

The Rundown

By: CLEARPATH
ACTION



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ClearPath Action Rundown September 5th, 2025

Happy Friday!

1. Oklo advances U.S. nuclear fuel opportunities



Oklo Inc., an advanced nuclear technology company, is moving the U.S. one step closer to solving the country's nuclear fuel supply chain challenge by building a fuel recycling facility in Oak Ridge, Tennessee – an investment of up to \$1.68 billion that will create more than 800 jobs.

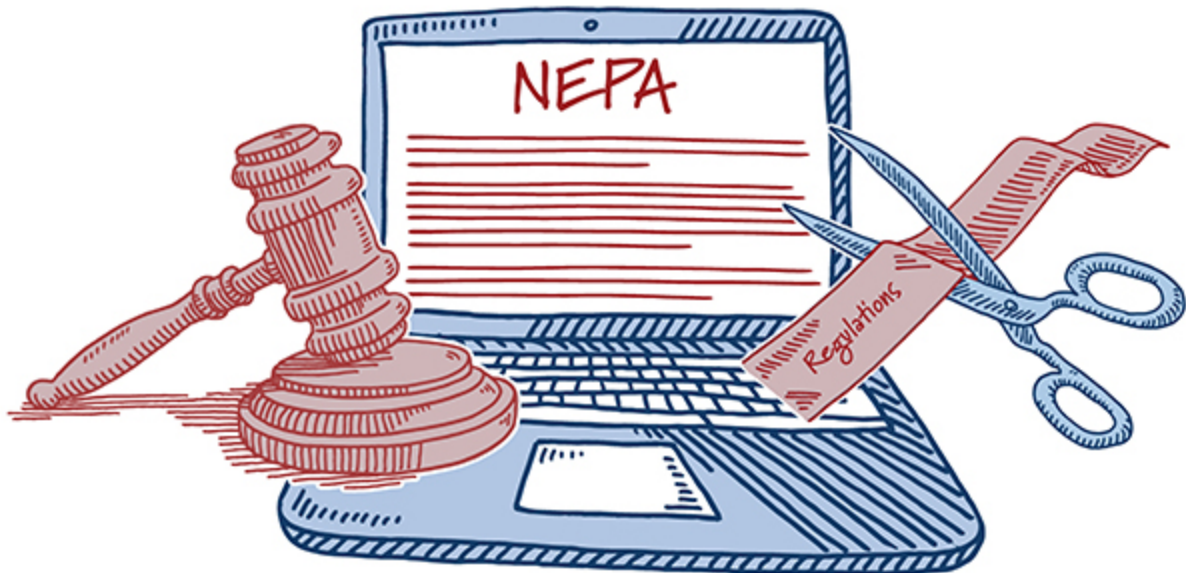
The Advanced Fuel Manufacturing Center will:

- Accelerate the deployment timeline for advanced “fast” reactors by making fuel available sooner;
- Recycle used nuclear fuel into new fuel, turning a liability into an asset;
- Begin producing fuel for Oklo’s reactors by the early 2030s; and
- Be the first-of-its-kind in the U.S.

What’s clear: “This investment builds on extensive bipartisan actions that reduced our reliance on Russian fuel, and now, not only is nuclear fuel manufacturing coming back to America, but we are seeing more innovative technologies coming to market,” said **ClearPath CEO Jeremy Harrell**.

Plug in: ClearPath [released a statement](#) detailing how Oklo is helping to fuel the future of nuclear energy in the U.S. and an additional series of domestic nuclear fuel investments.

2. A curtain raiser on permitting reform this fall



With Congress back in session, [permitting reform is at the top of the agenda](#). House Natural Resources Committee Chairman Bruce Westerman (R-AR) is working to get a permitting legislative package to the Senate by the end of the year to let America build infrastructure and energy projects faster.

