

SEP 3 Bracewell PRG Energy Update: Back to the Action & Campaign Season

Friends,

We are back! Hope you had a great Labor Day. Of course, passing Labor Day means that summer is really over and the campaign season is in FULL SWING – 63 Days to Election Day!!!!

Speaking of that, just one quick note about the new energy VP Kamala Harris is generating among climate and youth activists as the new top of the Democratic ticket. I was at the DNC in Chicago and I can tell you for sure, among climate activists, there is palpable energy that clearly was NOT there for Biden. Even with her moderated comments about “fracking,” activists are clearly energized and giving her a pass on the more nuanced positions. Perhaps they think they can influence her more if she wins or maybe they’re just making the calculation that she is better than Trump for their cause no matter. Whatever it is, the energy (while not a primary vote driver as climate remains very low on the issues priority list) may matter in these very close races in key states, as well as drive supporters out that can help Senate and House candidates that may have seemed a lost cause just 8 weeks ago. We will see how this plays out starting in next Tuesday’s important Presidential Debate. Happy to discuss, or get you resources to discuss, in more specific detail.

We’re back in action in DC too, with budget discussions on everyone’s mind. Both chambers will have to deal with challenges from the budget hawks when they return officially to session next week. And Senate Minority Leader Mitch McConnell has been pressing House conservatives to drop their push to add a non-citizen voting measure to a continuing resolution to keep the government open past early October.

The House Oversight Committee holds a field hearing in Maui tomorrow looking back at the federal government’s response to the 2023 wildfires so expect some discussion of climate change; House Resources looks at water resource issues at a hearing in Santa Nella, California and Climate envoy John Podesta heads to China to meet with his counterpart ahead of UN Climate Week (just 3 weeks away) and COP 29.

With two months to election day, expect a lot of political events and funding roll outs to highlight money being spent from the bipartisan infrastructure law and IRA. For example, on Friday, DOE’s David Crane was in Oakland touting hydrogen hubs and trucks, while this week Interior Secretary Haaland and EPA Admin Regan will be in Arizona unveiling climate grants. Expect a lot of this over the next 63 days (really until the end of the Biden Administration).

Unsurprisingly, Scottie Sheffler won golf’s FedEx Cup over the weekend and we are into the Quarters at the US Open in NYC. Fall College sports launched over the weekend with football, field hockey, volleyball and cross-country all in action (I was at Duke for field hockey). Finally, the NFL launches on Thursday with the Ravens and Chiefs, a rematch of the AFC Championship game from last year.

Thoughts and prayers with the family of “Johnny Hockey” Gaudreau given their [tragic news](#) over the weekend. Call with any questions.

Best,

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FRANKLY SPOKEN

“If I can’t get that power capacity online, I cannot do the data center. I cannot do the manufacturing. I can’t grow the core businesses of some of the largest corporations in the country. The stakes are really, really high. This is a new environment. We have to get this right.”

Petter Skantze, vice president of infrastructure development at NextEra Energy Resources, the renewable energy unit of NextEra Energy in a conference in New York City in June, included in a [CNBC online article by Spencer Kimball](#).

ON THE PODCAST

Volts Talks Clean Energy Jobs with Julian Spector – Through the passage of IRA and CHIPS, the Biden administration has invested billions of dollars and created more than 100,000 manufacturing jobs in purple and red districts that have been hard-hit by globalization and disinvestment. [In this episode of Volts](#), David Roberts is joined by Julian Spector of Canary Media, reporting from local communities to share reactions to this influx of new money and opportunities, and the reality that Trump’s Project 2025 wants to roll back the tax credits fueling this growth.

Jay Hakes Talks Climate with Columbia Energy Exchange – This week on the [Columbia Energy Exchange](#) podcast, host Bill Loveless talks with Jay Hakes about his book [“The Presidents and the Planet: Climate Change Science and Politics from Eisenhower to Bush.”](#) Hakes is a scholar and author on U.S. energy policy. From 2000-2013 he served as the director of the Jimmy Carter Presidential Library. He also served in both the Obama and Clinton administrations, including a seven-year stint as director of the U.S. Energy Information Administration. Jay’s other books include “Energy Crises: Nixon, Ford, Carter, and Hard Choices in the 1970s” and “A Declaration of Energy Policy Independence.”

