The Rundown

By: CLEARPATH ACTION

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ClearPath Action Rundown
August 29th, 2025

Happy Friday!

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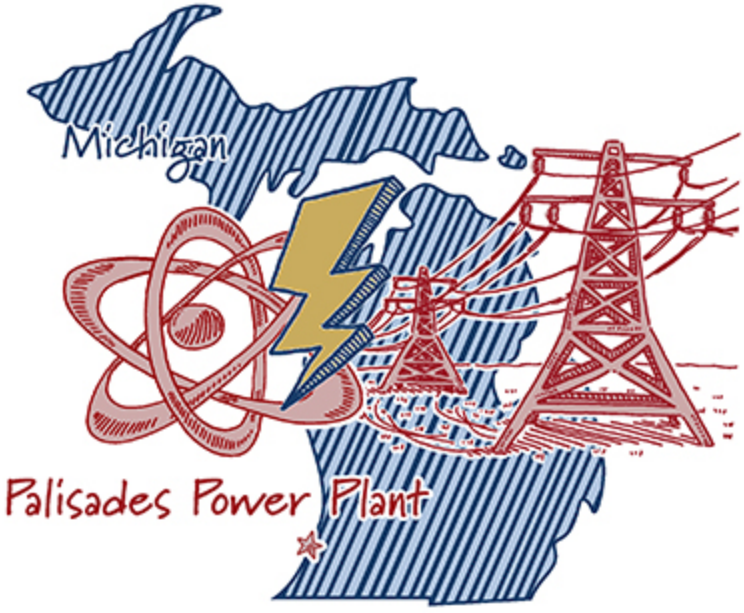
1. Back to life: Palisades transitions back to operational status



Michigan is part of the nuclear revival in the U.S. as home to the first nuclear plant in the country to **transition from decommissioning to operating status**.

The NRC approved this change, which allows Palisades Nuclear Plant to:

- Receive and load new fuel to restart the plant after finishing final preparations; and
- Generate more than 800 MW of reliable and carbon-free baseload power, enough to power more than 800,000 households.

What's clear: The NRC's decision reflects its review of Palisades and marks the first time a previously shut-down U.S. nuclear plant has returned to operations. The restart of Palisades will enhance grid reliability and help meet growing energy demand in Michigan and beyond.

Plug in: Check out other states to watch for new nuclear in our recent **blog.**

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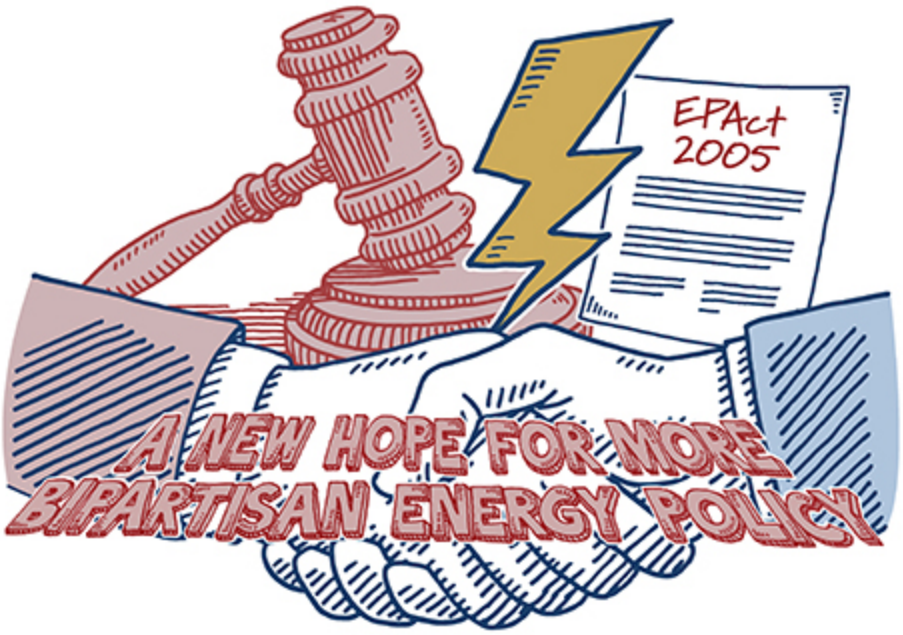
2. NEW blog: 20 Years Since the Energy Policy Act of 2005



For decades, the U.S. has worked to solve for the continued challenges that come with the ever-evolving energy landscape. Twenty years ago this month, **Congress passed the Energy Policy Act (EPAct) of 2005**, which focused on increasing energy supplies, building energy infrastructure and driving investment in American innovation.

