Model Application

According to the research of Brian Obach, Republic control of state government, high percentages of workers employed in the timber industry, and past labor/industry cooperation are all associated with poor labor/environmental relations (Obach, 2002). This analysis will explore those variables in the context of North Carolina in an effort to gauge the potential for a labor/environmental alliance in the state under present conditions.

The first variable, the partisan composition of North Carolina's state government, reveals hopeful trends for a blue/green alliance. While Democrats have occupied the office of the governor for over two decades, the state legislature has a slightly more varied history. In 2002, the political party affiliation breakdown of the state General Assembly was a mixed picture with Republicans holding a narrow majority in the lower house and Democrats winning out in the upper house. The 2005 legislative profile shows favor swinging to the Democrats in the lower house as they continued to retain majority in the upper house. Most recently, the November 2006 elections won the Democrats seats in both houses, making the current state government composition decidedly Democratic. According to the Obach model, this is an indication of amenable labor/environmental relations potential.

The second variable, the size of North Carolina's timber industry workforce, is less encouraging for favorable labor/environmental collaboration. Examining U.S. Census data found in their *County Business Pattern* reports reveals that workers in North Carolina are more likely than the national average to be employed in the forestry/timber industry. While nearly 12 in every 10,000 North Carolina workers is employed in the forestry/timber industry, the same can be said for less than 7 in every 10,000 workers nationally (U.S. Bureau of Census, 2004).

The industry classification breakdown does not provide a clear delineation between the forestry and timber industries, thus this analysis looked at the combined statistic as a proxy for the timber industry workforce.

The third and final variable, history of labor/industry cooperation, was a more difficult to determine because of the limited sphere of labor representatives in the state available for contact. However, the information gathered through interviews with officers of the NC AFL-CIO reported very few past instances of labor/industry collaboration. Respondents were asked if their organization, in this case the NC AFL-CIO, had ever collaborated with industry through the four following means: information sharing, holding regular meetings, issuing joint press statements, or coordinated lobbying. In every instance the answer was “no” with one exception, tobacco issues. According to NC AFL-CIO representatives, the union and the tobacco industry participated in coordinated lobbying to advocate for the industry and protect its jobs. Given that reported labor/industry collaboration is limited to this isolated instance, this third variable points towards favorable labor/environmental relations.

Potential Policy Opportunities

If a labor/environmental coalition were to form in North Carolina, what policy-making opportunities would they be most likely to pursue to influence the state's energy policy? This part of the analysis is designed to address two facets of policy opportunities: potential institutional venues for policy change and individual policy proposals.

Institutional Venues

The primary policy-making groups handling energy issues in the state include the North Carolina General Assembly (NCGA), the North Carolina Utilities Commission (NCUC), the Environmental Management Commission (EMC), and select agencies within the state's executive branch, namely the State Energy Office (SEO). Every environmental group interviewed had experience with at least three of the aforementioned bodies. While the NC AFL-CIO is involved with the state legislature, its past involvement with the NCUC, EMC, and SEO is limited. Other policy forums with which the NC AFL-CIO reported having most frequent involvement more directly pertained to labor issues such as the Employment Security Commission, Department of Labor, and the advisory group to the North Carolina Industrial Commission.

The NCGA seems to be the most likely venue for a labor/environmental coalition to influence energy policy. While the NCUC has proved an effective forum for environmental groups to affect policy related to electric utilities, these targets involve just one thread of energy policy. In addition, every group (from both labor and environmental communities) reported involvement with the state legislature. Strategically combining the existing presence and

connections of these organizations may be the most efficient means of pursuing comprehensive energy policy for an otherwise resource-limited coalition.

North Carolina is home to a bi-cameral General Assembly with 120 members in the House of Representatives (68 Democrats and 52 Republicans) and 50 in the Senate (31 Democrats and 19 Republicans). Interviewed organizations reported most frequent involvement with the Appropriations, Finance, Health, Natural Resources, and Public Utilities Committees. The legislature meets for regular sessions beginning in January of odd-numbered years and for shorter sessions on even-numbered years. As more business is predictably accomplished during the longer sessions, 2007 could be a promising year for legislative movement.

