

# On the Grid: Flexing America's Manufacturing Muscles 8/04/23



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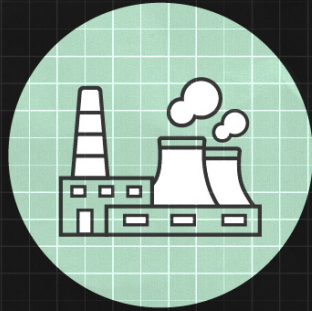
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Hello to 187,000 new jobs! With unemployment falling to 3.5%, the signals are pointing to a healthy but cooling economy. And with billions in federal investments continuing to flow to clean energy infrastructure projects, we're seeing spending to build manufacturing facilities skyrocket and construction jobs continuing to trend up. The numbers don't lie—the US is building back its manufacturing muscles and gaining the capacity to build enough clean energy technologies for use here at home and to export to allies around the world.

*P.S. Want to help add another job to that figure? Third Way's Climate and Energy Program is hiring a Senior Policy Advisor for Industry to help oversee our expanding industrial decarbonization and clean energy supply chains portfolio!*



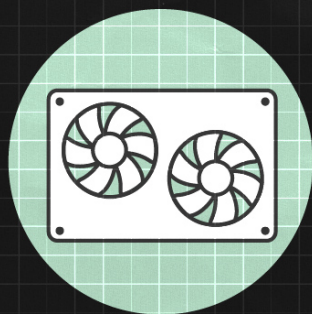
## NUCLEAR

This week, Georgia Power's Vogtle Unit 3 nuclear reactor began commercial operations, marking the first time in 27 years that a new nuclear power plant is generating electricity for the grid.

There's a lot to celebrate here: the lessons learned during the construction of Unit 3 are being applied to accelerate construction and testing for Unit 4, which is expected to go into service early next year. Above all else, this showcases how the US nuclear industry can adapt.

This is also the first AP1000 nuclear reactor entering into commercial service in the US, designed and built by American nuclear company Westinghouse Electric. With advanced safety and efficiency, Vogtle Unit 3 marks a significant milestone for the nuclear industry and is a powerful testament to the viability of this advanced reactor design, particularly for international partners.

Countries such as Poland, Bulgaria, India, Czechia, and even Ukraine have turned to the AP1000 reactor as they look to build out their respective nuclear energy sectors. Vogtle Unit 3 not only exemplifies our ability to build and deploy advanced nuclear energy at home, but it's also a strong proof point for prospective international partners. And as countries like China and Russia continue to expand their international nuclear presence, developments like this can help the US make a powerful comeback in global markets.



## CARBON MANAGEMENT

The aviation sector is incredibly carbon-intensive, and as we begin to decarbonize other forms of transportation, it's becoming one of the country's fastest-growing sources of greenhouse gas

emissions. Sustainable aviation fuel (SAF), a low-carbon “drop-in” jet fuel that can be used interchangeably and blended with conventional jet fuel, will play a key role in shrinking that carbon footprint—but it won’t zero it out entirely.

This is where carbon dioxide removal (CDR) technology can be leveraged to fill that gap, drawing down tons of carbon from the atmosphere to be permanently stored or used to produce fuel. Japan’s largest airline, All Nippon Airways (ANA), became the first airline in the world to recognize this potential, announcing its contract this week to purchase 30,000 tonnes of carbon trading credits from 1PointFive. The US-based company is actively building its first commercial direct air capture (DAC) facility in Texas and will use the technology to absorb carbon directly from the atmosphere starting in 2025.



Last week, the White House Council on Environmental Quality proposed revisions that streamline how the government reviews energy projects under the National Environmental Policy Act (NEPA). The rule would codify pragmatic NEPA reforms negotiated under the Fiscal Responsibility Act earlier this year, including stricter deadlines, page limits, and new discretion for agencies to exclude more types of project categories from review. However, the proposed rule goes a step further, rolling back a Trump-era rule that limited public input and judicial challenges while also directing agencies to consider environmental justice and climate change in project reviews.

Opinions on the proposed rule have been mixed, with some applauding the revisions and added support for marginalized communities, as well as concerns that this opens the door for clean energy opponents to weaponize the review process and stall progress even further.

Getting permitting reform right is tough (we get it.) But as we face record-breaking heat year after year, it’s clear that we’re in a race against time. As officials work to finalize the first of many revisions to the permitting process, it’s important we craft a process that is as efficient as possible while respecting and baking in common-sense environmental justice considerations.



## INTERNATIONAL NEWS

Europe is grappling with two intertwining challenges: 1) An ongoing energy crisis brought on by Russia's war in Ukraine and a longstanding over-reliance on fossil fuels, and 2) Uncertainty around the best approach to cut dependence on volatile forms of energy moving forward. We've been adamant about our view—we need to deploy every clean energy technology we have, get more of it on the grid, and cut through every barrier that is holding it up.

In [a new op-ed](#), Lindsey Walter, Director of International Climate Policy and co-founder for [Carbon-Free Europe](#), leverages [updated energy-systems modeling](#) to drill down this exact point.

As Lindsey put it, “The clock is ticking. We need consensus and unity. Most importantly, we need courage from EU leaders. They must be willing to utilize every technology and policy tool available to meet climate commitments and break free from Russia's grip on the continent by cutting off the financial support fueling their atrocities in Ukraine.”



## WHAT WE'RE READING & LISTENING TO

- [Emily Pontecorvo](#), in *Heat Map*, spotlights debates within the US Treasury as the agency works to define what constitutes “clean electricity” for a new hydrogen tax credit. These decisions will impact billions in subsidies, international trade, and the broader transition to cleaner energy.
- [Michelle Solomon and Taylor McNair](#) in the *Los Angeles Times* make the case for offshore wind as both an economic engine for job growth in California and as a critical component of its energy landscape.

- Ed Crooks, host of the *Energy Gang* podcast series, talks with Dr. Melissa Lott of Columbia University's Centre on Global Energy Policy and Amy Myers Jaffe from NYU's Energy, Climate Justice, and Sustainability Lab to unpack the record-high temperatures and what that means for energy demand, power stability, and clean energy.



Third Way's Climate and Energy Program draws the spotlight on China as the nation continues to build new nuclear energy at breaking speed.



**Third Way Climate & Energy**  
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This week, China announced it is funding six more nuclear reactors.

We can't afford to be complacent. The global race to build advanced reactors is on, and while China adds to its nuclear reserves, the US risks falling behind.

Let's build 20 advanced nuclear reactors by 2035.

