

The Rundown

By: CLEARPATH
ACTION



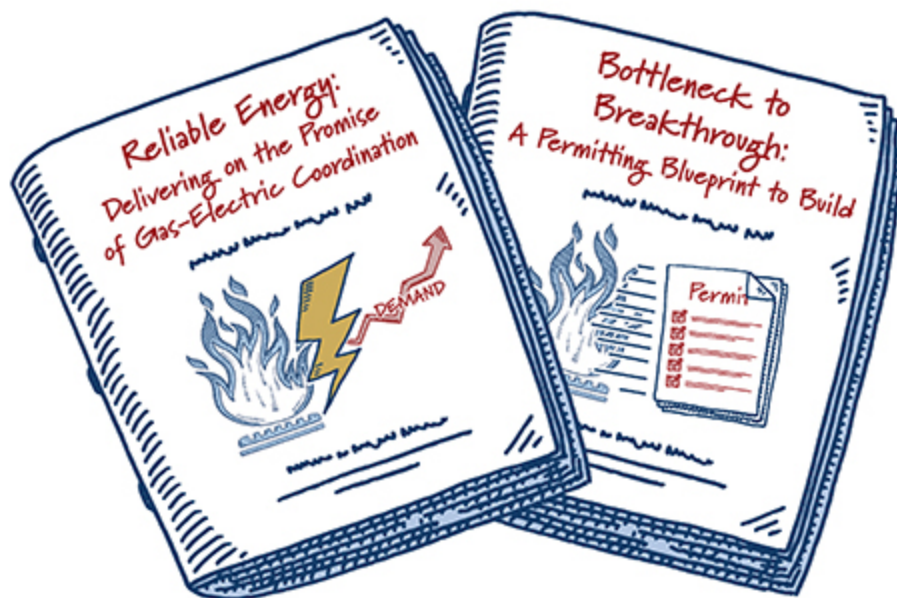
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ClearPath Action Rundown December 5th, 2025

Happy Friday!

1. National Petroleum Council releases new studies



A pair of new reports from the National Petroleum Council (NPC) warns that without modernized permitting and stronger gas-electric coordination, reliability will suffer

and critical projects will stall.

The Department of Energy (DOE) **released** studies outlining recommendations to modernize federal permitting and remove barriers to building essential energy infrastructure:

- **Gas-Electric Coordination Report**: Calls for infrastructure investment, improved market and regulatory frameworks and stronger reliability and accountability measures for gas-fired power.
- **Oil and Natural Gas Permitting Report**: Recommends streamlining NEPA reviews, expanding FERC authority and establishing predictable federal timelines for natural gas infrastructure approvals.

2. America's future agriculture strength depends upon innovation



Jeremy Harrell and AEM Senior Vice President Kip Eideberg co-authored an Agri-Pulse op-ed urging the U.S. to regain its leadership in agriculture innovation. U.S. investment has stalled even as competitors accelerate. With global food demand expected to rise 50% by 2050, the next Farm Bill presents a critical opportunity to regain that leadership.

Key points from the op-ed:

- U.S. agriculture R&D is falling behind while competitors accelerate investment;
- Precision agriculture can boost yields, improve soil and water efficiency and reduce emissions;
- Programs like AgARDA, FFAR and EQIP should be strengthened in the next Farm Bill; and
- A modernized Farm Bill can protect America's global edge in food production and ag technology.

Plug in: Read the full op-ed in **Agri-Pulse**.

