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ClearPath Action Rundown
November 13th, 2026

Happy Friday!

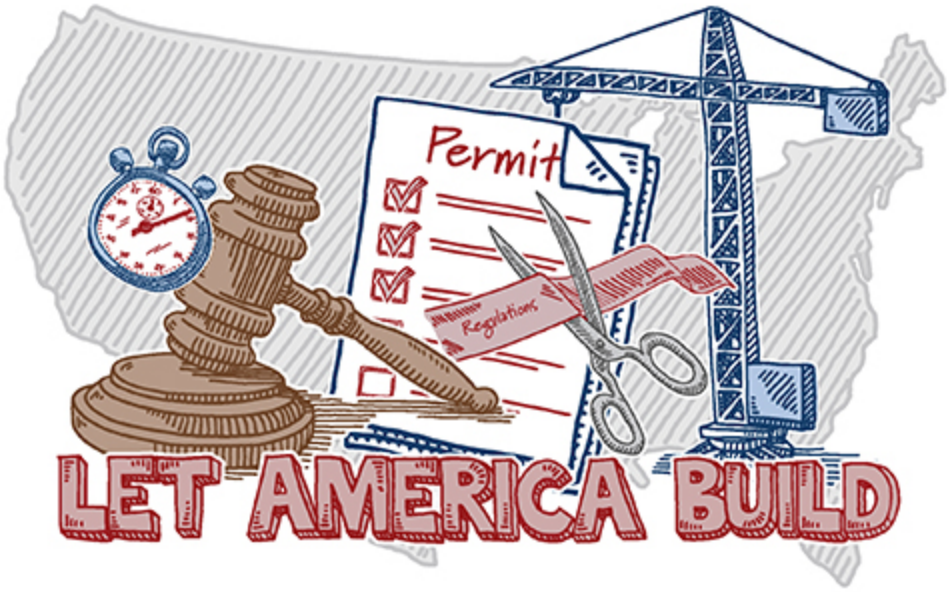
ClearPath seeks talented people passionate about advancing clean energy innovation and American energy leadership. Explore our current opportunities:

- **Events Coordinator**
- **Nuclear Associate**
- **Policy Associate, Clean Power and Natural Resources**
- **CCLP State Government Fellow**

Interested in joining our team or know someone who might be a great fit? Explore these opportunities and apply at **ClearPath.org**.

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1. Let America build: the permitting push



This week: the bipartisan deal grows stronger.

The Senate **advanced the Bipartisan American Affordability and Jobs Act (BAAJA)** 73-25 in its initial procedural vote. The vote came following the release of a **manager's amendment** on Nov. 7 that strengthens ratepayer protections, adds bipartisan nuclear licensing reforms and accelerates legal certainty for new projects. This week, we examine what the updated bill delivers ahead of a likely final Senate vote next week.

What the manager's amendment adds:

- Stronger ratepayer protections: Every data center, regardless of size, must bear the full cost of the power and infrastructure built to serve it, and FERC must issue a proposed rule to enforce those protections within 90 days;
- Nuclear licensing reform: A new title ends uncontested, mandatory Nuclear Regulatory Commission (NRC) hearings and allows at-risk construction of uranium enrichment facilities, drawing on the American Enrichment Deployment Act, which **passed the House** 394-3 on Monday; and
- Protects the role of states and Tribes: States have a full year to act on transmission lines before FERC can step in, and existing rights of first refusal remain. Tribes have a role in transmission planning equal to that of states, and federal officials can no longer supplant Tribal historic preservation programs or stand in for Tribes in consultation.

What's clear: Durable reform earns broad support when it protects consumers and delivers results. The updated BAAJA preserves the bill's core permitting framework while answering concerns from ratepayers, states and the House. Congress should pass this bill to let America build.

Read and share: **Share our take on X** and read Jeremy's full op-ed in The Daily Caller, "**Wall Street Is Ready To Invest In America's Energy Future. If Washington Permits It.**," for why permitting reform is key to bringing private investment into American energy projects.

2. NEW op-ed: New York's chip boom depends on permitting reform



New York has secured some of the largest semiconductor investments in American history, and powering them now depends on Washington. In a **new op-ed in Syracuse.com**, ClearPath's Hillary O'Brien argues that **Micron**'s campus in Clay and **GlobalFoundries**' fab in Malta will need new power plants and transmission lines that our current federal permitting system could delay for years, unless BAAJA is passed.

The op-ed highlights:

- Historic investment: Micron's Clay campus alone represents **up to $100 billion** and about 9,000 jobs, the largest private investment in New York's history;
- A broad coalition: Former Treasury Secretary Janet Yellen and former Secretary of State Mike Pompeo jointly urged Congress to pass BAAJA, and the U.S. Chamber of Commerce, Citizens' Climate Lobby and SEMI Americas support it; and
- A clear ask: Sens. Chuck Schumer (D-NY) and Kirsten Gillibrand (D-NY) and Reps. Hakeem Jeffries (D-NY) and Paul Tonko (D-NY) can help deliver the reforms New York's new factories need.

