

The Rundown

By: CLEARPATH
ACTION



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ClearPath Action Rundown September 25th, 2026

Happy Friday!

1. Fifth annual Carbon Innovation Forum convenes top policy leaders



This week, ClearPath and API hosted the fifth annual **Carbon Innovation Forum**: Building the Next 250 Years of American Energy during New York Climate Week. Distinguished speakers included Sen. John Curtis (R-UT) and DOE's Alex Fitzsimmons, Andy Rapp, and Jeff McClure, among many others.

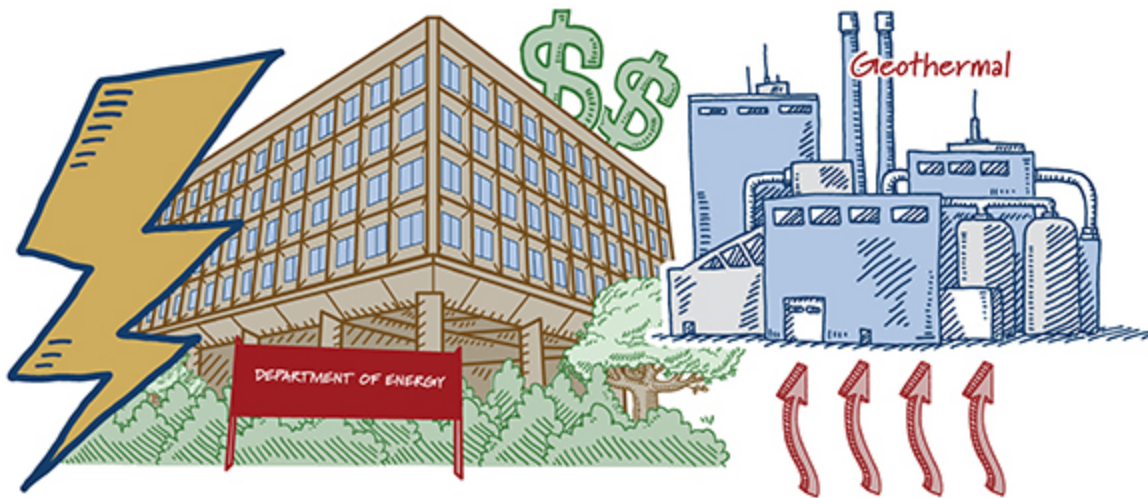
Key takeaways from the day included:

- The next decade will be the geothermal decade;
- No single step would do more to let America build than modernizing permitting; and
- Innovation only matters if promising technologies can reach commercial scale, which requires capital at every stage.

What's clear: America has the talent, capital and innovative spirit to carry us through the next 250 years of continued American energy dominance.

Plug in: Read ClearPath's full recap of the event [here](#).

2. DOE makes major investments in 21 geothermal projects



DOE **announced more than \$99 million in funding** supporting 21 geothermal projects through its Hydrocarbons and Geothermal Energy Office. Under Secretary of Energy Kyle Hausveit made the announcement during a fireside chat with ClearPath Head of Policy **Lisa Epifani** at the Geothermal Rising Conference in Houston.



The funding will enable:

- **Five projects** awarded to AlterG Resources, Fervo Energy, the University of Utah, Quaise and Zanskar to conduct field-scale tests for enhanced geothermal systems (EGS) in real-world conditions ahead of full-scale development; and
- **16 additional projects** to identify promising geothermal resources through exploration drilling and make their data public.

What's clear: The Trump administration has solidified geothermal as a key pillar of its energy dominance strategy. These awards, part of the largest ever competitive geothermal funding opportunity in American history, will enable the technology to provide reliable, clean, firm power at the scale needed to meet rising demand.

Plug in: Read ClearPath's recap of the awards in "**The Biggest Week Yet for the Future of Next-Gen Geothermal**" for where the sector stands as private capital moves in.

