

ATOMS FOR APPALACHIA:

Building state capacity for nuclear-enabled economic development

By Lauren Hughes



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Cover

A view from the top of Sassafras Mountain on the border of South Carolina.

Source: UNSPLASH/Bradley Allweil

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Table of contents

Introduction1

Surveying the states.....2

Common themes: Enabling economic growth
and affordable electricity8

About the author 13



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Introduction

In 2025, the Atlantic Council's Nuclear Energy Policy Initiative, in partnership with the Breakthrough Energy Foundation, convened a series of private workshops to identify the opportunities and challenges of nuclear energy development in select Appalachian states. The Atoms for Appalachia (A4A) workshops took place in: Lexington, Kentucky; Greenville, South Carolina; Lynchburg, Virginia; and Charleston, West Virginia. This series expands on the 2024 A4A workshops that the Atlantic Council hosted in North Carolina, Pennsylvania, Tennessee, and West Virginia.

The workshops assembled leaders from the federal, state, and local levels to explore the potential for nuclear energy to play an enabling role for economic development, particularly for generating high-quality career opportunities. Attracting the future workforce—recruitment, retention, and retraining of the talent pipeline—featured prominently in the A4A workshop discussions. A4A participants also emphasized that the availability of affordable and reliable electricity is essential to a state's ability to attract private investment from energy-intensive industries such as manufacturers and data center developers.¹

Across the United States and in the Appalachian region, states recognize that they need to significantly increase their capacity to provide cost-competitive and reliable power. In June 2025, while visiting the National Energy Technology Laboratory in Morgantown, West Virginia, Secretary of Energy Chris Wright declared that strengthening the nation's electric grid is equivalent in importance and scale to a "second Manhattan Project" because the US ability to compete globally in artificial intelligence (AI) requires vast amount of electricity.² Electricity demand projections are rising in many Appalachian states, due largely to data centers conglomerating around regional hubs such as Charlotte, North Carolina; Charleston, South Carolina; Ashburn, Virginia; and Atlanta, Georgia. And states such as West Virginia are positioning themselves to attract data center companies by expanding existing capacity of high-voltage transmission lines.³ Even in states that are not currently building data center infrastructure, energy availability, affordability, and grid resiliency are crucial considerations that inform state energy policies.

South Carolina and Virginia have nuclear generation as part of their electricity mix, while Kentucky and West Virginia lifted their bans on nuclear energy in 2017 and 2022, respectively. These states are pursuing different opportunities across the advanced nuclear innovation ecosystem and their nuclear energy policies are at varying stages of development.

¹ In Kentucky and South Carolina, manufacturing accounts for approximately 30 percent of electricity use.

² Chris Schulz, "U.S. Energy Secretary Visits Morgantown, Promotes Domestic Industry," West Virginia Public Broadcasting, June 25, 2025, <https://wvpublic.org/story/energy-environment/u-s-energy-secretary-visits-morgantown-promotes-domestic-industry/>.

³ Ethan Howland, "PJM Board Approves \$6.7B Transmission Expansion Plan," Utility Dive, February 27, 2025, <https://www.utilitydive.com/news/pjm-rtep-transmission-expansion-plan-aep-dominion-firstenergy/741097/>.

Surveying the states

Energy has long been an economic engine harnessed by each of the four states, which have rich legacies of energy production. Kentucky and West Virginia have enabled economic growth far beyond their own borders by exporting coal, while South Carolina and Virginia contribute to the nuclear fuel supply chain and the sustained operation of the existing fleet of light-water reactors (LWRs) within their borders and across the United States. All four are laying a foundation through varying mechanisms to build on these legacies and toward the advancement of nuclear energy.

KENTUCKY

Kentucky primarily utilizes coal-fired power plants and natural gas in its electricity mix, at approximately 68 percent and 16 percent in 2022, respectively.⁴ In the early 1990s, the state employed more coal miners than any other nationwide, and the industry supported more than twenty-nine thousand jobs, a figure that fell precipitously to fewer than four thousand by 2023.⁵ While it does not operate any nuclear reactors, Kentucky is no stranger to uranium enrichment infrastructure. In 1950, the US Atomic Energy Commission selected Paducah as the location for a uranium enrichment plant to bolster US fissile material production during the Cold War.⁶ The Paducah Gaseous Diffusion Plant (PGDP)—first devoted to defense purposes and later to supplying enriched uranium to the commercial nuclear fleet—operated until 2013 and dramatically influenced the local economy, as well as the local population’s receptivity to nuclear energy.

