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On the Grid: 100 Days Later 5/02/25



Mary Sagatelova, Senior Advocacy Advisor

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Welcome back to *On the Grid*, Third Way's bi-weekly newsletter, where we'll recap how we're working to deploy every clean energy technology as quickly and affordably as possible. We're excited to have you join us!

A note: We're now 100 days into the Trump Administration, and there's been no shortage of activity. For a deeper look at the Administration's recent activity, check out Third Way's [full analysis here](#). Below, we'll dig in on specific energy impacts.



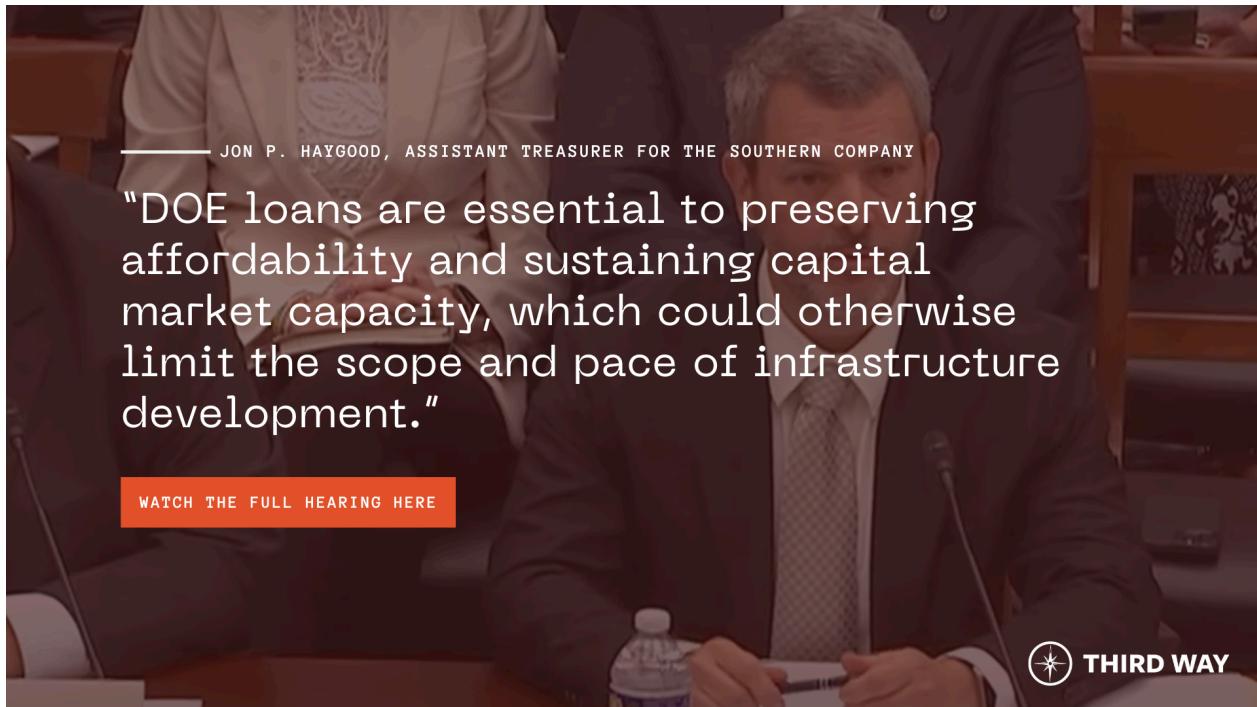
CONGRESS

The Department of Energy's Loan Programs Office (LPO) is the little engine that could of the US government. Year after year, LPO provides companies access to very low-interest financing and grants to build critical, large-scale energy projects like advanced nuclear and fossil energy projects. It is best known for its program supporting nascent and not-fully-commercialized energy technologies. This is a powerful tool for the US to maintain its competitive edge in a rapidly transforming global market.