3. Jeremy Harrell on The Scott Jennings Show: America needs more power, fast



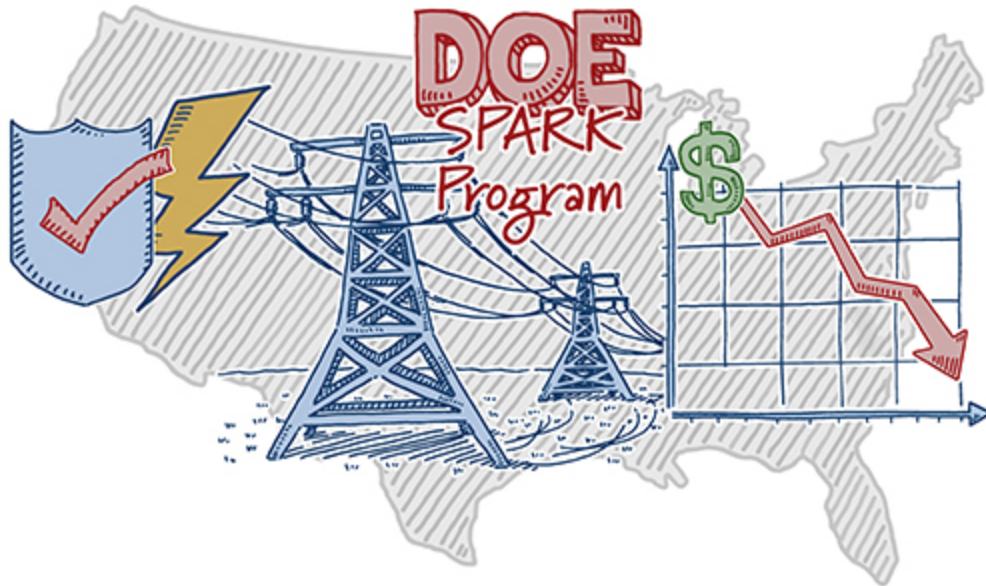
America can't lead on AI or bring manufacturing home without a stronger grid. ClearPath Action CEO [Jeremy Harrell](#) and Corporate Energy Buyers Association (CEBA) CEO Rich Powell joined [The Scott Jennings Show](#) to argue that Washington has a rare bipartisan opening to capitalize on. With demand on track to climb roughly 20 percent over the next decade, the status quo simply can't keep up.

The conversation covered:

- Closing the deal on permitting reform to end endless litigation and build transmission;
- Meeting data center demand with firm geothermal, nuclear and storage without raising ratepayer bills; and
- Big tech buyers already signing record deals for nuclear, carbon capture and geothermal.

Plug in: Read ClearPath CEO Jeremy Harrell's new op-ed in The Daily Caller, "[Wall Street Is Ready To Invest In America's Energy Future. If Washington Permits It.](#)"

4.DOE SPARKs grid upgrades in 26 states



Making the grid more resilient, smarter and higher-capacity through innovation is essential for growing our economy while keeping electricity bills affordable. The DOE Office of Electricity **announced** SPARK initiative award selections to deploy advanced transmission technologies across 26 states to modernize the grid in ways that enhance reliability and lower costs.

SPARK awards will:

- Optimize performance and efficiency with AI, dynamic line rating and advanced monitoring and power flow control technologies;
- Increase grid capacity and enable speed to power through reconductoring existing lines using advanced conductor technologies; and
- Improve interregional transfer capabilities to strengthen reliability, resilience and operational flexibility across multiple states.

What's clear: America needs to optimize the use of our existing grid and build new transmission to meet demand growth while keeping costs affordable. DOE's SPARK program is leading the rapid growth America needs to support our growing economy and secure the nation's electric grid.

Plug in: Read ClearPath's report "**Amping Up the Grid**" to learn more about the opportunity for advanced conductors to grow the grid quickly and affordably.

