

The Rundown

By: CLEARPATH
ACTION



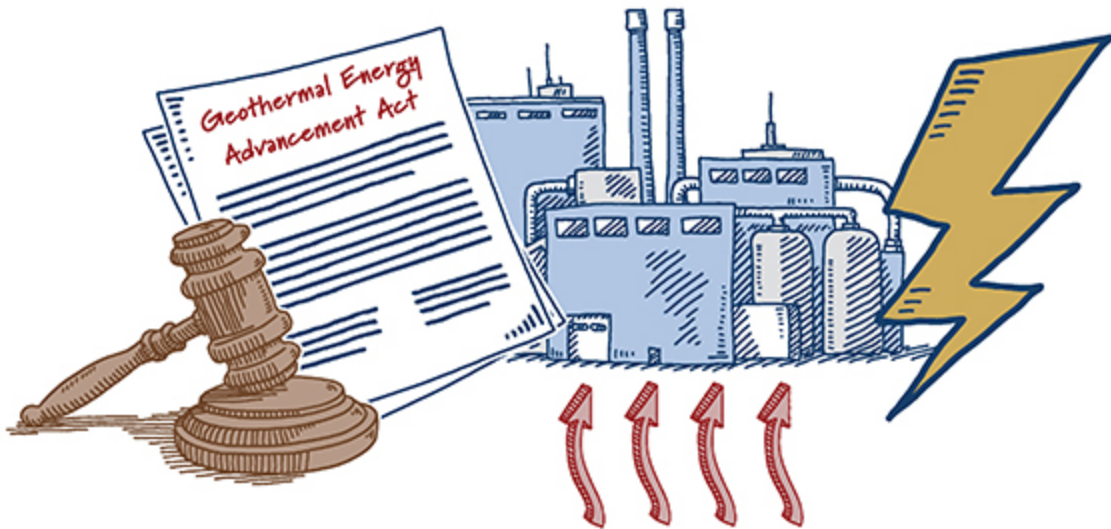
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ClearPath Action Rundown July 31st, 2026

Happy Friday!

1. Geothermal permitting package passes Senate ENR Committee



Geothermal is ready to scale, but only if federal permitting keeps pace with industry demand. The Senate Energy and Natural Resources Committee **advanced** the

House-passed [Geothermal Energy Advancement Act](#) with bipartisan support, sending the permitting package to the Senate floor.

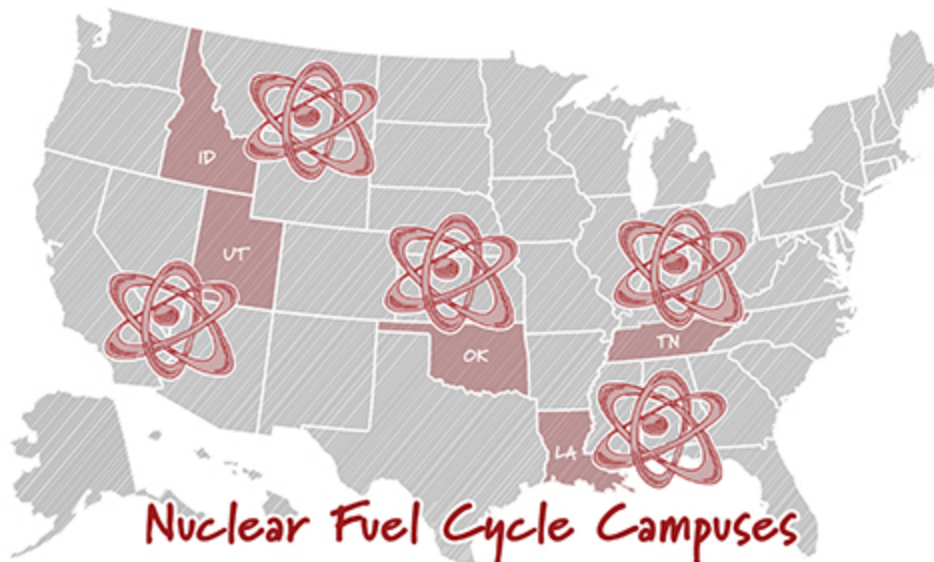
The bill will:

- Require DOI to process geothermal lease applications within 60 days of completing applicable federal requirements;
- Expand NEPA categorical exclusions for geothermal activities, bringing treatment closer to parity with oil and gas; and
- Establish a dedicated geothermal ombudsman and Bureau of Land Management permitting task force to standardize reviews across field offices.

What's clear: Permitting reform is the key to unlocking geothermal development. Congress has the opportunity to get the barriers out of the way and let America build.

Plug in: Explore [Geothermal Permitting: Cutting Delays, Driving Deployment](#), where ClearPath highlights many of these geothermal permitting reforms.

2. Five states vie to host nuclear fuel cycle campuses



America needs a full domestic nuclear fuel cycle to beat China and secure energy dominance. The Department of Energy **named** Utah, Tennessee, Oklahoma, Louisiana and Idaho as potential hosts for Nuclear Lifecycle Innovation Campuses, signing agreements to explore sites for fuel fabrication, enrichment, reprocessing and final disposition.

