The Rundown

By: CLEARPATH ACTION

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ClearPath Action Rundown
February 20th, 2026

Happy Friday!

Congratulations to…

Kyle Haustveit on his nomination to serve as Under Secretary of Energy at the Department of Energy;

David LaCerte on his renomination to serve as a Commissioner at the Federal Energy Regulatory Commission; and

Rep. Celeste Maloy (R-UT) who was named Co-Chair of the Build America Caucus.

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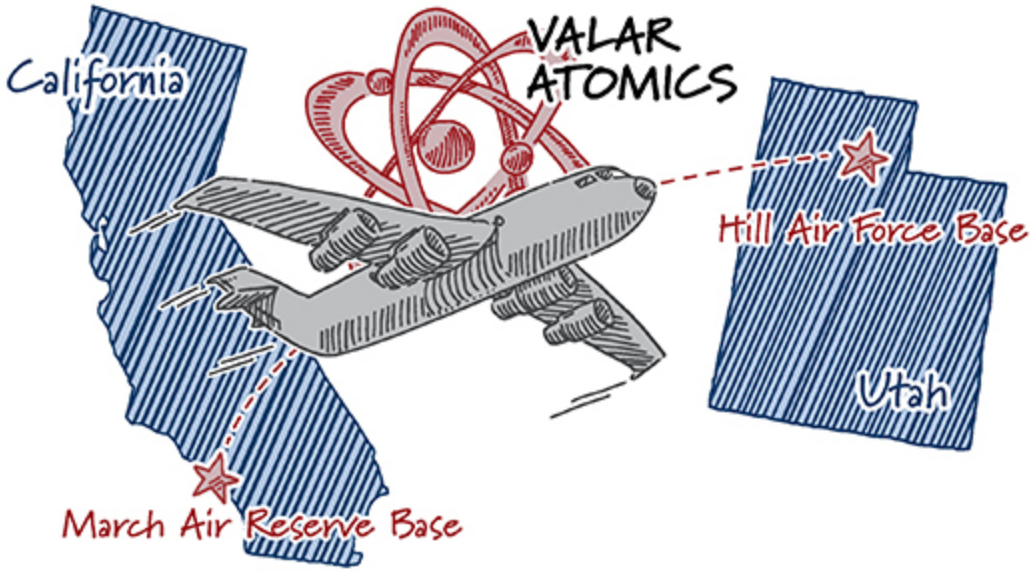
1. Small nuclear takes off



The Dept. of War (DOW) and Dept. of Energy (DOE) **airlifted** Valar Atomics' unfueled next-generation nuclear reactor from California to Utah aboard a C-17. This successful transport is part of President Trump's agenda to strengthen the United States' nuclear energy production and deployment.

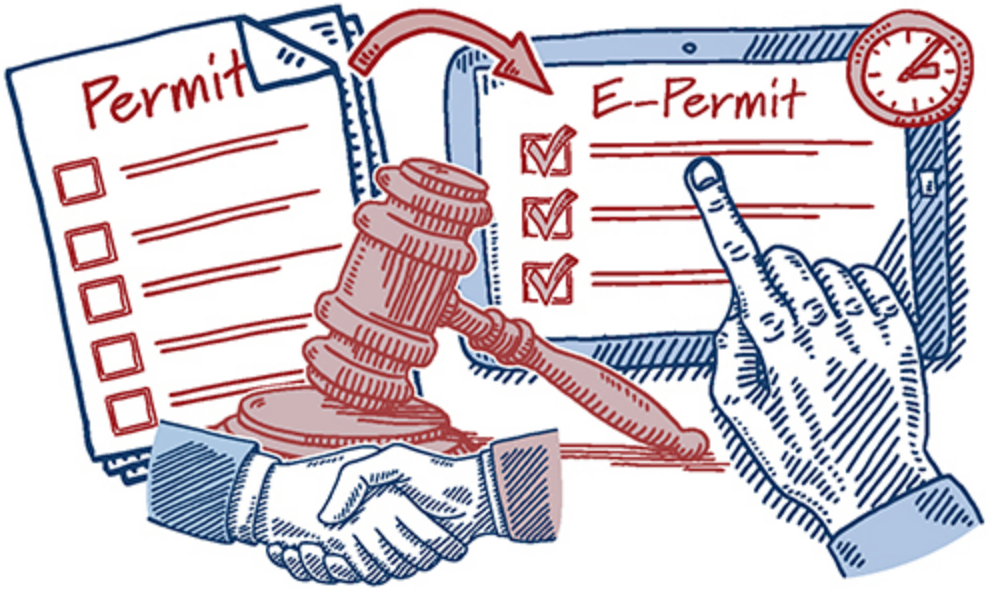
What to know:

