

# The Rundown

By: CLEARPATH  
ACTION



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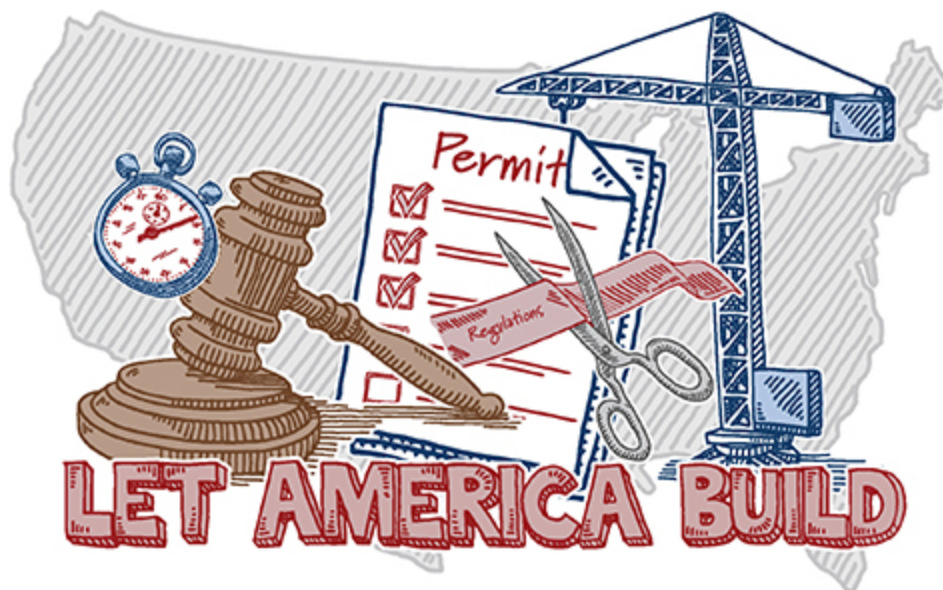
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## ClearPath Action Rundown October 23rd, 2026

Happy Friday!

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### 1. Let America build: the permitting push



This week: let every technology compete.

Nuclear plants, geothermal wells, transmission lines and pipelines all face permitting challenges, often for many years. The [\*\*Bipartisan American Affordability and Jobs Act\*\*](#) (BAAJA) creates one set of rules for every technology so the permitting process doesn't pick winners and losers.

**Why BAAJA matters for every technology:**

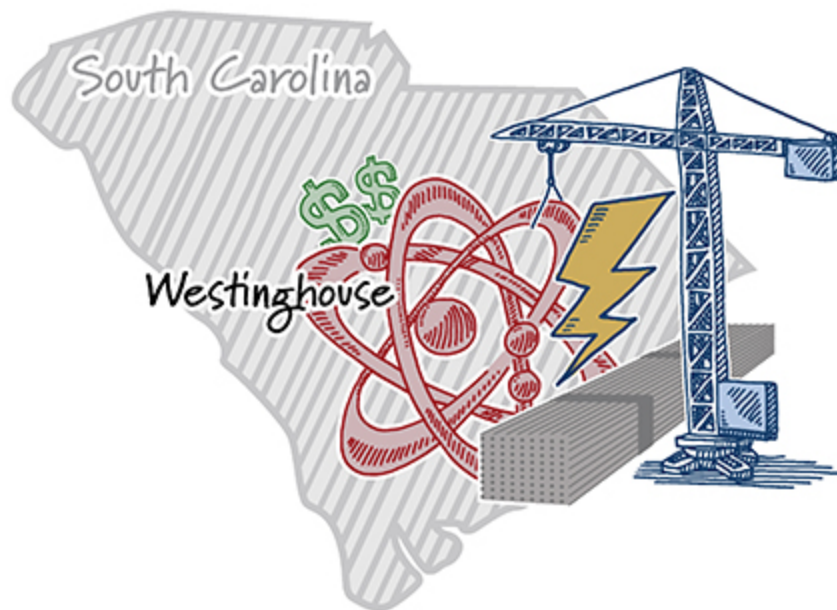
- BAAJA targets duplicative steps and drawn-out legal fights, while keeping the environmental standards that every project must continue to meet in place;
- BAAJA puts federal reviews on a clock, protects permits once they are issued, opens the grid to more power to drive down costs; and
- BAAJA allows developers to [\*\*seek damages\*\*](#) when an agency singles out their type of project for delay or denial, with protections covering dozens of project types from nuclear and pipelines to mining.

