

On the Grid: One Year Later 2/24/23

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We are thrilled to welcome former Congressman **Tim Ryan** to Third Way as a Senior Visiting Fellow. Over the last two decades, Ryan has been fighting for working-class Ohioans that have faced a challenging job market as factories moved abroad. Now, as we step into a new industrial and post-globalization era, funded by investments in a trifecta of legislation, we have an opportunity to bring new, long-term economic opportunities back home. But it's going to take a lot of work to rebuild Americans' trust in institutions to deliver the benefits of a clean energy transition to their communities.

Keep an eye out as we work alongside the Congressman to build lasting support for America's re-industrialization.



THIRD WAY

Third Way welcomes
Senior Visiting Fellow
Tim Ryan



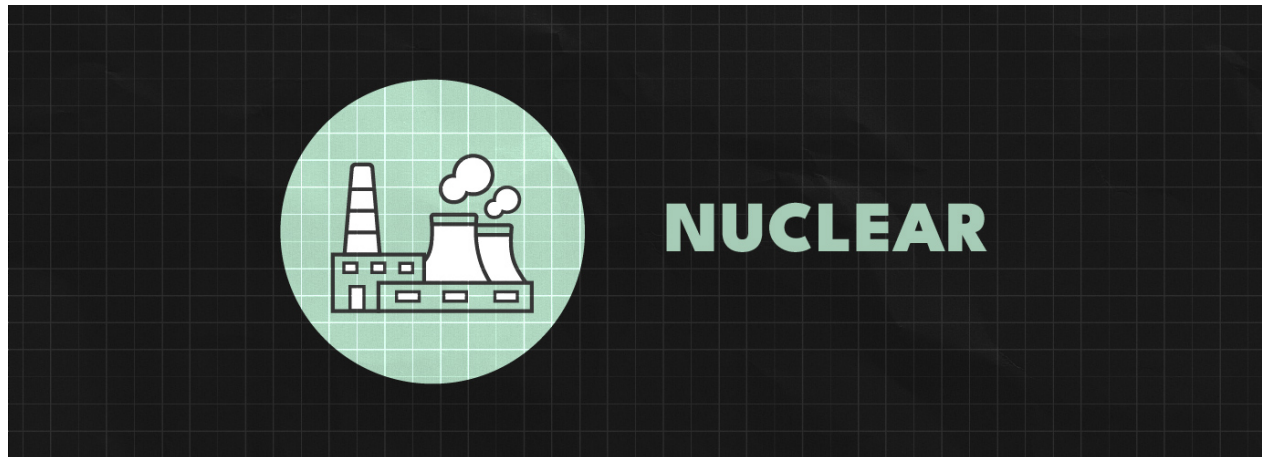
INTERNATIONAL
NEWS

Today marks one year since Russia first launched its brutal assault on Ukraine, resulting in untold casualties as Russian missiles level homes, schools, and hospitals. The Kremlin's ruthless attacks on Ukrainian cities have threatened sovereignty, democracy, and above all, shattered global energy security.

Over the past year, the US has reprised its role as an "Arsenal of Democracy" for European nations as they reduced their use of Russian energy, boosting shipments of Liquefied Natural Gas to Europe by **over 137%** compared to the previous year. Permanently replacing Russian oil with more reliable and secure energy is going to take some work because, as **Senator Joe Manchin** said in Davos earlier this year, "You don't just eliminate what the world is using. You innovate it and do it better."

Policymakers passed comprehensive legislation that is supporting our long-term goal of switching to carbon-free fuels. Doing so will ensure we reach energy independence and can act as an "**Arsenal of Clean Energy**" to our allies abroad, exporting American clean energy technology and helping

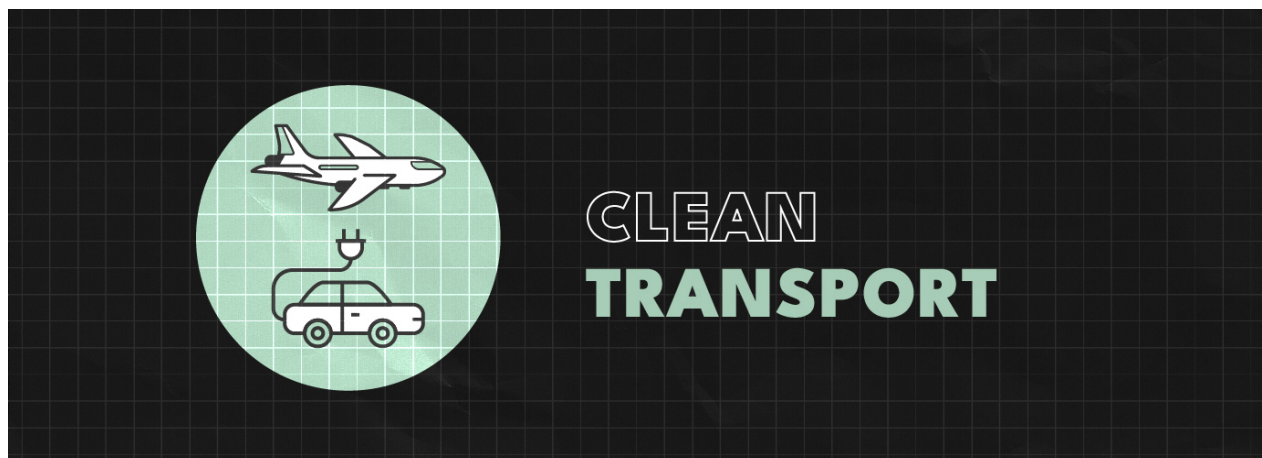
build a clean, firm energy network immune to Russia's aggression. Vladimir Putin is a scar on democracy and by adopting policies and technology that expand global energy security we can finally loosen his stranglehold and protect democratic values.