Legislative Opportunities

The Washington Apollo Alliance developed a list of criteria for endorsing projects and legislation which satisfies both their labor and environmental interests. In ascertaining what policy proposals a labor/environmental coalition in North Carolina would be likely to pursue, the following list of criteria was modified from the Washington Apollo Alliance. Such a coalition would support policies that:

- Have the potential to create high-quality jobs
- Go beyond mere “job creation” to include workforce standards (livable family wages and benefits)
- Include a community component (opportunities for local residents, women, and people of color)
- Result in a net decrease in greenhouse gas emissions
- Provide incentives for domestic content, local hire and in-state preference

In light of the aforementioned criteria and responses to electronic interviews asking about organizational support for policies, this analysis identifies five items as potential legislative opportunities for such a coalition. Four of the five items were bills introduced in the 2004-05

session of the NC State Legislature where they all expired in committee. However, every one of the primary sponsors of each of these bills was reelected in November of 2007, securing their return to the legislature for the 2007-08 term.

Energy Futures Act of 2006

This bill would have directed the NCUC to study the least cost mix of generation and demand for electricity while giving closer examination to energy efficiency, renewable energy, and reduced demand considerations. By more seriously investigating these more environmentally-sound options, the NCUC's decisions would take into account the life-cycle cost of electric energy use to determine the cheapest and safest option for the state's customers both today and in the future. A recent study ranked North Carolina 46th out of 50 states in energy efficiency, in part because of the state's failure to do a thorough evaluation of the costs and benefits of energy efficiency (York, 2002). As originally proposed, the bill also mandated that this comprehensive assessment examine increasing incentives for investments in energy efficiency and decentralized electricity production.

This proposal fulfills the coalition support criteria of job creation and decreased greenhouse gas emissions. Analysts suggest that up to 13,000 manufacturing jobs could be created in North Carolina if the state strongly supported renewable energy development, a possible reality if investment incentives were deemed favorable (Renewable Energy Policy Project, 2005). Additionally, decreased electricity demand, increased energy efficiency, and substitution of the state's primary electric fuel source, coal, for renewable energy generation would all exert downward pressure on greenhouse gas emissions.

“Clean Cars” Act

A version of the “Clean Cars” Act was introduced in both houses of the NC General Assembly during the 2005-2006 session. The bill would have required all new, conventional cars sold in the state after 2008 to meet low emission vehicle standards. Currently, nine states, accounting for roughly a third of the U.S. auto-fleet, have instituted a similar clean car standard.

Similar to the Energy Futures Act of 2006, this proposal meets both the job creation and reduced greenhouse gas emissions criteria. The U.S. Clean Air Act places health-based air quality standards on states and measures achievement of these standards on a county by county basis. About a third of North Carolina counties (over 30 counties) consistently fail to meet these national standards in part or all of their jurisdictions, making it very difficult for them to attract new industrial development. Helping to bring non-attainment areas of the state into compliance would allow new industry to enter and create more jobs in the North Carolina economy. Furthermore, implementing this proposal is estimated to prevent the release of 800,000 tons of greenhouse gases by 2020 (North Carolina Sustainable Energy Association, 2006).

Renewable Motor Fuels Tax Exemption

Introduced in both the state House and Senate, this proposal would have exempted biodiesel, fuel alcohol, and gasohol from the state motor fuels excise tax (~27¢/gallon). In addition, the bill would have awarded a tax credit to renewable fuel distributors based on the volume and proportion of renewable fuels sold at their establishment. The proposal is designed to drive both the demand and supply of renewable fuels in an effort to decrease the greenhouse gas emissions associated with transportation fuels and diversify the state’s fuel supply.

As interview responses suggest, North Carolina labor and environmental groups perceive incentives for clean and renewable energy sources as having the most positive employment effects out of the ten aforementioned policies. In addition, subsidizing clean and renewable energy sources was among the five policies which received the highest scores for organizational support.