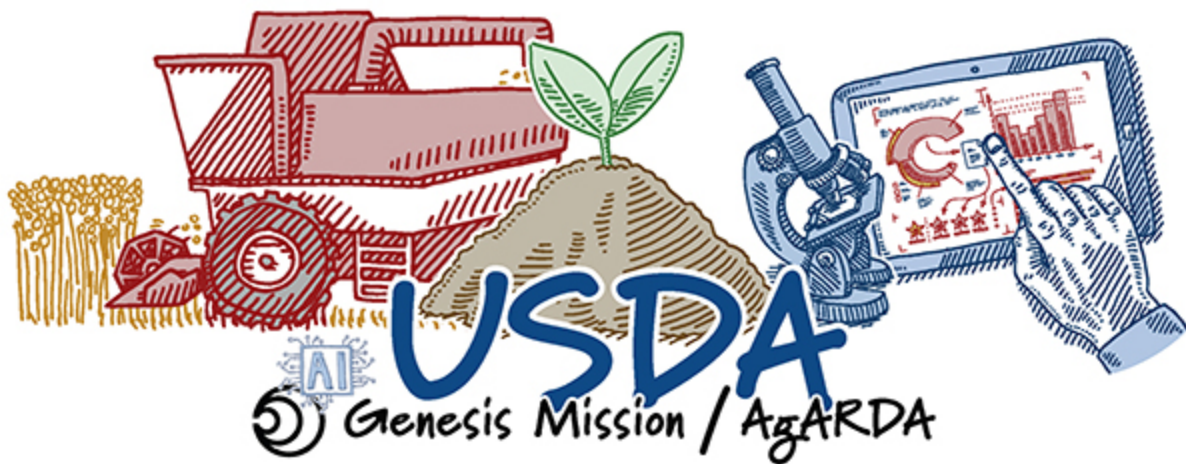
Each campus could:

- Attract up to \$50 billion in capital investment;
- Generate as much as \$10 billion in state and local tax revenue; and
- Create nearly 25,000 jobs while opening the door to co-located advanced reactors and data centers.

What's clear: A secure, homegrown fuel cycle is the foundation for scaling new nuclear deployment and cutting reliance on foreign uranium.

Plug in: Read ClearPath's [Unleashing U.S. Energy: Lessons from Japan](#) on why building out the full fuel cycle, from enrichment to used fuel reprocessing, is key to long-term nuclear fuel independence.

3. USDA to launch ag challenge through AgARDA and Genesis Mission



America's edge in agriculture depends on modern tools that can analyze crop data. USDA, via the [Genesis Mission](#) and AgARDA, is calling on universities and industry partners to build AI tools that use existing plant data to create more resilient, higher-yield crops through the [Agricultural National Science & Technology Challenge](#), expected to launch later this year.

What the challenge aims to do:

- Pull together images, field data and lab results so scientists can spot valuable plant and seed traits faster;
- Speed development of crops that are more resilient and productive, strengthening America's food system; and
- Give teams access to the American Science and Security Platform, DOE-built infrastructure that links datasets, instruments and AI tools.

What's clear: America keeps its edge in agriculture by putting AI and private-sector partners to work on the data it already collects, prioritizing innovation over regulation.

4. Firm, affordable power on demand: thermal energy storage expands



Keeping power affordable and reliable as demand surges means banking cheap electricity and putting it to work when the grid is tight. U.S. thermal battery producer **Antora Energy** raised \$550 million to expand its thermal battery manufacturing, scaling production with a second domestic factory to build more modular units that store cheap power as heat and discharge it on demand for steel plants, cement kilns and data centers.

Why this matters:

- Lowers costs for hard-to-electrify steel and cement plants by storing energy for days;
- Builds firm, reliable capacity in the U.S., scaling American-made storage that turns cheap, off-peak power into on-demand energy; and
- Gives large industrial and commercial power users a way to bring on their own supply and skip long grid-connection queues.

What's clear: Cheap, long-duration energy storage lets industry buy power when it's abundant and use it when it's expensive, holding down costs for manufacturers and the grid as demand climbs.

Plug in: Read ClearPath's [take](#) on how Antora Energy is reshaping industrial decarbonization through thermal batteries.

5. 250 years of American energy innovation



As America celebrates its 250th anniversary, ClearPath is **highlighting** America's innovation story. From the earliest discoveries in electricity and steam power to modern nuclear, natural gas, advanced grid technologies and agriculture, American innovators have consistently pushed the boundaries of what's possible.



6. The Circuit



Lisa Epifani spoke at the American Council for Capital Formation's event Building Faster and Cheaper in America: Permitting Reform for Energy, Industry, AI and National Security. Also speaking were Sens. Bill Cassidy (R-LA), Kevin Cramer (R-ND), Mike Rounds (R-SD), Alan Armstrong (R-OK) and John Hickenlooper (D-CO).

7. ICYMI

- Former ClearPath advisory board member **Kathryn McCarthy**, a 25-year veteran of Idaho National Laboratory and former U.S. ITER Project Director, joined **Terrestrial Energy's** Board of Directors.
- The State Department **announced** a \$500 million program to bolster critical minerals projects and commercial diplomacy across sub-Saharan Africa.
- DOE **launched** the Common Investment Initial Screening Application, a resource that allows critical minerals project developers to submit information to 14 federal partners through a single entry point, streamlining the process of connecting with agencies and identifying funding opportunities.
- DOE released a **fact sheet** detailing the policy wins in leading America toward nuclear energy dominance.
- USDA is guaranteeing **\$80 million in loans** to expand wood-processing capacity in Oregon and Nevada, part of a push to grow domestic timber production 25% and pull dangerous fuel out of fire-prone forests. Read ClearPath's **breakdown of innovative forest management** for how thinning and domestic wood markets fit into the wildfire mitigation toolkit.
- DOE's Office of Critical Minerals and Energy Innovation **announced** eight winners of their Lithium-Ion Battery Recycling Prize: Breakthrough Contest. Each winner will receive funding for developing innovative lithium-ion battery recycling solutions.



*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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