5. CCLP cultivates the next generation of energy leaders to lead in Washington



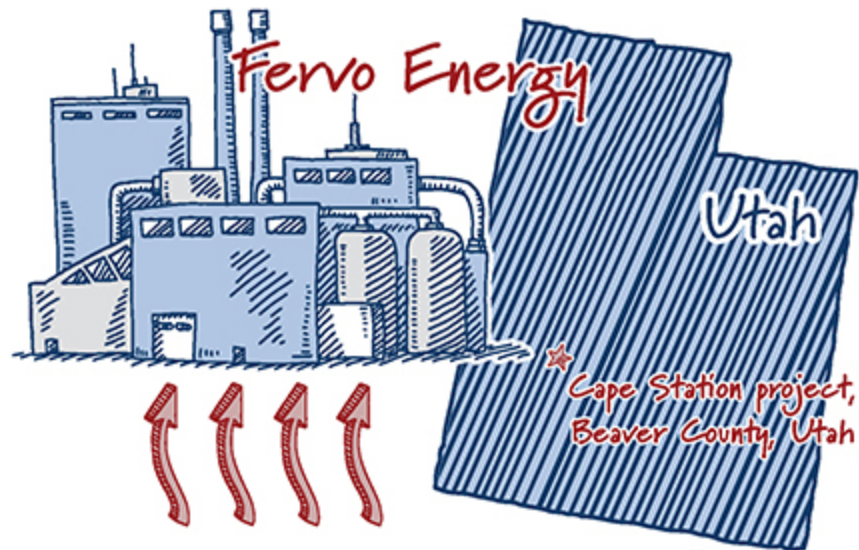
ClearPath's Conservative Leadership Program (CCLP) is preparing the next generation of energy leaders, bringing fellows to Charlotte, North Carolina, for its second annual retreat. The retreat combined professional development and steel-in-the-ground site visits at Siemens Energy hub in Charlotte and Albemarle's lithium mine in Kings Mountain to help fellows deepen their knowledge of the energy landscape.



What's clear: To meet growing energy demand, America needs to build more than it has in a generation, and the policy solutions will be shaped by leaders who understand how it actually happens. CCLP is preparing emerging leaders in Washington with stronger skills, broader perspectives and a network that can support them throughout their careers.

Plug in: Read ClearPath Fellow [Reagan Reese's "Seeing What Building Requires: CCLP Fellows Visit Charlotte"](#) for a firsthand look at how CCLP prepares young professionals for careers in energy and on Capitol Hill.

6. Fervo Energy achieves first power at Cape Station



American drilling know-how just put a new kind of firm power on the grid. **Fervo Energy achieved first power at its flagship Cape Station project** located in Beaver County, Utah. Cape Station marks the first time a utility-scale enhanced geothermal development has reached this milestone anywhere in the world.

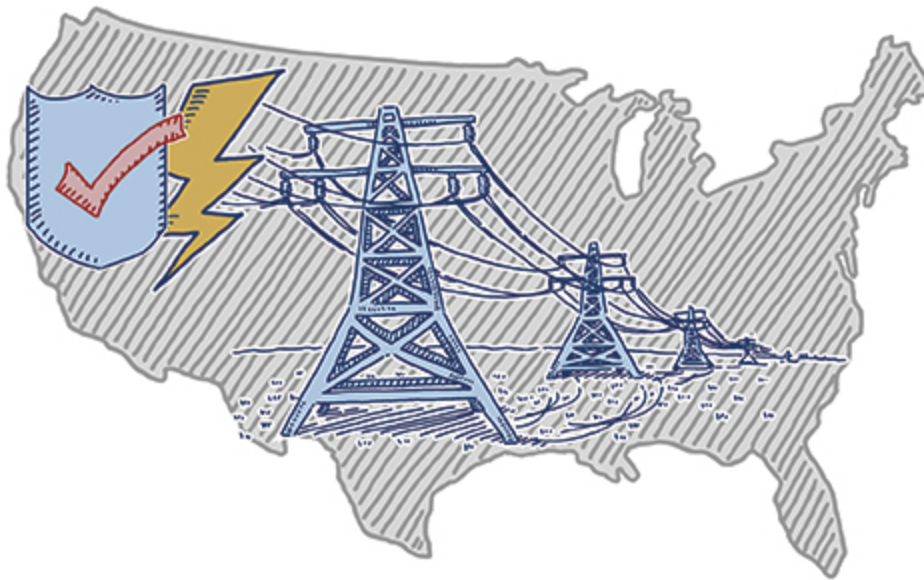
What to know:

- Phase I of the project is expected to reach roughly 100 megawatts by the end of the year, growing to 400 megawatts in Phase II by 2028; and
- Fervo has 900 megawatts fully contracted through binding power purchase agreements, equating to enough power for roughly one million homes.