What's clear: America's manufacturing comeback runs on reliable power. Factories built in a few years cannot wait a decade for the power plants and transmission lines that serve them, and Congress can close that gap by passing BAAJA.

Read and share: **Share our take on X** and read Hillary's full op-ed, "**New York won the chips. Now it needs the permits**," for why permitting reform will decide whether New York's chip investments deliver.

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3. NEW blog: Doubling down on ARPA-E's SCALEUP program



American energy leadership depends on moving breakthrough technologies from the lab to the market. In a **new ClearPath blog**, Rafae Ghani and Matthew Mailloux make the case for expanding the **SCALEUP program** at DOE's Advanced Research Projects Agency-Energy (ARPA-E). SCALEUP awards up to $20 million in follow-on funding to help proven startups cross the gap between early research and private investment.

The blog highlights:

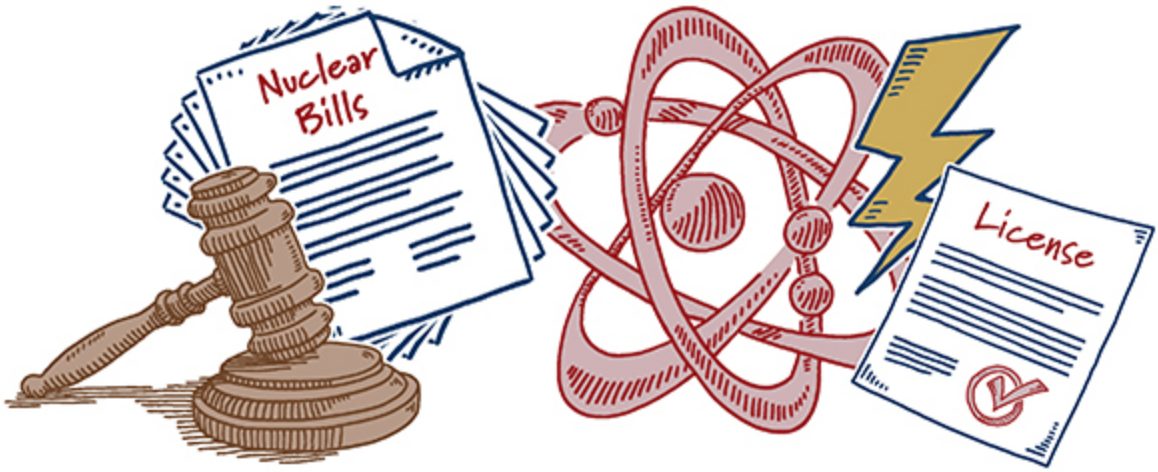
- A strong track record: ARPA-E has **invested more than $4.4 billion** in over 1,850 projects, launching at least 173 new American companies and 41 exits worth $32.6 billion;
- Proven results: ARPA-E-backed companies, **Fervo Energy**, **Form Energy** and **Commonwealth Fusion Systems**, are leaders in enhanced geothermal, long-duration storage and fusion; and
- Deploying existing funding: An additional $80 million per year for SCALEUP, as a **National Academies report** recommends, would support 6 to 10 more projects annually.

What's clear: Federal research dollars deliver the greatest return when they carry promising technologies all the way to commercial scale. A stronger SCALEUP program gives American innovators the follow-on support they need to outpace foreign competitors and establish the next generation of domestic energy industries.

Read and share: **Share our take on X** and read ClearPath's "**Doubling Down on the ARPA-E SCALEUP Program**" for how expanding SCALEUP would accelerate American energy technologies from the lab to the market.

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4. House advances six nuclear bills to modernize licensing



Congress is modernizing the rules that govern America's nuclear buildout. The House **passed six bipartisan nuclear bills** this week, two by commanding recorded margins and four by voice vote, to streamline licensing, strengthen the nuclear fuel supply chain and support the Nuclear Regulatory Commission (NRC) workforce. ClearPath Action CEO Jeremy Harrell **testified in support of all six proposals** in June, and several now advance alongside the Senate's bipartisan permitting bill.

