

# On the Grid: The State of Clean Energy 2/10/23



**Mary Sagatlova**  
Communications and Content Advisor  
[@MarySagatlova](https://twitter.com/MarySagatlova)



**Jared DeWese**  
Former Deputy Director of Communications,  
Climate and Energy Program  
[@jareddewese](https://twitter.com/jareddewese)

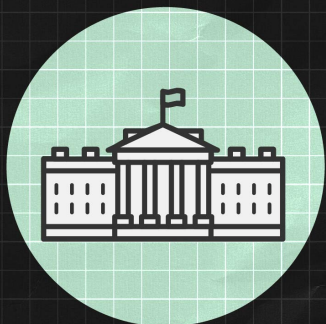
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The clean energy conversation in the US has shifted from debating legislation or focusing on the broad need to address climate change to examining the details of how to get it done right—and who sees the benefits. As we discuss below, President Biden keyed in on explaining the benefits of investment in clean energy and infrastructure in his State of the Union this week, giving only a glancing mention of climate change. We think that makes sense, and that’s why this week’s *On The Grid* unpacks the implications of the nation’s new clean energy policies for some of the major energy sectors—manufacturing, transportation, and nuclear – in the United States.



## US ECONOMY

Ahead of President Biden’s State of the Union Address, Third Way’s Senior Resident Fellow Dr. Ellen Hughes-Cromwick provided her own “State of the Economy” on CNN, breaking down different economic metrics and the positive impacts of clean energy legislation on the American economy.



## ADMINISTRATION

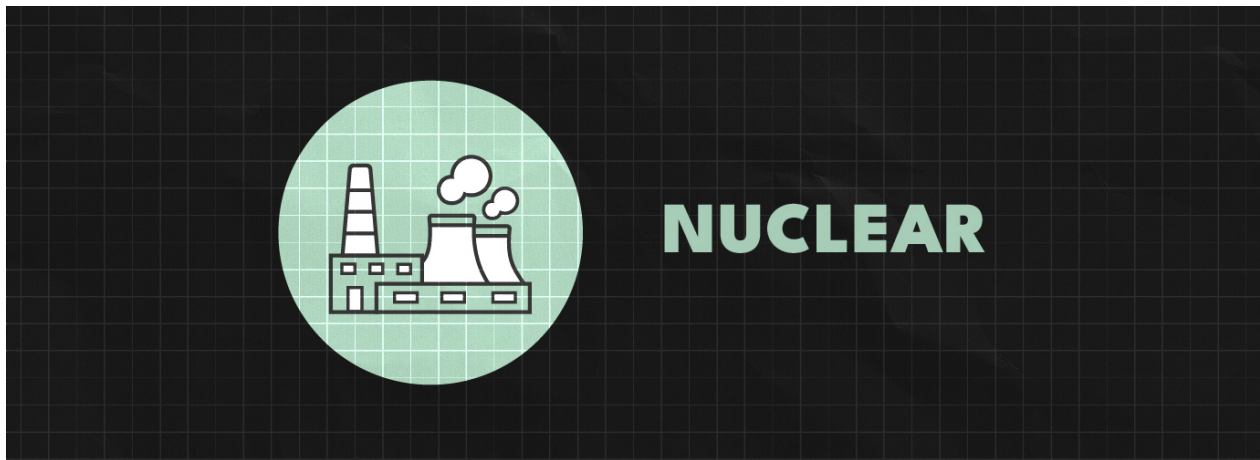
President Biden didn’t dwell on the climate emergency in this week’s State of the Union. He didn’t talk about the need for massive increases in wind and solar. He even acknowledged—in a line that

drew jeers from Republicans—that we would need oil for at least another decade.

And yet, we thought it was a great speech. Why? Because Biden put the emphasis where it belongs: on the promise that the massive clean energy investments he signed last year will help to transform the lives of Americans who are focused much more on the economic health of their families and communities than they are on the emissions reductions.

