



Planet Pulse

**A rhythmic check-in on
climate issues**





Hit the bricks... with heat

- The holy grail of storage is long duration sufficient to provide guaranteed power around the clock.
- Rondo Energy thinks it has a solution: a “heat battery.”
- It’s a variation on concentrated solar power.
- Fill a four-story structure with refractory bricks, then use a 20 MW solar array to superheat them to **1800°+F**.
- Rondo claims its first-of-a-kind 100 MWh thermal battery will remove 13K metric tons of CO₂ per year.
- The fly in the ointment: it’s powering an oil field.
- Pragmatically, if viable, it’s a major step forward.

NEXT PAGE



The “New Uranium” Lady

- Unlike Japan, the U.S. has been unable to elect a woman as head of state.
- Japan’s new Prime Minister Sanae Takaichi - with her conservative views - is being compared to the “Iron Lady” - Margret Thatcher.
- But as one publication noted, given that she vows to restore Japan’s nuclear industry, “Uranium Lady” might be a more accurate moniker.
- Since the 2011 Fukushima accident more than half of Japan’s 33 operational nuclear reactors have been kept online.
- With its limited land mass, neither solar or wind are great options, causing Japan to rely on imported natural gas - an expensive solution.
- Her desire to go nuclear is in part a byproduct of Chinese security concerns related to both shipping lanes and China’s dominance in renewables.



NEXT PAGE





How'd that happen?

There are two parts to the headline.

Part #1 - the bad news:

- According to the World Resources Institute, coal use hit a worldwide record high in 2024.
- That's despite a percentage decline in power generation.
- India passed the 1 billion metric ton mark in production.
- Excellent work climate strategists.

Part #2 - the good news (sort of)

- The Idaho Power Company made an unusual request of Oregon regulators - to cut electric rates by 1%.
- The reason: the closure of a 522 MW coal-powered plant.
- Don't they know that big beautiful coal is also cheaper?

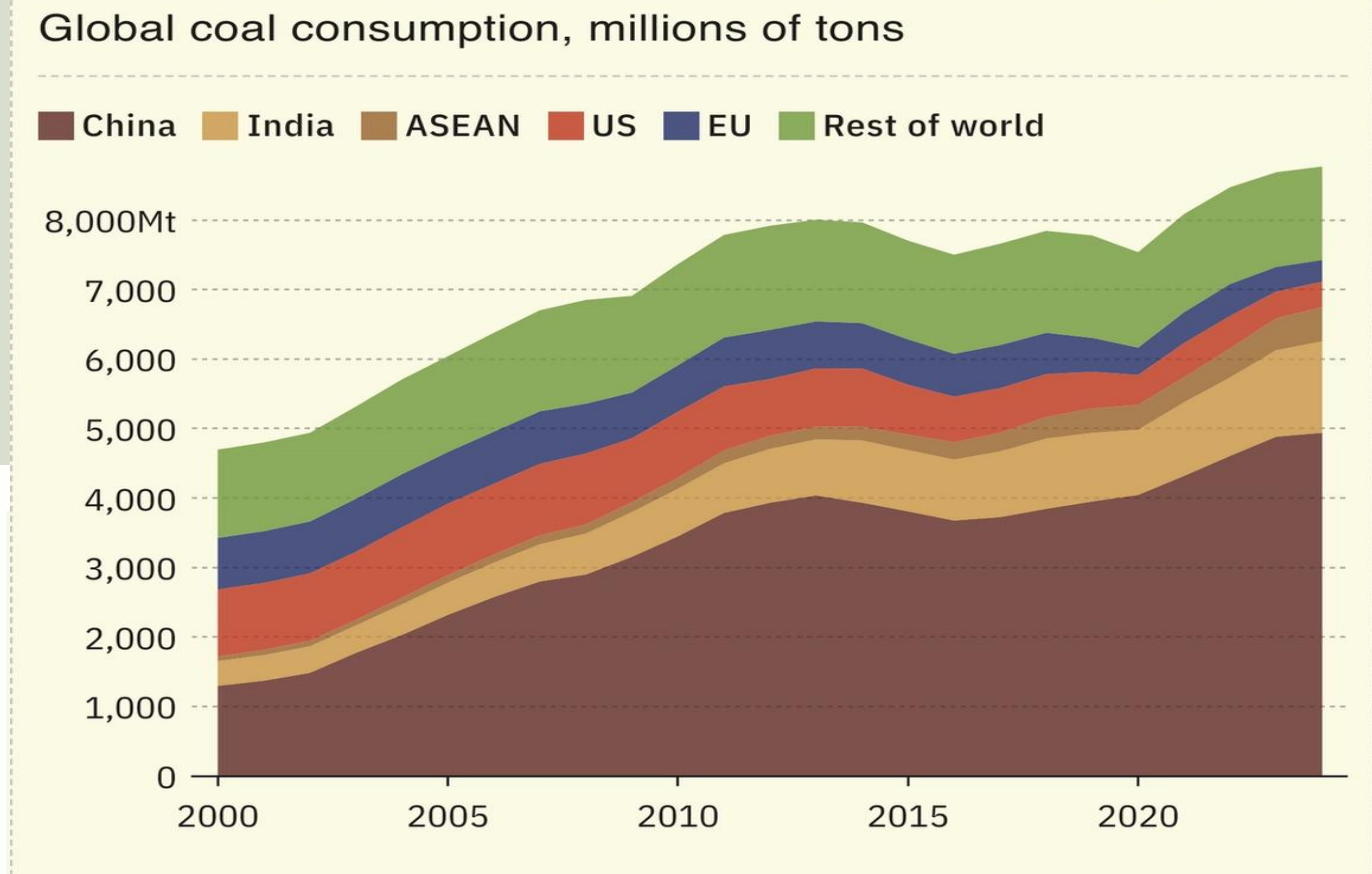
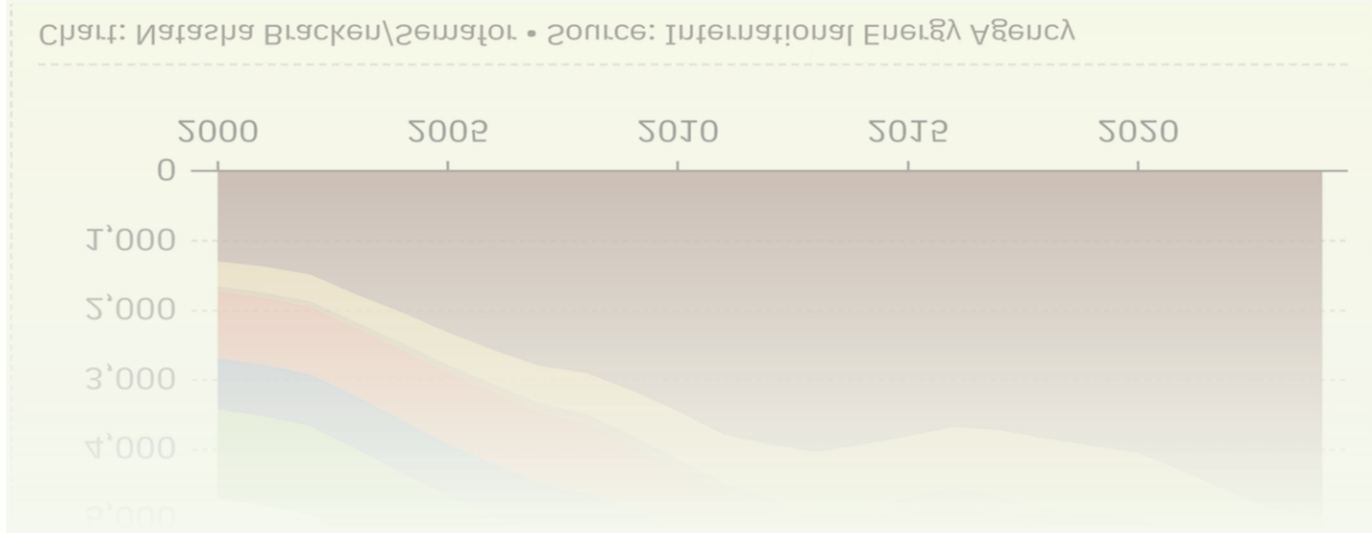


