

October Energy, Sustainability, and Infrastructure Washington Update

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As we go to press on this update, the government has officially shutdown. The duration is unknown and the uncertainty reflects a political standoff that benefits neither party. Beyond that disruption, Washington is seeing a wave of energy and infrastructure developments that reflect shifting priorities and growing urgency. This month's update covers a narrowly passed House appropriations bill that potentially reshapes Department of Energy funding, critical minerals announcements, and progress on permitting reform. With key nominations confirmed and fresh funding opportunities emerging, September has marked another pivotal moment for energy policy and innovation.

House Passes Energy Appropriations Bill

In a narrow 214-213 vote, the House of Representatives **passed** a \$53.7 billion appropriations bill funding the Department of Energy (DOE) and federal water programs. The legislation proposes \$57.3 billion in discretionary funding — roughly \$766 million below current levels — with significant reshuffling across DOE offices.

More than half of the total — \$25.3 billion — would go to the National Nuclear Security Administration, which would get a bump of almost \$1.2 billion. DOE's civilian nuclear energy account would get a \$110 million increase, including a raise for the Advanced Nuclear Fuel Availability program to help support production of the kind of fuel used by advanced reactors. DOE's Loan Programs Office (LPO) would also newly allocate \$150 million for the cost of loan guarantees for the construction of small modular reactors or advanced nuclear reactors as part of the Title 17 Innovative Technology Loan Guarantee Program. The Nuclear Regulatory Commission would get higher funding — \$27.4 billion — for the second year in a row. The bill **report** also recommends the provision of not less than \$100 million for competitively awarded enhanced geothermal system demonstrations (EGS) and next-generation geothermal demonstration projects in diverse geographic areas, a source favored by Energy Secretary Chris Wright and congressional Republicans.

However, the bill proposes sharp cuts to clean energy programs. The Advanced Research Projects Agency's (ARPA-E) funding would drop by \$110 million and the Office of Energy Efficiency and Renewable Energy (EERE) would face a 46% reduction — though this is less severe than the White House's **proposed** 70% cut. Grid modernization efforts would also be impacted, with the Office of Grid Deployment and the Office of Electricity potentially seeing budget reductions of more than 50% and nearly 20%, respectively. The Office of Fossil Energy was also not spared from potential cutbacks, with the budget trimmed by \$177.5 million, and new provisions restrict petroleum sales to China and prevent DOE financing from benefiting foreign entities of concern.

The Senate has not tipped its hand on their FY26 appropriations bill, potentially waiting to release it until discussions over the pending CR and potential government shutdown are resolved. While the two bodies were relatively aligned on the One Big Beautiful Bill (OBBB) passed in July, it remains to be seen whether this will continue or some Republican senators that have expressed support of clean energy initiatives will take a stronger position.

Nominations Update

Throughout the month, the Senate confirmed a slate of Trump administration nominees to key energy and environmental posts.

Among those confirmed to DOE positions are: Dario Gil (DOE Undersecretary for Science), Kyle Haustveit (DOE Assistant Secretary for Fossil Energy), Tina Pierce (DOE Chief Financial Officer), Jonathan Brightbill (DOE General Counsel), Conner Prochaska (ARPA-E Director), Tristan Abbey (Energy Information Administration Administrator), Theodore Garrish (DOE Assistant Secretary for Nuclear Energy), Scott Pappano (National Nuclear Security Administration Principal Deputy Administrator), and Matthew Napoli (National Nuclear Security Administration Deputy Administrator for Defense Nuclear

Nonproliferation).

Among those confirmed to EPA positions are Jessica Kramer (EPA Office of Water) and Paul Roberti (EPA Pipeline and Hazardous Materials Safety Administrator). Lastly, Katherine Scarlett was confirmed as chair of the White House's Council on Environmental Quality.

Critical Minerals Announcements

While no official announcement has been made, the Trump administration is reportedly looking to take an equity stake in Lithium Americas as it considers whether to proceed with a promised \$2.3 billion LPO loan for the Thacker Pass lithium mine and processing facility located in Nevada. The potential upside from the investment is one way the administration is trying to address the inherent risk in the critical minerals market, especially evident in the recent drop in lithium prices, which has been attributed to reported Chinese manipulation. If finalized, the move would be the latest example of the Trump administration's industrial strategy as it previously took a 10% stake in chip maker Intel and a 15% share in rare earths producer MP Materials.

Also during September, Perpetua Resources **announced** that the **Stibnite Gold Project** received issuance of a conditional Notice to Proceed from the US Forest Service, confirming that Perpetua has met the requirements outlined in the Record of Decision and may begin development upon posting the required financial assurance. The project has the potential to supply approximately 35% of US antimony demand during the first six years of operation. Perpetua has also received \$80 million in funding for the project from the Department of Defense. The project is currently awaiting financing approval from the US Export-Import Bank.

To wrap up the month, RZ Resources announced they had secured historic financing from the US Export-Import Bank — marking the first time an Australian critical minerals company has received backing from a US government agency. Australian companies are also eligible for funding under the DoD Defense Production Act Title III program, along with those from Canada and the UK. Though, to date, only Canadian critical minerals companies have received funding from DPA, the RZ Resources announcement shows US government urgency in addressing critical minerals supply, both domestically and through allies.