The Financing Engine Under Fire: Unfortunately, LPO faces existential threats from both the Administration and Congress. As many as 60% of the program's staff have elected to take DOGE-driven buyouts, which would cripple the office. Congress could also try to cut or eliminate LPO's funding as part of its quest to pay for tax cut extensions. A recent House Science subcommittee hearing highlighted the important role the LPO plays *and* the support it has from not just start-ups and investors, but also some of the giants of the energy business.

A Utility Perspective: LPO's defenders had powerful backup from Jon Haygood, Assistant Treasurer of Southern Company, one of the country's largest power producers. He credited DOE loan support as a key factor in advancing the Plant Vogtle nuclear project—the first new nuclear reactors built in the US in decades—saving customers more than \$500 million and returning \$1.15 billion in interest to taxpayers in the process. Importantly, Haygood also recommended that LPO streamline the approval process for investment-grade utilities while preserving accountability and oversight. Coming from one of the country's most established utilities, this was a powerful reminder that the LPO is a strategic tool

for building out American energy leadership.



What We're Doing: We are staunch proponents of LPO. It is a critical tool for providing affordable financing for clean energy infrastructure when the private markets can't. From restarting mothballed nuclear plants to helping retool shuttered fossil sites, LPO helps make next-generation projects bankable and scalable. That's why we've been sounding the alarm on proposals that would weaken LPO, highlighting how preserving the office's funding is essential to maintaining America's competitiveness in global clean energy markets.

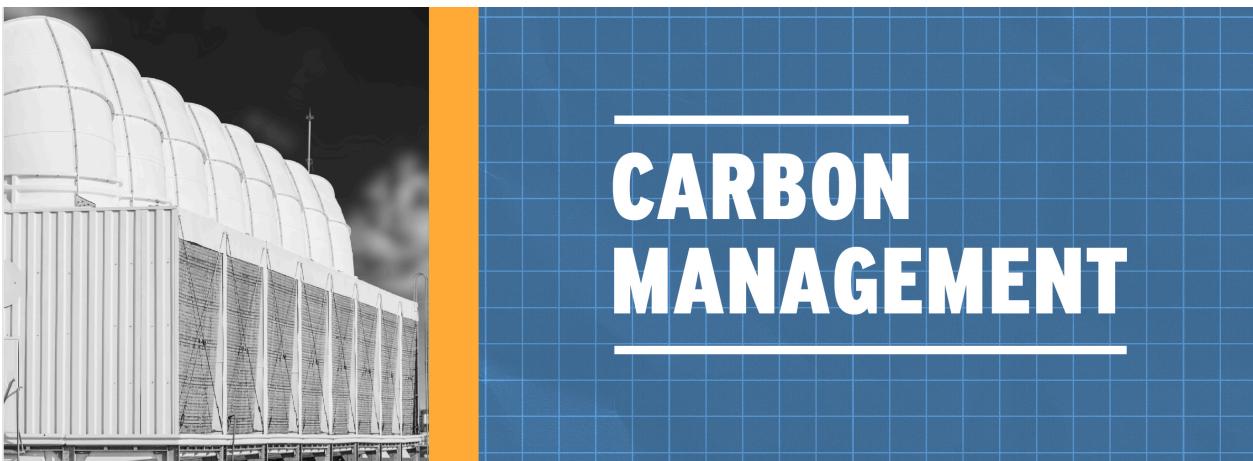


Non-college-educated men make up roughly a quarter of the electorate. They're also uniquely significant for clean energy deployment. Most energy jobs are currently held by men without college degrees. As new projects continue to come online, workers must feel confident that clean technologies—and the jobs they create—are here to stay. Building compelling clean energy messages tailored to non-college men is, therefore, especially pressing.