Key provisions of EPAct 2005 included:

- Mandatory reliability standards and measures to modernize transmission infrastructure;

- Creation of the Loan Guarantee Program to support investments in innovative technologies, like nuclear;
- Expedited siting and permitting of LNG terminals for more access to markets;
- Streamlined hydraulic fracturing regulations to increase domestic oil and gas; and
- Tax and R&D support for various resources.

What's clear: With pressure today to secure the grid for increasing demand, Congress has another opportunity to create solutions that outshine the shadow of energy challenges we are facing. Permitting hurdles remain a major barrier to building critical energy infrastructure. Innovative technologies still need strong public-private partnerships to bridge the commercialization gap and scale to competitive solutions.

Plug in: Dive into the ever-growing list of policy solutions that can address today's energy challenges and allow for American innovation to thrive in the **latest blog** by **Lisa Epifani**.

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3. Teaming up: New nuclear for U.S.

As AI data center build out continues to grow, so does the demand for energy. X-energy, Amazon, Korea Hydro & Nuclear Power and Doosan Enerbility have **partnered** to accelerate the deployment of new Xe-100 advanced nuclear reactors in the U.S. They plan to:

- Mobilize up to $50 billion in public and private investments for Xe-100 projects and the expansion of associated supply chain capacity;
- Deploy more than five GW of new nuclear energy across the U.S. by 2039;

Key Facts:

- X-energy's early deployments are planned for Seadrift, TX and Washington state; and

- This partnership is aligned with the recent $350 billion trade deal that President Trump signed with Korea.

What's clear: The Advanced Reactor Demonstration Program, which President Trump signed into law during his first term, made it possible for the world's leading innovators in nuclear technology, energy project delivery and cloud infrastructure to collaborate on cost-effective, commercial deployments of X-energy's advanced reactor. This delivered on the Trump administration's goal to deploy 300 GW of new nuclear energy by 2050.

Plug in: Check out the recent Energy Innovation Reform Project's **report** on "How America Can Achieve Nuclear Energy Dominance: Recommendations to Implement President Trump's Policy Agenda," which provides additional recommendations to accelerate the deployment of nuclear energy.

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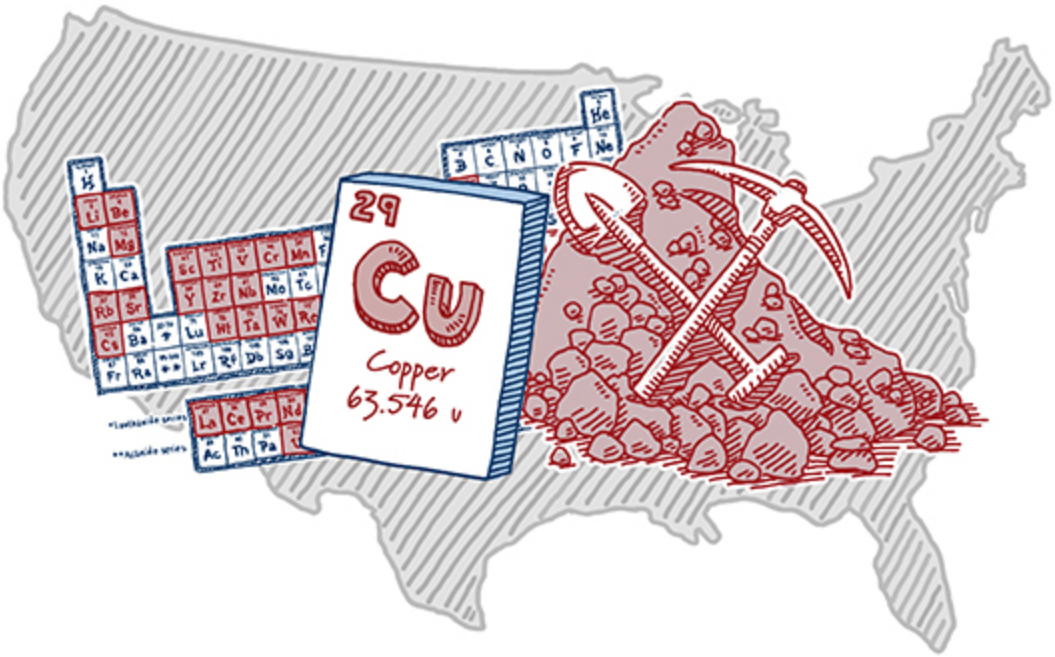
4. Copper as the new critical?