Energy Conservation in State-Owned Facilities

One potential proposal that a labor/environmental coalition could get behind would address energy and water conservation in state-owned facilities. The Energy Independence Act (S2051), signed into law by Governor Easley in August, 2006, directs the Joint Legislative Oversight Committee on Capital Improvements to study energy and water conservation in both current and future state facilities. The results of this study, due out in February, 2007, may provide a framework for a legislative proposal on improving the energy efficiency of state buildings. The study examines the costs of repairing and renovating existing buildings to achieve at least a 20% reduction in their energy use by 2012. Such repairs and renovations could create many local North Carolina jobs while saving energy and preventing greenhouse gas emissions.

Lobbying Reforms

The last potential coalition opportunity is not directly related to energy policy yet may provide a good first collaborative effort between state labor and environmental groups. During interviews, both environmental and labor groups reported targeting lobbying reform proposals in the state legislature's 2005-06 session. Most notable was the Lobbying Reforms of 2006 (H1849) which would have generally strengthened the lobbying reforms passed in 2005 by expanding oversight coverage to executive branch lobbyists, instituting a gift ban from lobbyists

to legislators and executive branch employees, and requiring monthly reporting of contributions and expenses. Support of H1849 by relevant organizations is consistent with interview findings concerning deep and policy core beliefs in broad distributive justice and favorable attitudes toward government intervention. Coalescing around such a proposal in the upcoming session would allow the two groups to become acquainted with each other while hopefully building trust and forming alliances.

Conclusions

According to this analysis, there is moderate potential for a labor/environmental alliance to form in North Carolina. As viewed through the analytical lens of the ACF, interviewed organizations share many, although not all, deep and policy core beliefs. While there is consistency in preference for broad distributive justice, perceived responsibility to protect nature, favorable attitudes toward government intervention, and long-term goal orientation, clear differences exist in value prioritization along labor/environmental lines. Labor organizations are most concerned with liberty and security, the two values, excluding beauty, which rank lowest among environmental groups. This discrepancy may complicate collaboration in light of the limited membership and resource base of North Carolina's organized labor community. If the NC AFL-CIO opts to concentrate on issues directly affecting their highest priority values, interested environmental groups may have to take the initiative to find common ground between the two bands' interests.

Applying the Obach model to North Carolina suggests similar findings - moderate potential for a blue/green alliance. While two of the three significant variables point towards positive labor/environmental relations, regression models are only so accurate when gauging something as complex and malleable as multi-stakeholder coalitions. The model's predictive capacity may be further obscured for the potential coalition in question due to the specific focus on energy policy.

This alliance may be cultivated through collaboration on five proposals targeting: full-cycle electricity generation assessments, clean car requirements, renewable fuels tax exemption, energy conservation in state facilities, and lobbying reforms. The first three proposals are based on legislation introduced in the last legislative session which may be reintroduced this session.

The fourth, energy conservation in state facilities, may have significant job and climate implications. While a formal proposal does not currently exist for such a policy, the Joint Legislative Oversight Committee on Capital Improvements has been studying energy and water conservation feasibility for state-owned facilities, the results of which were due in February, 2007. The last proposal, lobbying reforms, is not directly related to energy policy yet may provide a rallying point for both labor and environmental interests. Coalescing around such a common concern may provide the needed foundation to nurture the moderate prospect of a labor /environmental coalition in North Carolina. The 2007 session of the North Carolina General Assembly is the first longer session of the legislature since both the state's Climate Action Plan Advisory Group and its Legislative Commission on Global Climate Change commenced. Public attention and legislative pressure is mounting for energy policy reforms based on environmental, national security, and economic grounds. If there was ever a time for those concerned about job creation and the environmental protection to wield their influence in the decision making process, it is now.