- The TRISO-fueled Ward 250 reactor is designed to scale up to produce 5 MW of energy, which could power 5,000 homes; and
- Air-transportable nuclear reactors could power military bases and remote locations.

Plug in: Mission readiness starts with reliable energy. President Trump's EOs are **accelerating** advanced nuclear deployment on U.S. military bases while reinforcing energy resilience and national security.

[L-R] Energy Secretary Chris Wright with Utah Gov. Spencer Cox at Hill Air Force Base, UT, for the arrival of the air-transportable nuclear reactor.

2. Let America Build: Bipartisan push to digitize permitting



Outdated federal permitting systems are slowing energy and infrastructure projects. Sen. John Curtis (R-UT) was joined by seven additional cosponsors to **introduce** the bipartisan Senate companion to the **ePermit Act** to digitize and modernize the federal environmental review process.

The ePermit Act would:

- Create a centralized, cloud-based permitting portal to improve transparency and interagency coordination;
- Digitize NEPA reviews and standardize data collection across agencies; and
- Maintain existing environmental protections while reducing bureaucratic delays.

Additional Senate co-sponsors include Sens. Booker (D-NJ), Budd (R-NC), Daines (R-MT), Hickenlooper (D-CO), Kelly (D-AZ), McCormick (R-PA) and Padilla (D-CA). The ePermit Act **passed the U.S. House** on December 9, 2025, led by Reps. Johnson (R-SD) and Peters (D-CA).

What's clear: To let America build, we need a predictable and efficient permitting process. Modernizing federal reviews is a commonsense, bipartisan step toward faster energy deployment and a stronger, more reliable grid.

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3. Genesis Mission: AI powering American energy innovation

AI is becoming a core driver of U.S. science, energy and national security policy. DOE launched the **Genesis Mission Consortium** in partnership with TechWerx and announced **26 national science and technology** solutions to accelerate AI-enabled innovation.

The new Genesis Mission Consortium will:

- Coordinate with DOE, National Labs, industry and universities;
- Align high-performance computing, cloud infrastructure and robotics capabilities; and
- Serve as a centralized hub for collaboration, standards and funding opportunities.

The 26 solutions include:

- Improving grid planning and operations to enhance reliability and reduce costs;
- Digitizing decades of nuclear research data to inform future energy and security decisions;
- Deploying AI-driven autonomous laboratories to speed materials and manufacturing innovation; and
- Accelerating biotechnology from early discovery to full-scale manufacturing in energy, agriculture, biosecurity and related industries.

What's clear: Harnessing AI for energy and science can dramatically shorten innovation timelines, lower costs and unlock faster deployment of technologies.

