

Policy Shifts Impacting Green Investments



From Sherrell <sherrell@sherrelldorsey.com>
To Steve <sjohnston@tuesdayforumcharlotte.org>
Date 2025-03-18 13:09

REGENERATIVE

BY SHERRELL DORSEY

A recent policy shift has shaken the landscape of green energy investment. The EPA's abrupt [cancellation](#) of \$20 billion in contracts, citing concerns over oversight of green banks, has sent shockwaves through the sector, particularly impacting projects underway in rural areas. This decision, already facing fierce opposition from various groups, arrives at a critical juncture as private capital quietly expands its presence in the green energy space.

Last week, I had the privilege of hosting a vital [conversation](#) with Amir Kirkwood, CEO of the Justice Climate Fund, which successfully secured \$940 million from the now-restructured Greenhouse Gas Reduction Fund. The discussion, attended by over 100 climate tech investors, fund managers, and innovative finance analysts, underscored the collective determination to sustain climate action and investment despite these challenges. This event highlighted the resilience of businesses in this category, even as they navigate a turbulent policy environment.

But the question remains: *What are the real-world implications of stalled or denied federal investments in green energy?*

- **Renewable Energy Project Stagnation:** Projects nationwide, especially in underserved rural areas, face potential delays or outright cancellation, hindering the transition to clean energy.
- **Increased Reliance on Fossil Fuels and Public Health Risks:** Without federal incentives and support, continued reliance on fossil fuels will exacerbate environmental degradation and negatively impact public health.
- **Diminished Corporate Incentives for Emission Reduction:** The absence of clear federal guidance and financial incentives weakens the impetus for companies to invest in emission reduction technologies.
- **Erosion of International Competitiveness:** As nations like China and Germany forge ahead in the green energy sector, the US risks falling behind, potentially leading to international disloyalty and loss of market share.
- **Over-Reliance on Limited Private Capital:** While private investment is crucial, it cannot entirely replace the scale and scope of federal funding, potentially stifling innovation and slowing down the transition.

This policy shift raises critical concerns about the following:

- **National Security Threats:** A few weeks back, in a conversation with [Giulia Siccardo](#), former DOE director, we discussed the tenets of energy policy, and lack of investments of multi-pronged energy solutions can create vulnerabilities in our energy infrastructure, posing national security risks.
- **Reduced Coordination and Innovation:** Without a central governing body to drive innovation and coordinate efforts, the green energy sector risks fragmentation and a slowdown in technological advancement.
- **Lack of Long-Term Strategic Vision:** The policy shift shows a lack of a long-term vision, and is reactionary rather than proactive.

What Can Be Done?

While the immediate future may seem uncertain, it's crucial to remain engaged and proactive. Here are some steps to consider:

- Support organizations advocating for sustainable energy policies.
- Engage with your local representatives to voice your concerns.
- Explore opportunities for private investment in promising green energy projects.
- Educate yourself and others on the long-term economic and social costs of inaction.

Finally, please share this newsletter with your colleagues and friends to help them stay informed.

Make it matter,



Find Me Here

- **Nuclear Energy Policy Forum** - Washington, D.C. March 20-21. I'll be speaking on a [panel](#) with other climate and sustainability journalists to discuss the evolving media landscape and how we engage audiences in conversations about America's clean energy future.
- **Miami Climate Week** - I'll be moderating a discussion on green tech ecosystem investments at the Resilience 365 conference. [Join me if you're in town.](#)

Listen and Learn With Me Here:

- **TED Tech.** Catch me every Friday on the [TED Tech podcast](#), where I cover talks from the TED stage from big thinkers and innovators on topics from AI to climate solutions and becoming a better human. [Spotify](#) | [Apple Podcasts](#)
- **ImpactAlpha.** Catch my monthly show, [Plugged In with ImpactAlpha](#), where I speak with LPs and GPs about investment trends shaping an equitable green economy

Follow Me on LinkedIn For Weekly Trend Updates

245 N HIGHLAND AVE NE, STE 230 #873, ATLANTA, GA 30307

[Unsubscribe](#) · [Preferences](#)