

The Rundown

By: CLEARPATH
ACTION



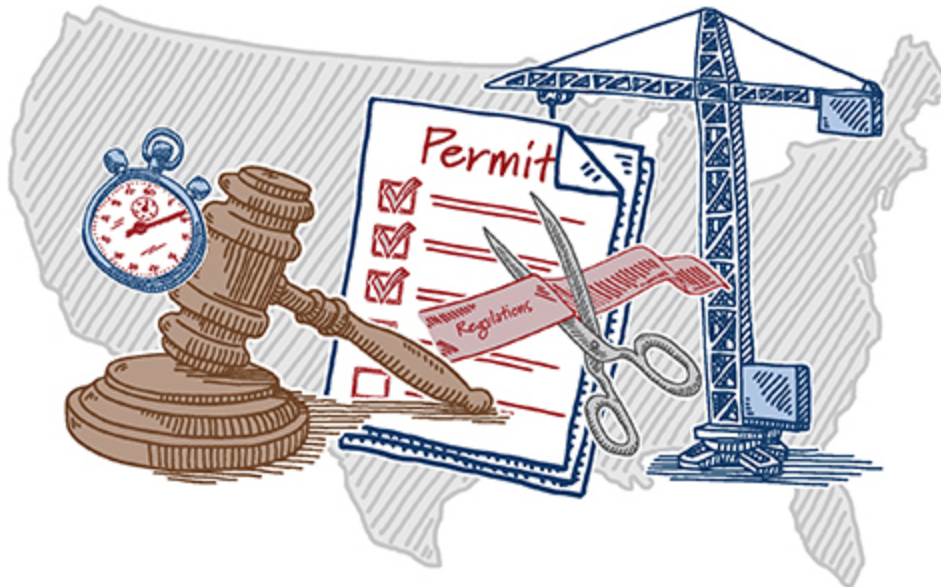
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ClearPath Action Rundown October 2nd, 2026

Happy Friday!

1. Bipartisan Senate permitting package will let America build



America can't win the global race for energy and manufacturing leadership if it can't build here at home, and the federal permitting system remains the largest obstacle. Senate negotiators unveiled the **Bipartisan American Affordability and Jobs Act**, a sweeping permitting package that will unleash American innovation and let America build.

"Our current federal permitting system is the largest obstacle to building the clean, reliable and affordable energy technologies needed to meet rising demand," said ClearPath Action CEO Jeremy Harrell. "This long-needed bipartisan deal will let America build. Negotiators on both sides of the aisle have put an extraordinary amount of effort into this bill, and we look forward to working with them to get it to the President's desk."

The bill:

- **Speeds up reviews:** Sets enforceable NEPA deadlines and gives Clean Water Act, Endangered Species Act and National Historic Preservation Act reviews a defined scope, while maintaining environmental protections;
- **Increases permit certainty:** Reforms judicial review in line with the Supreme Court *Seven County* decision, setting a higher bar to prevent approved projects from being undone by lawsuits and insulating them from political interference; and
- **Modernizes the grid:** Expands interregional transmission planning, updates backstop siting, speeds interconnection and codifies ratepayer protections.

What's clear: At a moment of surging energy demand and mounting affordability pressures, the stakes could not be higher. After years of bipartisan work, Congress now has a real opportunity to deliver. The deal released this week by the Senate builds on the permitting reforms House Republicans advanced earlier this Congress.

Plug in: Read ClearPath Action's **full statement** on the bill and ClearPath CEO Jeremy Harrell's take on "**A Bipartisan Permitting Path That Will Let America Build.**"

2. American Leadership in Fusion Act introduced



Private investors are already betting big on fusion, putting a record **\$4.5 billion** into the industry over the past year. Now Congress wants DOE to keep up. Reps. Jay Obernolte (R-CA) and Zoe Lofgren (D-CA) introduced the bipartisan **American Leadership in Fusion Act**. **Endorsed by ClearPath Action**, this bill seeks to carry fusion from the lab to the grid.