Community leaders from Paducah have worked to designate the area as a “Nuclear-Ready Community” and to fulfill environmental management prerogatives while also looking to the future, when the site could be repurposed for other industrial development.⁷ Paducah has garnered national attention because of its new nuclear projects. In November 2024, Governor Andy Beshear announced a land transfer agreement to Global Laser Enrichment (GLE), which plans (pending licensing approval by the Nuclear Regulatory Commission) to build a commercial uranium enrichment facility for \$1.76 billion on a greenfield site adjacent to the former PGDP.⁸ In August 2025, General Matter announced it would also develop a \$1.5 billion uranium enrichment facility at the former PGDP site; the company “evaluated more than 1,000 potential locations across 11 states before selecting Paducah, citing its strategic infrastructure, skilled workforce, and strong state and local support.”⁹ Paducah is moving from “nuclear ready” toward starting new fuel cycle projects.¹⁰

In parallel, the state legislature established the Kentucky Nuclear Energy Development Authority (KNEDA) in 2024, an action recommended by the Kentucky Office of Energy Policy in its 2023 report.¹¹ KNEDA serves as the nonregulatory state government agency that facilitates “the development of the nuclear energy ecosystem across the Commonwealth in a collaborative manner.”¹² The Authority, administered by the University of Kentucky Center for Applied Energy Research, plays an integral role in advancing nuclear energy policy and supports communities that are interested in a Nuclear-Ready Community designation.¹³ In October 2025, KNEDA launched

4 “Kentucky Energy Profile,” Team Kentucky Energy and Environment Cabinet, 2024, <https://experience.arcgis.com/experience/7fc9a57bdf1f416da11eee439f01446d>.

5 “Employment Outcomes of Separated Coal Workers in Kentucky,” Kentucky Center for Statistics, last visited July 20, 2026, <https://kystats.ky.gov/Blogs/BlogContent/21>.

6 “Paducah Background,” US Department of Energy, last visited July 20, 2026, <https://www.energy.gov/pppo/paducah-background>.

7 “Paducah Community Members, DOE Leaders Set Sights on Clean Energy Future,” US Department of Energy Office of Environmental Management, March 12, 2024, <https://www.energy.gov/em/articles/paducah-community-members-doe-leaders-set-sights-clean-energy-future>.

8 “Gov. Beshear: Global Laser Enrichment Announces Single Largest Investment in Western Kentucky History, \$1.76 Billion Project Creating 240 High-Wage Jobs,” Kentucky Office of the Governor, press release, March 26, 2026, <https://www.kentucky.gov/Pages/Activity-stream.aspx?n=GovernorBeshear&prId=2719>.

9 “General Matter to Construct \$1.5 Billion Uranium Enrichment Facility in Paducah,” City of Paducah, press release, August 5, 2025, <https://paducahky.gov/news/general-matter-construct-15-billion-uranium-enrichment-facility-paducah>.

10 “Nuclear-Ready Community Designation Process,” Kentucky Nuclear Energy Development Authority, October 2025, <https://caer.uky.edu/sites/default/files/2025-10/nuclear-ready-community.pdf>.

11 “Report to the Kentucky Legislative Research Commission Pursuant to 2023RS SJR 79,” Energy and Environment Cabinet, Kentucky Office of Energy Policy, November 17, 2023, https://eec.ky.gov/Energy/Documents/Final%20Report%20SJR79_11.17.23.pdf.

12 “KNEDA,” University of Kentucky Center for Applied Energy Research, last visited July 20, 2026, <https://caer.uky.edu/kneda>.