What's clear: Enhanced geothermal is ready to compete as firm, around-the-clock power. As demand climbs, adding power that runs day and night makes the grid stronger and more reliable.

Plug in: Read the full story in **“The Biggest Week Yet for the Future of Next-Gen Geothermal”** from ClearPath’s **Matt Mailloux**.

7. Washington Times: The grid security gap Congress can close this year



America must build more energy infrastructure than it has in generations, and that infrastructure must be secure. In a new [Washington Times op-ed](#), ClearPath Action CEO [Jeremy Harrell](#) urges Congress to comprehensively authorize DOE's Office of Cybersecurity, Energy Security and Emergency Response (CESER).

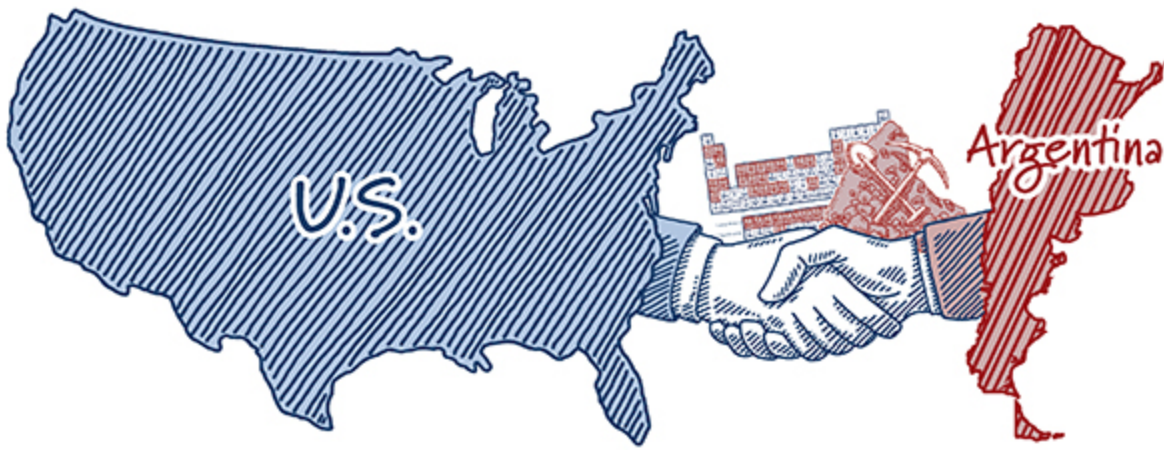
Authorizing CESER would help America:

- Counter growing threats, from hackers targeting U.S. critical infrastructure and industrial organizations, to extreme weather events like winter storms and wildfires;
- Leverage federal advantages no single utility can match, including National Laboratory expertise, classified threat intelligence and shared testbeds;
- Make permanent the energy security mission CESER already carries out, without creating new programs; and
- Protect the largest grid buildout in generations from adversaries.

What's clear: Securing the grid is part of letting America build. Authorizing CESER is a long-overdue, bipartisan step that costs little compared to the price of inaction.

Plug in: Check out [Jeremy Harrell's op-ed](#) in the Washington Times' special issue alongside [Sens. Kevin Cramer \(R-ND\)](#), [Todd Young \(R-IN\)](#), [Pete Ricketts \(R-NE\)](#), [Steve Daines \(R-MT\)](#), and [Reps. Bob Latta \(R-OH\)](#), [Morgan Griffith \(R-VA\)](#), [Gabe Evans \(R-CO\)](#), [Craig Goldman \(R-TX\)](#), [Richard Hudson \(R-NC\)](#), [Gus Bilirakis \(R-FL\)](#), [Darin LaHood \(R-IL\)](#), [Nick Begich \(R-AK\)](#) and [Brett Guthrie \(R-KY\)](#).

