

The Rundown

By: CLEARPATH
ACTION



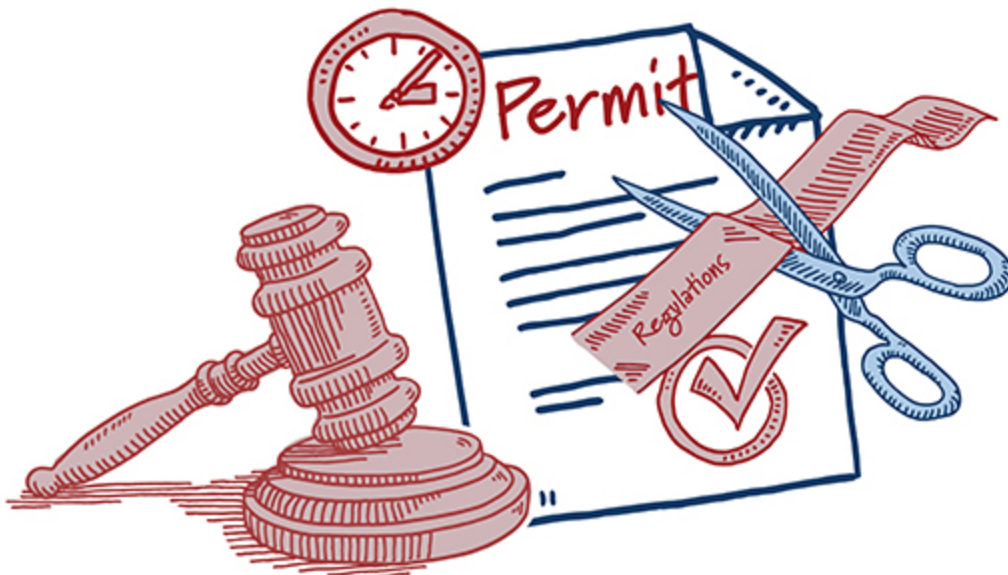
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ClearPath Action Rundown January 30th, 2026

Happy Friday!

1. Senate explores modernizing permitting to let America build



As energy demand rises, the Senate continues to work on addressing project delays through permitting modernization. The Senate Environment and Public Works Committee held a **hearing** this week on federal environmental review and permitting.

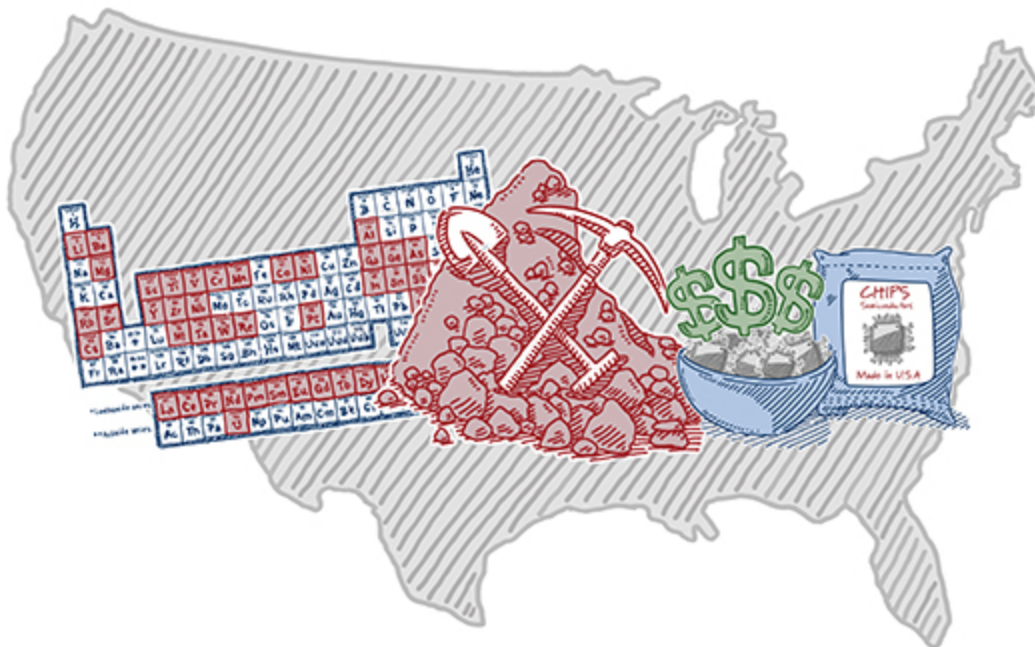
What to know:

- Chair Capito (R-WV) urged bipartisan action to give projects the certainty they need from one administration to the next;
- Ranking Member Whitehouse (D-RI) said he wants bipartisan reform, pointing to faster permitting as a way to add jobs and expand power supply;
- A coalition led by Bipartisan Policy Center Action, including ClearPath Action, sent a **letter** to Congress calling for durable, technology-neutral reforms to improve affordability and strengthen national security; and
- Dustin Meyer, Senior Vice President at the American Petroleum Institute, testified on the need for certainty.

What's clear: Letting America build requires a faster, more certain timeline for developers and customers. Bipartisan reform can unlock investment, lower costs and ensure the U.S. can meet rising demand.

Plug in: Read [**2026: A Clear Path for American Energy Dominance**](#) on ClearPath's full policy agenda, including how modernized permitting can expand U.S. energy leadership.

