

The Rundown

By: CLEARPATH
ACTION



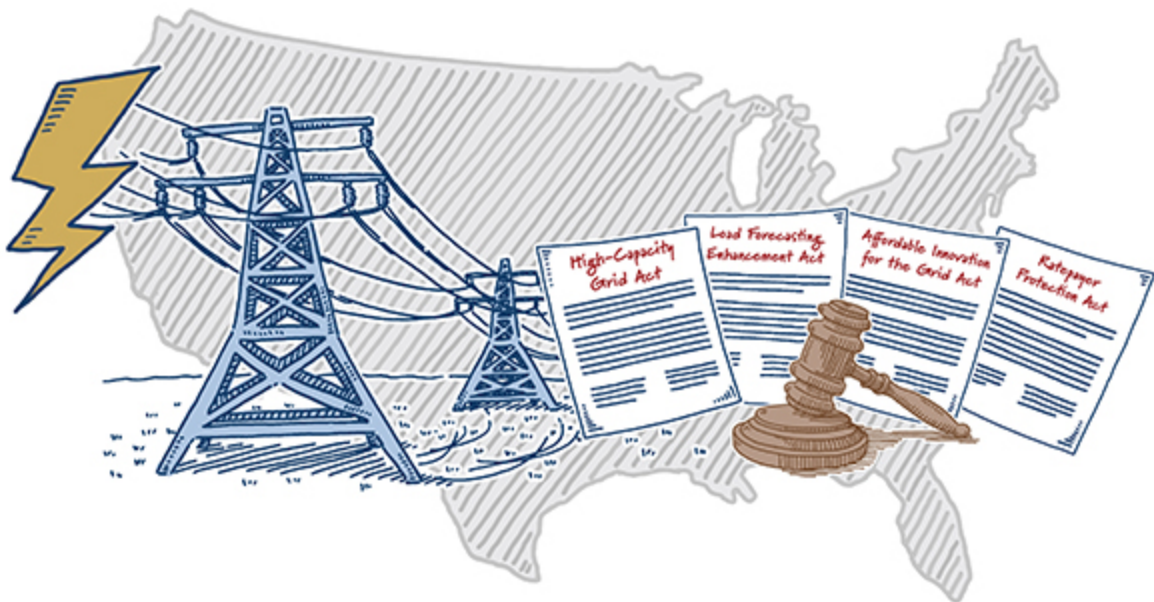
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ClearPath Action Rundown September 18th, 2026

Happy Friday!

1. House passes grid bills to get more out of existing lines and protect consumers



The House passed a number of bills this week targeting conductors, load forecasting and grid operations. The Ratepayer Protection Act cleared by a **417-3 vote**, a sign that addressing our grid challenges is drawing bipartisan support as electricity demand climbs.

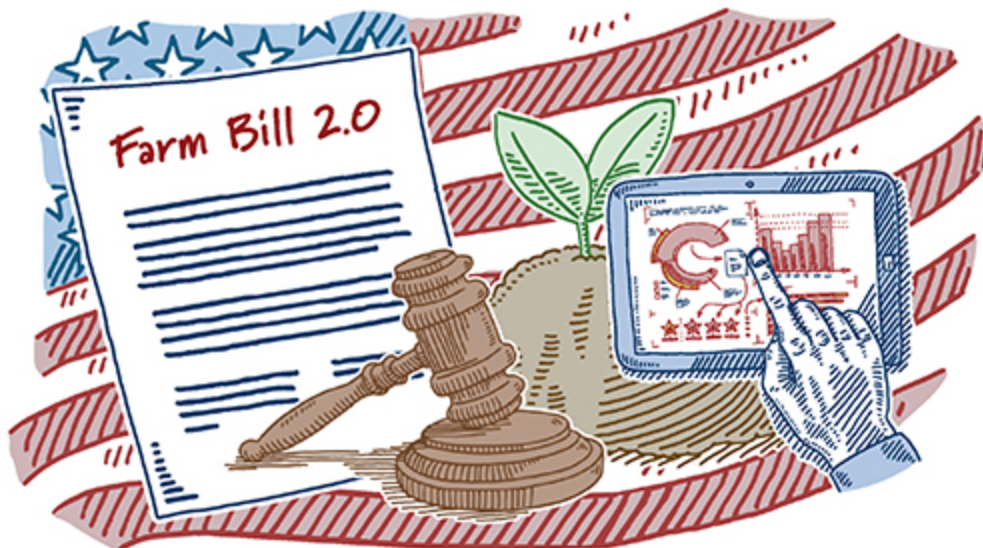
The four bills include the:

- **High-Capacity Grid Act** from Rep. Fedorchak (R-ND) which directs the Federal Energy Regulatory Commission (FERC) to set a best-available conductor standard for transmission lines;
- **Load Forecasting Enhancement Act** from Reps. Balderson (R-OH) and Menendez (D-NJ) which convenes FERC and state regulators in regional joint boards to identify best practices for electric load forecasting for states to consider in their energy plans and regulations;
- **Affordable Innovation for the Grid Act** from Reps. Harshbarger (R-TN) and Mullin (D-CA) which directs DOE to work with FERC and the North American Electric Reliability Corporation on how AI and high-performance computing can raise the capacity, reliability and operational efficiency of the bulk power system; and
- **Ratepayer Protection Act** from Reps. Evans (R-CO) and Castor (D-FL) which protects American ratepayers from higher costs from growing digital and energy infrastructure.

What's clear: Americans don't need to choose between affordability and innovation. Higher capacity conductors and sharper load forecasts can add usable capacity to the grid and reduce uncertainty for grid planners.

Plug in: Read ClearPath's "**Amping Up the Grid**" for the case that high-capacity conductors expand transmission capacity faster and at lower cost than building new lines.

2. Senate Ag advances Farm Bill out of committee



The Senate Agriculture, Nutrition and Forestry Committee, led by Chairman John Boozman (R-AR), **advanced** the Agricultural Act of 2026 out of committee on Wednesday, moving the farm bill one step closer to enactment. The bill complements the Farm, Food and National Security Act of 2026 from the House Committee on Agriculture, led by Chairman Glenn Thompson (R-PA), that passed the House in April.

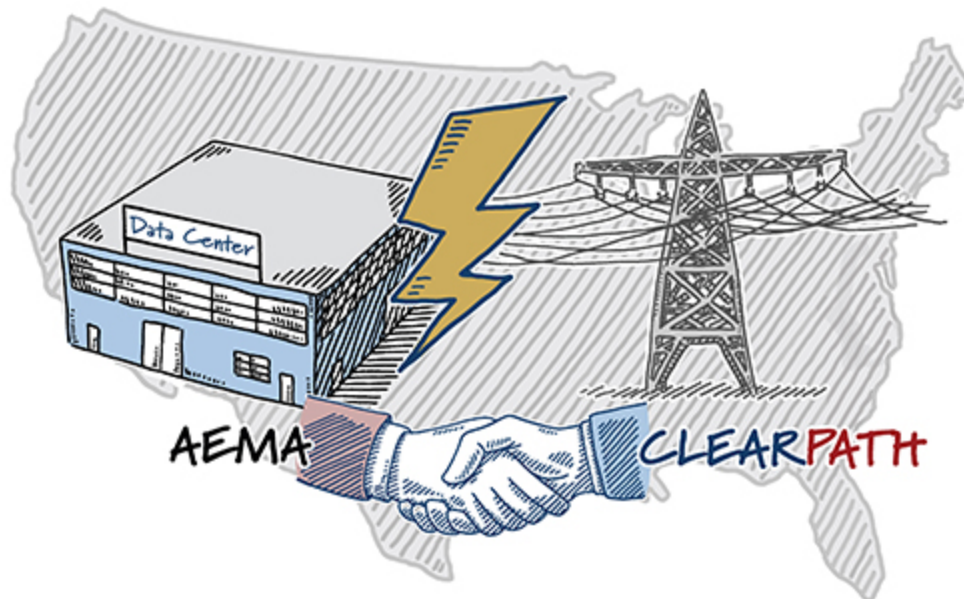
This legislation prioritizes USDA innovation programs by:

- Reauthorizing the Agriculture Advanced Research and Development Authority (AgARDA);
- Funding the Foundation for Food and Agriculture Research (FFAR);
- Authorizing the Biochar Research Network Act; and
- Modernizing Section 9003, the Biorefinery, Renewable Chemical and Biobased Product Manufacturing Program.

What's clear: American farmers thrive on innovation, not mandates. A full five-year farm bill gives producers the certainty to invest in the research and precision tools that keep U.S. agriculture ahead of China.