This week the Polish government and American nuclear company Westinghouse Electric signed a deal to move forward with their previously announced agreement to build several AP1000 nuclear reactors, the country's first source of nuclear power generation.

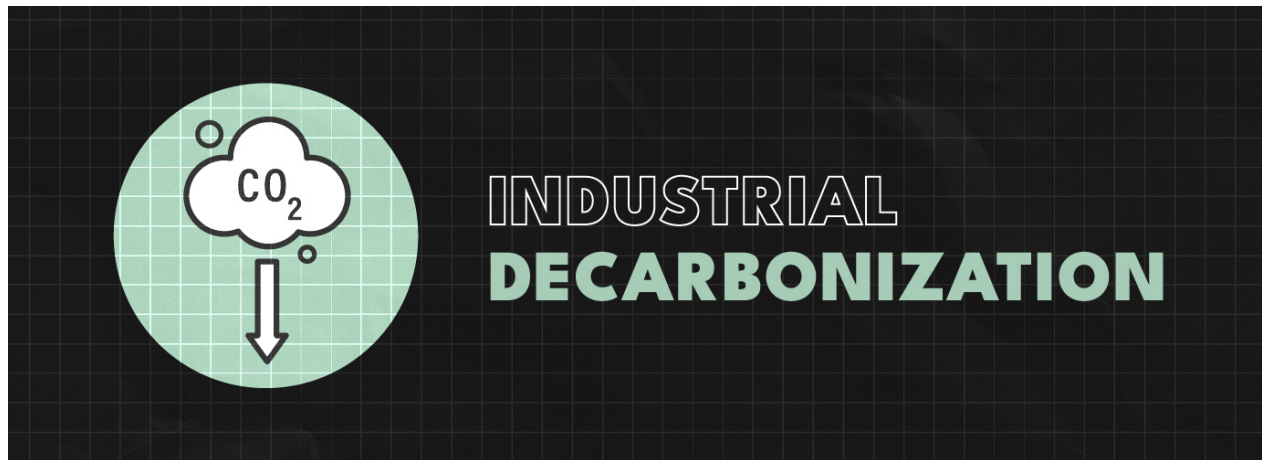
Fossil fuels like coal currently dominate Poland's energy landscape, but nuclear energy will play a key role in helping Poland shift to a carbon-free energy mix by mid-century. Modeling from Carbon-Free Europe shows that by 2050, nuclear reactors will be responsible for generating nearly 40% of Poland's electricity.

Poland's embrace of nuclear energy is part of a larger pattern of European nations scaling up more reliable, affordable, and secure energy to wean their reliance on volatile energy markets. And most importantly, Europe is turning away from authoritarian states like Russia and China and instead looking towards American nuclear. It's not just about importing technology, it's about making commitments that will not create vulnerabilities to authoritarian aggression and hostile geopolitical agendas. If this pattern continues, as we expect it will, nuclear energy will remain Europe's largest source of electricity.



This week, United Airlines, along with Air Canada, Boeing, GE Aerospace, JPMorgan Chase, and Honeywell, invested \$100 million to scale up sustainable aviation fuel (SAF), a big step that will help make SAF cost competitive with conventional jet fuel. While the Inflation Reduction Act includes a suite of sustainable fuels tax credits, large-scale private investment from some of aviation's biggest names is filling an investment gap and will move the needle faster.

The aviation sector is incredibly carbon intensive, and as we continue to invest in sources that cut aviation-related emissions, we are cleaning up our air and creating good-paying jobs across the American agricultural and manufacturing sectors. But given the high-dollar price tag on new refineries, we still have a long way to go before SAF is fully integrated into our aviation sector.



Starting in 2026, the European Union will begin to phase in a Carbon Border Adjustment Mechanism (CBAM), imposing a tax on imported fertilizers, steel, iron, cement, aluminum, and electric energy production based on their carbon footprint. This will incentivize cleaner industrial production while ensuring EU manufacturers remain competitive.

Our newest blog from Elena Benaim, Carbon-Free Europe's Policy Analyst for Carbon Pricing and Clean Energy Supply Chains, outlines the impacts a European CBAM will have on American businesses. With some of the cleanest industrial production facilities already based in the US, and a bundle of clean energy legislation ready to drive even more efficient manufacturing, American companies are well-positioned to stand up to a European CBAM.



WHAT WE'RE READING & LISTENING TO

- Brad Plummer, in *The New York Times*, outlines the obstacles blocking clean energy projects from connecting to our electrical grid and what's at stake if we don't expand our transmission capacity.
- Emma Marris, in *The Atlantic*, lays out the emerging ubiquity of electric vehicles and how the reputation of electric vehicles is shifting away from novelties to everyday cars, bringing normality to our all-electric future.
- Bill Loveless, on the *Columbia Energy Exchange* podcast series, talks with Sagatom Saha and Noah Kaufman about the unfolding transatlantic industrial arms race, kicked off by the Inflation Reduction Act and pushing European countries to respond to American subsidies to clean energy manufacturing.

ON SOCIAL

Josh Freed, Senior Vice President for Third Way's Climate and Energy Program, reflects on the one year anniversary of Russia's invasion of Ukraine and outlines the essential role American energy will play in protecting global democracy.



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Today marks one year since Vladimir Putin began an unjust & unprovoked war against Ukraine. As we grimly commemorate the invasion, I want to take a moment and reflect on the consequences of this war. 📖 1/

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