13 “Nuclear-Ready Community Designation Process.”

a request for proposals (RFP) under the Nuclear Energy Development Grant Program to “drive job creation, regional economic development, workforce training, and sustainability through nuclear energy innovation.”¹⁴ KNEDA recently announced six awardees—including GLE and General Matter—to receive grants that collectively total \$10 million.¹⁵

SOUTH CAROLINA

Nuclear generation constituted 60 percent of South Carolina’s electricity mix as of May 2025, alongside coal-fired, natural gas-fired, and renewable assets.¹⁶ There are seven operating reactors across four nuclear power plants, and the single-unit Robinson Nuclear Plant—the first in the southeast—entered commercial operation in 1971.¹⁷ In addition to its existing fleet, South Carolina participates in the nuclear fuel supply chain, and Westinghouse has operated the Columbia Fuel Fabrication Facility (CFFF) since 1969.¹⁸ Westinghouse recently dispatched lead test assemblies of low-enriched uranium plus (LEU+) fuel from CFFF to the Vogtle plant in Georgia that could—after testing and qualification—increase the length of time that nuclear reactors operate before needing to refuel.¹⁹ South Carolina is home to Savannah River National Laboratory (SRNL), a Department of Energy (DOE) national laboratory whose mission advances national security, environmental stewardship, and energy resilience.²⁰ SRNL is a leader in nuclear fuel cycle technology and was also selected as a DOE finalist to host AI data center and energy infrastructure projects.²¹

The Governor’s Nuclear Advisory Council (GNAC) was established in 2000 and originally run out of the Department of Administration; it is now run out of the Department of Commerce and advises South Carolina’s governor on nuclear activities. Also important to the South Carolina nuclear innovation ecosystem is the Nexus for Advanced Resilient Energy (SC Nexus), a federally designated Tech Hub led by the South Carolina Department of Commerce.²² The SC Nexus is a public-private consortium that focuses on cross-cutting themes—accelerating innovation and high-quality job growth; and enhancing energy generation, distribution, and storage—that align with building a nuclear innovation ecosystem. In June 2025, after Republican Governor Henry McMaster signed the South Carolina Energy Security Act (House Bill 3309), GNAC was relocated within the SC Nexus and its role has expanded “to include a statewide strategic plan for nuclear generation.”²³

VIRGINIA

Virginia currently operates four reactors that accounted for approximately 28 percent of electricity generation in 2024, and natural gas-fired power plants constituted more than 60 percent.²⁴ Even with these local sources of generation, Virginia imports more than one-third of its power and surpassed California in 2023 as the nation’s top electricity importer due to “growing commercial-sector demand, including from data centers.”²⁵ The commonwealth has the largest concentration of data centers in the world and hosts more than 35 percent of the hyperscale data centers that are driving robust electricity demand projections.²⁶

14 “Kentucky Nuclear Energy Development Authority (KNEDA) Request for Proposal (RFP),” University of Kentucky Procurement Services, October 31, 2025, <https://purchasing.uky.edu/sites/default/files/2025-09/uk-2561-26.pdf>.

15 Edward Smith, “Kentucky Nuclear Energy Push Continues with Grant Announcement,” WLKY, March 5, 2026, <https://www.wlky.com/article/kentucky-nuclear-energy-grant-announcement/70629537>.

16 “South Carolina,” US Energy Information Administration, last visited July 20, 2026, <https://www.eia.gov/state/print.php?sid=SC>.

17 “Robinson Nuclear, a Pioneer in Nuclear Energy,” Duke Energy Nuclear Information Center, October 22, 2013, <https://nuclear.duke-energy.com/2013/10/22/robinson-nuclear-a-pioneer-in-nuclear-energy>.

18 “Overview,” South Carolina Department of Environmental Services and Westinghouse, last visited July 20, 2026, <https://des.sc.gov/community/environmental-sites-projects/westinghouse>.

19 “Westinghouse’s LEU+ Fuel Loaded into Vogtle 2,” World Nuclear News, April 15, 2025, <https://www.world-nuclear-news.org/articles/westinghouse--leu-fuel-loaded-in-vogtle-2>.

20 “About SRNL,” Savannah River National Laboratory, last visited July 20, 2026, <https://www.srnl.gov/about-us/>.

21 “DOE Announces Site Selection for AI Data Center and Energy Infrastructure Development on Federal Lands,” US Department of Energy, July 24, 2025, <https://www.energy.gov/articles/doe-announces-site-selection-ai-data-center-and-energy-infrastructure-development-federal>.