**What's clear:** Every energy source hits the same permitting wall and needs a modernized grid. Utah Gov. Spencer Cox (R) and Nevada Gov. Joe Lombardo (R) are calling for an end to the state-by-state patchwork for transmission in [\*\*their new op-ed\*\*](#).

**Read and share:** [\*\*Share this week's takeaway on X\*\*](#) with your network and read ClearPath's "[\*\*Permitting 101\*\*](#)" for a breakdown on how permitting delays hold back new energy and what it will take to fix them.

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## 2. Westinghouse announces major investment in nuclear fuel



More power from America's existing reactors starts with a new type of American-made fuel. [\*\*Westinghouse announced\*\*](#) a \$1 billion investment in a new factory at its Columbia Fuel Fabrication Facility in Hopkins, S.C., to produce [\*\*low-enriched uranium plus \(LEU+\) fuel\*\*](#) by 2030. This will be the first fleet-scale nuclear fuel factory built in the U.S. in more than 50 years.

## What to know:

- LEU+ fuel enables power uprates and longer operating cycles at existing plants, supporting DOE's **UPRISE** effort to add up to five gigawatts from existing nuclear power plants by 2029;
- The Department of Energy has been **collaborating with industry** to develop advanced fuel types since 2012; and
- This expansion will build upon the more than 1,200 people already employed at the Columbia facility.

**What's clear:** Manufacturing advanced fuel at home improves the reactors running today and strengthens the supply chain the next generation of reactors will need.

**Read and share:** [Share this announcement on X](#) with your network and read ClearPath's [recap of House staff touring Constellation's Limerick nuclear plant](#) to learn how uprates add power from reactors already on the grid.

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## 3. USDA strengthens American fertilizer manufacturing



Farmers need fertilizer they can count on, and making it in America is a matter of national security. USDA **selected eight projects**, representing more than \$1.34 billion in total investment, to support domestic fertilizer manufacturing capacity and provide more fertilizer suppliers for farmers to choose from through its **Fertilizer Investment and Expansion for Long-Term Domestic Supply (FIELDS) Program**.

### The projects will:

- Expand domestic production of nitrogen, phosphorus, potassium and sulfur fertilizers across the country; and
- Add about 1.08 million tons of annual domestic fertilizer production.

These projects were selected because they have secured private investment, demonstrated market demand and measurable production outcomes.

**What's clear:** Fertilizer is a strategic input, and expanding domestic manufacturing steadies input costs and reduces U.S. reliance on foreign suppliers.

**Read and share:** [Share this announcement on X](#) with your network and read ClearPath's "[Conservation Innovation Grants: Putting American Farmers First Through Fertilizer Innovation](#)" for a picture of how new fertilizer technologies can lower farmers' input costs.

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## 4. ICYMI

- Kairos Power **raised** \$643 million in private and federal funding, including \$275 million from DOE, to build Hermes 2, its 50-megawatt molten salt demonstration reactor in Oak Ridge, TN. The reactor will help power Google data centers through the Tennessee Valley Authority.
- Phoenix Tailings **selected** Rochester, N.Y., to host its Freedom Separation facility, which will begin producing separated rare earth oxides in 2027.
- The Nuclear Company **unveiled** Prosperity One, a proposed campus of up to six Westinghouse AP1000 reactors totaling about 6.6 gigawatts in Lewis County, Kentucky.
- The Bureau of Land Management **accepted** winning bids on 60 parcels in the Nevada geothermal lease sale held this week, totaling 186,641 acres and netting \$4.83 million in total receipts.



*ClearPath believes America must lead the world in innovation over regulation... markets over mandates...providing affordable, reliable, clean energy.*

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That's all from us. Thanks for reading and have a great weekend!

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