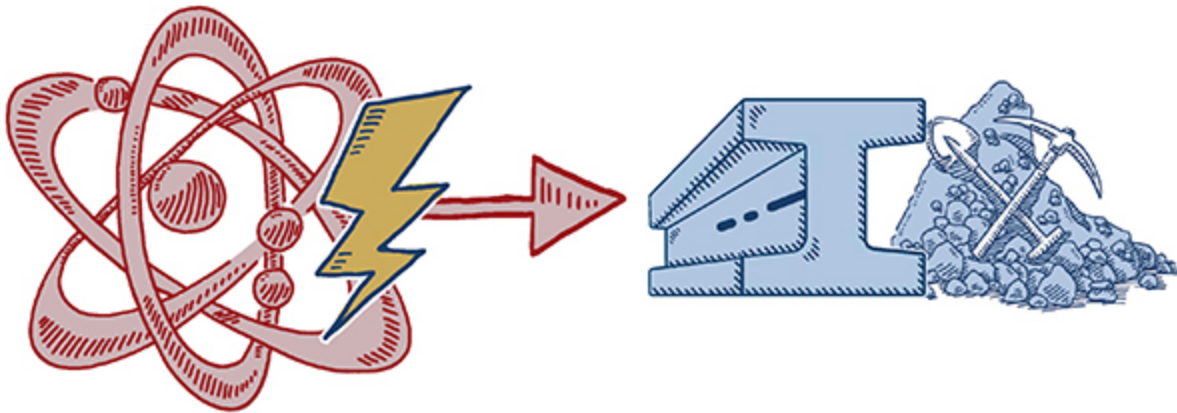
ClearPath Action CEO [Jeremy Harrell](#) will testify before the U.S. House Committee on Natural Resources at a [hearing](#) next Wednesday on three bipartisan permitting proposals that can streamline reviews and bring more transparency to the process, including:

- The [Studying NEPA’s Impact on Projects Act](#)
- The [ePermit Act](#)
- The [Standardizing Permitting and Expediting Economic Development Act](#) or the “SPEED Act”

What’s clear: “Without NEPA reform, which is the key part of permitting reform, I don’t think there is any kind of a permitting reform bill. Everything hinges on NEPA,”

said **Chairman Westerman**.

3. New support for industry through nuclear



The Open Group **formed** the Industrial Advanced Nuclear Consortium (IANC) to accelerate the deployment of nuclear heat and power solutions for industrial applications.

Founding members include Chevron, ConocoPhillips, ExxonMobil, Freeport-McMoRan, Nucor, Rio Tinto and Shell.

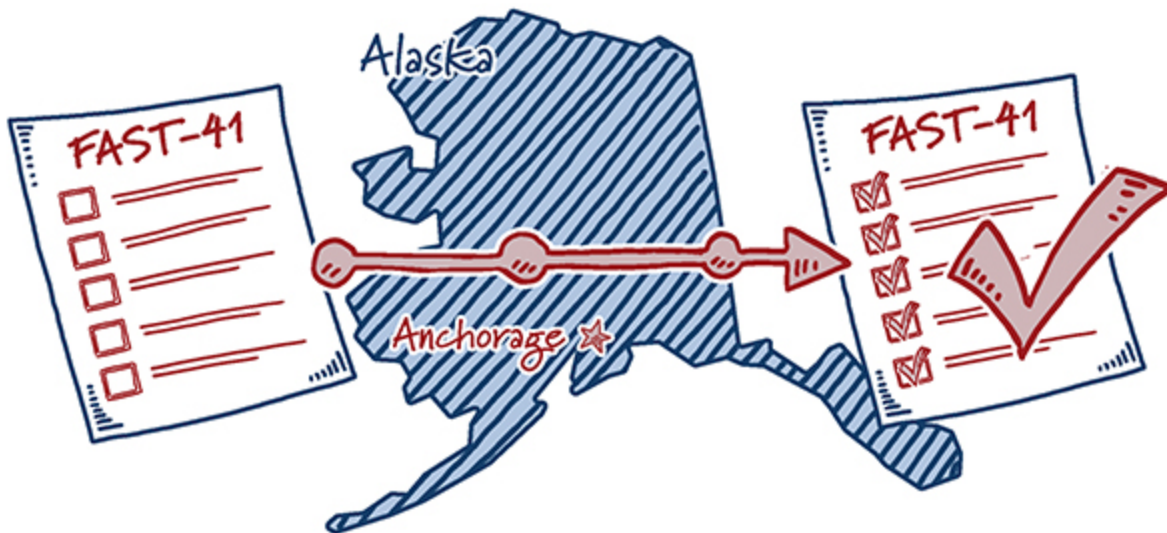
IANC will:

- Aggregate and amplify the demand for nuclear power in industrial settings;
- Develop industrial use cases and requirements; and
- Create technical standards and business guidelines for deployment.

