

The Rundown

By: CLEARPATH
ACTION



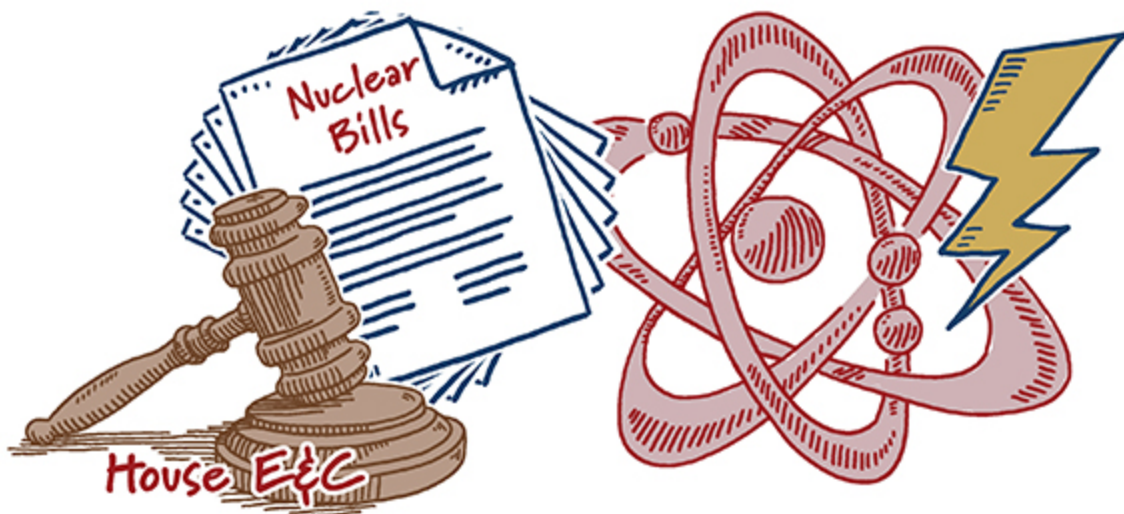
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ClearPath Action Rundown September 4th, 2026

Happy Friday!

1. House E&C advances six ClearPath Action-championed nuclear bills



Cutting duplicative permitting steps, not safety review, is how Congress keeps nuclear on schedule. The House Energy and Commerce Committee advanced **six nuclear bills** out of full committee on Wednesday, each by a unanimous vote.

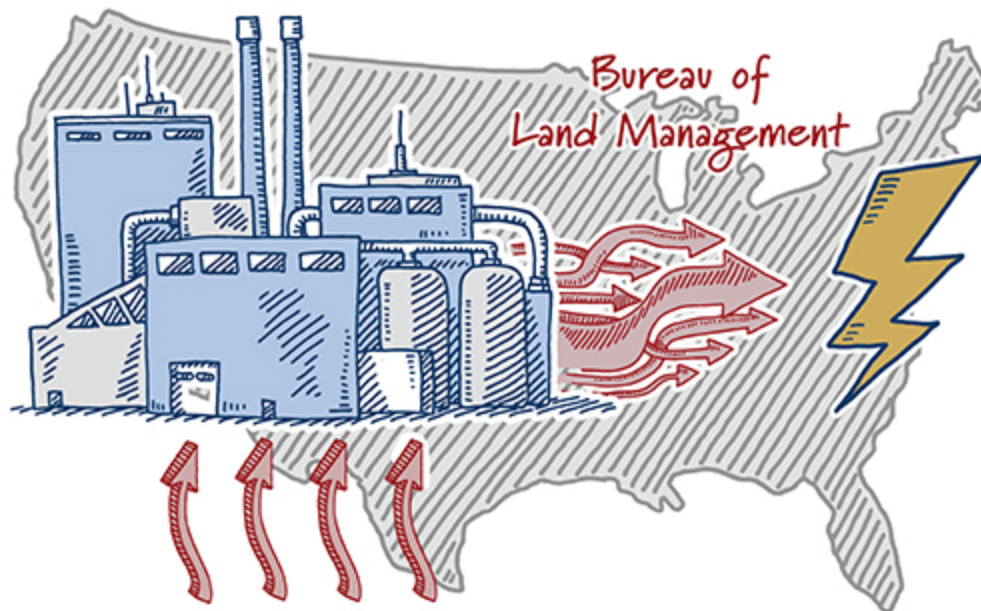
The six bills were:

- [Nuclear REFUEL Act](#) (44-0);
- [Efficient Nuclear Licensing Hearings Act](#) (44-0);
- [American Enrichment Deployment Act](#) (43-0);
- [NRC Staff Pay Alignment Act](#) (42-0);
- [Nuclear Advisory Committee Reform Act](#) (41-0); and
- [DOE Nuclear Transparency Act](#) (41-0).

What's clear: Republicans and Democrats made the same argument on all six bills: cutting duplicative paperwork will allow reactors and fuel facilities to be built faster. Six unanimous bipartisan votes on nuclear policy in one afternoon prove Congress can move at the same pace as industry.

Plug in: Watch [ClearPath Action CEO Jeremy Harrell's](#) June 2026 Congressional testimony in support of the advanced bills and nuclear permitting reform [here](#).

2. BLM clears the way for faster geothermal exploration



Geothermal offers firm, scalable power to meet rising demand, but outdated federal permitting has slowed exploration on federal lands where the vast majority of geothermal resources exist. The Bureau of Land Management (BLM) issued [new guidance](#) allowing low-impact exploration activities to proceed without a permit. [ClearPath's Head of Policy Lisa Epifani](#) will take that conversation further on September 21, joining DOE Under Secretary Kyle Haustveit and BLM Principal Deputy Bill Groffy in Houston, TX for a panel on "[The Federal Vision for Geothermal](#)" at the Geothermal Rising Conference.

BLM's latest action:

- Builds on a series of administrative moves from both the Biden and Trump administrations to streamline geothermal permitting on federal land.
- Covers hand sampling, mapping, shallow geophysical surveys, water and soil sampling and temporary sensor installations, while excluding mechanized drilling and other heavy equipment; and
- Requires BLM officials to act on qualifying applications within 15 days, giving developers certainty to move quickly.

What's clear: Clarifying casual use exploration removes a real bottleneck for early-stage geothermal developers. Scaling geothermal into gigawatts of reliable new power will take continued permitting reform, not just this one policy fix.

Plug in: Read ClearPath's [report on federal geothermal permitting reform](#) for more on what it will take to unlock geothermal at scale.

3. Federal backing for nuclear reaches its strongest point in decades



Reaching America's goal of quadrupling nuclear capacity to 400 gigawatts by 2050 depends on the federal government moving as fast as industry can build. For nearly a decade, Congress has demonstrated bipartisan support for modernizing the Nuclear Regulatory Commission and developing advanced technologies. Last year, the Trump Administration issued four executive orders aimed at rebuilding the American nuclear industry, creating what [ClearPath's Jake Kincer calls the most supportive policy environment for nuclear in decades](#).

Recent regulatory and industry wins include:

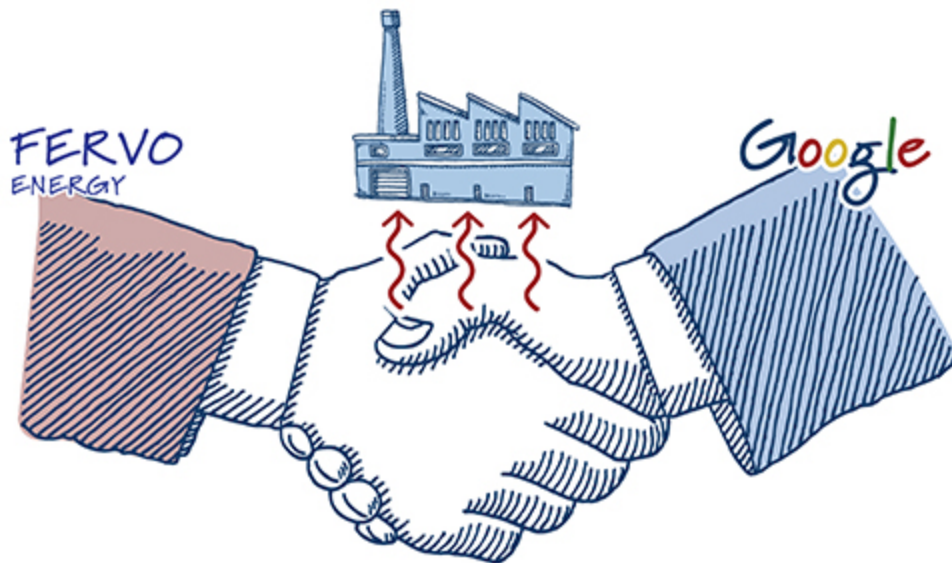
- Approving the first-ever construction permit for a commercial non-light-water reactor, advancing [TerraPower's](#) Natrium plant in Kemmerer, Wyoming, months ahead of schedule;
- Completing environmental review in May for [X-energy's](#) four-reactor Long Mott project in Texas, built to power [Dow Chemical's](#) operations; and