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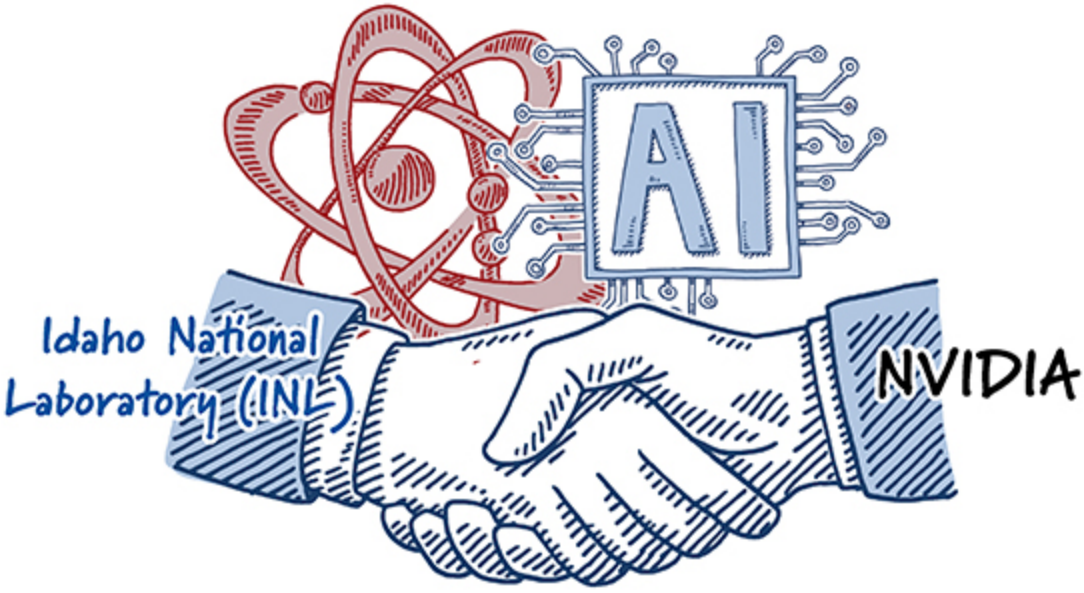
4. INL, NVIDIA target faster, lower-cost nuclear with AI



Meeting surging electricity demand will require building nuclear reactors in years, not decades. Idaho National Laboratory (INL) and NVIDIA announced a **partnership** under DOE's **Genesis Mission** to use AI to accelerate nuclear deployment. The effort aims to cut project timelines in half and reduce operating costs by more than 50%.

The partnership works by:

- **Using** AI, digital twins and agentic workflows to improve reactor design, licensing, construction and operations;
- **Leveraging** DOE supercomputers and NVIDIA AI systems for large-scale simulation and real-time operations;
- **Validating** tools with INL's legacy nuclear data and on-site reactors, including NRAD and MARVEL; and
- **Accelerating** simulation codes on high-performance computing platforms while supporting broader industry adoption.

What's clear: Surging power demand from AI and advanced manufacturing requires reliable energy at scale. If AI can compress nuclear timelines and lower costs, it could fundamentally reshape deployment economics and strengthen American energy dominance.

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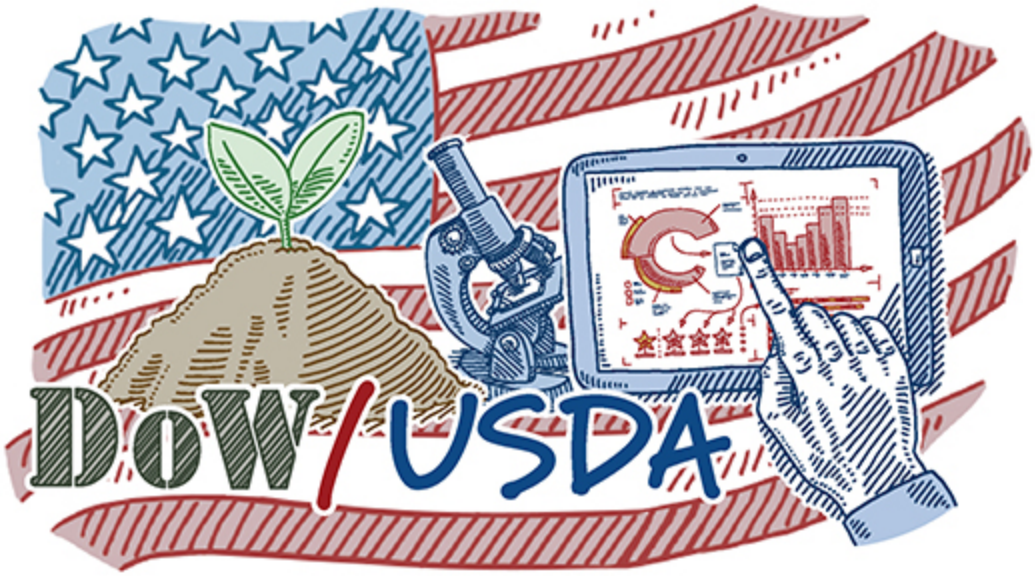
5. Strengthening America’s food and national security