What's clear: The group is committed to reliable and carbon-free heat and electricity. Today, industrial users are expressing growing interest in clean, firm power. By leveraging nuclear energy, the IANC offers reliable solutions.

Plug in: This announcement is part of a growing trend of **private industry betting on nuclear technology**.

4. Permitting partnership: Alaska and the Permitting Council



Permitting delays and red tape often cause delays to critical infrastructure and energy projects. The **Fixing America's Surface Transportation Act (FAST-41)** was established to improve transparency and predictability for critical infrastructure projects.

Gov. Mike Dunleavy (R-AK) and Permitting Council Executive Director Emily Domenech **signed a Memorandum of Understanding (MOU)** regarding the FAST-41 program to expedite the permitting process for projects across Alaska. This first-of-a-kind agreement builds on recent action to add the Graphite Creek Project, located on the Seward Peninsula, to the FAST-41 Dashboard to develop domestic supplies of graphite ore used in lithium-ion batteries and energy storage solutions.

The MOU establishes a framework to:

- Improve coordination between partners;
- Increase predictability; and
- Get projects approved and built in a faster timeframe.

What's clear: Permitting remains a major source of project delays. Streamlining the permitting process and offering increased transparency allows vital projects, including critical mineral enterprises, to be developed across America.

5. XMR era begins: Aalo breaks ground at INL Aalo-X



Aalo Atomics **announced** a first-of-its-kind experimental extra-modular nuclear reactor (XMR).

Aalo-X aims to:

- Meet President Trump's goal of having three new test reactors reach criticality by July 4, 2026;
- Test a 10 MW reactor design that will be used as part of the Aalo Pod, a modular five-reactor design capable of producing 50 MW of baseload power;
- Prove the concept of a highly transportable and scalable reactor prototype;
- Be the first sodium-cooled test reactor to go critical in the U.S. in over four decades; and
- Power a co-located data center, with next-generation AI chips.

What's clear: The development of Aalo Atomics's Aalo-X could be a key step in the broader U.S. initiative to achieve American nuclear energy dominance. The Department of Energy's support for innovative nuclear energy companies aligns its world-class research and development infrastructure with an ambitious vision for an energy-dominant America.

6. The Circuit



Niko McMurray spoke on a panel at the **ECC Conference** with nuclear reactor developers and hyperscalers to discuss new nuclear technologies, what challenges exist and how to achieve successful project execution.

Jackson Blackwell attended **Quaise Energy's tech demo** in Marble Falls, TX. Quaise Energy's millimeter wave drilling technology will allow it to drill deeper and access superhot geothermal energy resources at extreme depths and temperatures, ultimately delivering megawatts to the grid.



7. Coming down the pipeline

September 8, 9:00 A.M., New York— **Lisa Epifani** will be delivering the keynote for the opening of the **New York Energy Innovation** event.

September 10, 8:30 A.M., Atlanta, GA — Niko McMurray will speak on a panel at the **NCEX 2025 Nuclear Energy Conference and Expo** on unlocking nuclear growth in the U.S. and solutions for meeting new and novel demand signals.

September 10, 10:00 A.M. — Jeremy Harrell is set to **testify** before the U.S. House Committee on Natural Resources on the **SPEED Act**, **ePermit Act**, and the **Studying NEPA's Impact on Projects Act**.

September 12, 1:10 PM CT, New Orleans, LA — **Luke Bolar** will speak on a panel at the **Tulane Future of Energy Forum** on coordinating nuclear energy policy, strategy and the future grid.

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.

8. ICYMI

- There is a new collaborative **agreement** between TVA, ENTRA1 Energy and NuScale to deploy up to six GW of nuclear energy in TVA's service territory.
- The House of Representatives **passed** the FY26 Energy and Water Appropriations Act, which includes funding for small modular reactors and advanced reactor demonstration programs, and expands the Nuclear Regulatory Commission's capacity to review and approve new reactors.



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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