FUN OPINIONS

Experts Say Hydrogen Credit Must be More Flexible – In an [opinion piece in the Energy News Network](#), electricity and enviro markets finance expert Bill Hayes and enviro/sustainability writer Joe Tedino say strict regulations threaten the green hydrogen industry. Hayes and Tedino suggest that hourly generation matching would make green hydrogen too costly and provides no carbon benefit to annual matching. There’s a global consensus that we need to urgently decarbonize to address the impacts of climate change. The Biden Administration’s goal to reduce GHG’s by 50% by 2030 and become net-zero by 2050 requires robust incentives to develop green energy industries as fast as possible. Without a viable hydrogen sector, we run the risk of being unable to fully decarbonize our economy.

Cement Huge Opportunity for Sustainability – In an [opinion piece in the Washington Times](#), Portland Cement Assn head Mike Ireland writes sustainable concrete infrastructure should remain a government priority. We all rely heavily on infrastructure, mostly made with concrete. The accident leading to the Key Bridge’s demise was a wake-up call. It revealed that we’ve been on autopilot when it comes to infrastructure because, as far back as we can remember, it’s always been there. The only time we’re aware of its essentialness is when it’s not.

FROG BLOG

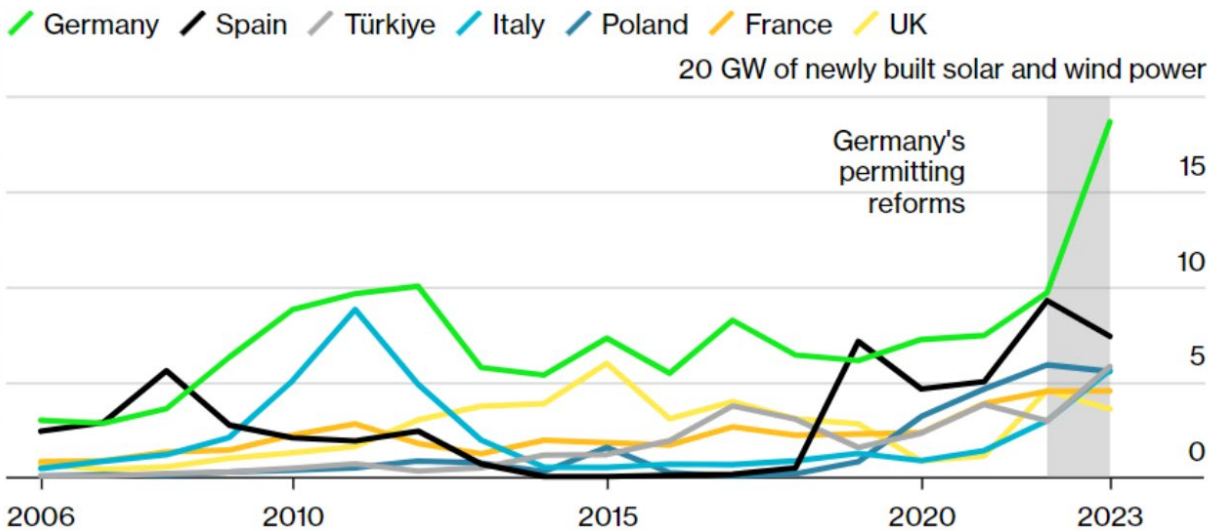
Debate Over Oil Forecasts – In a [blog for Rice University’s Baker Institute](#), energy economist and expert Mark Finley, (also formerly of bp) details the growing divergence among key forecasting bodies in the oil analyst world and its high stakes. Finley explores analytical divides between the International Energy Agency, OPEC, and the U.S. Energy Information Administration. The former longtime BP economist fears that "outlooks are becoming less objective and more aspirational." Incentives may be changing, writes Finley, noting a shift in "institutional pressures" that could bring unintentional bias.

FUN FACTS

Permit Reforms Are Working in Germany to Speed Energy Transition: A recent [Bloomberg article](#) by Akshat Rathi and Martin Marilen highlights as most countries struggle to install clean energy fast enough, Germany tackled the industry’s toughest problem: slow permitting.

Reforms Payoff

Germany has pursued the most aggressive permitting reforms across Europe since 2022, which shows in its renewables buildout



Source: BloombergNEF

IN THE NEWS

DOE Touts Hydrogen with ARCHES, Port of Oakland – In a visit to the bay area of California, Under Energy Secretary David Crane [joined](#) Governor Gavin Newsom and Senator Alex Padilla (D-CA), along with other local, state and federal leaders, to celebrate this landmark commitment to build and expand clean energy in California. The half-day event showcased cutting-edge hydrogen-powered transportation projects in Oakland, demonstrating not only what has already been accomplished in California, but what is coming thanks to ARCHES’ renewable hydrogen hub.