DoW/USDA

America leads the world in agricultural innovation, but staying ahead requires stronger federal coordination. Reps. Mark Messmer (R-IN) and Don Davis (D-NC) **introduced** the **DOD and USDA Interagency Research Act (H.R. 7547)** to formalize collaboration between the two departments on high-risk, high-reward research.

The bill would:

- Direct DOD and USDA to establish a formal MOU to coordinate advanced R&D;
- Support joint R&D aligned with national security and agricultural priorities, including through the Agriculture Advanced Research and Development Authority (AgARDA); and
- Strengthen collaboration to protect the U.S. agrifood system and accelerate next-generation innovation.

In the same week, USDA and DOW signed an **MOU** advancing the National Farm Security Action Plan.

Under the agreement:

- USDA and DOW will coordinate efforts to protect farmland, supply chains and research from emerging security threats;
- DOW's Defense Advanced Research Projects Agency (DARPA) and USDA's Office of the Chief Scientist will partner to accelerate new technologies and address vulnerabilities in the agrifood system; and
- USDA announced the creation of a new Office of Research, Economic, and Science Security to coordinate research security.

What's clear: The DARPA model has proven successful in addressing challenges and bringing new technologies to market. Applying it to agriculture through AgARDA can turn coordination into breakthrough innovation that strengthens national security and U.S. competitiveness.

Plug in: Read ClearPath's blog, **Cultivating Tomorrow: Driving High Impact Agricultural Innovation with AgARDA**, for recommendations on standing up AgARDA and unlocking its full potential.

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6. Nuclear regulator approves first-ever advanced reactor fuel factory

The U.S. Nuclear Regulatory Commission approved **a license** for X-energy's TRISO-X to build the first commercial-scale TRISO fuel fabrication facility in Oak Ridge, TN. TRISO fuel is made up of small spheres of enriched uranium that are coated in carbon and ceramic layers and designed to withstand extremely high temperatures, improving performance.

What the approval means:

- Licensing the first U.S. commercial TRISO fuel plant strengthens the domestic nuclear supply chain; and
- The facility will support X-energy's project with Dow Chemical in Texas and subsequent projects.

Plug in: In 2024, ClearPath **brought Congressional Staff** to Oak Ridge, Tennessee, to see the innovative work performed at the TRISO Fuel Lab. Read ClearPath's **Advanced Nuclear Fuel 201** to dive deeper into TRISO fuel and other fuels for new reactors.