Plug in: Read ClearPath's "[America Must Lead the Way in Agricultural Innovation](#)" for why federal ag R&D is the competitive play.

3. ClearPath joins new alliance to make data centers work for the grid

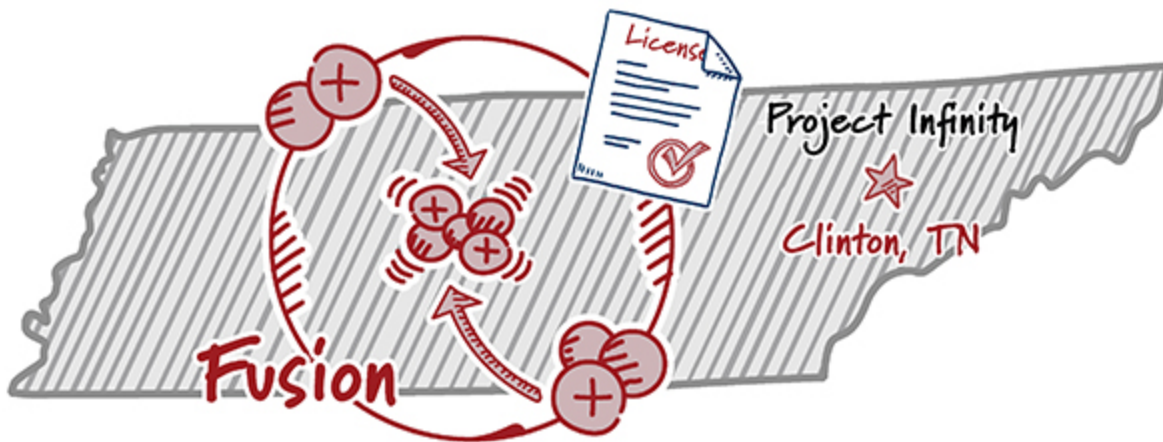


The fastest way to power American AI is to get more out of the grid we already have. ClearPath signed on as a launch partner in the **AI Energy Management Alliance** (AEMA), a new coalition founded by Emerald AI, Google and NVIDIA, to advance data centers that dial back their power consumption during periods of grid stress. Data center flexibility can reduce grid infrastructure needs, bring data centers online faster and promote reliability.

The alliance will:

- Push for faster interconnection for data centers that can flex their power use;
 - Advance a range of demand management tools, including colocated generation, storage and computational flexibility; and
 - Champion technology-neutral, performance-based standards that measure flexible data centers against real grid reliability metrics.
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4. Tennessee issues first commercial fusion license



The Tennessee Department of Environment and Conservation issued **Type One Energy** the nation's **first license for a commercial fusion machine**, clearing a path for Project Infinity at TVA's retired Bull Run coal site in Clinton, Tennessee. The ADVANCE Act of 2024 placed fusion machines under the Atomic Energy Act's byproduct material framework rather than reactor licensing, allowing NRC Agreement States like Tennessee to move quickly.

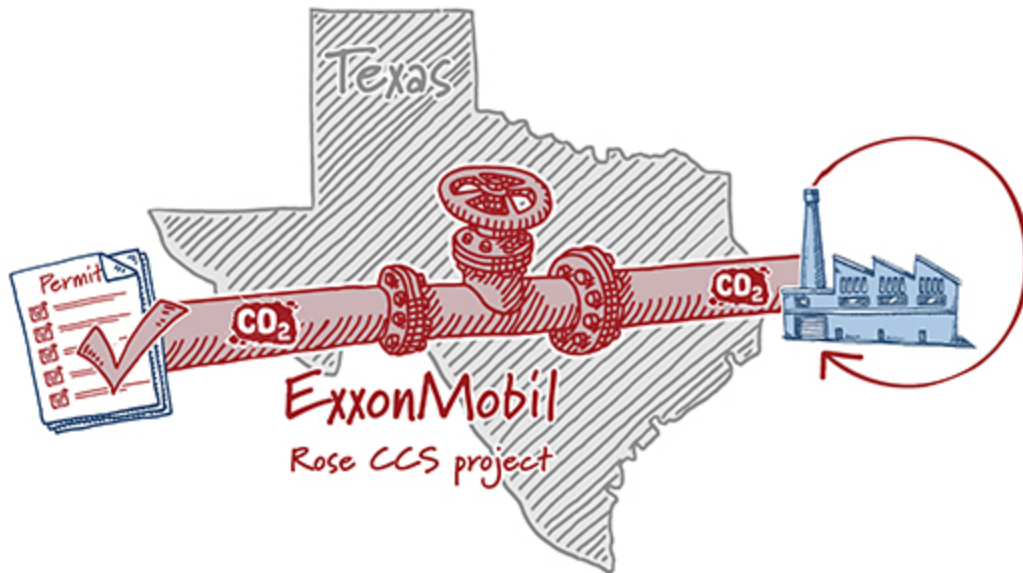
The license:

- Covers Project Infinity, which Type One Energy will develop as a fusion technology campus on a retired fossil site;
- Supports plans for Infinity Two, a proposed 400 MWe stellarator power plant, with full startup expected by 2034; and
- Gives other states and developers the first working template for licensing commercial fusion.

What's clear: Fusion needs both technical progress and clear regulation. Congress clarified a state-led regulatory pathway for fusion, which allowed Tennessee to move quickly to lead on fusion deployment.

Plug in: Read ClearPath's "**From Vision to Reality: The U.S. Fusion Imperative**" for more on how DOE's fusion roadmap and supply chain investment are moving fusion from research to deployment.

5. Exxon's Texas storage permit unlocks a 900-mile CO₂ pipeline plan



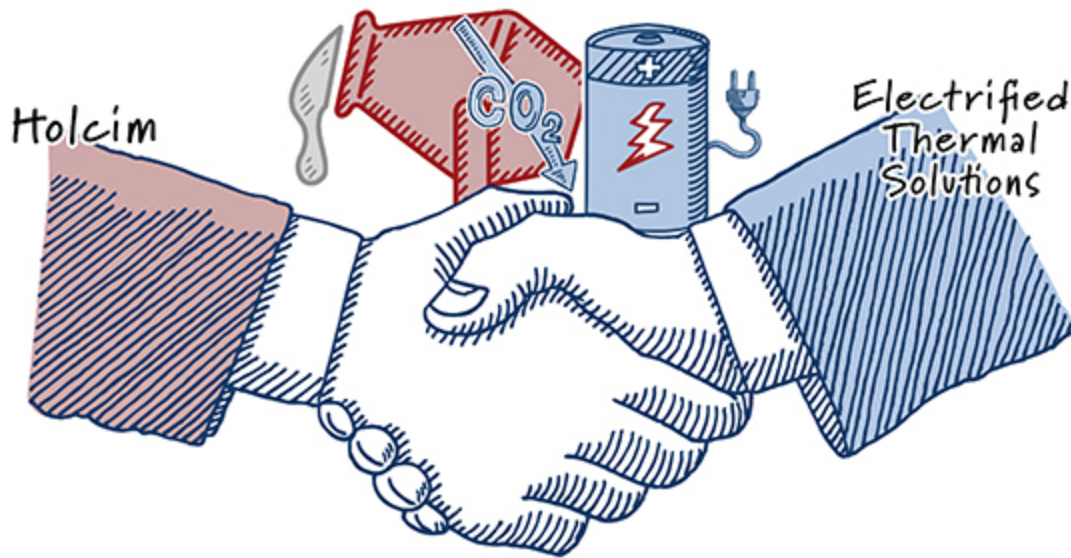
Carbon capture scales only when there is somewhere to put the carbon, and America can build that capacity fast on the Gulf Coast. The Railroad Commission of Texas approved **ExxonMobil's** permit for the **Rose CCS project**, clearing three wells in Jefferson County to store roughly 53 million metric tons of customers' carbon dioxide (CO₂). The permit anchors a \$5 billion-plus plan to link industrial customers to a 900-mile CO₂ pipeline network.

What to know about the decision:

- Unlocks new, permanent CO₂ storage for Gulf Coast refiners, chemical producers and manufacturers;
- Advances the largest CO₂ transport network in the world, giving industrial customers a pathway to transport captured CO₂ to permanent geologic storage deep underground; and
- Keeps American industrial exports competitive in key global markets.

What's clear: Carbon capture projects like this can meet growing market demand when regulators give builders a predictable answer.