“Clean hydrogen is the ‘Swiss Army Knife’ of energy technologies and a solution to decarbonizing the industries we cannot live without,” said U.S. Secretary of Energy Jennifer M. Granholm.

“President Biden and Vice President Harris have developed a modern, industrial strategy to build a clean hydrogen industry here at home—with California and the ARCHES Hydrogen Hub leading the way.”

The group traveled in the world’s first hydrogen-powered passenger ferry, then on AC Transit and SamTrans hydrogen fuel cell electric buses, to the True Zero Hydrogen Fuel Station, which can support 200 semi-trucks. SoCal Gas President Maryam Brown attended the event and spoke in a video message. She is pictured below with Gov. Newsom and Undersecretary Crane.



Exxon Outlook Forecasters Still See Demand – Exxon's new long-term outlook warns that failure to invest in fresh supplies would quickly leave a massive shortfall. Forecasters see global oil thirst

plateauing after 2030 but remaining above 100 million barrels a day through 2050. Output from existing fields declines roughly 15% annually, risking a supply shock with "dire" economic effects absent new investment. That's a much steeper decline than IEA envisions if investment froze, the outlook [released this morning](#) notes. "This will be the first time in modern history that global emissions have fallen while population and economic prosperity has continued to rise," Chris Birdsall, Exxon's energy and economics director told Axios.

DOE Announces Hydrogen Project Grants – DOE [announced](#) \$62 million last week for 20 projects meant to accelerate the research, development, demonstration and deployment of next-generation clean hydrogen. The projects span hydrogen fueling infrastructure, community engagement, fuel cell port equipment, permitting and siting challenges and the development of a "hydrogen fueling station of the future" to meet the needs of commercial-scale medium- and heavy-duty truck fueling. Companies selected to move forward to award negotiations include Plug Power, Southern Company Gas and GTI, as well as groups like the International Code Council, EPRI and NASEO. Also, several universities received project including UC-Riverside, Washington St. U, Wayne State in Detroit and the University of Houston.

ON THE SCHEDULE THIS WEEK

Advance Energy Forum to Look at Grid – Tomorrow at 10:00 a.m., Advanced Energy United holds a [webinar](#) that will discuss specific steps FERC commissioners and staff, grid operators, and utilities can take to get America closer to an ideal interconnection process, which would still hold project developers accountable for grid readiness but provide certainty in exchange for the upfront cost and risk of entering the queue. Expert panelists will underline findings from our newly released report, "Unlocking America's Energy: How to Efficiently Connect New Generation to the Grid." This report, authored by The Brattle Group and Grid Strategies proposes ambitious and comprehensive reforms to deliver a more reliable and affordable electricity system that would make it easier to connect the lowest-cost energy resources to the power grid. Rob Gramlich, Kyle Davis of the Clean Energy Buyer Assn are among the panelists.

Forum Looks at Zero Emissions – New America holds a [virtual book discussion](#) tomorrow at 10:00 a.m. on "Climate Capitalism: Winning the Race to Zero Emissions and Solving the Crisis of Our Age." Bringing people, technology, and policy together, Akshat Rathi's first book, *Climate Capitalism*, is opening the door for conversations on how economic opportunities can drive climate policy, benefit communities, and create a better tomorrow.

USEA Looks at NatGas Policy, Issues – The US Energy Assn holds another [virtual press briefing](#) tomorrow at 11:00 a.m. looking at what is going on with gas. A panel of senior reporters, from The Wall Street Journal, Forbes, E&E News, Energy Central and PBS, will question experts in natural gas on its promise and challenges, including those in supply, distribution and the environment. Experts include Natural Gas Supply Association head Dena Wiggins, former President of the New Jersey Board of Public Utilities Richard Mroz, IPAA CEO Jeff Eshelman and representatives from FERC and EIA.

RMI Looks at Utility Incentives – RMI holds a [webinar](#) on Wednesday at 3:00 p.m. on leveraging comprehensive performance based-regulation to build a resilient and affordable energy system for all. The event features a new report, [How to Restructure Utility Incentives](#), focusing on how state

public utility commissions can employ performance-based regulation to achieve affordability, decarbonization, resilience, and social equity. This webinar is intended for commissioners, commission staff, and key actors who participate in state regulatory proceedings; it may also be of interest to state policymakers and other thought leaders.

House Oversight Looks at Maui Wildfires – The House Oversight’s Government Operations and the Federal Workforce Subcommittee holds a field hearing on Wednesday at 4:00 p.m. assessing the Federal Government's Response to the 2023 Maui Wildfires.