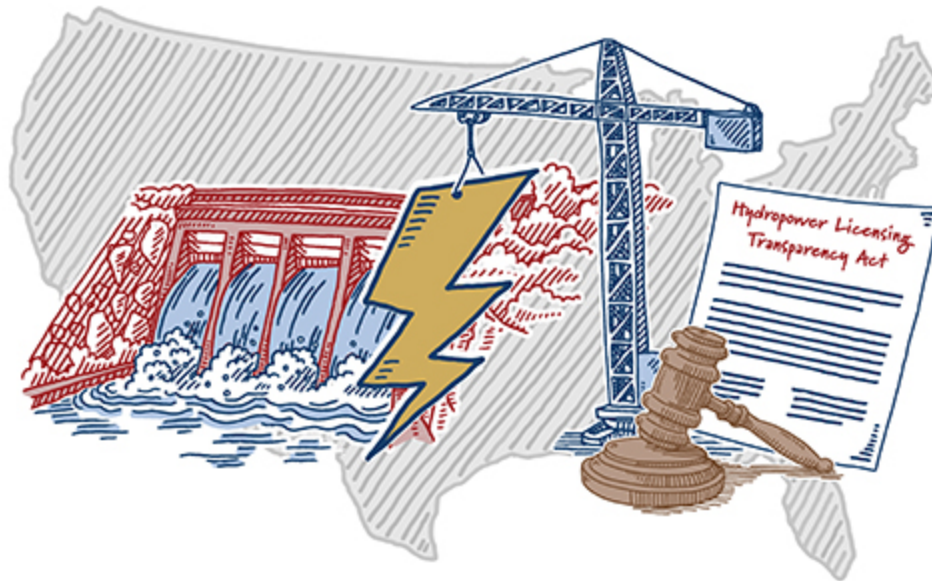
The bill would:

- Create an Office of Fusion at DOE, led by a Senate-confirmed Assistant Secretary for Fusion Energy;
- Invest roughly \$4 billion in test facilities for fusion materials and fuel research;
- Expand DOE's Milestone-Based Fusion Development Program with \$2 billion;
- Launch a \$3 billion cost-shared demonstration program for larger commercial projects; and
- Build out domestic supply chains and the fusion workforce through new public-private partnerships.

What's clear: American fusion innovators have the capital and the momentum. This bill gives them a federal partner built to help them build here and sell globally.

Plug in: Read ClearPath's "**Fusion 101**" for a breakdown of how fusion works and why it matters.

3. Hydropower licensing bill signed into law



Keeping America's existing firm, clean power online shouldn't take a decade of paperwork, yet hydropower relicensing typically takes seven to 10 years. President Trump signed the **Hydropower Licensing Transparency Act** into law, requiring FERC to report to Congress every year on the status of pending hydropower license and relicense applications.

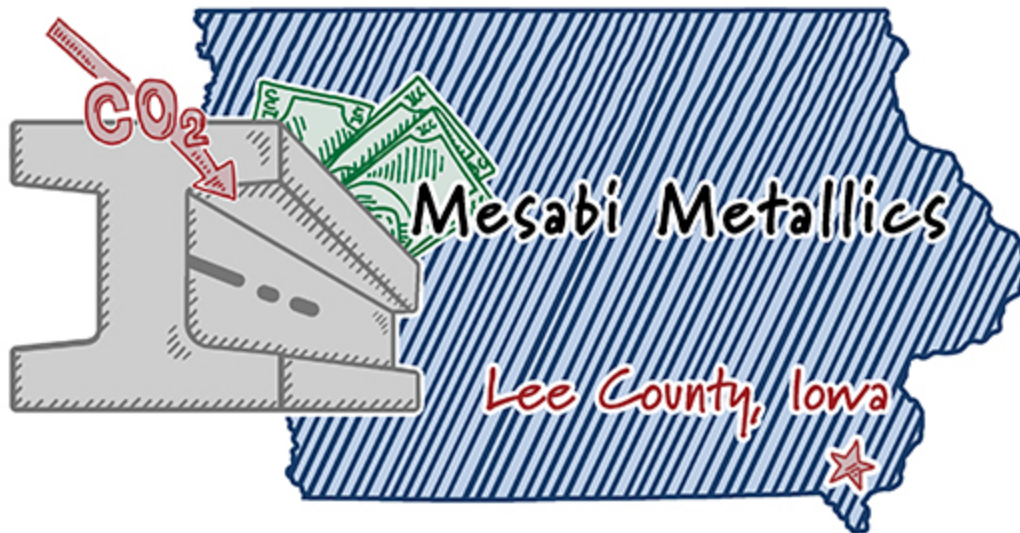
The new law will:

- Require FERC to deliver its **first status report** to Congress within 180 days of enactment;
- Give dam operators and communities clearer visibility into where their applications stand; and
- Flag delays before they push reliable baseload generation into early retirement.