Praising the inclusion of fossil fuels in the State of the Union may feel counterintuitive coming from clean energy and climate program. We think, however, it is the best path to ensure that the move to clean energy, and the historic investments from the Inflation Reduction, CHIPS and Science, and Infrastructure Investment and Jobs Acts, endure beyond one presidency or political party's control. Today, a majority of voters are unaware of the investments in the trifecta of laws. Public opinion surveys also show that voters remain most concerned about inflation and economic opportunities in their communities. And after the economic, social, and political chaos of the last six years, they're very wary of disruptive change.

No doubt, there will be a lot of quibbles. Some won't like the President's calling out of the oil companies' huge profits and low investment. Others will think it didn't go far enough. The same will no doubt be said about how much or little he touched on clean energy, climate change, and everyone's technology of choice. The President's inclusion of domestic oil and gas production, along with lots of manufacturing and building infrastructure on the road to a clean energy economy, places his vision and values firmly in the center. The more he leans into this, the more likely the historic clean energy and climate investments will become as durable.



The fate of the Diablo Canyon Nuclear Power Plant, California's largest source of reliable carbon-free electricity, remains uncertain as the owner, PG&E, is in the midst of an attempt to keep the plant operational, while license expirations for its two reactors loom over the next two years.

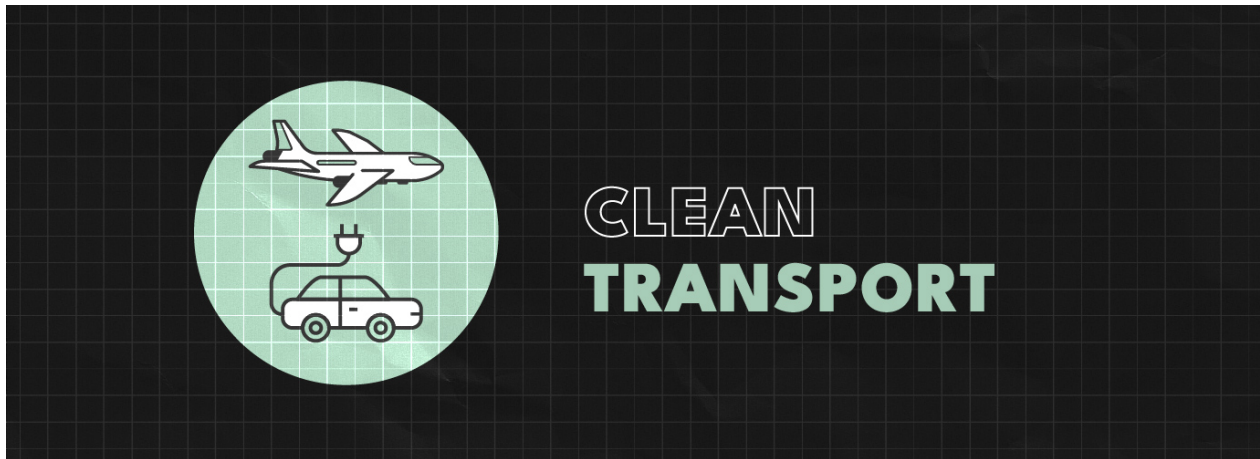
In an upcoming decision, the US Nuclear Regulatory Commission (NRC) will determine whether or not Diablo Canyon can remain open during the plant's upcoming license renewal process, which typically takes 5 years. Continuing to generate affordable and safe nuclear power is essential,

especially given that the plant's closure will be supplemented by natural gas and emit 15.5 million metric tons of global warming emissions into the atmosphere.

Third Way sent a letter to NRC, urging agency staff to grant Diablo Canyon an exemption from the typical 5-year renewal period to prevent the plant from shutting down when the reactor licenses lapse, as they have done for the Ginna, Clinton, and Oyster Creek nuclear power plants.

Diablo Canyon, and the remainder of our existing nuclear fleet, must remain open to ensure that the US energy landscape remains reliable, secure, and clean.

