

NEWSLETTER *Published May 23, 2024 • 9 minute read*

On the Grid: Bridging Clean Energy Partnerships 05/23/24

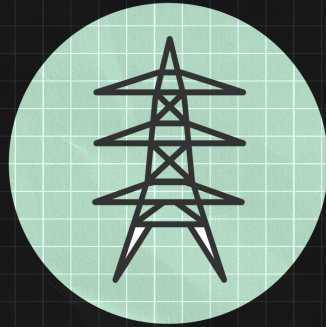


Mary Sagatelova, Senior Advocacy Advisor

Click [HERE](#) to subscribe to this bi-weekly newsletter.

Welcome to *On the Grid*, Third Way's bi-weekly newsletter, where we recap how we're working to deploy every clean energy technology as quickly and affordably as possible. And we're cutting through the election year noise to parse out what this year means for clean energy and how we can push decarbonization forward today and into the future.

We're excited to have you join us!



TRANSMISSION

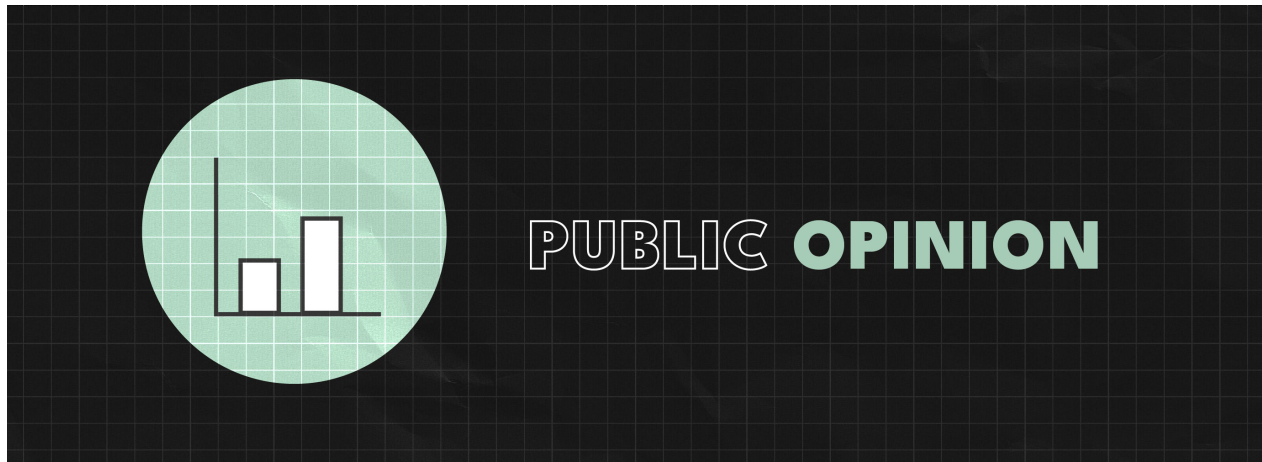
Last week, the Federal Energy Regulatory Commission (FERC) issued two new rules that will make it easier to build transmission across the country. Here's a quick breakdown:

- **Mandating Long-Term Transmission Planning:** Transmission planners must now develop long-term plans that evaluate transmission needs over a 20-year horizon, with updates made every 5 years.
- **Prioritizing Benefits:** Transmission planners must prioritize projects that yield greater reliability, reduced congestion, and lower costs for consumers, among other benefits.
- **Improving Cost Allocation:** FERC will now require transmission providers to engage states early on in the planning process and create a clear plan for cost distribution. This change will help ensure that *only* those who benefit will be required to pay for a new project. If states can't agree, FERC has established a standardized process to prevent any project delays.
- **Fast-Tracking Critical Transmission Projects:** FERC now has the power to step in and approve permits for interstate transmission projects. If a state denies a permit application, excessively delays the project, or lacks authority to act, FERC can now ensure that critical transmission projects in designated National Interest Electric Transmission Corridors keep moving forward.

Why This Matters: If the US is going to get all the clean, reliable electricity we need to the factories, data centers, and communities that need more electricity, we need to massively expand our transmission capacity. Last year, only 255 miles of new transmission lines were built because the rules were so byzantine and it was too easy to block projects. This new ruling will make it easier to build much of the up to 75,000 miles of new transmission the US will need in the next 11 years.

What We're Doing: As Ryan Fitzpatrick, Senior Director for Climate and Energy, stated last week, "these FERC orders are a turning point that will put America's power system on that path to success." By reforming regional transmission planning and cost allocation processes, we can build more transmission lines at a much faster pace. FERC has also mandated that grid-enhancing

technologies be deployed to boost the capacity and reliability of our existing grid. Our [newest blog](#) outlines these innovative solutions and the benefits of widespread deployment. And we have an additional product coming up, which will identify what else needs to get fixed so the US can deploy the transmission we need for a clean, affordable, reliable grid.