What's clear: Predictable answers from regulators keep existing dams online and firm power on the grid. Status reports from FERC will make relicensing more accountable and give lawmakers the data to step in when reviews drag on. Transparency shows where relicensing breaks down, and permitting reform is how Congress fixes it.

Plug in: Read ClearPath's "**Time to Fix America's Permitting Problems and Let America Build**" to see why more permitting transparency is one of four ways to get projects like hydropower built faster.

4. Largest steel investment in U.S. history



American steel is getting a cleaner, fully domestic industrial base, from the mine all the way to the mill. At a White House event this week, Mesabi Metallica **unveiled plans** for a \$15 billion steel complex in **Rep. Mariannette Miller-Meeks' (R-IA) district, in Lee County, Iowa**, fed by iron ore from Minnesota. Financing from the Export-Import Bank of the United States (EXIM) laid the groundwork by backing the first new iron ore mine and pellet plant in 50 years.

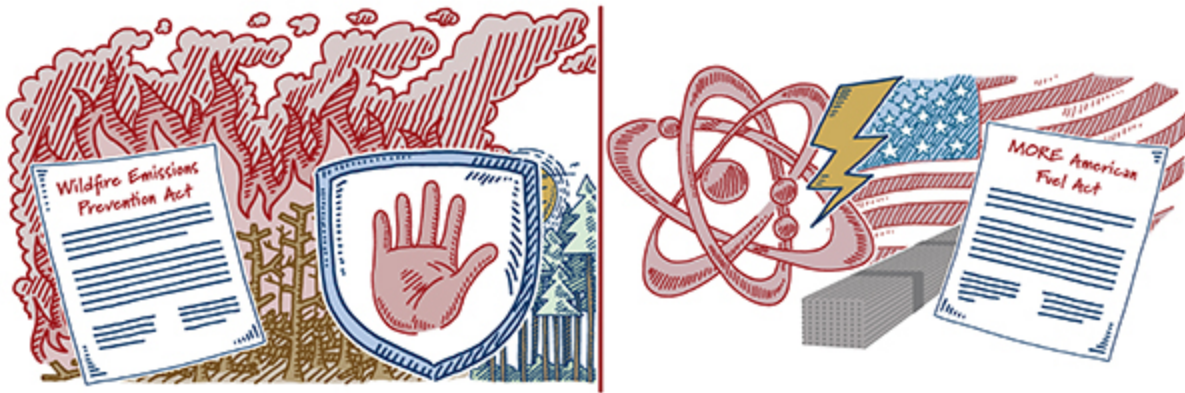
The Iowa complex will:

- Build 7.5 million tons of steelmaking capacity, with planned expansion to 10 million tons, making it the largest in the U.S.;
- Pair a direct reduced (DR) iron facility with at least two electric arc furnaces, which run on natural gas and cut emissions at least 50 percent compared to a traditional blast furnace;
- Source DR-grade pellets from a Minnesota mine backed by up to \$10 billion in **EXIM Make More in America financing**, including a **\$770 million direct loan**, reducing import dependence;
- Create 1,700 permanent jobs and 5,000 to 6,000 construction jobs, with the first pour projected for 2030; and
- Generate an expected \$95 billion in economic output over 10 years.

What's clear: Energy dominance depends on the materials behind it, and steel is where that starts. A secure American supply chain, from domestic ore to domestic metal, keeps critical manufacturing here at home and out of the hands of foreign competitors.

Plug in: Explore ClearPath's work on **clean steel and industrial innovation**.