What each of the six bills do:

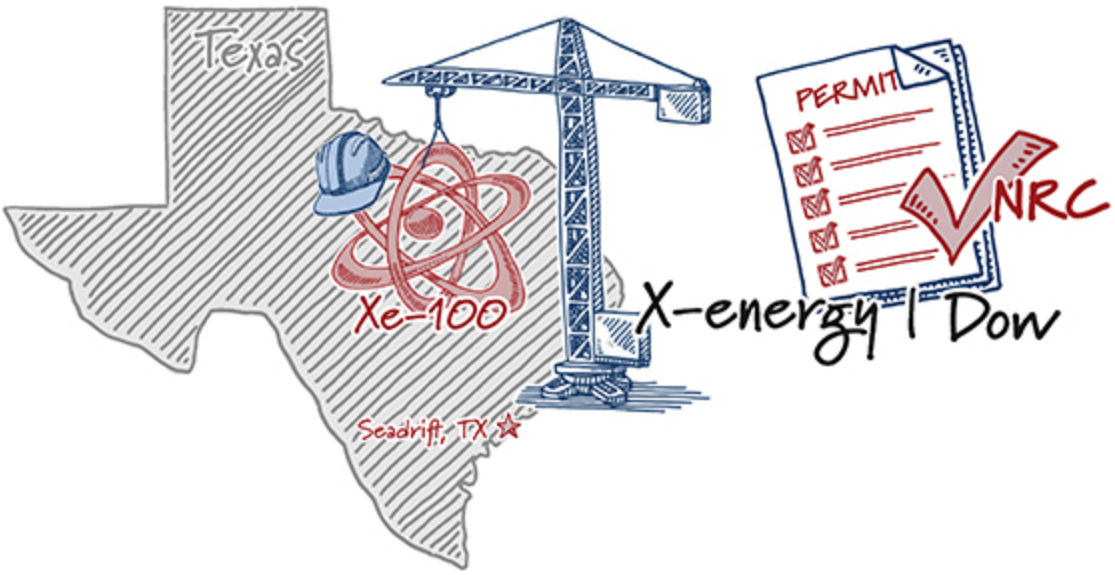
- **Efficient Nuclear Licensing Hearings Act**: Ends mandatory NRC hearings for uncontested license applications;
- **Nuclear Advisory Committee Reform Act**: Focuses the NRC's Advisory Committee on Reactor Safeguards on new and novel safety issues;
- **American Enrichment Deployment Act**: Allows uranium enrichment facilities to begin construction before receiving an NRC license;
- **Nuclear REFUEL Act**: Modernizes licensing for commercial fuel reprocessing facilities;
- **NRC Staff Pay Alignment Act**: Helps the NRC recruit and retain experienced leaders with competitive pay; and
- **Department of Energy Nuclear Transparency Act**: Requires DOE to promptly publish decisions relating to its nuclear facility authorizations and safety standards.

What's clear: Durable nuclear policy rests on broad bipartisan agreement. By retiring outdated procedural hurdles while preserving rigorous safety review, these bills help the NRC keep pace with rising demand and position American reactors and fuel to outcompete Russia and China.

Read and share: **Share our take on X** and read **Jeremy's June testimony** for how each reform accelerates new nuclear without weakening safety.

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5. NRC approves advanced nuclear plant at an American industrial site



America's reactor demonstrations are moving from design to construction. The Nuclear Regulatory Commission (NRC) **approved the construction permit** for the Long Mott Generating Station, where **X-energy** and **Dow** plan to build four Xe-100 reactors at Dow's Seadrift, Texas manufacturing site.

What to know:

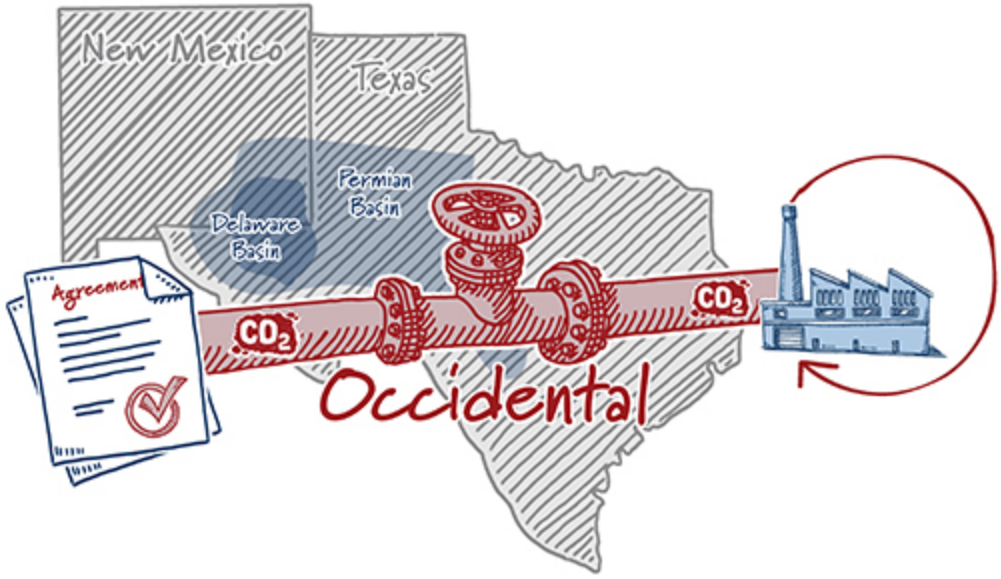
- Four 80-megawatt reactors will supply electricity and high-temperature steam for Dow's chemical operations;
- The NRC completed its review on an **18-month schedule**, issuing the first construction permit for a high-temperature gas-cooled reactor in nearly 60 years; and
- Both commercial **Advanced Reactor Demonstration Program** (ARDP) projects now hold construction permits.