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Appendix 1: Member Organizations of the National Apollo Alliance

The Apollo Alliance has been endorsed by the following groups and individuals:

Labor Unions

AFL-CIO
AFL-CIO Industrial Union Council (IUC)
AFL-CIO Building and Construction Trades Dept
National Heavy and Highway Alliance
Amalgamated Transit Union (ATU)
American Federation of State, County, and Municipal Employees (AFSCME)
Bakery, Confectionery, Tobacco Workers and Grain Millers Intl. Union (BCTGM)
Boilermakers Union (IBB)
California Labor Federation
Graphic Communications Industrial Union (GCIU)
Hawaii AFL-CIO
Illinois AFL-CIO
Indiana AFL-CIO
International Association of Machinists and Aerospace Workers (IAM)
International Brotherhood of Electrical Workers (IBEW)
International Brotherhood of Teamsters (IBT)
International Union of Electrical Workers (IUE-CWA)
King County Labor Council, AFL-CIO
Laborers' International Union of North America (LIUNA)
Metropolitan Detroit, AFL-CIO
Michigan AFL-CIO
Minnesota AFL-CIO
Oregon AFL-CIO
Paper and Allied Chemical Employees (PACE)
Pennsylvania AFL-CIO
Service Employees International Union (SEIU)
Sheet Metal Workers International Association (SMWIA)
Transportation Workers Union (TWU)
United Automobile and Aerospace Workers (UAW)
United Food and Commercial Workers (UFCW)
United Mine Workers of America (UMWA)
UNITE HERE!
United Steel Workers of America (USWA)
Washington State Labor Council, AFL-CIO
Wisconsin AFL-CIO

Environmental Organizations

Center for Environmental Health
Ceres
Coalition for Environmentally Responsible Conventions

The Detroit Project
EarthVoice
Environment 2004
Environmental Law and Policy Center
Energy Action
Global Green USA
Greenpeace USA
Healthy Schools Network
League of Conservation Voters
Natural Resources Defense Council (NRDC)
National Wildlife Federation
Rainforest Action Network
Republicans for Environmental Protection
The Sierra Club
The Sierra Student Coalition
South Carolina Coastal Conservation League
Union of Concerned Scientists (UCS)

Economic, Social Justice, Faith-Based, and State & Local Partners

ACORN
Action for Grassroots Economic and Neighborhood Development
Alternatives (AGENDA)
Black Farmers USA
Coalition of Black Trade Unionists (CBTU)
Ella Baker Center for Human Rights
Jim Hightower and The Rolling Thunder Down Home Democracy Tour
Institute for Agriculture and Trade Policy
Intertribal Council On Utility Policy (COUP)
Plug in Partners
South Carolina Coastal Conservation League
Urban Agenda

Appendix 2: Phone Interview

Date:

Interviewee:

Position:

Organization:

1. How does your organization recruit members?
2. What incentives do your members have for joining your organization?
3. What led to the founding of your organization?
4. What are your organization's top three policy goals currently?
5. How does your organization prioritize your policy objectives?
6. In what policy-making forums is your organization most frequently involved?
7. What policy-making bodies does your legislative strategy involve?
8. Has your organization ever engaged with labor/environmental organizations in the following activities¹:
 - information sharing?
 - holding regular meetings?
 - issuing joint press statements?
 - coordinated lobbying?
9. Has your organization ever collaborated with industry on a labor/environmental issue through the following means:
 - information sharing?
 - holding regular meetings?
 - issuing joint press statements?
 - coordinated lobbying?

¹ Question modified from Obach, B. (2002). Labor-Environmental Relations: An Analysis of the Relationship between Labor Unions and Environmentalists. *Social Science Quarterly*, 83(1), 82-100.