5. Senate passes two ClearPath Action endorsed bills



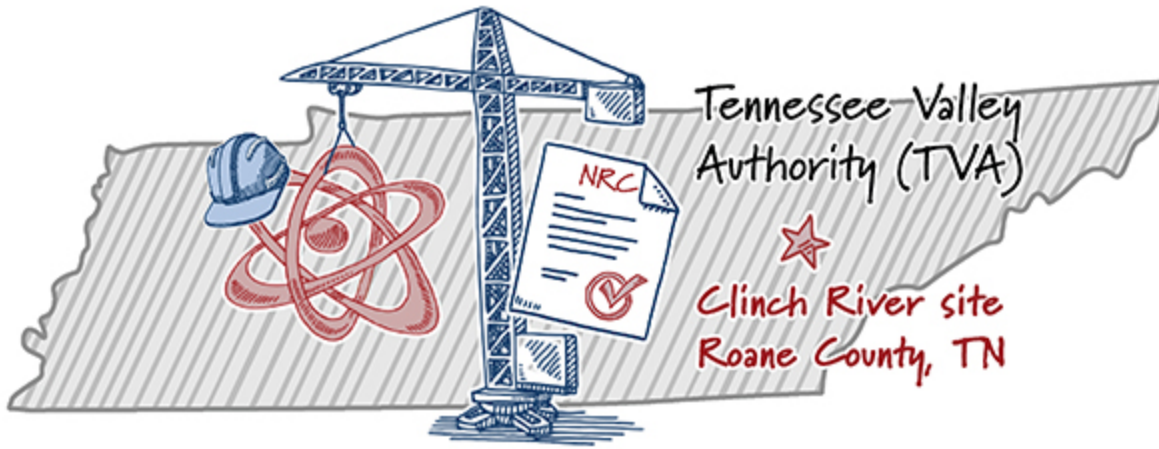
The Senate passed two bipartisan bills – the **MORE American Fuel Act** and **Wildfire Emissions Prevention Act** – that remove barriers for the developers rebuilding domestic uranium enrichment and for the land managers working to stop catastrophic wildfires before they start. ClearPath Action has endorsed both bills.

- The **MORE American Fuel Act** from Sens. Lummis (R-WY) and Kelly (D-AZ), could speed deployment of new enrichment facilities by more than a year without altering NRC safety standards by allowing them to begin construction while the NRC reviews their license.
- The **Wildfire Emissions Prevention Act** from Sens. Curtis (R-UT), Merkley (D-OR), Capito (R-WV), Padilla (D-CA), Boozman (R-AR) and Kelly (D-AZ), treats prescribed burns as "exceptional events" under the Clean Air Act so states no longer face EPA penalties for proactive wildfire mitigation and protects American communities from nonattainment designations driven by foreign pollution like Canadian wildfire smoke.

What's clear: When Washington enables proactive work, America builds stronger supply chains and healthier forests. The Senate's bipartisan votes show that message is landing.

Plug in: Read ClearPath Action's breakdowns of the **MORE American Fuel Act** and the **Wildfire Emissions Prevention Act** to see what each bill does.

6. NRC approves permit of America's first small modular reactor in Tennessee



Meeting soaring power demand means building new nuclear, and the Nuclear Regulatory Commission (NRC) is proving it can keep pace. The NRC **approved a construction permit** four months ahead of schedule, clearing the way for the **Tennessee Valley Authority** (TVA) to build the nation's first commercial small modular reactor at its Clinch River site in Oak Ridge, Tennessee.

The NRC license:

- Allows TVA to build a 300-megawatt **GE Vernova Hitachi** BWRX-300 boiling-water reactor to serve growing regional power demand, though TVA still needs a separate operating license before loading fuel; and
- Builds on the early site permit TVA secured for Clinch River in 2019.

What's clear: Energy dominance depends on how fast America can say yes to new projects. Approving a first-of-its-kind reactor ahead of schedule shows that timely, predictable permitting lets America grow its world-leading domestic industry.

Plug in: Read ClearPath's "**10 NRC Rulemakings to Watch**" for the changes that can make fast, predictable licensing the standard for every new reactor.

7. New funding for critical minerals lab projects



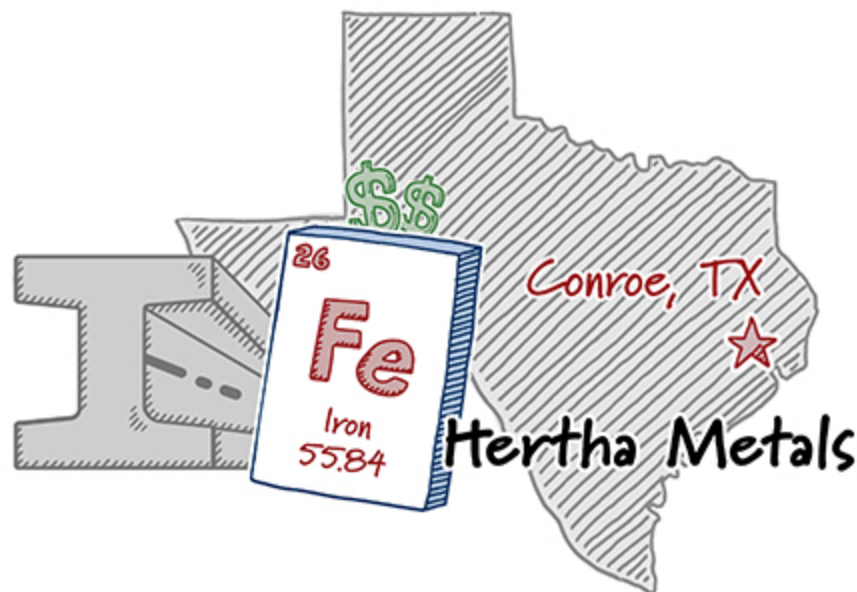
Leveraging American ingenuity is crucial to build the secure, domestic critical mineral supply chains needed for energy, manufacturing and defense. DOE selected 17 national laboratory projects for **\$29.5 million** to develop next-generation mining technologies. The awards run through DOE's **Mine of the Future Initiative**, which is part of a broader effort to rebuild domestic mining and processing capacity.

