Event link here
Main notes doc here
Meeting Recording n/a

**Guest: Alex Young is a Senior Associate on the Frontier Technology team at Energy Impact Partners** (EIP), a global investment firm dedicated to accelerating the energy transition. At EIP, Alex focuses on technical diligence and thesis development, applying a deep technical lens to evaluate technologies and companies with significant decarbonization potential.Prior to joining EIP, Alex led technoeconomic analysis (TEA) and life cycle assessment (LCA) at Twelve, a climate tech startup pioneering low-temperature electrochemical conversion of carbon dioxide into fuels and chemicals. She also previously worked as an engineer at Antora Energy. Alex holds a degree in Chemical Engineering.

**Please insert topics Below and upvote up to 5 topics**

- ************What novel tech or climate problem are you excited about but are not finding the right startups/teams working on a solution?
- ***********Are there specific sectors or technologies within decarbonization that you find particularly exciting right now?
- ********Are there certifications you would recommend for someone looking to deepen expertise in carbon markets and decarbonization strategies?
    - GREET | Department of Energy
    - Integrated Technoeconomic, Lifecycle, and Circularity Analyses Tool for EV Batteries | ARPA-E
    - Life Cycle Analysis of Geologic Hydrogen Production | ARPA-E
    - https://assessccus.globalco2initiative.org/
- *******From your work with LCAs at Twelve, what are the most important skills or tools someone transitioning from client-facing operations into sustainability strategy should develop? (And how do you see the career transition vice versa from strategy to Ops?)
- ****** The big trend in energy right now seems to be building energy solutions to the AI data center problem - can we go outside of that and talk about anything else interesting happening in energy investing?
- *****What does a typical week look like in your role evaluating climate tech startups, and how much agency do you have to influence investment decisions?
- *****How are you and investors ( as well as tech start-ups) strategizing a path to build momentum post BBB/destruction of IRA. I am thinking in terms of project finance also being foundational for deployment in many hard tech market share.
- ** **How do you approach inclusivity and diversification in hard tech? I work with hard tech founders and it's a very male dominated space- always looking for ideas on how we can support women and gender diverse folks in this space.
- ***How is equity (as in overburdened communities, underserved communities) being factored into decisions? Is this no longer a focus given the current Administration's perspective on this work?

▪ _****How do you think about developing an investment thesis? Where does your POV come from, and how much of it is yours vs your firm's?_
▪ ****How does someone new to the space (both climate and early-stage investing) enter climate investing?
▪*** ___What types of industrial tech do you find most interesting or compelling from a unit economics point of view?*___

▪ **Are there any metrics you use to assess high-potential investments that people wouldn't necessarily expect or think about?
▪ _*Where is the best place to start a hardtech company (State, Country, Etc.)?_
▪**How has OBBB influenced investor outlook and strategy?
▪* How does EIP engage with its portfolio companies?   How regularly, on what topics, etc? So how clear of a view do you have as to the day to day?

▪ **How much is rooftop solar/behind-the-meter technologies being prioritized over more utility-scale solutions?
▪ ** How much are you focused on US vs EU right now?  (I know EIP has an EU team as well) - and has the OBB affected that much?
▪What type of investments are the safest to accept?  (safe meaning investors don't have too much control, there's less risk in terms of if your business is unsuccessful, nobody takes out your kneecaps)
▪*How do you maintain technical expertise, when there are so many technical pathways in the  energy transition space?
▪_*Thoughts on the future of green hydrogen?_
▪ How is the BBB affecting investor sentiment - with things like DAC being supported but others like renewables not?
▪ *How are you thinking about the need for patient capital for climate tech startups? For those solutions that have a longer than VC time horizon (10-15+ years).
▪ **How do you see the role of government in hard tech? What would you like to see? And what do you think we should expect for the next few years?
▪How do you think about helping companies access capital needed for FOAK/NOAK infrastructure?
▪ *How do you go about capturing and valuing market interest signals independently of regulatory volatility? How do you see customer interest developing and what's driving that interest?
▪ With your current portfolio, how are they changing how they will fundraise and who they will fundraise from with the birth of American Dynamism/Reindustrialize type funds and investors?
▪ I'm trying to better understand how investors approach early-stage financing for capital-intensive climate solutions, including hardtech. What kinds of capital structures have you seen work successfully for early-stage climate companies?
Is there any early stage company ripe for catalytic capital that is based in NYC that you are excited about?