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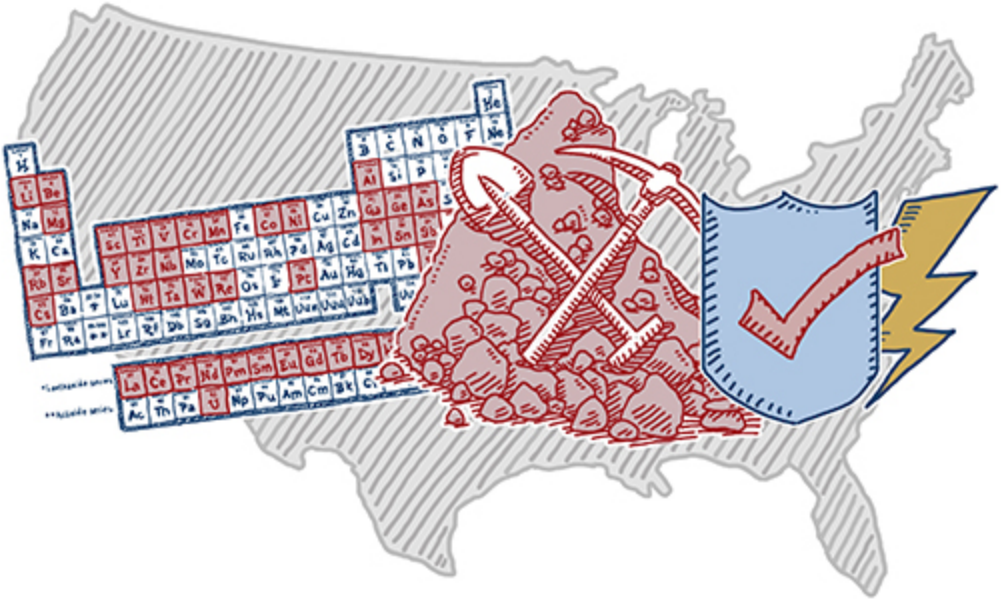
7. Domestic critical mineral supply is energy security



Critical minerals are the backbone of modern energy and defense systems, yet the U.S. remains heavily reliant on imports. The U.S. Geological Survey's 2026 **Mineral Commodity Summaries** report highlights continued import reliance even as domestic production value rises.

What the report shows:

- The U.S. is 100% import reliant on 13 critical minerals and more than 50% reliant on another 20;
- Nonfuel mineral production value rose by 5.6% in 2025, driven by price increases in gold and silver;
- Industrial minerals production reached $73.7 billion, a 2% increase year-over-year; and
- The U.S. relies on imports for more than two-thirds of the rare earth compounds and metals it consumes, posing a significant national security risk.

What's clear: Modest production value increases are encouraging but do not resolve structural supply chain dependence. Securing America's mineral base will require modernizing mining innovation, expanding domestic production, streamlining permitting and deepening coordination with allies by codifying **Energy Security Compacts**. Energy dominance starts with mineral security.

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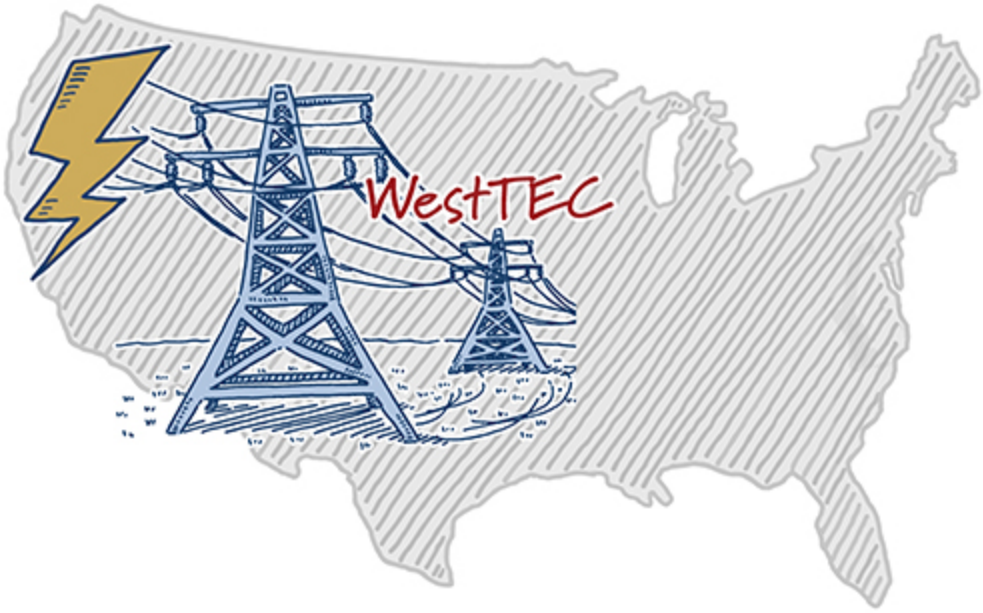
8. West-wide Transmission Study released