The projects will:

- Accelerate innovative technologies that expand and improve America's domestic mining capabilities;
- Draw on expertise from 12 national labs; and
- Reduce reliance on foreign supply chains to strengthen U.S. energy and national security.

What's clear: U.S. competitiveness in critical minerals depends on advancing innovative solutions that make mining and processing better, cheaper, more efficient and safer. DOE's investment taps the specialized expertise and capabilities of America's National Labs to accelerate the next generation of critical minerals technologies.

8. Department of War (DOW) and private investment to onshore high-purity iron



Hertha Metals, a Conroe, Texas-based start-up pioneering a novel ironmaking process, **announced** it has raised \$133 million in new funding backed by the federal government and leading venture capital firms. Hertha's process can use any grade of iron ore to produce iron and steel in a single-step process with 25 percent lower production costs and at least 50 percent lower emissions compared to conventional blast furnaces.

The funding will:

- Feature a \$65 million equity investment from the DOW's **Industrial Base Analysis and Sustainment** (IBAS) arm, in conjunction with the Economic Defense Unit;
- Finance the Hertha Chalyx plant, a 10,000 ton per year facility which represents an order-of-magnitude scale-up from its pilot facility; and
- Establish domestic production for high-purity iron required for rare earth magnets, defense and energy applications.

Why it matters: Funding from private capital and the Department of War is a massive vote of confidence for Hertha Metals and highlights how clean industrial innovation can onshore and provide supply chain security for strategic industries.

9. Coming down the pipeline

- **Thursday, October 8, at 2:00PM EDT** – ClearPath CEO Jeremy Harrell will join Groundwork Collaborative's Alex Jacquez and policy experts from Crux Climate for a webinar titled, **"What new data shows about US clean energy supply chains,"** where they will discuss how 45X has shaped domestic manufacturing investment and where US capacity still trails.
 - **Friday, October 9, at 1:00PM EDT** – ClearPath CEO Jeremy Harrell will join Xan Fishman from the Bipartisan Policy Center for a webinar titled, **"A Detailed Walkthrough of the Bipartisan American Affordability and Jobs Act,"** to discuss Congress' new permitting package.
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10. ICYMI

- General Matter filed its **first license application** with the NRC to build and operate the first U.S.-owned commercial uranium enrichment facility in Paducah, Kentucky, and plans to file an amendment next year to produce high-assay low-enriched uranium (HALEU).
- HyTerra is opening **data and samples from its Kansas geologic hydrogen exploration** to Texas A&M University, the University of Texas at Austin and the New Mexico Institute of Mining and Technology, which were selected through Chimaera Fund's Geologic Hydrogen Site Access Challenge to study the subsurface potential of geologic hydrogen.
- Solcoa Industries **raised** \$75 million to scale domestic production of rare earth metals needed for defense, manufacturing and energy technologies. Solcoa has innovated a novel, efficient process to produce rare earth metals and will produce 500 tonnes per year at its Nevada Solcoa One plant, which will come online in July 2027.
- Tax credit marketplace Crux released a new report, **"Tracing Clean Energy Supply Chains: Where America Builds and Where It Buys."** The report

finds strong industry appetite for expanded 45X manufacturing tax credit coverage to close cost gaps and bolster domestic supply chains.

- Constellation and Amazon **announced** a 20-year power purchase agreement, which will support investments to uprate the Calvert Cliffs Clean Energy Center, adding 190 megawatts of reliable nuclear power to the grid.
- Antora and Pratt Energy **announced** a 5.8 gigawatt-hour thermal battery project in Pratt County, Kansas to create jobs and community benefits. Once complete, the project will be one of the largest battery storage systems in the world.



*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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