22 “SC Nexus Receives Federal Designation as a Regional Technology and Innovation Hub for Advanced Energy,” South Carolina Office of the Governor, October 23, 2023, <https://governor.sc.gov/news/2023-10/sc-nexus-receives-federal-designation-regional-technology-and-innovation-hub-advanced>.

23 “Gov. McMaster Signs Legislation to Secure South Carolina’s Energy Future,” South Carolina Office of the Governor, June 18, 2025, <https://governor.sc.gov/news/2025-06/gov-mcmaster-signs-legislation-secure-south-carolinas-energy-future>.

24 “Overview of Virginia Energy Policy Landscape,” Boundary Stone Partners, last visited July 20, 2026, <https://www.boundarystone.com/insights/overview-of-virginia-energy-policy-landscape>.

25 “Virginia Was the Top Net Electricity Recipient of Any State in 2023,” US Energy Information Administration, December 20, 2024, <https://www.eia.gov/todayinenergy/detail.php?id=64104>.

26 “Data Centers,” Virginia Economic Development Partnership, last visited July 20, 2026, <https://www.vedp.org/industry/data-centers>.



Coal mining has supplied energy and economic activity in the Appalachian region. REUTERS/Charles Mostoller

Virginia has a vibrant nuclear industry that spans from services and fuel for the commercial operating fleet to defense-oriented companies that build naval reactors and submarines for the US Navy. The Virginia Nuclear Energy Authority (formed in 2013) and the Virginia Nuclear Energy Consortium (VNEC)—a corporation created by the Authority that includes industry members—functions to sustain the commonwealth’s role as a global leader in nuclear energy. Additionally, the Virginia Innovative Nuclear Hub (VIN Hub) supports two anchor projects: the VA Center of Nuclear Materials and Reliability project to advance critical materials research for advanced reactors and the Virginia Research and Education Research Facility (VA-RERF) project focused on “the feasibility, design, and implementation strategy” of a research reactor.²⁷

In July 2025, then Republican Governor Glenn Youngkin, who had identified nuclear energy as a strategic priority of his administration, announced state grants to support advanced reactor siting in southwest Virginia.²⁸ Such commitments also underscore the investment in facilities and workforce development programs by private Lynchburg-based companies such as BWX Technologies and Framatome, which have upgraded their campuses and training facilities.²⁹ In November 2025, VNEC released its “Strategic Plan for Nuclear Energy, 2025–2029,” which surveys such successes and outlines strategies for the commonwealth to leverage its capabilities through 2030.³⁰ Democratic Governor Abigail Spanberger, who expressed support for nuclear energy during her 2025 gubernatorial campaign, signed House Bill (HB) 369 in March 2026 to encourage investment in clean energy, including fusion and nuclear.³¹

27 Virginia Department of Energy, “Governor Youngkin Announces \$1.2 Million Investment to Advance Virginia’s Leadership in Nuclear Innovation,” press release, May 13, 2025, <https://www.energy.virginia.gov/public/documents/newsroom/2025/Press%20Release%20-%20VPIP%20VIN%20Hub%20Awards%205.13.25.pdf>.

28 “Virginia Moves Forward on Advanced Nuclear Deployment in Southwest Virginia,” Virginia Department of Energy, press release, July 7, 2025, https://www.energy.virginia.gov/public/documents/newsroom/2025/Virginia%20Move_Press_.pdf.

29 “BWXT Launches Innovation Campus to Speed Development of Advanced Nuclear Technologies,” BWXT, press release, April 2, 2025, <https://www.bwxt.com/bwxt-launches-innovation-campus-to-speed-development-of-advanced-nuclear-technologies/>; Michael Doti, “Lynchburg Nuclear Facility Opens Renovated Training Center,” WFXR Fox, July 27, 2025, <https://www.wfxrtv.com/lynchburg/lynchburg-nuclear-facility-opens-renovated-training-center/>.