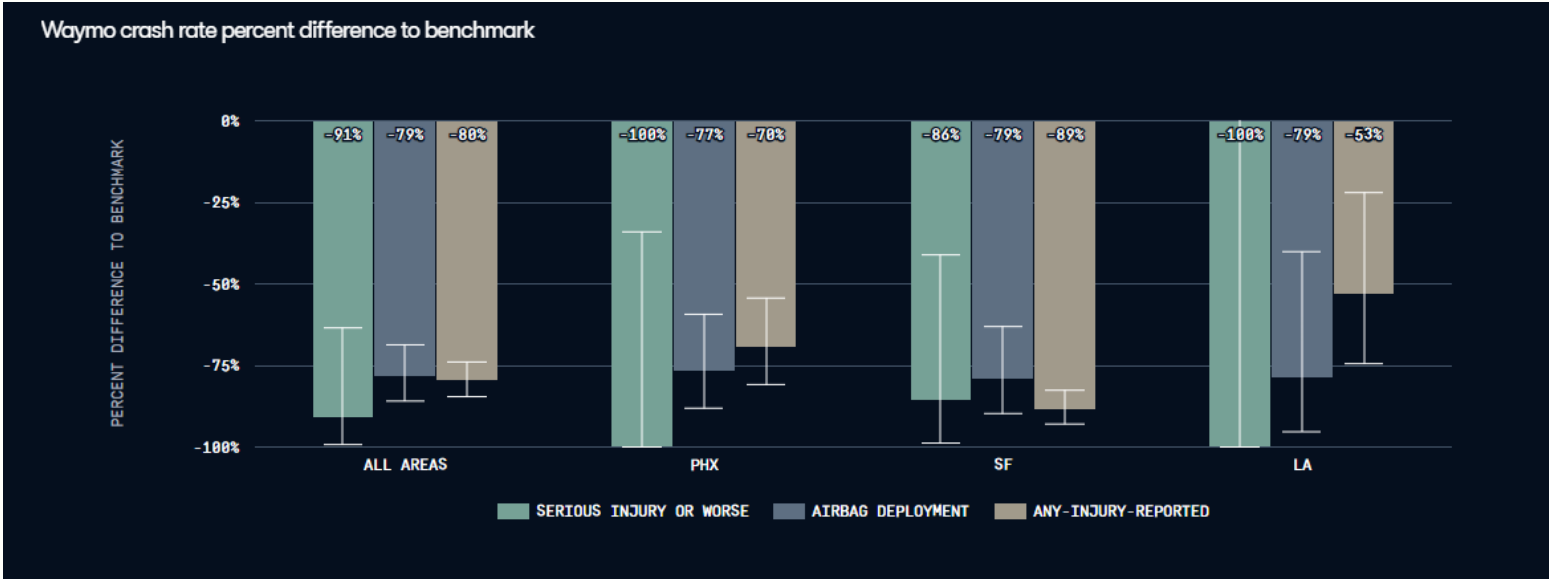
Chart: Natasha Bracken/Semafor • Source: International Energy Agency



