

NEWSLETTER *Published August 22, 2025 • 5 minute read*

On the Grid: An Electrician, A Lineman, and Joe Rogan Walk Into A Bar...



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Hi Friend!

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!



PUBLIC OPINION

Third Way's public opinion research has shown that non-college-educated men are increasingly skeptical of clean energy technologies. As we've covered in past issues, roughly 40% of non-college men under 50 say that fossil fuels are just as good, if not better, for the environment than clean energy. In focus groups, many said clean energy was unreliable or raised half-truths that overemphasize concerns about clean technologies, like concerns about costs or local environmental impacts of critical mineral mining.

New research shows this isn't so much a messaging challenge as it is a credibility crisis. On clean energy, the right messengers make a huge difference with this group—and they aren't always who you'd think. If the very people who build and maintain America's energy infrastructure don't believe in clean energy, the transition will struggle. And if this electorally powerful group doesn't back clean energy, the transition could be doomed. Our new public opinion research points to two types of messengers who cut through the noise to reach non-college men:

1. **The Neighbor:** These are people rooted in respondents' communities, like local electricians, linemen, and business owners. They aren't selling clean energy—but they're living with it, working with it, and, for some, staking their livelihoods on it. They've got a clear financial stake in the energy sector AND they're familiar. That makes them credible.
2. **The Rebel:** Anti-establishment voices, like Joe Rogan, Theo Von, and Elon Musk, who challenge clean energy orthodoxy and press on soft spots in arguments. By pushing back on mainstream narratives, Rebels build trust with non-college men who see their skepticism not as cynicism but as honesty.

What We're Doing: This year, we've been digging into how non-college-educated men perceive energy issues, conducting focus groups and surveys to understand what drives their skepticism and what might win their support. Our goal is to get durable buy-in from key constituencies by moving beyond superficial perceptions of clean energy technologies and meet these people on their terms, where these discussions are happening.



NUCLEAR

This week, the Energy Innovation Reform Project and the Center for the National Interest released a report on how America can achieve nuclear energy dominance and where we stand today. Their findings fall broadly into three categories:

1. **Building at Home to Lead Abroad:** A strong domestic nuclear industry underpins not only our national and energy security, but also our global influence. To lead internationally, the US must first succeed at home.
2. **Expanding Public Sector Support:** Nuclear deployment is complex, costly, and too big for the private sector alone. Success and investor confidence require strong, consistent government support and streamlined permitting and licensing.
3. **Ensuring Fuel and Workforce Foundations:** America's nuclear future depends on a secure fuel supply chain and a skilled workforce, from reactor operators and construction crews to agency staff who can deliver the regulatory capacity needed.

Where Does That Leave Us? The Trump Administration has pledged to reach 400 GW of domestic nuclear capacity by 2050. Getting there requires progress across all three categories, but what's actually happened has been a bit more complicated..

1. **On domestic deployment...** This week, Kairos Power and Google announced plans for a 50 MW reactor tied to the Tennessee Valley Authority grid by 2030. This is part of a larger deal for Google to buy 500 MW from seven Kairos SMRs between 2030 and 2035. Corporate power purchase agreements like this, and similar ones from Amazon, are creating real order books and making projects bankable at home. But Russia and China dominate reactor exports, financing, and supply chains abroad.

2. **On public sector support...** Foreign Entity of Concern restrictions, tariffs, shifting federal policies, and agency overhauls have complicated both domestic and international US projects. While intended to protect national security, they add costs and uncertainty, undermining investor confidence, and make the US look like less and less of a reliable partner in negotiations.
3. **On fuel and workforce issues...** Despite funding for HALEU and fuel security, we're far from a secure US supply chain. Furthermore, cuts to staffing at the Nuclear Regulatory Commission and Department of Energy have slowed licensing and oversight. At the same time, the skilled labor force needed for a large-scale build-out remains underdeveloped.

What We're Doing: For over a decade, we've led the push for the US to lead on nuclear energy. This report and the work of EIRP and the Center for National Interest help reinforce the key challenges that policymakers should focus on to clear the way for the American nuclear industry to thrive. There is, however, a big challenge. The Trump Administration is creating many obstacles in how it is engaging with the Nuclear Regulatory Commission, tariffs, and funding. We and our allies are pushing the Administration as much as we can, but there's a serious limit to how open they are to outside input that is unique in this era. That's why we're also pushing for bilateral partnerships with allies and to open doors for US nuclear firms abroad.



- Matt Yglesias, in *Slow Boring*, argues that, while data centers can strain our electrical grid and raise electricity costs, smart policies that force them to pay for the infrastructure they need and operate more flexibly during peak demand could actually help data centers *lower* costs for ratepayers.
- Joshua Basseches, in the *MIT Technology Review*, argues that reframing the clean energy narrative away from climate to affordability and other local priorities can help us make progress despite federal rollbacks.

- Rob Meyer and Jessie Jenkins, on *Heatmap's Shift Key* podcast, unpack what it takes to manage a diverse grid system with Mark Rothleder, senior vice president and chief operating officer of the California Independent System Operator (CAISO).