30 “Strategic Plan for Nuclear Energy 2025–2029,” Virginia Secretary of Commerce and Trade, November 6, 2025, https://www.commerce.virginia.gov/media/governorviriniagov/secretary-of-commerce-and-trade/va-nuclear/va-nuclear-pdf/11-6-25-2025-2029_Virginia_Strategic_Plan_For_Nuclear_Energy.pdf.

31 “Governor Spanberger Signs Bills to Make Healthcare, Housing, & Energy More Affordable for Virginians,” Office of the Governor of Virginia, press release, March 31, 2026, <https://www.governor.virginia.gov/newsroom/news-releases/2026/march-releases/name-1115166-en.html>.

WEST VIRGINIA

West Virginia relies primarily on coal-fired power plants that contributed more than 83 percent of electricity generation in May 2025, with the remainder generated by renewables and natural gas-fired and petroleum-fired power plants.³² In August 2025, Republican Governor Patrick Morrisey announced his plan to “supercharge West Virginia’s power production” and “increase reliability by prioritizing stable sources of fuel, primarily coal, natural gas, and nuclear” through the “50 by 50” initiative.³³ Morrisey wants to position the state to meet AI energy demands and will push to increase generation capacity from 16 gigawatts (GW) to 50 GW by 2050. The West Virginia legislature echoed this imperative in HB 2014, the Power Generation and Consumption Act, which created a specialized tax structure for data center-related projects. However, a potential new nuclear reactor co-located with an industrial manufacturer (e.g., Nucor) would not be eligible because the bill as enacted only provides the tax incentives for data center projects.

West Virginia does not have an advisory council or working group devoted to nuclear energy but participates in the Advanced Nuclear First Mover Initiative, a multi-state effort launched by the National Association of State Energy Officials to encourage strategic collaboration and information sharing between states and private-sector participants.³⁴ Furthermore, the National Governors Association Center for Best Practices selected West Virginia as a retreat state for a two-day, multistate convening in June 2025.³⁵ The West Virginia Office of Energy (WVOE) is actively engaged in efforts to support Morrisey’s ad-

vocacy for nuclear energy as a baseload generation source in a forthcoming twenty-five-year strategic development plan.³⁶ In late 2025, WVOE solicited feedback on multiple components of the comprehensive energy policy and the twenty-five-year strategic development plans for each energy source, including nuclear.³⁷

During the 2025 legislative session, Delegates Brandon Steele (R-42) and Kayla Young (D-56) introduced HB 2205, which proposed expanding the Public Service Commission’s jurisdiction to include advanced reactors and for the commission “to govern the issuance of permits for the construction of, and the use and retirement of advanced nuclear reactors within the state.”³⁸ The West Virginia Senate did not advance the bill, but the House of Delegates voted 90-5 in favor of it.³⁹ State legislators also proposed nuclear energy legislation that did not advance during the 2026 legislative session. In January 2026, Delegate Clay Riley (R-Harrison) introduced HB 4491 to clarify the Public Service Commission’s authority to “modify siting certificates and certificates of convenience and necessity for advanced small modular and micro nuclear reactors.”⁴⁰ And in February 2026, Senator Glenn Jeffries (R-Putnam) introduced Senate Bill (SB) 1001, the West Virginia Nuclear Lifecycle and Advanced Fuel Cycle Development Act, to authorize and support activities related to state permitting coordination and the nuclear fuel cycle.⁴¹

32 “West Virginia,” US Energy Information Administration, last visited July 20, 2026, <https://www.eia.gov/state/print.php?sid=WV>.

33 “Governor Patrick Morrisey Speaks at the West Virginia Chamber Business Summit,” West Virginia Office of the Governor, press release, August 29, 2025, <https://governor.wv.gov/article/video-governor-patrick-morrisey-speaks-west-virginia-chamber-business-summit>.

34 “Advanced Nuclear First Mover Initiative,” National Association of State Energy Officials, last visited July 20, 2026, <https://www.naseo.org/issues/electricity/firstmover>.

35 “Nuclear Energy In-State Retreats, Technical Assistance, and Action Planning,” National Governors Association, April 2, 2025, <https://www.nga.org/projects/nuclear-energy-in-state-retreats-technical-assistance-and-action-planning/>.