Appendix 3: Electronic Interview

1. How would your organization characterize the relationship between humans and nature?
1-5 Scale (*1= humans completely dominant nature, 5= humans mainly responsible to protect nature*)
2. How would your organization rank the following values in order of priority?
Rank 1-7
 - individual liberty ___
 - beauty ___
 - security ___
 - wise stewardship of natural resources ___
 - fairness ___
 - economic well-being ___
 - knowledge ___
3. What type of distribution pattern does your organization find most just? Gains should be enjoyed:
Choose One (*most by the general public, most by deserving portions or society, most by especially deserving individuals*)
4. What does your organization think is the best mix of government and private sector activity?
1-5 Scale (*1= more private market freedom, 3= status quo, 5= more government intervention*)
5. How would your organization rank government intervention mechanisms in order of effectiveness?
Rank 1-5
 - providing information ___
 - giving incentives ___
 - mandating policies ___
 - leveraging government purchases ___
 - providing avenues of legal recourse ___
6. How would your organization characterize the effect of increased energy costs on employment?
1-5 Scale (*1=very negative affect, 3=no change, 5=very positive affect*)
7. How would your organization characterize the effect of increased energy use on employment?
1-5 Scale (*1= very negative affect, 3= no change, 5= very positive affect*)
8. How would your organization characterize your willingness to accept *short-term* costs for *long-term* benefits?
1-5 Scale (*1= unwilling to sacrifice in short term regardless of long term benefits, 5= willing to make large sacrifices today for long term benefits*)
9. Whose welfare should count when evaluating a potential government policy?
Choose One (*only those directly and materially affected, those indirectly affected, all members of society, all members of society and future generations*)

10. How willing would your organization be to protect the environment if it meant slowing down economic expansion?

1-5 Scale (*1= not at all, 5= very willing if it meant a safe environment*)

11. To what degree would your organization support or oppose the following government policies:

1-5 Scale (*1= strongly oppose, 3= no opinion, 5= strongly support*)

- a. create incentives for advanced technology and hybrid cars that use less fuel
- b. subsidize factories that are energy efficient
- c. mandate energy efficiency standards for factories
- d. mandate energy efficiency standards for homes and office buildings
- e. create incentives for energy efficient appliance use
- f. subsidize clean and renewable energy sources
- g. use government funds to expand alternative transportation options (bus systems, bicycle routes, rail infrastructure)
- h. plan cities according to “smart growth” strategies (more dense use of urban areas for both housing and living uses to decrease suburban sprawl and long work commutes)
- i. expand regulation protecting clean air standards
- j. limit the emissions of global warming-causing gases

12. How would your organization perceive the employment effects of the following government policies:

1-5 Scale (*1= very harmful to employment, 3= no effect on employment, 5= very positive effect on employment*)

- a. a. create incentives for advanced technology and hybrid cars that use less fuel
- b. subsidize factories that are energy efficient
- c. mandate energy efficiency standards for factories
- d. mandate energy efficiency standards for homes and office buildings
- e. create incentives for energy efficient appliance use
- f. subsidize clean and renewable energy sources
- g. use government funds to expand alternative transportation options (bus systems, bicycle routes, rail infrastructure)
- h. plan cities according to “smart growth” strategies (more dense use of urban areas for both housing and living uses to decrease suburban sprawl and long work commutes)
- i. expand regulation protecting clean air standards
- j. limit the emissions of global warming-causing gases

Appendix 4: Informed Consent Statement

Hello, my name is Sarah Zaleski, I am a graduate student at Duke University conducting research on labor/environmental alliances in North Carolina.

The goal of my research is to assess the potential for an energy-focused labor-environmental coalition in North Carolina. I hope to identify potential opportunities for this coalition to influence state energy policy and propose an agenda that capitalizes on these opportunities.

I would like to interview you to gain an understanding of your organization's organizational range as well as a sense of your organization's policy beliefs. The interview will include several open-ended questions. Following the interview, I will provide you with a 12-item questionnaire which you can later return to me electronically.

I will be identifying the organizations represented by individuals who participate in my research. And while I will not associate your name directly with your responses in my report, it is possible that someone will be able to identify you through your association with your organization.

This interview will take approximately 20 minutes to complete and your participation is greatly appreciated. There are no correct or incorrect responses, so please feel free to express your opinions. Your participation is voluntary and you may choose to withdraw at any time or choose not to answer every question.

Please feel free to ask questions about my research. You may contact me at sbz@duke.edu, or you may contact my advisor, Dr. Deborah Gallagher at deb.gallagher@duke.edu. If you have questions about being a participant in a research project, you may contact the Chair of the Human Subjects Committee at (919) 684-3030.

Is this a good time for the interview? If not, I'll be happy to schedule another time to call you back.

Are you ready for the first question?

Appendix 5: NC AFL-CIO Affiliate Unions whose National Affiliates have signed onto the Apollo Alliance