The Western Transmission Expansion Coalition (WestTEC) **released** its 10-year outlook on interregional transmission needs. Across the West, the nearly 12,600 miles of planned, new and upgraded transmission needed by 2035 represent an estimated $60 billion in investment.

What is driving the need for transmission?

- **Rapid load growth:** The West is expecting 30% load growth by 2035 and interregional transmission is crucial to unlocking system bottlenecks.
- **Generation additions:** More transmission is crucial for unlocking over 200 GW of new generation that represents the West's wealth of natural resources.
- **Regional reliability and resilience:** Transmission investment is necessary to ensure safe operating conditions and robust networks that can withstand difficult conditions and threats.

Key takeaways for policymakers:

- Timely completion of planned transmission projects is essential for reliability and realizing the immense economic opportunity;
- Transforming identified projects into steel in the ground requires sponsorships and partnerships across utilities, developers and public power; and
- States and stakeholders must coordinate effectively to permit, site and allocate project costs.

What's clear: This voluntary coalition of industry, states, tribes and other stakeholders demonstrates how the Western U.S. is charting its own path to a stronger, more robust grid that provides the foundation for economic growth and energy dominance.

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9. Three big things in geothermal

Geothermal is scaling fast. Driven by private investment, advanced drilling and 24/7 power demand, next-generation geothermal is scaling fast and delivering affordable, reliable, clean energy.

The latest signals of momentum include:

- Ormat **signing a 150 MW agreement** with NV Energy to power Google's Nevada operations, reinforcing geothermal's role as firm energy addition for hyperscalers; and
- Fervo announcing it has drilled its hottest well to date at a **new giga-scale project site**, demonstrating how advanced drilling can unlock deeper, higher-temperature resources and scale next-generation geothermal.
- New federal data shows geothermal **generation and capacity are increasing**, underscoring steady U.S. deployment as demand for clean firm power rises.

Plug in: Streamlined permitting and leasing reforms can accelerate next-generation geothermal deployment. Read more in ClearPath's blog **A Clear Path for Geothermal Permitting: Cutting Delays, Driving Deployment**.

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10. The Circuit

Matthew Mailloux spoke on a panel at the Congressional Western Caucus' "Geothermal 101" briefing about policy reforms to accelerate deployment.

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11. ICYMI

- **Streamlining permitting -** The Permitting Council **announced** two new MOUs with Gov. Little (ID) and Gov. Lee (TN), with commitments from each state to opt into the FAST-41 process and align timelines for state and federal environmental reviews.
- **Fusion lasers** - Fusion start-up Inertia Enterprises **raised $450 million** to commercialize laser-based fusion energy. The company plans to build the world's most powerful fusion laser system and advance a roadmap to deliver utility-scale, grid-connected fusion power.
- **Farm Bill -** House Agriculture Committee Chair Glenn Thompson (R-PA) released the **Farm, Food, and National Security Act of 2026**, a five-year Farm Bill reauthorization to strengthen the farm safety net, update farm policy and provide long-term direction for agriculture programs. The House Agriculture Committee will begin markup next week.
- **AI for grid** - CTC Global launched **GridVista**, an advanced conductor with embedded optical fibers that enable Tapestry and Google Cloud AI tools to provide analytical support for optimizing grid performance and safety.
- **Congressional Caucus Launch -** Reps. Brad Finstad (R-MN) and Jim Costa (D-CA) launched the **bipartisan Soil Caucus** for the 119th Congress.

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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