Forum Looks at Key SCOTUS Admin Law Ruling – The Hudson Institute holds a [discussion](#) on Thursday at 10:00 a.m. focused on "The Supreme Court's Other Administrative Law Blockbuster: the *Corner Post* ruling. On the final day of the term, the court released its decision in the case on the seemingly dry and unimportant question of whether a claim accrues under the Administrative Procedure Act’s review provisions when a plaintiff suffers an injury or when a regulation was issued. *Corner Post* held that a claim accrues, and thus the statute of limitations begins to run when a plaintiff is injured, no matter how old a rule might be.

SAFE Webinar Looks at Mining, Minerals Future – On Thursday at 11:00 a.m., SAFE [holds a forum](#) on revitalizing legacy mining assets for the 21st Century. SAFE's discussion with mining experts, private sector leaders, and policymakers about the economics, regulatory context, and technological innovations that can help unlock the potential of these languishing reservoirs. Speakers include Interior’s Steve Feldgus, Elizabeth Holley of the CO School of Mines, and BHP’s Kate Sommerville. Abigail Hunter, Executive Director of SAFE's Center for Critical Minerals Strategy, will moderate and the panel will feature opening remarks from Gen. (ret.) Richard Cody, Member of SAFE's Energy Security Leadership Council (ESLC).

ACP Looks at Clean Energy Trade Tariffs – The American Clean Power Association (ACP) holds a [POWERCAST webinar](#) on Thursday at 1:00 p.m. on understanding clean energy tariff policies. ACP expert Vanessa Sciarra provides a clear overview of the various ways the Executive Branch sets tariffs.

House Resource Looks at CA Water Issues – On Friday at 1:30 p.m., the House Resources’ Water, Wildlife and Fisheries Subcommittee holds a field hearing in Sanat Nella, CA looking at on water opportunities and challenges in California.

IN THE FUTURE

RE+ Set for Anaheim – RE+ will be held in the Anaheim Convention Center on September 9th to the 12th. Developed by the nation’s leading clean energy organizations, the Smart Electric Power Alliance (SEPA) and the Solar Energy Industries Association (SEIA), [RE+](#) reflects an ongoing entrepreneurial approach to renewing best practices across the clean energy landscape as the marketplace evolves.

FERC Workshop to Look at Grid Queue – Federal Energy Regulatory Commission will [convene a staff-led workshop](#) Tuesday September 10th and Wednesday September 11th in the Commission Meeting Room at Commission headquarters to provide a public forum for the presentation and discussion of opportunities for further innovation and increased efficiency in the generator interconnection process.

WaPo Live Hosts Deese – On Tuesday, September 10th at 11:00 a.m., Washington Post Live [hosts conversations](#) with former National Economic Council director Brian Deese and Schneider Electric CEO Peter Herweck about the challenges and opportunities of the new energy era.

Crit Mineral Forum Set – The Colorado School of Mines will host the annual Critical Minerals Symposium on September 12-13th in Golden, CO. This symposium serves as a platform for government officials, business leaders, investors, academics, and community members to engage in vital discussions aimed at identifying opportunities and mitigating challenges associated with the future of critical minerals. The event is a project of the Payne Institute's Critical Minerals Initiative, in partnership with the Global Energy Future Initiative at Mines.

Forum to Look at Carbon Removal – On Thursday September 12th at 3:00 p.m., EESI and the World Resources Institute (WRI) [holds a briefing](#) about effective policy-making for carbon dioxide removal (CDR). Leveraging key findings from recent reports, panelists from NGOs, academia, and the private sector will explore existing policies supporting different stages of CDR development, the level of CDR we expect to need, the potential for CDR in the United States, policy options to enable scaling to that level, and private sector perspectives on the policy landscape. Panelists will also pinpoint key takeaways relevant for federal policymakers.

Webinar Looks at Gas Utilities Role – On Monday September 16th at 1:00 p.m., Utility Dive and West Monroe holds a [webinar](#) to look at role of gas utilities in the energy transition. Panelists will delve into the challenges of meeting decarbonization targets and explore the pivotal role of the gas industry in this transition. Industry experts will discuss the hurdles faced in achieving these ambitious goals and share strategies on how gas utilities are planning for a more sustainable future.

Semafor Hosts Southern CEO, Rep. Casten on Energy – Semafor will hold a [forum](#) on Tuesday September 17th at 9:00 a.m. on powering the next era of American energy. Rep. Sean Casten (D-Illinois) and Chris Womack, President and CEO, Southern Company will join Semafor's editors to examine the importance of reliable energy infrastructure to economic development, and the ways the public and private sectors are working together to protect energy security.