36 “Governor Patrick Morrisey Announces Comprehensive Energy Policy Framework to Make West Virginia Energy Dominant,” West Virginia Office of the Governor, press release, September 10, 2025, <https://governor.wv.gov/article/governor-patrick-morrisey-announces-comprehensive-energy-policy-framework-make-west>.

37 West Virginia Office of Energy, “Public Comment Opportunity: West Virginia Comprehensive Energy Policy,” LinkedIn, December 2025, https://www.linkedin.com/posts/energywv_westvirginia-energy-activity-7404173043838640128-smxp/.

38 “House Bill 2205,” West Virginia Legislature, February 12, 2025, https://www.wvlegislature.gov/Bill_Status/bills_text.cfm?billdoc=hb2205%20intr.htm&yr=2025&sesstype=RS&i=2205.

39 Mike Tony, “WV House Overwhelmingly Passes Bill Expanding PSC Reach to Advanced Nuclear Reactors,” *West Virginia Press*, March 28, 2025, <https://wvpress.org/breaking-news/wv-house-overwhelmingly-passes-bill-expanding-psc-reach-to-advanced-nuclear-reactors/>.

40 “House Bill 4491,” West Virginia Legislature, January 19, 2026, https://www.wvlegislature.gov/Bill_Text_HTML/2026_SESSIONS/RS/bills/hb4491%20intr.pdf.

41 “Senate Bill 1001,” West Virginia Legislature, February 19, 2026, https://www.wvlegislature.gov/Bill_Text_HTML/2026_SESSIONS/RS/bills/sb1001%20intr.pdf.



The control room of the Crane Clean Energy Center, formerly called the Three Mile Island Nuclear Station. REUTERS/Eduardo Munoz

Recent developments in 2024 A4A states

In 2024, the Atlantic Council hosted four A4A workshops in: Asheville, North Carolina; Pittsburgh, Pennsylvania; Knoxville, Tennessee; and Morgantown, West Virginia. The results of these workshop discussions were featured in an earlier report, but there have been several advancements in each state since then. Below are recent updates in nuclear energy development in three of those states—North Carolina, Pennsylvania, and Tennessee. West Virginia is omitted from the list because it is included in this issue brief based on a May 2025 workshop held in Charleston.

NORTH CAROLINA

- In March 2025, the North Carolina Collaboratory submitted a report to the North Carolina General Assembly that highlighted a partnership between North Carolina State University (NC State) and the Electric Power Research Institute to fully utilize

the university's research reactor and identify workforce knowledge gaps.⁴²

- In May 2025, NC State completed a feasibility study, directed by the North Carolina General Assembly, for its planned research and training reactor (RTR).⁴³ NC State estimates that the total capital cost of the advanced RTR would be approximately \$500 million, with completion targeted by the mid-2030s.
- In October 2025, Duke Energy filed its 2025 Carolinas Resource Plan with the North Carolina Utilities Commission.⁴⁴ The plan stated the company would evaluate large LWRs and small modular reactors (SMRs) in its long-range planning.

42 "Next Generation Energy," North Carolina University Collaboratory, last visited July 27, 2026, <https://collaboratory.unc.edu/highlighted-projects/next-generation-energy/>.

43 "NC State Releases Feasibility Study for New Research and Test Reactor," Nuclear Newswire, May 14, 2025, <https://www.ans.org/news/2025-05-14/article-7022/nc-state-releases-feasibility-study-for-new-research-and-test-reactor/>.

44 "Duke Energy Files 2025 Carolinas Resources Plan, Continues Modernizing Energy Infrastructure to Support Future Growth," Duke Energy News Center, October 1, 2025, <https://news.duke-energy.com/releases/duke-energy-files-2025-carolinas-resource-plan-continues-modernizing-energy-infrastructure-to-support-future-growth>.