3. ClearPath government affairs team expands



Tanner Brown

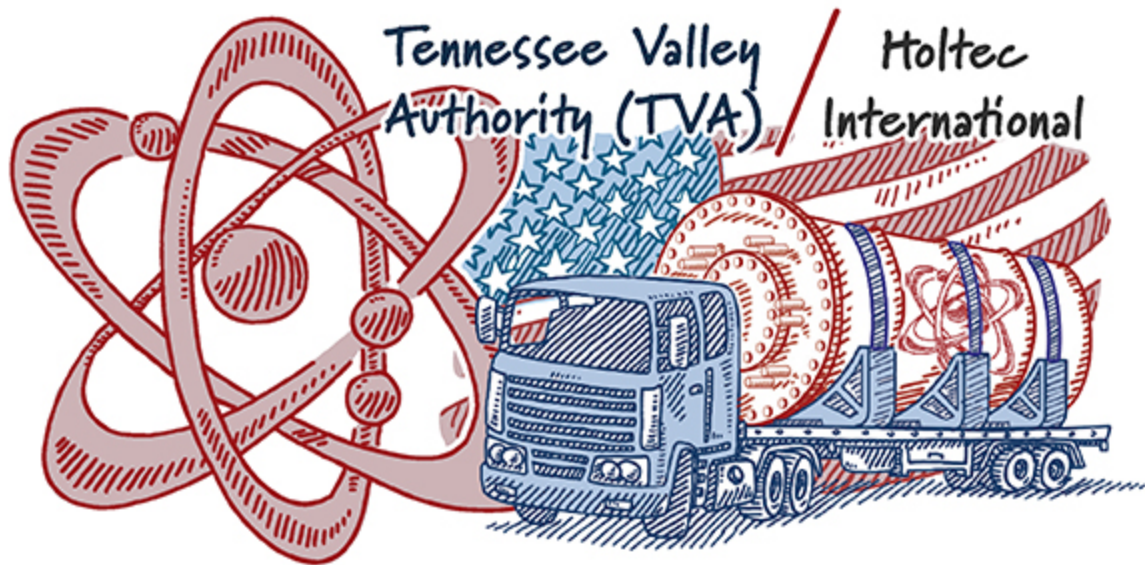
Tanner Brown joined as a member of ClearPath's government affairs team, where he will serve as an educational resource for House Members and staff working to advance innovative energy and agriculture policies.

Before joining ClearPath, Tanner spent nearly five years on Capitol Hill, most recently as Deputy Chief of Staff for Rep. Jim Baird (R-IN). He worked across a broad legislation portfolio with a focus on:

- Strengthening American agriculture and rural development;
- Supporting domestic energy production and innovation; and
- Advancing research and foreign affairs priorities.

Welcome **Tanner**!

4. DOE selects TVA and Holtec to jump-start early SMR deployments



Meeting America's soaring power demand will require new nuclear and fast. To support early deployments, the DOE selected the **Tennessee Valley Authority (TVA) and Holtec Government Services** to each receive \$400 million to accelerate near-term Gen III+ projects that can add reliable, carbon-free power and strengthen domestic supply chains.

TVA plans to:

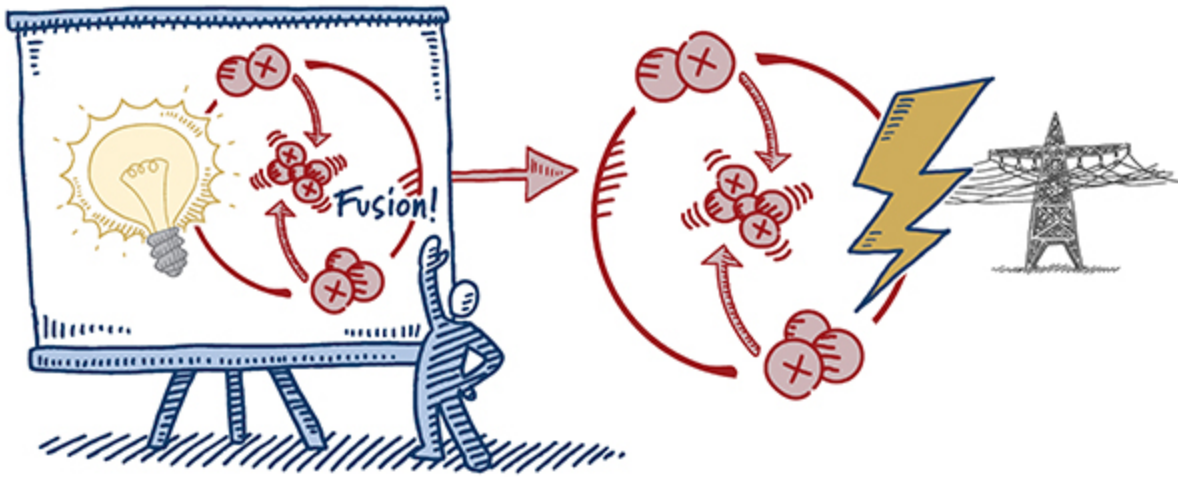
- Deploy a GE Vernova Hitachi BWRX-300 at the Clinch River site in Tennessee;
- Deploy additional, follow-on units with Indiana Michigan Power and Elementl; and
- Partner with domestic supply chain companies, including Scot Forge, North American Forgemasters, BWX Technologies and Aecon, with support from Duke Energy, ORAU and EPRI.