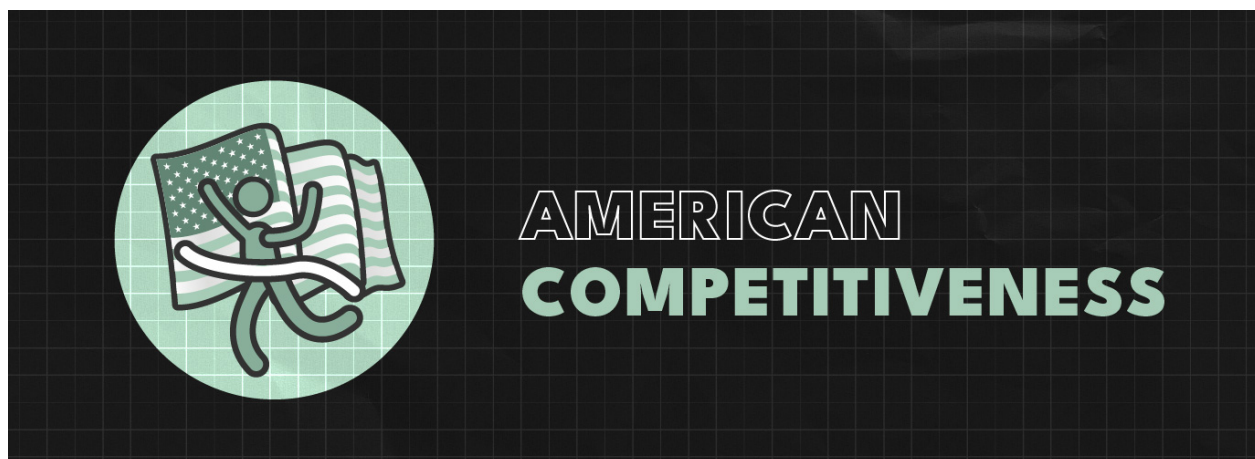
Too many climate advocates and many in the media continue to make the incorrect assumption that young voters rate climate change as one of the most important issues for them this election year. We've always been suspicious of this case—and we have the data to back it up.

- [Harvard University's recent youth poll](#)—the most thorough and regularly conducted survey of young voters—found that climate change is far from the top issue for young voters. In fact, in 2024, the share of young voters who think the government should do more to curb climate change at the expense of economic growth declined from previous years.
- BluePrint's [new youth poll](#) also shows that young voters are overwhelmingly concerned about inflation, healthcare, and jobs, rather than climate change, and;
- Our own [public opinion polling](#) has found that young voters—more than any other age demographic—are most concerned about high costs and inflation, not climate change.

What We're Focusing On: Young voters have [general concerns](#) about climate change and want to see action. That does not mean it is a top issue for them, particularly this year. Like every other voting cohort, younger Americans are basing their voting decisions on issues that are immediate and tangibly impacting their daily lives, including inflation, high grocery prices, and housing costs.

What We're Doing: Misinterpreting young voters' priorities and overlooking their pressing economic anxieties could prove to be disastrous this election cycle. We're working with policymakers, candidates, and allies to use messages and communications strategies informed by this polling. Our next batch of polling will explore more deeply what motivates young voters to pull the lever for a

candidate and test how their attitudes toward specific climate policies. Stay tuned for a detailed breakdown of our data in the coming weeks.



Federal investments in clean energy are helping American industries carve out a competitive edge in the global clean energy marketplace, cut carbon emissions, and crowd in massive amounts of private investment. Analysis from [Rhodium Group and MIT](#) shows that in the last three years alone, we've already seen over \$552 billion in both public and private investment in clean energy. Clean energy investment now makes up 5% of all private investment in structures, equipment, and durable consumer goods in the US, up from 3.7% in 2022, and there's still a lot left to unlock.

A Trump win in November could derail this momentum, putting over \$1 trillion in clean energy investment at risk due to threatened rollbacks of key clean energy policies. Many businesses and industry leaders, including unusual suspects, are worried that a second Trump Administration would undermine American companies' ability to compete in the global energy market. That's why [key business groups](#) like the US Chamber of Commerce, the American Petroleum Institute, and Edison Electric Institute traditionally seen as Republican allies, are already raising concerns about the rollback of parts of the Inflation Reduction Act and Bipartisan Infrastructure Law.

What We're Doing: While not sufficient on their own, it's important to recognize the significance of business groups like the US Chamber coming to the defense of the federal clean energy investment policy five months ahead of the November election. We often work with business leaders where they are aligned with our clean energy and competitiveness goals. Now, we are focused on leveraging these relationships, along with our ties to industrial labor unions to make the case for staying the course on clean energy policies and investments. Their perspectives matter, and we'll be working to get them more vocal now on the benefits of these investments and their defense.