2. Scaling America's rare earth supply chain



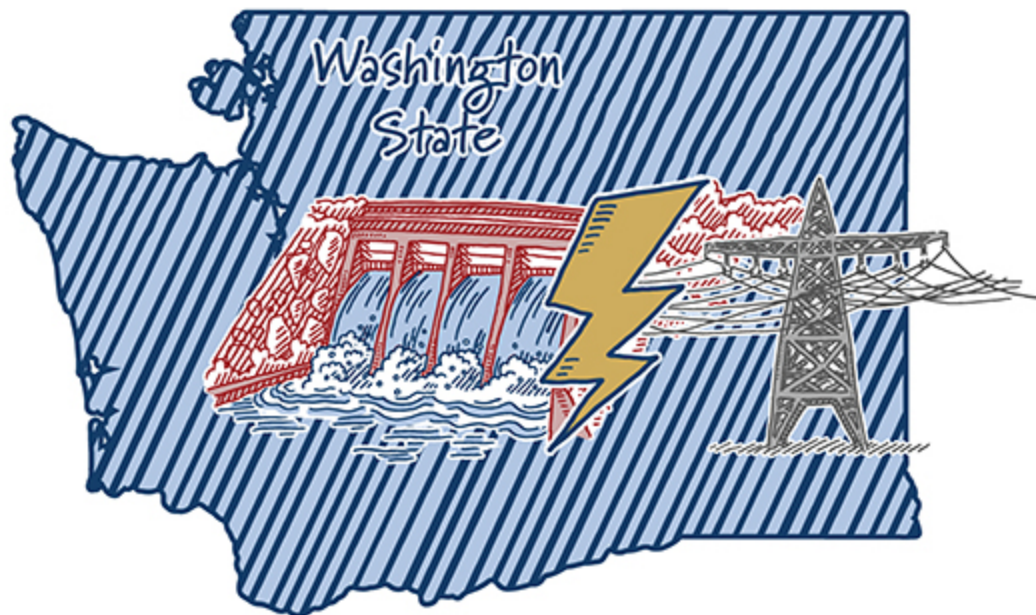
The effort to rebuild America's critical mineral supply chains is scaling fast. USA Rare Earth (USAR) raised \$1.5 billion in new private investment and announced a **Letter of Intent** (LOI) with the U.S. Department of Commerce's CHIPS Program for up to \$1.6 billion in public support.

What's happening:

- The CHIPS LOI includes \$277 million in federal funding and \$1.3 billion in a secured loan in exchange for 16.1 million shares of common stock and 17.6 million warrants issued to the Department of Commerce;
- The funding will allow USAR to scale its “mine-to-magnet” activities, including the extraction and processing of rare earths and permanent magnet manufacturing; and
- USAR will also collaborate with the Department of Energy to advance heavy rare earth element separation technologies.

What's clear: Critical minerals sit at the center of American energy leadership, industrial competitiveness and national security. Strengthening these supply chains will require faster permitting, greater investment in mining innovation and robust international cooperation through the use of strategic trade tools like **Energy Security Compacts**.

3. FERC makes waves with pumped storage + new bipartisan hydropower legislation



Momentum is building to unleash American hydropower. FERC approved construction of the **Goldendale Energy Pumped Storage Project** in Washington state, the first major hydropower project approved by the Commission in over a decade. The project will deliver 1,200 megawatts of clean, dispatchable capacity to support grid reliability in the Pacific Northwest.

In other hydro news:

- Sens. Murkowski (R-AK) and King (I-ME) introduced the **Fair Licensing for Operations of Water Structures** (FLOWS) Act to reduce regulatory and permitting burdens.

- The bipartisan bill aims to cut federal red tape and remove barriers to hydrokinetic energy projects, including technologies that generate electricity from tides, waves and river currents.
- FERC issued a **Notice of Intent** for blanket waivers for post-licensing activities at hydropower projects.

What's clear: Today, the U.S. uses hydropower for **5.7% of its electricity**. Yet, we use only 3% of the 92,000 dams in America for electricity. As electricity demand rises, more hydropower is an affordable, reliable and emission-free option.

4. The ClearPath Circuit



Hillary O'Brien joined a panel discussion at the Center for Climate and Energy Solutions' Playing to Win: A Policymaker's Guide to Accelerating U.S. Technology Leadership event. The discussion focused on the importance of sustained federal investment in innovative energy technologies and the need for comprehensive federal permitting reform.

5. ICYMI

- A C3 Solutions **report** finds that investing in innovation across agriculture and food production can help keep food affordable while reducing environmental impacts, showing how smarter technologies can cut costs, reduce waste and strengthen food security.
- Geothermal developer XGS Energy and Vallourec announced a **strategic supply chain partnership** to accelerate next-generation geothermal deployment, including a 150-MW project in partnership with Meta beginning construction in New Mexico this year.
- Thermal energy storage innovator Electrified Thermal Solutions **announced** the commissioning of its first commercial-scale thermal battery in San Antonio, which will deliver low-cost, reliable, clean heat at high temperatures demanded by industries like cement, steel and chemicals.
- U.S. primary aluminum producer Century Aluminum entered into a **joint development agreement** with Emirates Global Aluminium, a UAE-based company, to build the nation's first new smelter in 45 years in Oklahoma, a project that would double domestic production capacity.
- Standard Nuclear **raised \$140 million** in a Series A round to expand domestic production of TRISO nuclear fuel using HALEU. It seeks to bring new facilities online in Tennessee and at Idaho National Laboratory (INL).

- Microreactor start-up Antares **received DOE approval** for its demonstration reactor at INL. This facility will validate fueling, reactor controls and core physics.
- Aclara's U.S.-based subsidiary is advancing vertically integrated rare earths supply chains. To support its heavy rare earth separation process, Aclara is entering into a Cooperative Research and Development **Agreement** with Argonne National Laboratory to develop an AI-enabled digital twin technology.



*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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