NEXT PAGE



Waymo way safer



Waymo knows it’s only a matter of time before Elon puts them out of business with the robotaxi. So, they’re doing what they can to earn a few dollars before the inevitable.

Bloomberg projects that by 2030, the company will be providing 8 million rides per week.

If they do, the streets will become way safer.

And yes, I’m joking about the robotaxi, which with its camera-only strategy may never see the light of day.



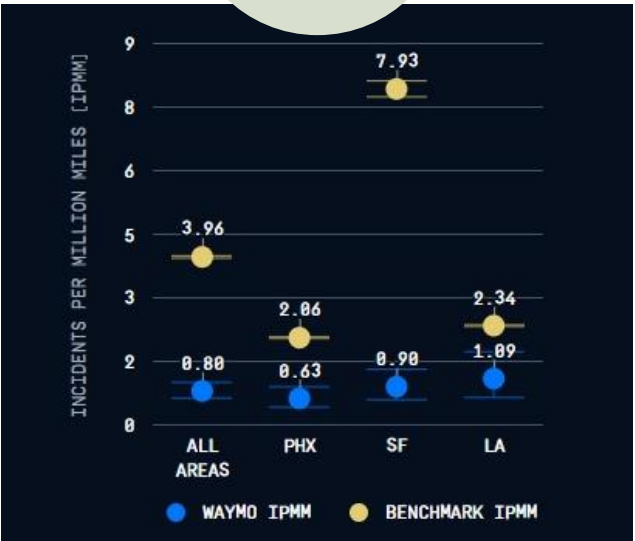
Globally, each year more than 1 million people die from road injuries.



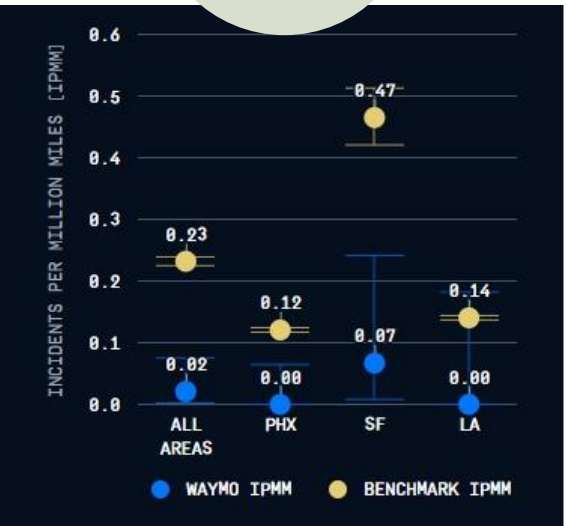
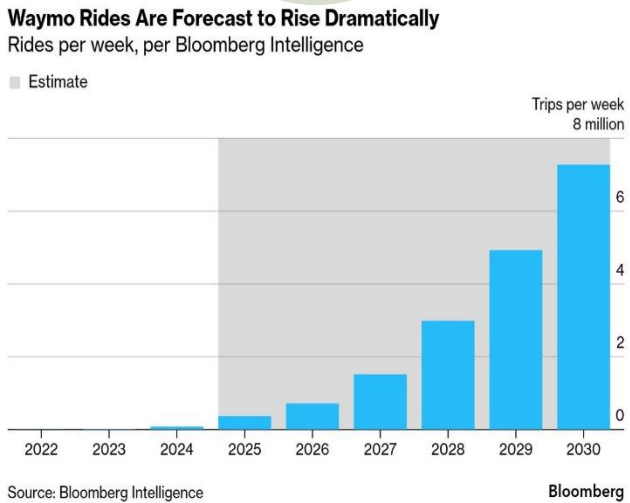
Waymo has clocked tens of millions of miles, and by every metric, has a better safety record than human drivers.



For those interested, all of Waymo’s safety stats can be found at: www.waymo/safety/impact/



Any Injury Reported
Crash Rates



Serious Injury Reported
Crash Rates

Unbiased and Unfiltered

An honest assessment of the cleantech industry and the effort to stem climate change.