The U.S. Geological Survey **released** its draft critical minerals list, which proposed adding copper, among other minerals, to the official list. Copper is currently mined in the U.S., primarily in the West, but we need more of it.

Adding copper as a critical mineral:

- Would allow copper mining projects to become eligible for the FAST-41 program under the Federal Permitting Improvement Steering Council, enabling coordinated project permitting, judicial review relief and transparency benefits; and
- Signals greater investment certainty for domestic copper enterprises and supports the goals of President Trump's "**Immediate Measures to Increase American Mineral Production**" Executive Order.

Plug in: This action follows robust investments in domestic critical minerals from the White House, including:

- **$60 million** **funding opportunity** through DOE's ARPA-E for two new technology programs to secure and expand America's critical minerals supply chain; and
- **$1 billion** in **funding opportunities** through various DOE programs to advance and scale mining, processing, and manufacturing technologies across key stages of the critical minerals and materials supply chains.

What's clear: Making key investments in domestic critical mineral technologies and operations and reducing regulatory barriers will allow the U.S. to reduce reliance on China for vital minerals and unleash affordable, reliable energy throughout the nation.

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5. Geothermal enhancing national security efforts

The Department of Defense (DoD) **announced** progress updates on the Defense Innovation Unit (DIU) partnerships with multiple geothermal companies and federal and state agencies to advance geothermal power developments at military installations:

- Six innovative geothermal companies are part of this effort, including Eavor, Fervo Energy, Greenfire Energy, Sage Geosystems, Teverra and Zanskar.
- DIU will collaborate with DOE's Geothermal Tech Office, DOI, Geothermal Trade Associations, Utilities and State Energy Offices as part of this effort.

The announced projects span 12 DoD installations across six states, including Naval Air Station Fallon (NV), Army White Sands Missile Range (NM), Mountain Home AFB (ID), El Centro and Marine Corps Air (CA) and Army Garrison Fort Bliss (TX).

What's clear: This initiative aims to accelerate geothermal development and power plant construction across DoD installations, providing safe and secure round-the-

clock power. The DIU's support of these innovative companies will allow DoD to serve as an anchor customer for co-located power production.