You can read our memo on the importance of preserving existing nuclear reactors to learn more about what's at risk.



The Bipartisan Infrastructure Law's \$5 billion National Electric Vehicle Infrastructure (NEVI) Program will deploy a national network of thousands of electric vehicle chargers along highway corridors over the next five years. As more electric vehicles (EVs) hit the road every day, building out a reliable and convenient fast-charging network is paramount.

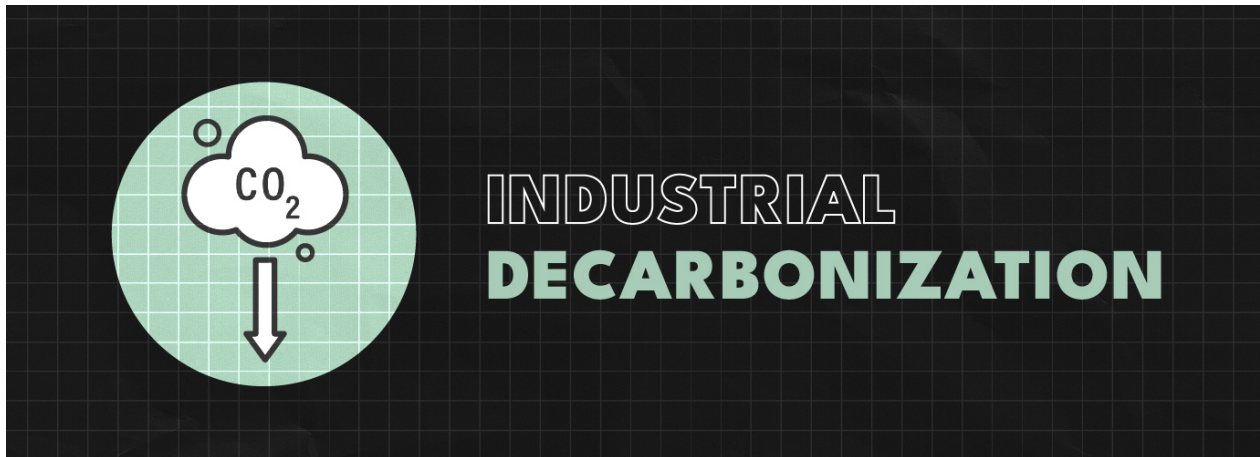
That's why this week, Alex Laska, Deputy Director of the Climate and Energy Program, and Dr. Ellen Hughes-Cromwick, Senior Resident Fellow, briefed the new Joint Office of Energy and Transportation with our latest research and analysis on how to best build out a nationwide EV charging network and how our domestic EV industry can be globally competitive.

Here are three things you should read to catch up on the conversation:

1. Third Way's NEVI map highlights how many fast chargers each state could install and the jobs that can be created building, operating, and maintaining them.
2. Third Way's newest set of policy recommendations outlines how key investments in the domestic EV supply chain can give American automakers the competitive edge to take advantage of a \$1 trillion global market, annually by 2050.



3. In a [blog](#), we delineate the specific provisions across Inflation Reduction, CHIPS and Science, and Infrastructure Investment and Jobs Acts that will bolster American EV manufacturing.