Holtec Government Services plans to:

- Deploy two SMR-300 reactors at the recently restarted Palisades Nuclear Generating Station site in Michigan; and
- Use a "one-stop" model that covers technology, supply chain, construction (with Hyundai E&C), operations and electricity sales.

What's clear: Early SMR deployments are key to meeting rising power demand and rebuilding U.S. nuclear capacity. These awards help move first projects toward construction, strengthen domestic supply chains, and support the administration's effort to drive a nuclear renaissance and expand America's energy dominance.

5. NEW blog: From Vision to Reality: The U.S. Fusion Imperative



As fusion power moves towards commercialization and real-world deployment, U.S. leaders are ramping up efforts to secure America's position as the dominant world leader. In October, the **[Commission on the Scaling of Fusion Energy \(CSFE\)](#)**, led by Sens. Risch (R-ID) and Cantwell (D-WA), laid out a plan to capitalize on this technology. The report recommends that the U.S. should:

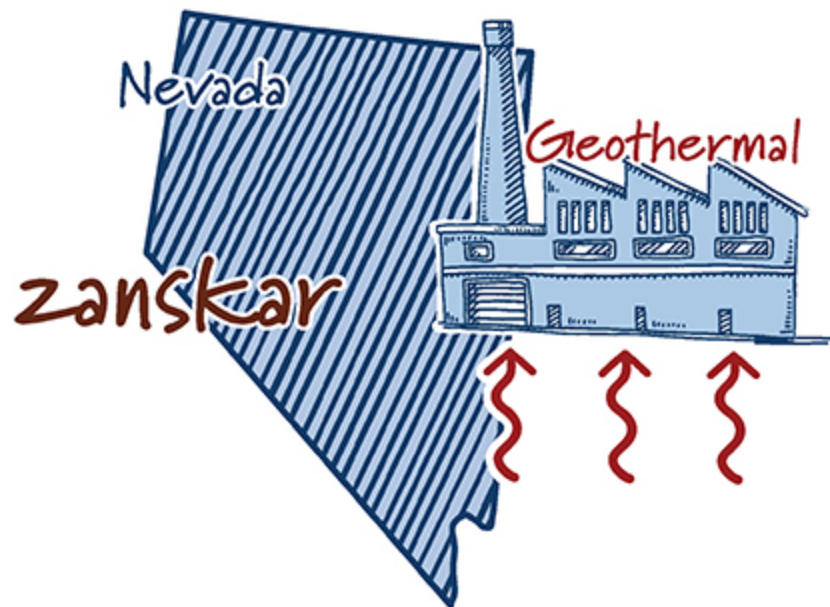
- Declare fusion a national security priority and invest billions to drive commercialization, and expand research and development; and
- Expand interagency and private sector collaboration, and take strategic action to expand infrastructure and fund existing programs.

In October 2025, the DOE released its **[Fusion Science & Technology Roadmap](#)**, which sets a national strategy to accelerate the deployment of commercial fusion power, and created a standalone Office of Fusion Energy.

What's clear: With China establishing state-owned fusion enterprises and investing billions into supply chains, U.S. policymakers are recognizing that U.S. leadership will require bold action, faster coordination, and stronger partnerships to anchor the American fusion energy industry.

Plug in: Dive into the future of fusion in **[Chase White](#)** and **[Jake Kincer's](#)** latest **[blog](#)**.

6. Zanskar's geothermal discovery



Zanskar, a pioneering geothermal company, **announced** the discovery of a “blind” geothermal system using its innovative AI prediction engine.

