

On the Grid: The Road Ahead 5/13/22



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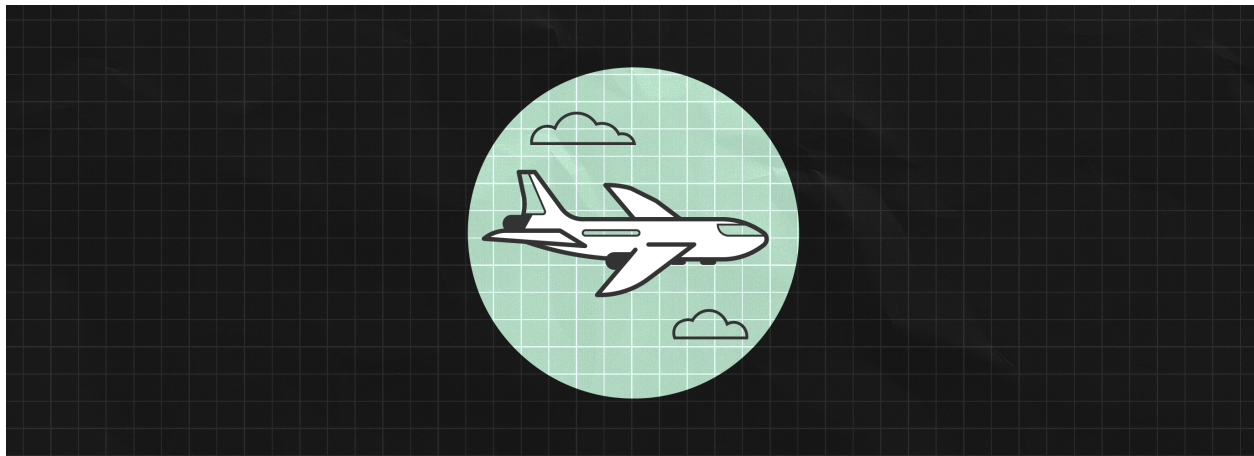
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The trifecta of the war in Ukraine, rapidly accelerating energy prices, and push to net-zero has upended energy strategies across much of the world. This week, Third Way's Josh Freed and Lindsey Walter were in London for meetings with Members of Parliament and the Department of Business, Energy, and Industrial Strategy to discuss our [modeling of the United Kingdom's pathways to net-zero](#), and the UK's clean energy strategy. While they were in London, the US advanced nuclear company [X-Energy announced a new partnership with UK-based Cavendish](#) to build power plants in the UK to help decarbonize British industry as well as electricity. This could help British Prime Minister Boris Johnson's very ambitious plan to [build one new nuclear plant every year](#) as part of his effort to get the nation to net-zero by 2050. It is also an important example of the kind of trans-Atlantic coordination we're advocating for to accelerate the deployment of clean, secure, reliable energy. Based on our meetings, we anticipate many more opportunities like this to come together!

1. Getting SAF in the Skies

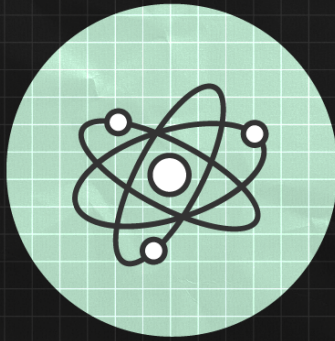


Global emissions declined by almost 2 billion tonnes in 2020, due to COVID-19 lockdowns. Just as people around the world weren't taking to the roads to travel, they also weren't flying either. But emissions are back up as pandemic regulations have relaxed and many want to travel and connect with others as they did before the pandemic. Today, aviation produces 3% of our total emissions. And because aviation isn't easy to electrify like vehicles, it will rely on liquid fuels for the foreseeable future. Without alternatives, that means a reliance on volatile global petroleum markets.

Sustainable aviation fuels (SAF), made from a variety of sustainable feedstocks like captured carbon and waste oils, offer a unique opportunity to reduce as much as 60% of aviation's carbon emissions while increasing US energy security by producing more energy domestically.

In our new [memo](#), Alex Laska, Third Way's Senior Policy Advisor for Transportation, outlines five federal programs that Congress should prioritize in upcoming appropriations talks. These programs will help move novel SAF production pathways out of the laboratory and into the market, accelerating commercialization. But investment in innovation is not enough. Once we have sustainable fuels, we need a performance-based tax credit for SAF to incentivize production and use. The federal government can play a direct role in getting cleaner fuels in our skies while giving domestic industries and workers a leg-up and reducing our dependence on global oil markets.