8. EXIM leads interagency energy and minerals push in Argentina



The U.S. and Argentina launched the **Andes-Atlantic Corridor**, which will link Argentina's northwest, rich in critical minerals, and its Vaca Muerta energy basin to Atlantic ports through modern rail, pipeline, port and power infrastructure.

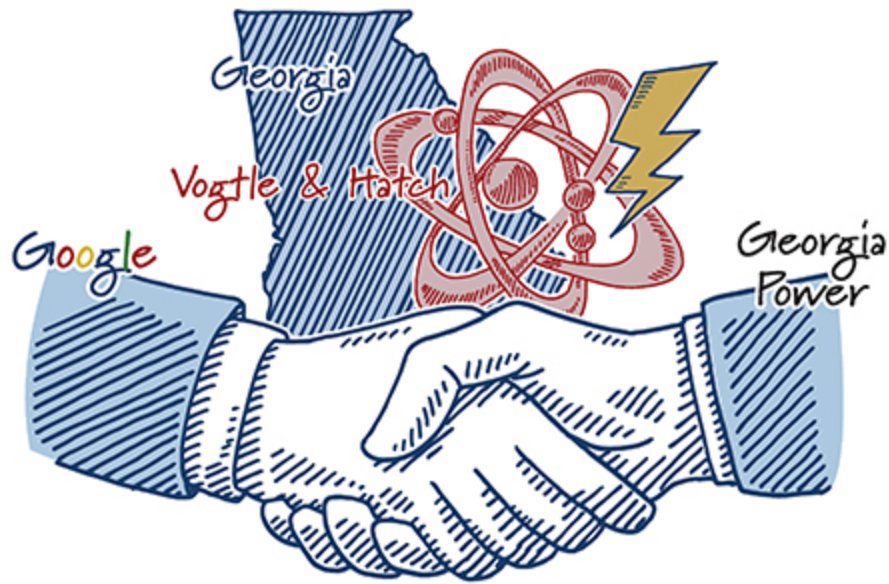
The Corridor will:

- Execute a State Department-led interagency effort around energy security and critical minerals;
- Expand opportunities for U.S. businesses while strengthening key supply chains; and
- Tap up to \$7 billion in Export-Import Bank (EXIM) financing through the **U.S.-Argentina Build the Future Framework**, alongside tools from the Development Finance Corporation (DFC) and U.S. Trade and Development Agency (USTDA), commercial expertise from the Departments of Commerce and Treasury and private capital.

What's clear: America outcompetes China abroad when its agencies move together. Locking in American leadership ahead of China in global energy markets will take many more interagency deals of this size and significance.

Plug in: Read ClearPath's blog on why **energy security belongs at the center of U.S. foreign policy** for more on how Energy Security Pacts can scale deals like this one.

9. Google adds nuclear in Georgia without raising other customers' bills



Google and **Georgia Power** filed an **agreement** with the Georgia Public Service Commission under which Google pays a premium for upgrades at plants **Vogtle** and **Hatch** through a new Nuclear Uprate tariff, keeping any added costs off other customers' bills. Upgrades like these "are really the fastest way to get nuclear onto the grid," ClearPath's **Jake Kincer** told the **Daily Caller**.