What's clear: New nuclear reactors can deliver the reliable heat and power American manufacturers need. A timely, predictable review shows the NRC can license new designs efficiently while maintaining rigorous safety standards, and sustained congressional support for ARDP is delivering licensed, first-of-a-kind reactors.

Read and share: **Share this announcement on X** and read ClearPath's "**Five States to Watch for New Nuclear**" for how Texas and other states are positioning to host new reactors like the Xe-100 units planned at Seadrift.

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6. Occidental commits to developing carbon capture infrastructure



Occidental **signed** a long-term agreement with two project development companies to build infrastructure that transports captured CO_2 from third-party plants from the Delaware Basin to the Permian Basin. The developers will finance and build the capture, transport and delivery infrastructure, with initial shipments expected in 2029.

What to know:

- The two infrastructure projects are predicted to transport 2 million metric tons of CO_2 annually from natural gas processing plants in the area with potential to expand to 4 million metric tons;
- This agreement will establish access to diverse sources of carbon capture and ensure that existing technologies have long-lasting productivity; and
- The resulting 100 miles of new pipelines in the Delaware Basin will connect to existing infrastructure in the Permian Basin, allowing for future projects to connect to the transportation system.

What's clear: CO_2 pipelines are critical energy security infrastructure that connect captured carbon to productive use in American oil fields.

Read and share: **Share this week's takeaway on X** and read ClearPath's "**Made in America, with Carbon**" to learn more about how carbon capture projects contribute to American economic growth.

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7. Department of War invests in domestic advanced battery manufacturing



America produces less than 1% of the nickel-manganese-cobalt (NMC) cathode material its batteries require, leaving defense and energy supply chains reliant on foreign suppliers. The Department of War's Office of Strategic Capital (OSC) **signed a $250 million conditional loan commitment** with **6K Inc.** to expand domestic production of cathode active material in Jackson, Tennessee.

What to know:

- Battery components are critical to next-generation defense technologies, including drones and tactical communications;
- 6K Inc. specializes in a streamlined manufacturing process that enables more efficient, and economical production of battery materials; and
- This loan commitment will help advance a secure, domestic battery supply chain.

What's clear: Batteries are essential to American energy and manufacturing, yet reliance on China for critical components threatens U.S. competitiveness. Targeted federal financing can unlock private investment and scale innovative technologies to strengthen domestic supply chains.

Read and share: **Share this week's takeaway on X** and read ClearPath's "**The Importance of Domestic Mining for U.S. National Security**" to learn more about how domestic supply chains for critical minerals secures U.S. national security.

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8. DOE launches a project dedicated to critical mineral recycling



DOE's Office of Critical Minerals and Energy Innovation **launched** the Accelerator for Supply Chain, Economy, and National Development (ASCEND) initiative, which seeks to leverage expertise from National Labs and industry to advance recycling of critical minerals from end-of-life electronics.

What to know:

- Led by Idaho National Laboratory, ASCEND will identify opportunities to expand domestic recovery, processing and recycling of critical materials from discarded electronics;
- Its initial work will assess recovery economics, identify supply chain gaps and engage industry to understand barriers to expanding domestic recycling; and
- Findings will help prioritize technologies and capabilities to increase American critical materials production and strengthen U.S. supply chains.

What's clear: ASCEND will modernize critical mineral reuse and recycling processes to advance American energy, economic, and national security.

Read and share: **Share this week's takeaway on X** and read "**More American Energy Needs More Minerals and Better Permitting**" to learn more about the importance of domestic supply chains for critical minerals.

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9. Coming down the pipeline

- **TODAY, November 13, 2026 at 12:00 PM** - ClearPath's Casey Kelly will participate as a panelist for a Bipartisan Policy Center briefing to House Republican staff on BAAJA and the grid. You can register **at this link**.

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10. ICYMI

- American Nuclear Society's Nuclear News **named** ClearPath's Niko McMurray to its 2026 40 Under 40 list, which recognizes young professionals advancing

nuclear energy. Congratulations, Niko!

- The Bureau of Land Management **launched** an interactive Critical Minerals Screening Tool that utilizes U.S. Geological Survey data to display the locations of critical mineral deposits, mining claims, and key mining infrastructure.
- The U.S. Department of Agriculture **proposed** a rule to streamline grazing permits and align fee-setting across national forests and grasslands in 16 Western states, giving ranchers greater certainty.



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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