6. Cement giant installs thermal batteries in industry first



Holcim, one of the world's largest cement producers, announced an **agreement** with American innovator Electrified Thermal Solutions (ETS) to deploy ETS's thermal batteries. The initial deployment will consist of 20 MWh of battery units capable of delivering near-flame temperatures to high-temperature cement-making operations.

What to know:

- This deal validates ETS' ability to reach ultra-high temperatures (up to 1,800°C) that have previously been inaccessible to electric heating technology.
- Industrial heat accounts for one-fifth of all energy consumption in the U.S. and globally; scaling technologies like ETS will be crucial to reduce emissions from the industrial sector.
- The deal exemplifies DOE's role in commercializing next-generation technologies: ETS has received multiple DOE funding awards, from ARPA-E to **pilot demonstration funding** for a demo unit in San Antonio at the Southwest Research Institute.

Plug In: "**The Future Of Industry: Made in America**" by ClearPath's Savita Bowman and Rafae Ghani lays out how innovation like thermal batteries in the U.S. can be commercialized domestically.

7. The Circuit



ClearPath CEO Jeremy Harrell spoke at [National Clean Energy Week](#) alongside ClearPath Advisory Board Member Roger Martella, Lawrence Kast, Mike Satre and Sasha Mackler on a panel titled “Built in America: Manufacturing, Supply Chains and Energy Security.”



ClearPath Action CEO Jeremy Harrell spoke at [Daily Caller Live: The New Age of American Power](#) with DOE Secretary Chris Wright. Jeremy spoke on a panel called “The Impact of Climate Lawfare on the Energy Sector: Fixing Litigation to Let America Build,” where he was joined by Liam Donovan, Jason Isaac and Will Upton.



ClearPath’s Rafae Ghani spoke at a Capitol Hill briefing called “Congressional Briefing on Thermal Energy Storage,” alongside Isaac Brown, Mike Davin, Melissa Hulting and Noah Long.



ClearPath's Samantha Edwards spoke at a Capitol Hill briefing for the Republican Study Committee HEAT Team focused on unlocking domestic critical mineral supply chains alongside Zoe Oysul and Jesse Edmondson.

8. Coming down the pipeline

- **Monday, September 21, New York, NY at 1:00PM** – ClearPath and API will host the 5th annual **Carbon Innovation Forum**. This event will explore how energy systems have evolved throughout the nation's history and the key technological advancements and policy developments of the last five years. Keynote speakers include Senator John Curtis (R-UT), DOE Associate Deputy Secretary Alex Fitzsimmons and many others. This event is open to the press. If you're interested in attending, please email media@clearpath.org.
- **Monday, September 21, Houston, TX at 10:30AM** – ClearPath's Head of Policy, Lisa Epifani, will moderate a fireside chat with DOE Under Secretary Kyle Haustveit and BLM Principal Deputy Director Bill Groffy at the **Geothermal Rising Conference**.

9. ICYMI

- USDA **opened** the Affordable Rural Cooperative Program, a \$175 million loan and grant program to help rural electric cooperatives purchase or deploy nuclear power supply and advanced transmission infrastructure.
- DOE **opened** applications for the 2027 Lab-Embedded Entrepreneurship Program, a two-year fellowship that embeds early-stage energy innovators at national laboratories including Argonne, Berkeley, Oak Ridge or the National Laboratory of the Rockies.
- The **Foundation for Food & Agriculture Research** awarded \$9.3 million across 12 grants through the Efficient Fertilizer Consortium to field-test nitrogen and phosphorus enhanced efficiency fertilizers in real-world cropping systems.
- The Bureau of Land Management will **auction** 19 geothermal lease parcels covering roughly 40,000 acres across six California counties on October 27, with a separate Nevada sale of 83 parcels set for a week earlier.
- Mazama Energy, a Texas-based superhot geothermal energy developer, **closed \$135 million in Series B funding** to demonstrate a commercially

scalable pathway for superhot rock geothermal.

- Google is **partnering** with Stegra, the world's first large-scale, near-zero emissions steel plant, to buy environmental attribute credits for up to 90,000 tons of Stegra's first year of production, helping lower the cost of innovative steelmaking.
- USDA's National Agricultural Statistics Service **launched** AgInsights, an interactive platform that turns the agency's Quick Stats database into sortable charts and maps, tailors the view to a producer's operation type and works on mobile.



*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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