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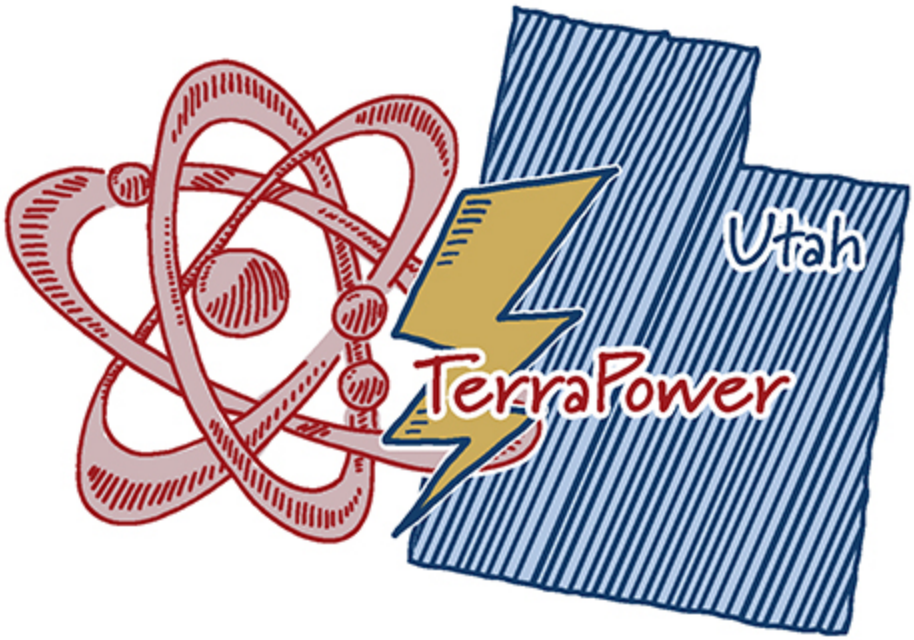
6. Utah's started siting: advanced nuclear



TerraPower and the Utah Office of Energy Development signed an MOU to identify and assess sites for a potential new TerraPower **Natrium reactor**.

This landmark agreement:

- Will identify and assess sites for a potential Natrium reactor, planning preliminary site recommendations by the end of 2025; and
- Supports Gov. Cox's Operation Gigawatt, a strategic effort to build an energy infrastructure that serves Utah and the Western U.S.

TerraPower is currently building its first Natrium reactor in **Wyoming** as part of the DOE Advanced Reactor Demonstration Program (ARDP).

Plug in: Read Gov. Cox's recent **op-ed**, featured in Deseret News, on why America can't afford to hesitate on nuclear energy and how he sees advanced nuclear as key to energy reliability, affordability and security.

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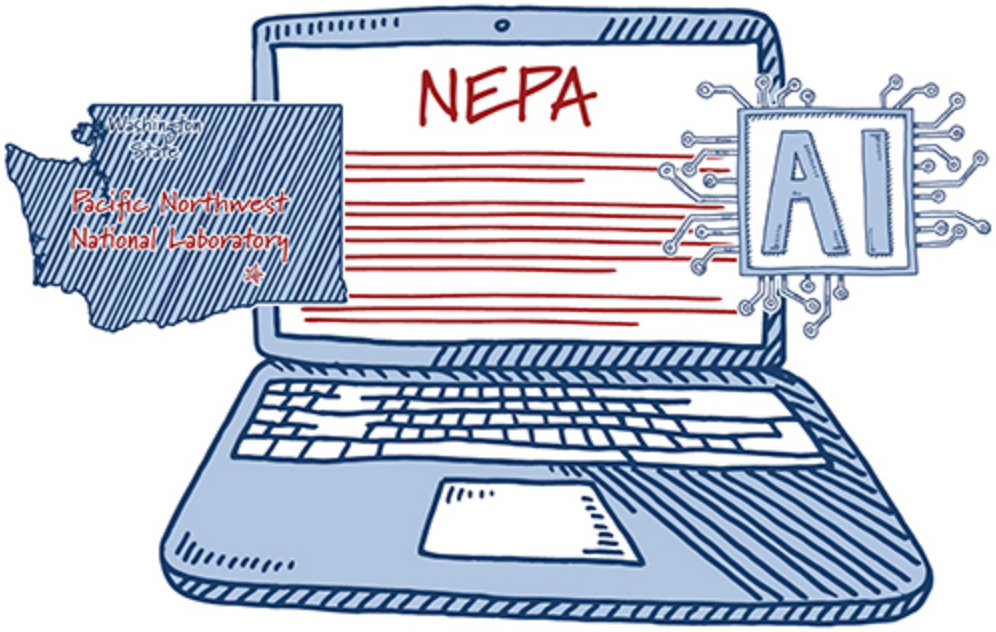
7. PNNL releases NEPA dataset developed by AI



Today, environmental reviews occur in agency silos with outdated systems that prevent decision-makers from leveraging existing information to accelerate informed decision-making. DOE's Pacific Northwest National Laboratory (PNNL) is using AI to resolve this key issue and increase permitting data transparency through its **PermitAI** initiative.