- Committing \$80 billion through an October Commerce Department partnership with [Westinghouse](#) to deploy new large reactors.

What's clear: As the industry moves rapidly toward deploying not just test reactors but dozens of commercial reactors, it is increasingly critical to build the workforce and supply chains to match. The industry will need hundreds of thousands of new workers and billions invested in new manufacturing to ensure the United States, not China, is exporting the next generation of reactors.

Plug in: Read ClearPath's "[TerraPower Breaks Ground in Wyoming, Clearing Path for New Nuclear](#)" for more on why the Natrium project's permitting win is a model for scaling advanced nuclear.

4. Fervo Energy signs largest-ever geothermal deal with Google



Firm, round-the-clock power is what wins the AI race, and enhanced geothermal just proved it can scale to meet it. [Fervo Energy](#) and Google signed a 396 megawatt [power purchase agreement](#), supplied by Fervo's Cape Station project in Utah, the largest geothermal deal signed to date. The deal will support additional capacity from Cape Station expected to come online in 2028 and is designed to anchor a future Utah data center at no cost to existing ratepayers.

What the deal accomplishes:

- Sets the stage for nearly one gigawatt of firm geothermal capacity by June 2030, given Google's option to expand the PPA by an additional 600 megawatts;
- Advances Fervo's repeatable "GeoBlock" modular approach, cutting costs and timelines for future enhanced geothermal projects; and
- Builds on Fervo's [115 megawatt agreement](#) with Google, signed in 2024, expanding a proven partnership.

What's clear: Tech companies are choosing American geothermal on its own merits, a signal that innovation, not regulation, is what keeps the United States ahead in the race for reliable power.

Plug in: Read ClearPath's "[Geothermal and the Next Era of American Energy](#)" for more on why enhanced geothermal is becoming a top choice to meet surging power demand.

5. DOE boosts American manufacturing through industrial innovation funding



Lower production costs and stronger supply chains keep American manufacturers competitive with China. The Department of Energy's Office of Critical Minerals and Energy Innovation (CMEI) **awarded \$117 million to 56 projects** across chemicals and fuels, iron and steel, advanced building materials and industrial heat electrification. Projects across all sectors aim to cut production costs, reduce import dependence and improve U.S. manufacturing competitiveness in the production of key commodities.

Some of the selected projects include:

- Nitricity received \$5 million for a plasma reactor that makes fertilizer from air, water and electricity, replacing imported ammonia;
- Lunar Resources, Helios Project and Cornell University received nearly \$9 million combined for ironmaking that uses lower-grade domestic ore; and
- Solid Carbon, the University of Miami, Rondo Energy, Blue Mountain Energy and Penn State received roughly \$14.5 million combined for domestic cement chemistries and industrial heat-storage technology.

What's clear: Rebuilding American manufacturing depends on funding innovation through its most critical stage: moving from the lab to the field and ultimately to commercialization. Backing projects that use domestic ore, feedstocks and industrial byproducts is how the U.S. builds technological dominance in clean manufacturing.

Plug in: Read ClearPath's "**The Future of Industry: Made in America**" for why pairing demonstration funding with smart policy keeps next-generation manufacturing, not just early-stage research, on U.S. soil.