Permitting Reform Still Alive

On September 10, the House Natural Resources Committee (HNRC) held a **hearing** to discuss legislative permitting reform proposals, including the **Studying NEPA's Impact on Projects Act**, the **ePermit Act**, and the **Standardizing Permitting and Expediting Economic Development (SPEED) Act**. The SPEED Act, a bipartisan bill **sponsored** by HNRC Chair Bruce Westerman (R-Ark.) and Rep. Jared Golden (D-ME), has received the most attention as it aims to amend the National Environmental Policy Act (NEPA) of 1969 by shortening permitting timelines, limiting litigation, clarifying when NEPA is triggered by refining the definition of "Major Federal Action," and establishing new judicial review limitations for NEPA-related claims. This includes a 150-day deadline for filing, a revised standard of review, and the "elimination of procedural tactics that delay project development." Supporters of the bill argue that it would restore balance and predictability to the NEPA review process without compromising NEPA's core intent. However, some Democrats, including HNRC Ranking Member Jared Huffman (D-CA), **denounced** the bill as "cutting corners for fossil fuels and corporate polluters."

Meanwhile, on September 17, Reps. Scott Peters (D-CA), Gabe Evans (R-CO), Brian Fitzpatrick (R-PA), and Tom Suozzi (D-NY) led the House Problem Solvers Caucus in **announcing** its endorsement of a **bipartisan permitting reform framework** that calls for cutting the red tape of linear infrastructure projects, reforming duplicative NEPA requirements, setting permitting deadlines, and strengthening domestic supply chains.

On September 18, the House of Representatives also passed two energy-permit-related bills: **H.R. 3062, the Promoting Cross-border Energy Infrastructure Act**, and **H.R. 1047, the GRID Power Act**. The former establishes a new process for approving or revoking permits for the construction and operation of energy infrastructure across an international border of the United States, while the latter requires the Federal Energy Regulatory Commission (FERC) to issue a rule that revises the prioritization and approval process for interconnection requests for dispatchable power projects.

New Opportunities

- **Large-Scale Grid Infrastructure Projects:** On September 18, DOE **announced** the **Speed to Power Initiative**, which aims to accelerate the speed of large-scale grid infrastructure project development for both transmission and generation. To kickstart the initiative, DOE issued a **Request for Information**, asking for input on how to best leverage its funding programs and authorities to rapidly expand energy generation and transmission grid capacity. Responses are due November 21, 2025.
- **Electricity Grid System Fedder and Circuit Designs:** On September 17, DOE's Office of Electricity (OE) **launched** the Feeder of the Future Prize under DOE's **American-Made program**. This is a single-

phase competition in which applicants design advanced distribution system feeders that address current and future energy challenges, including dynamic loads, onsite generation, and distributed devices. The competition consists of three tracks — Rural, Suburban, and Urban — to address the varying characteristics and necessities of power delivery for all US consumers. The Feeder of the Future Prize offers up to \$100,000 total in cash prizes for up to 18 competitors: 10 winners and 8 runners-up. Prize submissions are welcome from all technology innovators, including individuals, small and large businesses, and universities. The deadline to apply is December 4, 2025.

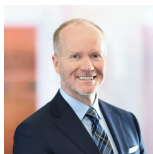
- **Domestic Gallium Production:** On September 15, DOE's Office of Fossil Energy and Carbon Management (FECM) **announced** up to \$6 million in federal funding available for research and development projects to help establish a secure domestic supply chain for gallium — a critical material for the energy, defense, and semiconductor sectors. Under the Technology for Recovery and Advanced Critical-Material Extraction – Gallium (TRACE-Ga) initiative, projects will test and validate prototype technologies with a goal of producing at least 50 kg of pure gallium from at least one 14-day campaign of continuous operation with a real-world metal industry processing stream, such as aluminum or zinc. To participate, technology developers and industrial host sites must apply jointly; technology developers without a planned host site will not be eligible to apply. However, to facilitate connections between technology developers and potential host sites, DOE is facilitating a **teaming partner list** where interested parties may provide their contact information. The TRACE-Ga initiative is managed by ENERGYWERX in partnership with DOE, a collaboration made possible through an innovative **Partnership Intermediary Agreement** set up by the DOE's **Office of Technology Commercialization**.

Authors



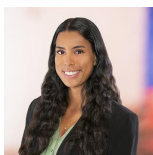
John Lushetsky, Senior Vice President

John Lushetsky draws on over 30 years of experience in government and industry to help clients identify strategic opportunities, secure federal funding, and position innovative technologies for success within evolving energy and infrastructure policy landscapes. He has successfully helped clients navigate complex issues through a variety of federal agencies.



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Neal Martin brings more than two decades of experience in government and federal relations to his work, helping clients navigate a wide range of issues. He provides strategic guidance to organizations seeking to advance their legislative priorities and enhance their visibility before Congress and federal agencies.



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Myria Garcia supports clients in achieving their policy objectives through legislative and regulatory engagement. She utilizes her experience working with congressional offices, government affairs teams, and advocacy organizations to pursue effective engagement strategies and has experience advising clients on federal financing applications.