2. Third Way at Aspen Climate in Miami



The Climate and Energy team's own Alan Ahn, Senior Fellow for Nuclear, joined experts and political leaders in Miami to moderate an important panel discussion on the role of nuclear power to address climate change. The conversation, which included Oklo co-founder Caroline Cochran, Westinghouse Chief Technology Office Dr. Rita Baranwal, and Dr. Melissa Lott, research director at Columbia's Center on Global Energy Policy, focused on nuclear accessibility and the path forward for advanced nuclear technology deployment. Panelists unpacked the many benefits of advanced nuclear technology in providing reliable, safe, clean power and how rapid technological advancements are shifting perceptions around nuclear technology and outdated assumptions.

3. April's Inflation Outlook



On Wednesday, the Bureau of Labor Statistics released the Consumer Price Index (CPI) report for April, showing an 8.3% increase in prices compared to last year, with slight ease in inflation numbers we saw in March.

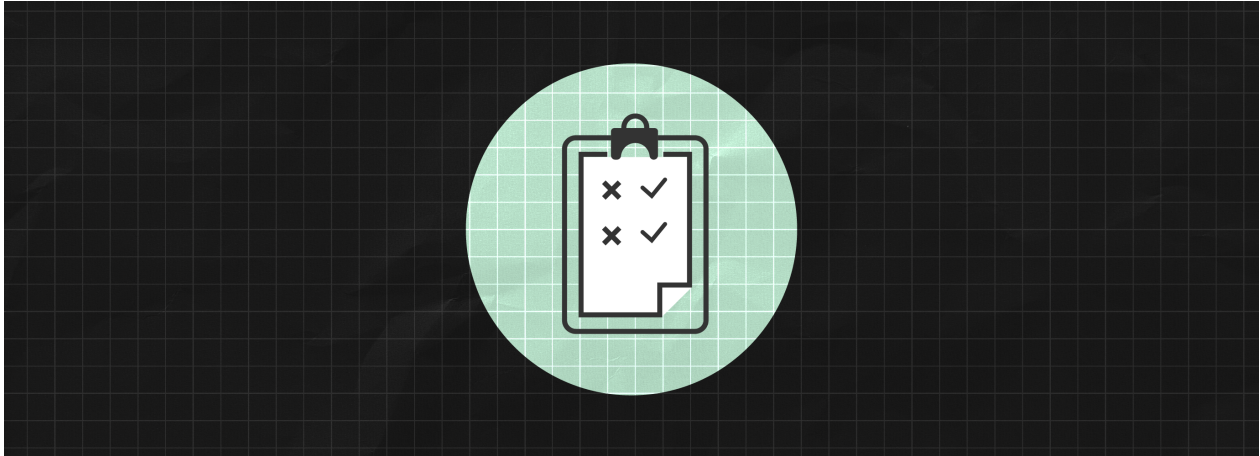
Russia's aggression in Ukraine has upended global energy markets, as evident in March's CPI report. This month we saw a slight reprieve as energy prices dropped by nearly 3% compared to the prior month, and even lower for gas prices, which saw a 6% drop. A small victory, but gas price inflation overall remains high, at a whopping 45% compared to last April as the nation confronts an ongoing pandemic, a coordinated recovery, and now, a war in the East. And as was pointed out on

Thursday's episode of The New York Times' The Daily, depending on your age, geography, and other factors, these increases are having a bigger impact on some Americans than others.

Dr. Ellen Hughes-Cromwick, Senior Resident Fellow and economist on the Climate and Energy team sat down with World War Zero to unpack the report and discuss actions the Federal Reserve can take to tame the inflationary prices hitting American families in every region of the country.

Watch Ellen's conversation [here](#).

4. Biden Planning for Action on Permitting



Last year's Bipartisan Infrastructure Law will ultimately have a tremendous impact on our ability to reduce emissions and expand America's clean energy potential. But as we know, successful and timely implementation is critical. On Wednesday, May 11, the Biden Administration announced it is taking steps to ensure that these investments are used efficiently, fairly, and in a way that encourages community engagement by releasing a Permitting Action Plan that will strengthen and accelerate the Federal permitting and review process to ensure that America's critical infrastructure projects are completed in a timely manner.

The Action Plan is grounded in five key elements:

- Leveraging interagency coordination and subject-matter expertise to accelerate the permitting and review process.
- Establishing definitive timelines, milestones, and deadlines, as well as tracking information, to bolster public transparency on projects implemented through BIL.
- Proactively, and continuously, engaging with a diverse set of stakeholders, particularly those within Tribal nations, States, territories, and local communities.
- Improving and streamlining federal assistance to Tribal nations, States, territories, and local communities navigating the often disorienting permitting and review process.

- Supporting and addressing agency needs to ensure that agencies have the skills and resources to efficiently complete the permitting and review process.