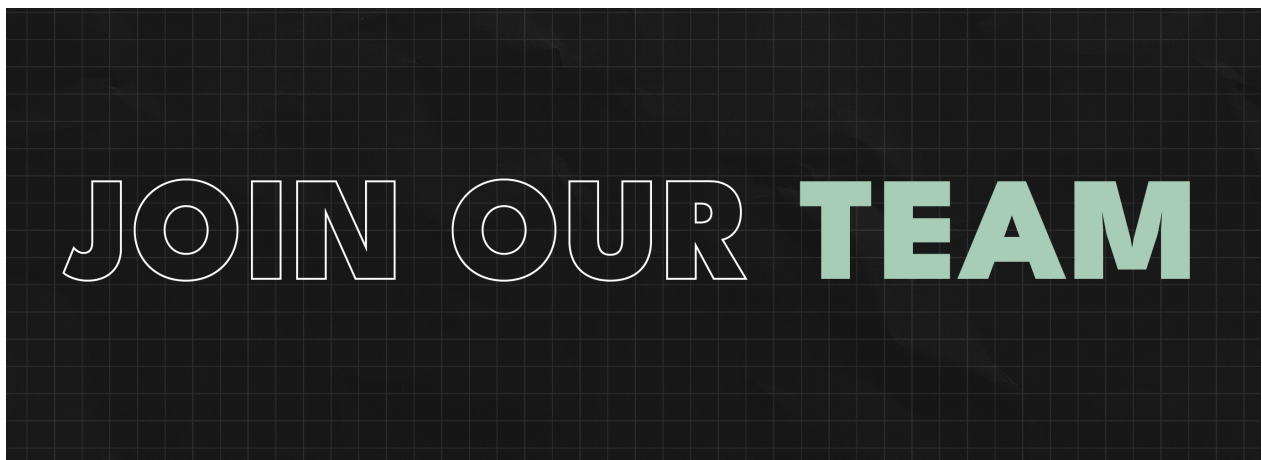
In his State of the Union Address, President Biden announced [new standards](#) that mandate all construction materials used in federally funded infrastructure projects be Made in America. This is in addition to existing [Buy Clean](#) standards that mandate cleaner and more energy-efficient production of construction materials like cement, steel, aluminum, and glass.

For Buy Clean and Made in America to be effective, they require the implementation of various industrial policies to ensure that embodied carbon is accurately measured. US industries also need to be equipped to take full advantage of available incentives to decarbonize their operations. We've been working on scaling up the use of [Embodied Product Declarations \(EPDs\)](#) as the disclosure method for product embodied carbon, which will be pivotal to this effort.

The federal government can learn from the successes and challenges of other procurement programs, like Buy Clean [California](#), to establish a program that advances national climate and economic goals. The stakes are clear, but we have a lot of work ahead of us to ensure that American manufacturers can keep up with decarbonization initiatives and remain globally competitive.



- Philip Bump, in *The Washington Post*, highlighted the Biden Administration's efforts to bolster the American working class, particularly labor unions, as part of a larger strategy to dually transform the economy and garner political support for Democrats in the 2024 election cycle.
- Emma Marris, in *The Atlantic*, outlines the renewed enthusiasm for clean energy as the US shifts towards a "carrots, not sticks" policy approach that has made addressing climate change more profitable than ignoring it.
- Andy Stone, on the Kleinman Center's *Energy Policy Now* podcast series, is joined by Daniel Poneman, former US Deputy Energy Secretary and current CEO of Centrus Energy to unpack the revived global interest in nuclear energy and what it means for the American economy and climate efforts.



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!

Deputy Director of Development: This person will cultivate and steward relationships with individual and philanthropic donors as well as set and oversee the execution of the development strategy for the Climate & Energy Program to maintain and grow our individual donors and foundation fundraising, working with the Senior Vice President for Climate, Third Way's development, and the Climate policy and Communications teams. This person will oversee the Development Advisor, who manages institutional philanthropic giving and grant accounts manager's fulfillment of all relevant grants. *Our ideal candidate will have 5+ years of energy policy experience and experience managing staff.*

# ON SOCIAL

*Josh Freed, Senior Vice President for Third Way's Climate and Energy Program, outlines the importance of a technology-inclusive clean energy approach to global decarbonization.*



Josh Freed   
@jsfreed



New @IEA study finds RE+Nuclear will reach tipping point on new electricity generation by `25.  
[reuters.com/business/susta... 1/](https://reuters.com/business/susta...)



reuters.com

**Renewable spurt pushes power towards emissions 'tipping point'**

A rise in wind and solar production, together with more nuclear electricity, will dominate growth in global power supply over the next three years, curbing th...