

NEWSLETTER *Published December 15, 2023 · 5 minute read*

On the Grid: Entering the Arena 12/15/23

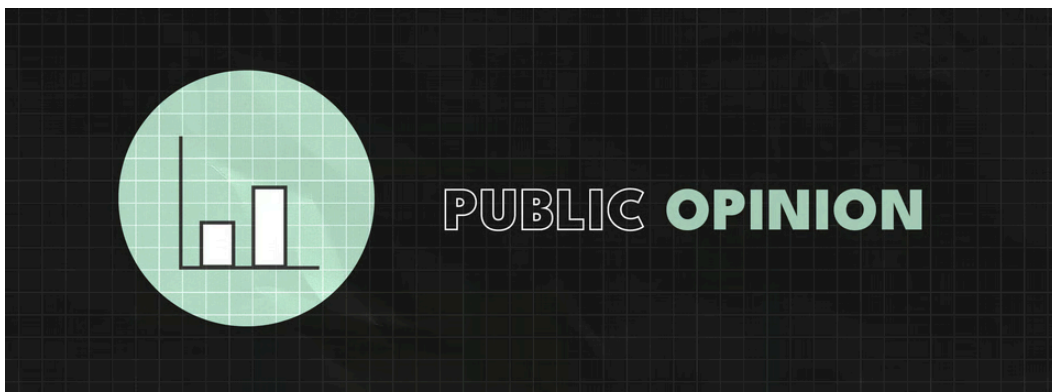
Mary Sagatelova



Welcome back to OTG, as we enter the home stretch of 2023. We're seeing some good news this week as inflation continues to slow, thanks, in large part, to falling energy prices.

But even with energy prices starting to decline, the majority of Americans are still grappling with high costs and that will, in all likelihood, play a central role in the upcoming presidential election. As Ron Brownstein noted this week in *The Atlantic*, it is counterproductive to *"try to convince Americans that inflation is abating or that the economy is improving while so many are struggling to make ends meet."*

In this week's *On the Grid*, we're taking a look at new public opinion research and unpacking some challenging conversations around climate action.



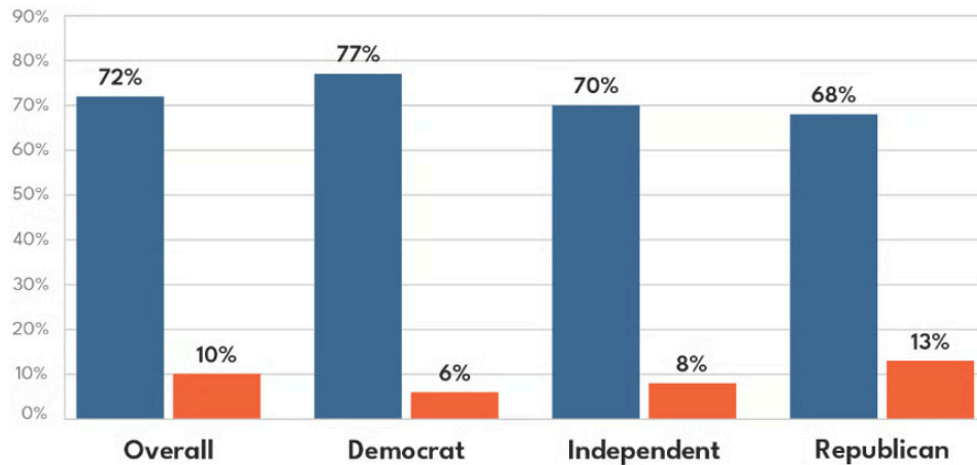
The United States and China are vying for leadership of competitive and highly lucrative clean energy markets. But this is far from a typical business rivalry—winning this race means setting the industry standards and regulations that will define the future's economy and energy landscape.

America must step up in this crucial contest—and new [public opinion polling from Third Way](#) shows the majority of Americans agree.

Voters Overwhelmingly Agree that America Can Compete With China on Clean Energy and Should Not Give Up

Which of the following comes closest to your point of view?

- China has a significant lead in clean energy markets, but if the US steps up and tries to compete, we can outcompete them.
- China's dominance over the world's clean energy technology market is not something the US can overcome. We should accept that and turn to other areas that we can excel in.