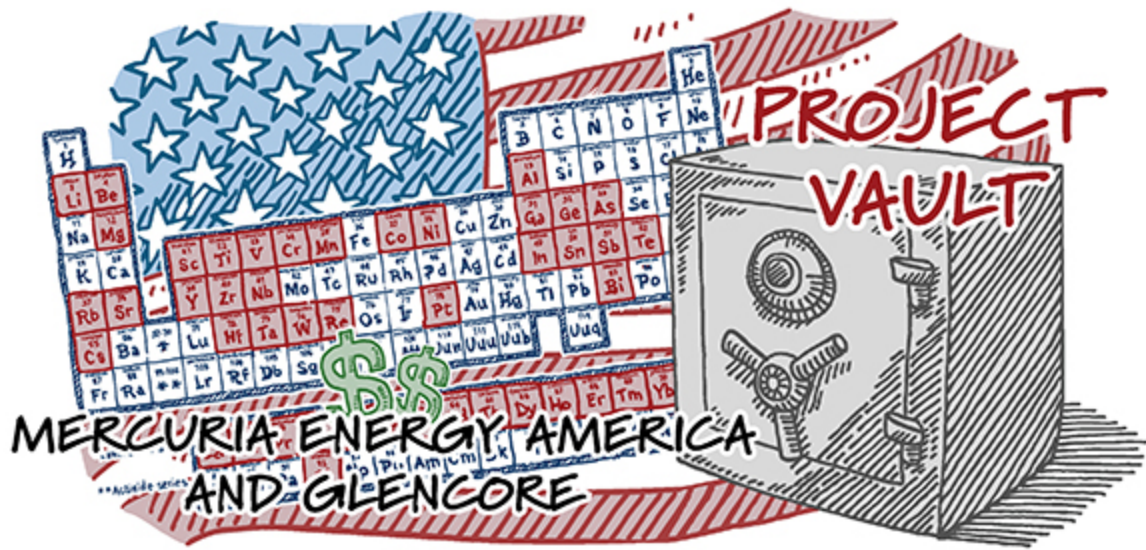
What the agreement will do:

- Add around 96 megawatts of capacity across Vogtle and Hatch Units 1 and 2;
- Deliver an estimated \$900 million in benefits to Georgia Power customers over the life of the reactors; and
- Achieve speed to power by finishing construction well ahead of any new build.

What's clear: When the companies driving new demand pay for the power they need, growth and affordability stop pulling against each other. The quickest nuclear gains are sitting inside plants the country has already built, and private capital is ready to unlock them.

Plug in: Read ClearPath's "**Private Industry Bets on Nuclear Energy**," co-authored by Kincer, for how tech companies became some of nuclear's most important customers.

10. Project Vault goes live with its first private backers



Unleashing American energy relies on secure, domestic supply chains of critical minerals. Stockpiling materials to protect against supply chain disruptions is key to resilience. Project Vault, administered by VaultCo, is **officially operational** after **Mercuria EnergyAmerica** and **Glencore** each committed \$500 million, backed by up to \$10 billion in Export-Import Bank financing.

What to know:

- **Mercuria** and **Glencore** will source and procure minerals;
- This initiative will help build strategic mineral inventories that support key American industrial sectors; and
- Operationalizing the Vault will provide resilience from supply disruptions, including export controls of critical minerals.

What's clear: Project Vault deploys public-private partnership and financing to secure supply chains, restore U.S. competitiveness and mitigate the economic, energy and national security risks of overreliance on adversaries for critical minerals.

Plug in: Read ClearPath CEO Jeremy Harrell on **why domestic mining matters for U.S. national security**, including how modernized permitting and targeted financial incentives can help American projects compete with state-subsidized rivals.

11. The Circuit



ClearPath's Jake Kincer spoke at the **Pioneering New Nuclear in Western Canada** conference in Edmonton, Alberta, Canada. The panel was titled "Canada–United States Cooperation on New Nuclear."

12. ICYMI

- Secretary of State Marco Rubio and Italian Foreign Minister Antonio Tajani signed a **critical minerals memorandum of understanding**, creating a joint technical working group to secure supply chains and mobilize investment in mining, processing and recycling.
 - **USDA Rural Development** opened \$2.5 million in grants through the Agriculture Innovation Center Program, funding centers that help producers develop and market value-added products.
 - The Rainey Center **released** a new policy brief titled "When Permits Aren't Permanent," which explains how revocation of approved permits can pressure investors to demand higher returns and pass on costs to American consumers.
 - The Department of Energy **selected nine projects** for \$3 million in Industrial Technology Validation (ITV) funding, pairing technology developers with host manufacturing and industrial sites nationwide to test innovations like thermal energy storage, induction heating and steam-to-electricity turbines.
 - DOE's Gregory Beard **writes in the Des Moines Register** that the department's \$1.9 billion loan to restart Iowa's Duane Arnold Energy Center delivers jobs, grid reliability and American nuclear leadership.
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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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