6. Everything's bigger in Texas, including the power lines



West Texas oil and gas production, along with the homes and businesses that depend on it, cannot grow without a grid built to match. The **Public Utility**

Commission of Texas unanimously approved two 765-kilovolt transmission lines, tied for the largest anywhere in the U.S. grid, stretching over 400 miles into the Permian Basin. The lines clear the last major hurdle before construction begins on the buildout, first authorized under the state's 2023 Permian Basin Reliability Plan.

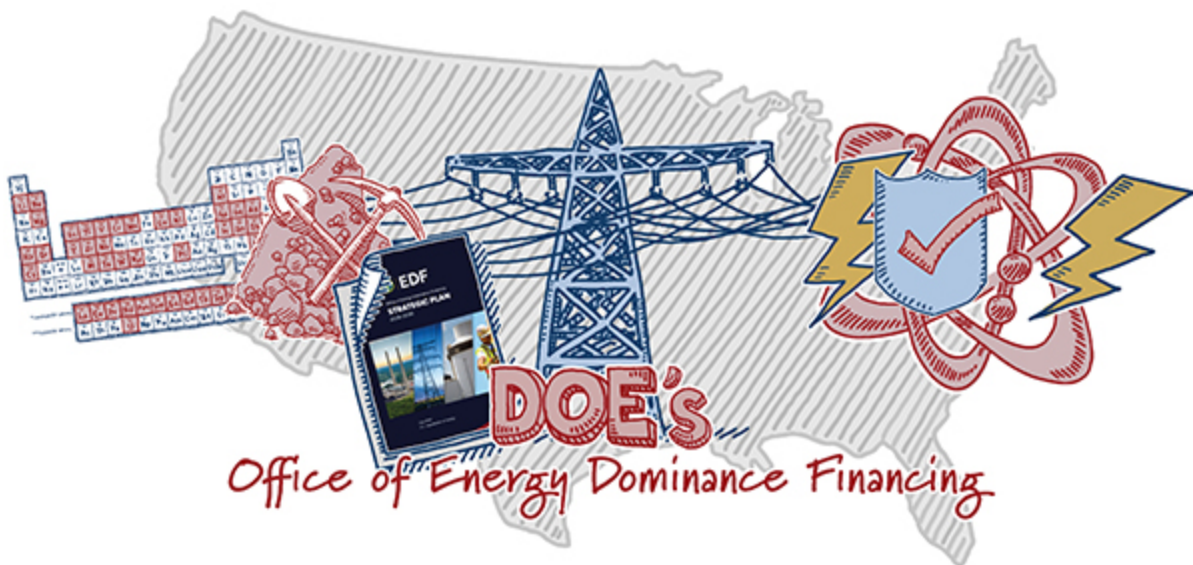
The approval will:

- Deliver reliable interconnection to Permian Basin oil and gas operations, industrial manufacturing and the broader ERCOT grid; and
- Address what Texas Oil and Gas Association president Todd Staples calls a risk to "America's most important energy security region."

What's clear: A grid that cannot keep pace with production growth becomes the bottleneck on American energy dominance. Texas regulators moved a crucial transmission buildout through its final approval, proof that clearing the path for infrastructure, not new mandates, is what lets the Permian Basin keep supplying the country's oil and gas.

Plug in: Read ClearPath's new report, "**Amping Up the Grid**," for a deep dive on how new greenfield transmission and innovative conductors can meet rising electricity demand in Texas.

7. EDF to support advanced nuclear, critical minerals and the grid



America's energy buildout needs capital moving as fast as innovation. The Department of Energy's Office of Energy Dominance Financing (EDF) released its **2026-2030 Strategic Plan**, mapping out how it will deploy over \$300 billion in loan authority to support advanced nuclear, critical minerals, grid and transmission projects. The office has already issued \$126 billion in loans and guarantees since implementing new authorities from the Working Families Tax Cut in July 2025.