Source: Third Way and Impact Research conducted polling via professional telephone interviews and a text-to-web survey of 800 likely 2024 general election voters, with an oversample of 200 East Asian American voters, from July 13-19, 2023. The confidence interval is +/- 3.5 percentage points at the 95% confidence level.

Conducted in partnership with Impact Research, our polling shows that Americans are fed up with China's dominance in the global economy and clean energy sector. They want to win—and more importantly, they're tired of Republicans' defeatist narratives that downplay America's capacity to compete with major players like China when it comes to building and deploying clean energy technologies.

Our findings show that Americans are looking for leaders who will confront China's growing influence and stick up for America's interests without slipping into extremism. Right now, voters do not see Democrats as those leaders. But our polling shows that can change. As we approach the 2024 election, Democrats have an opportunity to turn the tide and prove that they are the party capable of fighting for American interests in the global clean energy marketplace.



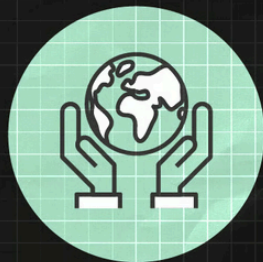
NUCLEAR

This week, the US House of Representatives passed a bipartisan bill to ban imports of low-enriched uranium, a critical component for nuclear fuel, from Russia. The move is part of a larger strategy to reduce reliance on Russian supply chains and to curb Vladimir Putin's influence in global energy politics.

While the US only received 3% of Russian crude oil exports, we're Russia's biggest customer when it comes to enriched uranium. We bought 42% of all of Russia's enriched uranium exports in 2022. By yanking American exports out from under Putin, we're slowly chipping away at Russia's influence in global energy markets.

And we can't stop there. During COP28 delegations, the US and 21 other countries pledged to triple nuclear power by 2050—a move that would ensure that the US and our allies continue to move away from Russian energy, nuclear or otherwise.

The legislation is currently stalled in the Senate, but we expect to see conversations reemerge in the new year. You can read our full statement on the House *Prohibiting Russian Uranium Imports Act* [here](#).



INTERNATIONAL NEWS

Speaking of COP: COP28 wrapped up this week with real, pragmatic progress. We saw nearly 200 countries come together and embrace using *every* low- and zero-carbon technology, oil companies finally agree to significantly reduce emissions from methane leaks, and an agreement on funding to help developing countries deal with the economic impacts of climate change. What we did not see is empty commitments to goals, like a phase-out of fossil fuels, which the world is not prepared to achieve yet and risks undermining serious progress.

Here's our take: The conversation needs to be centered on actions we can and must accomplish now and that a broad set of public and actors can get behind.

As Josh Freed, Senior Vice President for the Climate and Energy Team, notes in [a new blog](#),

“Part of the reason the agreed-upon language is mercifully vague and unenforceable is that there is still no pathway, even for advanced economies like the United States, to phase out fossil fuels. Even small spikes in energy prices have sent political shockwaves across the US, let alone countries in Europe dealing with even deeper economic and political dissatisfaction. That’s because we simply don’t have enough affordable alternatives, particularly in transportation and industry, for most people to envision seriously phasing out fossil fuels. To get to this transition, we need to keep the biggest champions of clean energy and climate action, like President Biden, in office by making clean energy much cheaper. To demand anything else – especially an end to oil and gas extraction in an election year – will only result in disaster for us.”



- As the first National Electric Vehicle Infrastructure (NEVI) Program-funded charging station opens in Ohio, we're steadily seeing more progress on EV charging across the country. Our new [blog](#) dives deeper into what this means and other Biden-led milestones.
- With a sudden uptick in offshore wind project cancellations, our new [blog](#) explores the market dynamics and regulator challenges behind this trend and what this shifting

landscape means for the future of offshore wind deployment.



- [John Keilman](#) in the *Wall Street Journal* outlines one of the biggest challenges facing the clean energy sector right now: labor shortages. Despite record investments in constructing new factories, manufacturers are encountering difficulties in recruiting enough workers to staff these facilities, highlighting a broader issue within clean energy industries.
 - [Ronald Brownstein](#) in *The Atlantic* highlights the challenge of connecting with voters through general economic messaging, emphasizing the importance of shifting focus towards specific policies that directly benefit communities.
 - [Ed Crooks](#) on the *Energy Gang* podcast is joined by Amy Harder and Melissa Lott to discuss COP28 and the true impact of the various negotiations and debates.
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