PNNL **announced** the launch of **NEPATEC 2.0**, a public dataset consisting of more than 120,000 NEPA documents from 60,000 projects prepared by more than 60 different agencies.

The launch of NEPATEC 2.0:

- Provides a centralized, machine-readable dataset of National Environmental Policy (NEPA) documents; and
- Complements the White House **America's AI Action Plan** and the Council on Environmental Quality's "**NEPA and Permitting Data and Technology Standard**" to increase data transparency and utilize AI.

What's clear: PNNL's dataset along with tools like SearchNEPA and CommentNEPA, will help streamline the permitting process by leveraging AI to speed up NEPA reviews and bring accountability to the permitting process.

Plug in: These efforts complement the goals of the bipartisan **ePermit Act** introduced by Rep. Dusty Johnson (R-SD) and Rep. Scott Peters (D-CA) to increase data accessibility and transparency.

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8. The Circuit

Lisa Epifani moderated a panel at the New York Energy Capital Assembly on how investors and hyperscale developers are building strategies to meet surging power demand driven by AI and data centers.

Nick Lombardo highlighted U.S. innovation in developing and deploying carbon management technologies and discussed opportunities for U.S. leadership globally at the Clean Energy Ministerial in South Korea.

Last week, ClearPath staff visited Argonne National Laboratory in Lemont, Illinois. The team saw the Aurora Exascale Supercomputer, Mechanisms Engineering Test Loop Facility, Materials Engineering Research Facility, and the Advanced Photon Source.

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9. Coming down the pipeline

September 4 at 1:35 — **Niko McMurray will join** nuclear reactor developers and hyperscalers to discuss new nuclear technologies, what challenges exist, and how to achieve successful project execution.

September 22-26, New York, NY — Are you going to New York Climate Week? We are hosting several events, including the **Carbon Innovation Forum** in partnership with API on September 22. Please email **Dillyn Carpenter** for more details.

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10. ICYMI

- Commonwealth Fusion Systems raised $863 million to support the completion of its demonstration reactor, "**SPARC**," and to further develop its commercial power plant in Virginia, "**ARC**." SPARC is expected to be completed in 2027, while ARC aims for early 2030s.
- Governor Armstrong **welcomed Energy Secretary Chris Wright** to ND, where the Governor outlined "outsized role in U.S. energy dominance," including carbon capture projects and increased transmission capacity.
- Peak Energy **launched** the United States' first grid-scale sodium-ion battery system in Colorado. The battery system will be used by utilities and independent energy producers as part of a shared pilot program.
- The Center on Global Energy Policy (CGEP) at Columbia University SIPA **hosted a roundtable** discussing the World Bank's announcement to allow nuclear projects as part of its lending portfolio.
- The Bureau of Land Management held its first **California lease sale** in nearly a decade, netting $27 million in winning bids, and **announced** plans for a Nevada lease sale to be held in October.
- DOE **announced** agreements on 11 projects and two prize competitions to remove barriers and strengthen American hydropower.
- Frontier **announced** a $50M offtake agreement with Planetary's Tufts Cove project, which removes CO_2 from the atmosphere while supporting conservation efforts like oyster restoration. The funding jump-starts Planetary's next phase, with project deliveries set for 2026.
- In addition to closing $100M Series B funding, Aalo Atomics was **selected** by DOE to test its Aalo-X nuclear power plant as part of the Department's advanced reactor pilot program.
- In accordance with President Trump's **Executive Order**, DOE is establishing the Defense Production Act Consortium to increase domestic nuclear fuel availability and help end reliance on foreign sources of uranium.
- HyTerra, a geologic hydrogen company, **recorded** natural hydrogen volumes of 83% at its Nemaha Project in Kansas. These are promising results, and production tests will show if the hydrogen can be commercially extracted at scale.

ClearPath believes America must lead the world in innovation over regulation… markets over mandates…providing affordable, reliable, clean energy.

That's all from us. Thanks for reading and have a great weekend!

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