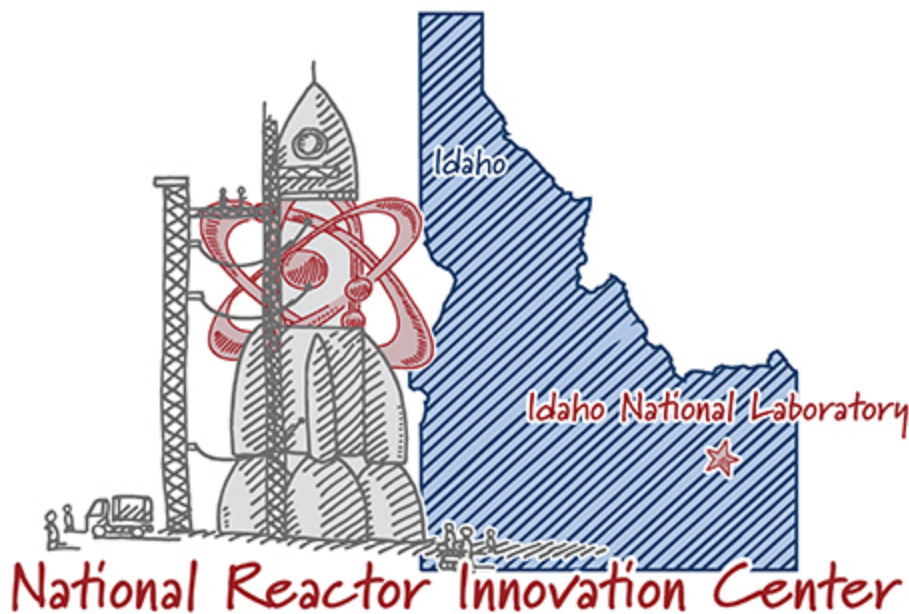
The plan's priorities:

- Fast-track advanced nuclear, geothermal and grid modernization projects toward commercial deployment;
- Rebuild domestic supply chains for critical minerals and advanced manufacturing; and
- Build on the \$126 billion in loans and guarantees the office has issued to date.

What's clear: Aiming hundreds of billions in capital at nuclear, minerals and grid technology gives private developers the tools to build faster and keeps America's energy edge ahead of China.

Plug in: Read ClearPath's "[Energy Dominance Financing 101](#)" for a breakdown of how EDF's loan authority bridges the gap between early-stage energy innovation and commercial deployment.

8. NRIC selects first wave of advanced reactor Launch Pad developers



America's edge in advanced nuclear depends on turning new reactor designs into working plants fast. The National Reactor Innovation Center at Idaho National Laboratory (INL) **selected 12 companies** for 13 projects under its new Launch Pad program, spanning reactor designs, nuclear fuel cycle technology and supply chain.

The Launch Pad program gives selected developers:

- Prioritized pathway to DOE authorization, cutting through years of regulatory uncertainty;
- Access to INL's nuclear research infrastructure, subject matter experts and tailored technical support; and
- A nationwide track through Launch Pad USA, opening federal and non-federal sites to new reactor and fuel cycle projects.

What's clear: Private industry-led, federally supported pathways, not new mandates, are what move advanced reactor designs from concept to commercial deployment. Pairing private developers with federal infrastructure is how America keeps its lead in reactor innovation and nuclear fuel technology as global competition intensifies.

Plug in: Read ClearPath's "[**The Reactor Pilot Program is Just the Beginning**](#)" for how Launch Pad is turning advanced reactor testing into commercial deployment.

9. ICYMI

- USDA **unveiled** a Data Modernization Plan to cut reporting burdens on farmers and modernize how the department collects agricultural data, including piloting satellite imagery and AI tools to improve acreage and yield estimates.
 - U.S. uranium production tripled last year, according to a **new analysis** from the U.S. Energy Information Administration, and was the highest since 2017.
 - DOE's Hydrocarbons and Geothermal Energy Office **issued** a Request for Information, seeking input from investors and industry on connecting private capital with geothermal energy, coal, and oil and gas technologies, building on the recent Small Business Investment Company-Energy Initiative.
 - DOE **announced** the Geothermal Center of Excellence to accelerate the discovery and deployment of gigawatt-scale geothermal technology, resource discovery and commercial development, which will unite expertise across DOE's National Laboratories.
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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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