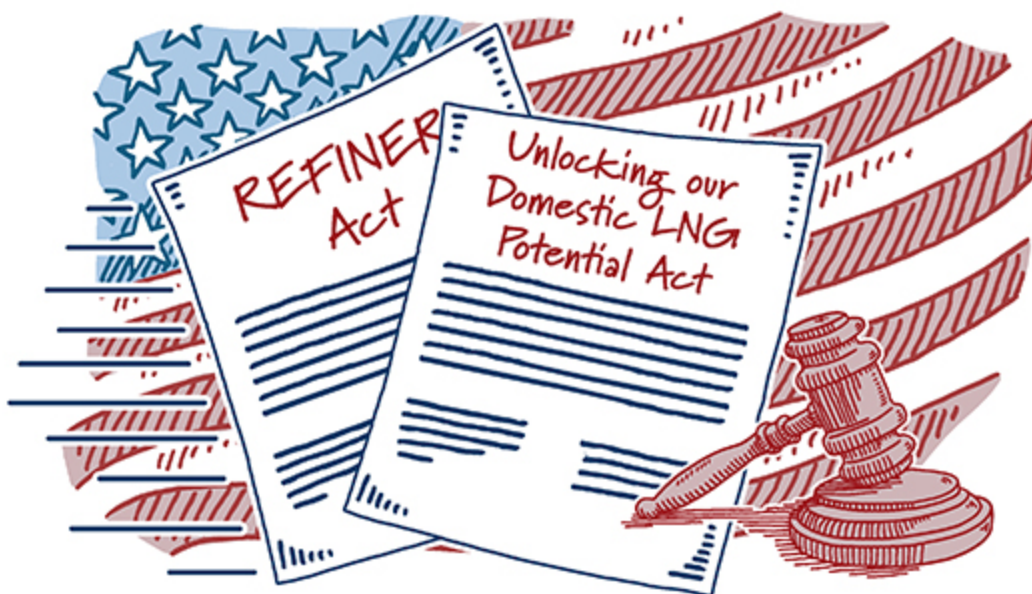
- A “blind” discovery means the resource does not show surface geothermal indicators and cannot be identified through traditional surveys.
- This discovery proves geothermal resources expand beyond conventional locations and may ultimately result in dozens of gigawatts in new electricity potential.



ClearPath was proud to join Zanskar at the Lightning Dock unveiling this summer in New Mexico. We are excited to see yet another breakthrough as geothermal innovation accelerates.

Why it matters: AI-driven exploration and subsurface modeling dramatically increase the number of viable geothermal prospects across the country. As energy demand continues to rise, geothermal offers a unique solution: clean, firm and reliable source of power.

7. E&C committee advances two fuel bills



With U.S. energy demand continuing to grow, lawmakers are looking for ways to reinforce America's reliability and streamline supply. In response, the House recently passed two bills aimed at improving American energy reliability and competitiveness.

- **The REFINER Act (H.R. 3109)**, led by Chair Latta (R-OH) of the House Energy and Commerce Committee's Subcommittee on Energy, would direct a federal study to assess U.S. refining capacity, identify barriers and recommend ways to expand domestic fuel production.
- **The Unlocking our Domestic LNG Potential Act (H.R. 1949)**, led by Rep. Pfluger (R-TX), would remove DOE's additional export authorization step for U.S. LNG and give FERC sole approval authority to provide developers more certainty and help prevent future export pauses.

What's clear: Lawmakers are increasingly focused on streamlining approvals, strengthening supply chains and keeping American energy competitive and affordable.

8. ICYMI

- The DOE Office of Critical Minerals and Energy Innovation announced a **Notice of Funding Opportunity** for up to \$134 million to enhance the domestic supply chain for rare earth elements (REEs).
- Sen. Cramer (R-ND) and Rep. Fedorchak (R-ND) introduced the **Fair Allocation of Interstate Rates (FAIR) Act**, which is intended to protect consumers from paying for transmission projects driven by another state's public policy.

- Charm Industrial CEO **Peter Reinhardt** published a piece on how over-regulation and permitting delays are the biggest barriers to building clean energy projects in the U.S.
 - Graphyte, a biomass carbon removal company, secured a **\$250,000 prepurchase agreement from Frontier** for its project in Arkansas.
 - The DOE awarded more than **\$5.3 million for 15 university-led infrastructure projects** that will strengthen America's nuclear energy workforce and research capabilities.
 - ACORE released a **report** on the opportunity for additional interconnection reforms to expedite the addition of new generation to the grid to meet demand growth.
 - Lawrence Berkeley National Laboratory launched the **Reconductoring Economic and Financial Analysis** tool, which analyzes the economic and financial performance of advanced conductors to identify cost-saving opportunities for deployment.
 - ClearPath's **Niko McMurray** was mentioned in **Energy Intelligence** on the NRC's regulatory overhaul, highlighting the importance of stakeholders participating in the rulemaking process to ensure good outcomes.
 - **Watch**: BWXT delivered a full core of TRISO fuel to Idaho National Laboratory for the Project Pele microreactor, marking a major milestone for the Defense Department's first transportable advanced reactor.
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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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