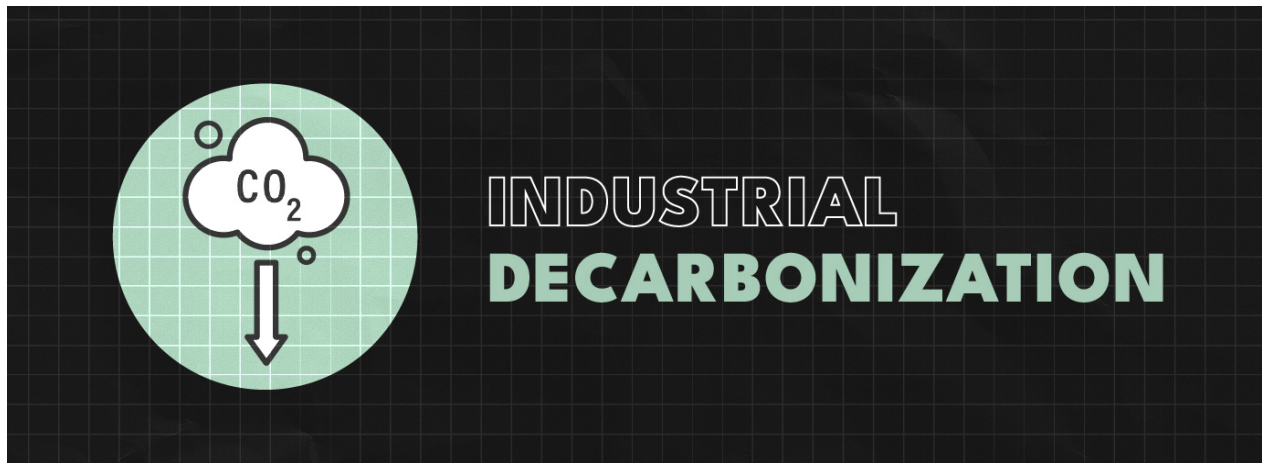


INTERNATIONAL NEWS

Poland is a critical partner of the United States on trade, decarbonization, and defense of democracy against authoritarian threats from Russia and China. A key part of this relationship is the country's plan to use nuclear power, including at least three American-made AP1000 nuclear reactors, as a key part of its energy, decarbonization, and security strategy. Recently, Third Way's Senior Vice President Josh Freed, Director of International Clean Energy Policy Lindsey Walter, and Board Chair Rachel Pritzker spent a week in Poland meeting with senior leaders of the Polish government and local NGOs.

Experiencing Warsaw first-hand highlighted Poland's current dynamic economy and, current, democratic government as well as the serious threats it is facing. Even as our meetings focused on the energy transition, the government officials reinforced that Russia's invasion of Ukraine and the threat to Poland's security, and energy independence were their top priorities. Nuclear power is a key part of this plan. The ruling Civic Platform Coalition, which last year defeated the illiberal Law and Justice Party, also voiced concern that the Right-wing populists are stoking and exploiting concern among Polish voters that European climate policies will raise prices significantly and make life much more difficult.

What We're Doing: Third Way's affiliate, Carbon-Free Europe, is using its Europe energy systems modeling to guide the next phase of Poland's energy strategy, including our continued collaboration with the Ministry of Climate and Environment, Silesian University of Technology, Institute of Power Engineering and Princeton University. We are also working closely with the US and Polish governments, and relevant companies, to help ensure that on both civilian nuclear power and transatlantic trade, the two countries are able to deepen our partnership and present a united front against Russia and China. Finally, we are working at the European Union parliament and council to raise concerns about how EU green policies are implemented and communicated, especially since most NGOs are not approaching this from a political/Eastern European perspective.



In an increasingly carbon-competitive global market, federal Buy Clean procurement policies are driving domestic demand for low-carbon materials. By moving to clean production early, American industries can gain a competitive edge and capture a significant share of emerging markets, reaping substantial economic benefits. Now, thanks to the Inflation Reduction Act, States have the opportunity to put Buy Clean into practice and boost domestic producers working to manufacture cleaner products. The Federal Highway Administration (FHWA) now has \$1.2 billion to help State Departments of Transportation establish and execute programs to procure cleaner cement, steel, asphalt, and flat glass.

Why This Matters: Industrial processes that produce goods like cement, steel, asphalt, and flat glass are incredibly energy-intensive. By leveraging its vast purchasing power, the government is helping drive early demand for low-carbon versions of these goods, accelerating the shift to cleaner production processes. This initiative is not only helping us cut emissions but is positioning US industries to lead in emerging global markets.

What We're Doing: Our team played a crucial role in securing the necessary funding through the Inflation Reduction Act to enable FHWA to procure low-carbon construction materials, ensuring State Departments of Transportation receive a *minimum* of \$22 million *each*. Now we're making sure states are aware of this opportunity ahead of the June 10 deadline. Our [2-page info sheet](#) outlines how states can apply for funding and know how to effectively layer this funding with other resources.



WHAT WE'RE READING & LISTENING TO

- [Justin Worland](#), in *TIME*, explores the economics of clean energy investments and how interest rates and moves from the Federal Reserve are shaping clean energy markets.
- [Alan Ohnsman and Amy Feldman](#), in *Forbes*, outline the threat a Trump Administration would have on our clean energy transition and clean energy investment.
- [Robinson Meyer and Jesse Jenkins](#), on *Shift Key*, discuss major transmission news with *Heatmap* reporter Matthew Zeitlin and Maria Robinson, the Director of DOE's Grid Deployment Office, outlining how the Biden Administration is making it easier to build transmission across the country.