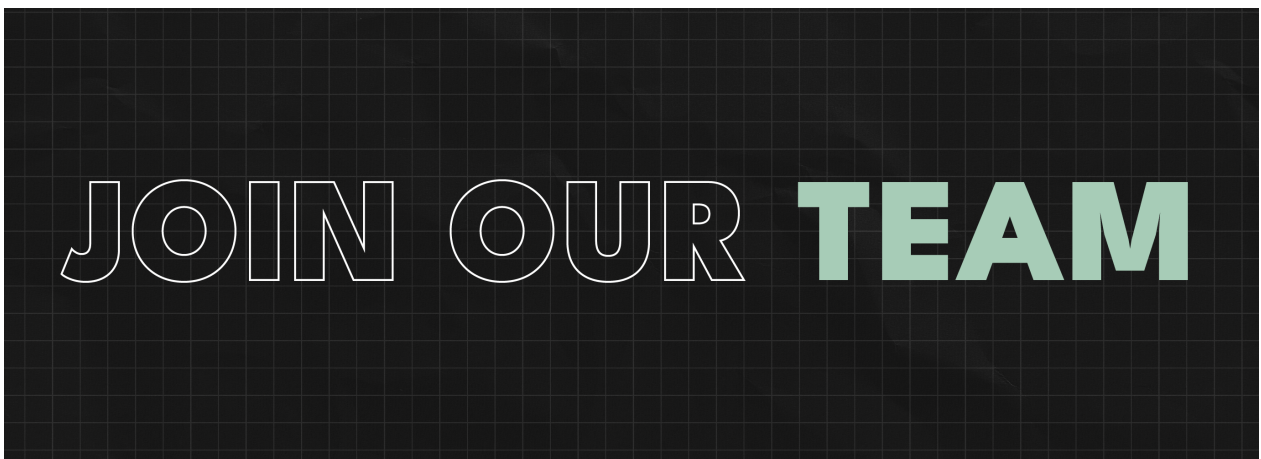
5. Nominations Moving Forward



Over the past two years, the Biden Administration has strived to appoint a diverse set of dedicated and highly qualified individuals to various open administrative positions, and we've been paying close attention. This week, [Dr. Lisa Cook](#) was confirmed as the first Black woman to serve on the Federal Reserve's Board of Governors and [Dr. Kathryn Huff](#) as the Department of Energy's new Assistant Secretary for Nuclear Energy. While they both faced intense scrutiny from Republicans, their qualifications spoke for themselves.

Recently, the White House announced [nominations](#) for Annie Caputo and Brad Crowell for positions within the Nuclear Regulatory Commission. Their leadership, experience, and commitment to innovative nuclear policies are strong indicators that America can still reach our energy security, climate, and economic growth goals with the help of nuclear energy.

6. We're Hiring



The clean energy policy conversation is expanding...and so are we! The Climate and Energy Program is looking for people with talent and a passion for climate solutions to fill two new roles on our

team. If you've got anyone in your mental Rolodex who you think might be a fit, please send them our way. And if you wanted to circulate these job postings more broadly with your networks, we wouldn't mind that either!

Executive Coordinator: This person will manage scheduling, meeting set-up, and meeting and calendar logistics for the Senior Vice-President, as well as provide background research in preparation for meetings and events, plan logistics of online and in-person events, prepare expense reports, and file consultant invoices and reimbursements. *(1 year of relevant work experience preferred)*

Policy Advisor for Transportation: This person will focus predominantly on policies to decarbonize the aviation sector by conducting original-source research and analysis, and authoring high-impact written reports, memos, and op-eds to better understand and explain the importance of policies, federal funding changes, and technologies that are necessary to eliminate emissions from aviation and provide associated benefits for the US economy, jobs, security, public health, and climate. *(1 year of experience in transportation, clean fuels policy, or a relevant field)*

Deputy Director for Innovation and Clean Industry: This person will help set policy, advocacy, and product strategy and supervise multiple team members working on issues surrounding energy innovation, carbon management, and industrial decarbonization while overseeing in-depth research and quantitative analysis to better understand and explain our policy goals in specific issue areas that relate to American clean energy innovation, deployment, and competitiveness. *(5+ years of experience in clean energy policy)*

7. What We're Reading and Listening To



- [US Secretary of Energy, Jennifer Granholm](#), writes in *The Hill* about how the Administration is helping existing American coal and power plants transition to clean energy while supporting the local communities through expanded job opportunities, a cleaner environment, and lower energy costs.

- Neal Boudette, in *the New York Times*, reports on Mary T. Barra, GM's chief executive, and her strategy to address market competition and produce affordable electric vehicles (EVs) that everyday Americans can get behind.
- The Energy Gang talk to Melissa Lott, the Director of Research at Columbia University's Center on Global Energy Policy, and Amy Harder, Executive Editor of *Cipher*, about the 15 minutes last week that California ran on 100% renewable power and what that means for the states energy future, as well as what the potential closure of Diablo Canyon, and advanced nuclear and the investment in US-made HALEU means to achieving broader climate goals. Third Way's Alan Ahn also spoke with Amy this week about how the US can meet that demand and lessen our reliance on Russia.