

NEWSLETTER *Published July 25, 2025 • 5 minute read*

On the Grid: The Call Is Coming From Inside the House 7/25/25



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Welcome back to *On the Grid*, Third Way's bi-weekly newsletter, where we'll recap how we're working to deploy every clean energy technology as quickly and affordably as possible. We're excited to have you join us!



NUCLEAR

The Trump Administration has repeatedly stated that growing the American nuclear industry is at the top of its energy agenda, setting a goal to expand American nuclear energy capacity from 100 GW today to 400 GW by 2050. But when you peel back that rhetoric, it becomes clear that their actions are actually undermining the nuclear industry. Nowhere is that more stark than what's happening with the Nuclear Regulatory Commission (NRC). Let's break it down.

What's Happening: The NRC regulates America's civil nuclear sector. Outdated statutes and rigid processes, however, make it unnecessarily difficult to deploy new advanced reactors. We're long overdue for comprehensive modernization. The Trump Administration's approach, however, is far less focused on making the agency efficient and faster, and more on taking a wrecking ball to the agency. For example, their latest Executive Order directs the NRC to pursue "reductions in force," but any serious effort to scale up to 400 GW will require more technical staff, more licensing experts, and more capacity, not less. And putting the Department of Government Efficiency (DOGE) in charge of this kind of overhaul is a recipe for dysfunction.

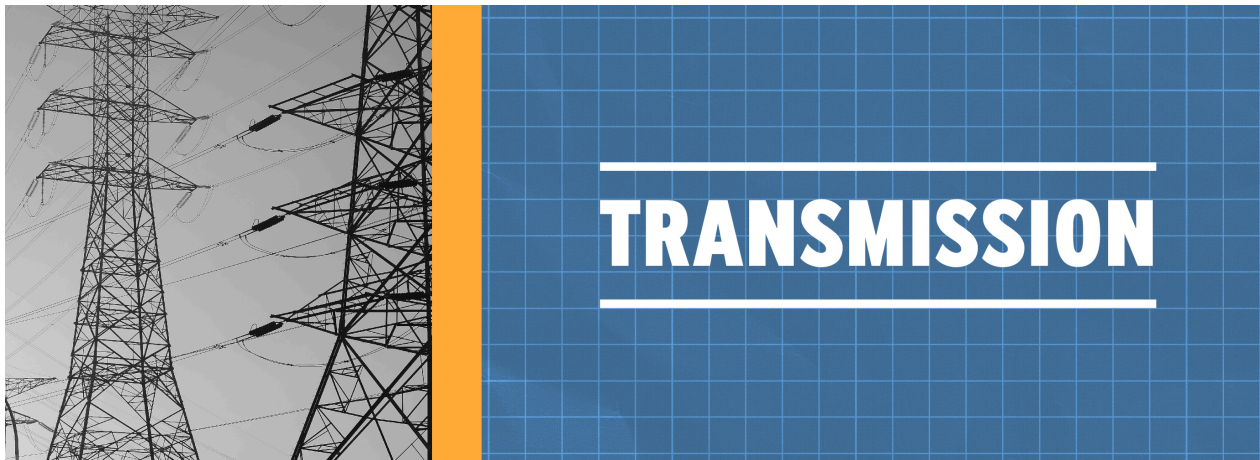
Why This Matters: Dismantling America's chief regulator for nuclear energy will have dangerous ripple effects. Here's how:

1. **Delayed Deployment:** The first advanced commercial reactors are nearing approval and set to come online in the early 2030s. But getting from 100GW to 400GW requires serious capacity and predictability, especially for first-of-a-kind reactors. Gutting the NRC and throwing the licensing process into flux will only slow things down.
2. **International Ramifications:** Countries around the world look to the NRC to shape their own regulations. Undermining the NRC's credibility doesn't hurt our leadership; it opens the door for adversaries like Russia and China to set the terms for global nuclear governance.

3. **Public Perception:** Public support for nuclear power is near a record high, but maintaining it is not guaranteed. The NRC's independence and technical rigor are the foundation of that growing support. Handing safety oversight to DOGE or other agencies risks politicizing the process and eroding public confidence when we need it most.

What We're Doing: This week, former NRC Commissioner and current Third Way fellow Stephen Burns testified before the House Economic Growth, Energy Policy, and Regulatory Affairs Subcommittee to stress the importance of the NRC's independence and warn against efforts to weaken the Commission's authority.

If you've been following our work, you know we've long pushed for a more streamlined regulatory process and speeding up nuclear licensing. Gutting the agency and shifting power to politically driven offices isn't reform, it's self-sabotage. We're making sure policymakers understand the stakes and the alternatives on the table to actually support nuclear industry growth.



For the past 25 years, the amount of electricity that the US uses has stayed relatively stagnant. But that's changing fast. As we electrify everything from transportation and manufacturing, and bring major AI data centers online, demand is surging to levels we haven't seen in 40 years. The problem is that our aging grid is not equipped to handle this kind of rapid load growth. That's not a partisan opinion—it's *the technical reality*. To get even close to meeting growing demand, the US will need to add about 120GW of new electricity capacity by 2030. And that can't happen without major upgrades to our current transmission system.

So why did the Trump Administration just cancel a \$4.9 billion loan guarantee for the largest transmission project in the country's history? Because they labeled it as a "green scam."

What's Happening: The Grain Belt Express is an \$11 billion, 800-mile transmission project designed to carry electricity generated by wind and solar farms across Kansas and Missouri to major population hubs in Indiana and Illinois. The developer, Invenergy, had even considered tying in coal-fired generation along the route. The Grain Belt Express project has been in the works for over a decade and

is set to strengthen grid reliability, lower energy costs, and support major economic development across the Midwest. However, Senator Josh Hawley (R-MO) has spent months flouting the project as a "green scam," and personally urging President Trump to kill the loan commitment, putting the entire project at risk.

Why This Matters: This loan cancellation is more than just a setback for one project. It's a case study into how ideology is getting in the way of solving real infrastructure problems across the US. Republican lawmakers have been vocal about meeting rising demand, preventing more frequent blackouts, and onshoring American manufacturing. But when presented with real, shovel-ready projects that would address this, they vehemently oppose them because they don't fit their ideal mold.

What We're Doing: We can't let political optics override the practical infrastructure solutions we need to keep the lights on. Projects and policy are frozen time and time again because ideology takes priority over pragmatism—on *both the right and the left*. We're working to break that paralysis. Deploy *every* credible solution we have to meet rising energy demand. That includes renewables, which are now some of the cheapest sources of power on the market, new nuclear, emerging clean technologies like geothermal and geological hydrogen, and, yes, for the foreseeable future, oil and gas.



- Rob Meyer, in *Heatmap News*, outlines how electricity prices are set to rise following the passage of the *One Big Beautiful Bill* and how Democrats will need a real plan—beyond just a political message blaming Republicans for higher bills—to stabilize the grid, lower costs, and rethink how we permit, finance, and build power in America.
- Tyler Norris, in his *Power & Policy* substack, warns that AI-fueled data center growth could make or break US electricity affordability and argues for smarter rate design and stronger accountability for corporate power users.
- Ezra Klein, on the *Ezra Klein Show*, talks with Jesse Jenkins and Jane Flegal about the current state of the climate movement and where we can go from here.