WoodMac Forum Looks at Copper – Wood Mackenzie expert hold an upcoming webinar '[Copper Rush: Diversify or go pure play?](#)', on the Tuesday September 17th starting at 9:00 a.m. where they will discuss how valuations, carbon footprints, and balance sheet health will shape the M&A strategies and overall corporate plans of both diversified miners and pure-play copper companies.

UN General Assembly Summits Launch Climate Week – The 79th session of the [United Nations General Assembly](#) will be held from September 22nd to 27th, marking a crucial milestone in the global effort to accelerate progress towards the 17 Sustainable Development Goals (SDGs). Heads of State and Government will gather at UN Headquarters in New York on 22-23 September 2024 to address the critical challenges and gaps in global governance exposed by recent global shocks. This Summit aims to reaffirm commitments to the Sustainable Development Goals (SDGs) and the United Nations Charter while enhancing cooperation and laying the foundations for a reinigorated multilateral system. It also includes the Summit of the Future, held during UNGA, underscores the urgent need for enhanced international cooperation to address pressing challenges such as climate change, poverty and inequality, while also tackling the impacts of ongoing conflicts and global health crises.

Climate Week Set – [Climate Week NYC 2024](#) will take place from September 22–29, 2024, in New York City. The event is hosted by the Climate Group in partnership with the United Nations General Assembly and the City of New York. The event's goal is to showcase climate action and discuss how to do more. It's considered the world's largest annual climate event, with over 600 in-person, hybrid, and online events and activities. The event will bring together leaders from business, tech, politics, academia, and civil society, as well as artists and activists.

Clean Energy Week Set for DC – The 8th annual [National Clean Energy Week](#) will be held on September 23 to 27th to look at policies, industries, and innovations that power our daily lives while producing no or very little greenhouse gas emissions. Despite the very real technological and political challenges, a clean energy future is in our reach, and America is ready to lead the way. The event features the flagship Policymakers Symposium on the Wednesday 25th and Thursday the 26th. For the first time since 2019, the Policymakers Symposium will be held fully in-person at The Conrad in Washington, D.C., with an online viewing option for remote attendees. The Symposium offers attendees the opportunity to network with like-minded professionals and hear from bipartisan leaders who are driving innovation and shaping the future of clean energy. Panel topics to include permitting reform; clean energy tax credits; rural communities and domestic manufacturing; offshore wind; liquid fuels; electric vehicles; hydrogen; nuclear; innovation; reducing industrial emissions; looking ahead to 2024 elections, 119th Congress and COP29; U.S. competitiveness, global leadership and supply chain security.

WaPo Event Features Kerry – As world leaders gather for the UN General Assembly, *Washington Post Live* will [explore the course of climate change](#) across all seven continents, one at a time in an event on Monday September 23rd at 2:00 p.m. Speakers include former U.S. secretary of state John Kerry, managing director of the IMF Kristalina Georgieva, Germany's state secretary and special envoy for international climate action Jennifer Morgan, CNN anchor and chief climate correspondent Bill Weir and many more.

WaPo Also Hosts Wednesday Climate Event – On Wednesday September 25th at 4:00 p.m., *Washington Post Live* [holds conversations](#) with changemakers and visionaries about the innovations that could shape the future of our planet. As scientists, entrepreneurs and governments race to develop climate technologies, environmental experts say that the world could be on the cusp of a new green industrial revolution. Google's James Manyika headlines the speakers.

FP Focuses on Sustainable Food – On Thursday September 26th at 12:30 p.m., *Foreign Policy* hosts an [event at UNGA79](#) to hear from leading experts, scientists, policymakers, investors, and entrepreneurs who are building more sustainable food systems. The event will discuss measures to advance crop science and regenerative agriculture, enhance soil sustainability and nutrient density, and provide innovative financing and safety nets to bolster food system resilience.

Mineral Forum Set for Kennedy Center – Forum to take Deep Look at Minerals, Mineral, Clean Energy – The Earthshot Foundation and OurEnergyPolicy are hosting an exclusive gathering at the Kennedy Center on October 7th for the [Terranauts Minologues](#). The event features a select group of senior leaders in energy that will delve into the urgent issue of critical minerals and the evolving energy eco-system. This daylong event will feature stimulating presentations and dynamic panel discussions, marking the culmination of a yearlong inquiry into the security, supply chain and

responsible mining challenges in ensuring a sufficient availability of essential materials for the future energy landscape.

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