To better understand how to build support for clean energy with this key constituency, we partnered with Impact Research earlier this year to conduct a nationwide survey of 800 non-college-educated men under 50, along with four focus groups spanning white, Black, and Latino non-college men. You can read our first memo breaking down the results [here](#), but below are a few key takeaways:

- **They Like Clean Energy—In Theory:** Non-college-educated men are broadly supportive of clean energy (81%), with strong support for solar (82%), wind (71%), nuclear (52%), and even EVs (57%). But that support begins to waver when costs enter the conversation.
- **It's the Economy. Still:** When asked about the biggest issue facing the country, 31% of non-college-educated men said inflation and high costs. Just 4% said climate change.
- **Cost Beats Climate Every Time:** Arguments about the high cost of living consistently beat out pro-clean energy messages, especially when those messages focus on climate change.
- **Clean Energy Isn't Clean:** A significant share of non-college-educated men (42%) say fossil fuels are just as good as, or even better, for the environment than clean energy, making it harder to build trust in these technologies.

What We're Doing: We'll be building on this research as the year goes on, honing in on effective messages to address skepticism about clean energy's efficacy, reliability, and environmental impact. We're digging into what non-college-educated men think about clean energy—the technologies, the transition, and their place in it.



Carbon dioxide removal (CDR) technologies have enormous potential to cut emissions while supporting economic growth. But tools like direct air capture and carbon sequestration are still new and unfamiliar technologies. They often face pushback from surrounding communities, especially when developers can't clearly answer the questions that matter most to communities.

What We Know: Even the most promising clean energy projects will struggle to get off the ground without public support. That's why last year, we led a group of leaders from influential stakeholder

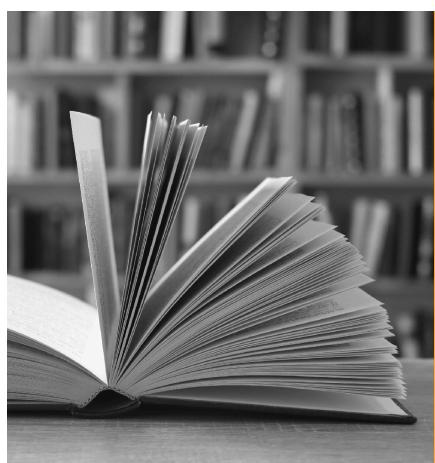
groups on a trip to Canadian CDR sites to see these technologies firsthand. We conducted surveys and on-the-ground research and synthesized our findings to create a concise messaging guide for developers on what it takes to help communities feel informed. You can read our full results and helpful insights [here](#).

We saw firsthand that support grew as participants learned about the local benefits, especially cleaner air, good jobs, and economic opportunity. But we also heard a clear warning: one-off engagement is not enough. Lasting support depends on trust, transparency, and long-term investment. To help projects move forward efficiently, we also created a separate guide just for developers, focused on the five key questions communities are most likely to ask:

1. *How will your carbon removal project bring prosperity to our community?*
2. *Will the jobs created by your carbon removal project actually go to members of our community?*
3. *How does your carbon removal project address local pollution?*
4. *How does your carbon removal project physically fit into our community?*
5. *Why did you select our community to host your carbon removal project?*

You can read our full guide for developers [here](#).

What We're Doing: We're making sure these insights reach critical stakeholders—industry, developers, local policymakers, funders, and other influential groups—so they can better engage with communities and build projects that last. We've already begun sharing the results of our visit to Canadian CDR sites, and we're seeing real impact: companies are using our findings to shape how they approach community engagement going forward.



WHAT WE ARE READING & LISTENING TO

- Kurt Campbell and Rush Doshi, in *Foreign Affairs*, argue that the US is dangerously underestimating China and must embrace an alliance-driven statecraft strategy to build deeper, more integrated partnerships with our allies across military, economic, and technological sectors.
- Alexander C. Kaufman, in *The Atlantic*, argues that geothermal energy, once a niche energy source, is poised for rapid growth in the US due to rising demand from data centers and compatibility with existing oil and gas infrastructure.
- Shayle Kann, on the *Catalyst* podcast, talks with Ahmad Ghahreman, co-founder and CEO of rare earth recycler Cyclic Materials, about China's dominance of rare earth elements and the challenges the US faces in building a supply chain outside its control.