- In January 2026, Duke Energy submitted an early site permit application to the Nuclear Regulatory Commission for a site near the Belews Creek Steam Station in Stokes County, North Carolina.⁴⁵
- In April 2026, the Department of Energy awarded the Consortium for Reactor Safety Training, led by NC State, \$18.3 million to “develop strategies to involve local communities in discussions about nuclear energy that address concerns and highlight the economic and environmental benefits of nuclear.”⁴⁶

PENNSYLVANIA

- At the Pennsylvania Energy Summit and Expo in July 2025, Westinghouse Electric announced it would begin constructing ten AP1000s by 2030, which are projected to generate \$6 billion in economic value in Pennsylvania.⁴⁷
- In November 2025, the Pennsylvania House Energy Committee voted to advance HB 2017, which would empower the Department of Environmental Protection to lower fees for microreactors and SMRs, defined as less than 100 megawatts electrical (MWe) and 400 MWe, respectively.⁴⁸
- Constellation Energy continues to advance the restart of the Crane Clean Energy Center by 2027, with the electricity generated to power Microsoft’s data centers under a twenty-year power-purchase agreement (PPA).⁴⁹ The US Department of Energy recently granted Constellation a \$1 billion loan to support this effort.⁵⁰

- In July 2026, the Pennsylvania House and Senate passed a bill, HB 2017, which would update the Department of Environmental Protection’s fee structure to account for microreactors and SMRs.⁵¹

TENNESSEE

- In April 2025, Republican Governor Bill Lee announced a grant to BWXT Enrichment Operations through the Nuclear Energy Fund to support the construction of a centrifuge manufacturing facility in Oak Ridge.
- In May 2025, the Tennessee Valley Authority (TVA) submitted a construction permit application to the Nuclear Regulatory Commission for the GE Hitachi BWRX-300 design.⁵²
- In August 2025, Google partnered with Kairos and TVA through a PPA, whereby TVA will procure electricity from Kairos’ Hermes 2 reactor for Google.
- In September 2025, Oklo announced plans to build and operate a fuel recycling facility in Tennessee that could create more than eight hundred high-quality jobs.⁵³
- In March 2026, the Tennessee Senate unanimously passed Senate Joint Resolution 0887, which pledges “full support for Tennessee’s candidacy” as host of a Nuclear Lifecycle Innovation Campus.⁵⁴

45 “New Nuclear Plan for Belews Creek,” *Nuclear Engineering International*, January 6, 2026, <https://www.neimagazine.com/news/duke-files-belews-creek-esp/>.

46 “Office of Nuclear Energy Awards \$49M to Enhance Nuclear Safety Training and Workforce Development,” US Department of Energy Office of Nuclear Energy, April 7, 2026, <https://www.energy.gov/ne/articles/office-nuclear-energy-awards-49m-enhance-nuclear-safety-training-and-workforce>.

47 Rachel Hostyk, “Westinghouse to Build 10 New Nuclear Reactors,” National Association of Manufacturers, July 22, 2025, <https://nam.org/westinghouse-to-build-10-new-nuclear-reactors/>.

48 In general provisions, further providing for definitions; and, in fees, providing for small modular reactor and microreactor fees and further providing for creation of special funds.

49 “Crane Clean Energy Centre on Track for Ahead-of-Schedule Restart,” World Nuclear News, June 26, 2025, <https://www.world-nuclear-news.org/articles/crane-clean-energy-centre-on-line-for-ahead-of-schedule-restart>.

50 “U.S. Government Backs Constellation’s Plan to Launch Crane Clean Energy Center, Adding 835 MWs of New Baseload Power to the Grid,” Constellation Energy, press release, November 18, 2025, <https://www.constellationenergy.com/news/2025/11/us-government-backs-constellations-plan-to-launch-crane-clean-energy-center-adding-835-mws-of-new-baseload-power-to-the-grid.html>.

51 “Giral Bill Encouraging Nuclear Energy Development Passes Pa. House,” Pennsylvania House Democratic Caucus, February 4, 2026, <https://www.pahouse.com/InTheNews/NewsRelease/?id=142173>; “House Bill 2017,” General Assembly of Pennsylvania, as amended by the Senate, June 23, 2026, <https://www.palegis.us/legislation/bills/text/PDF/2025/0/HB2017/PN3686>.

52 “TVA Submits Nation’s First Construction Permit Application for BWRX-300 SMR,” Tennessee Valley Authority, press release, May 20, 2025, <https://www.prnewswire.com/news-releases/tva-submits-nations-first-construction-permit-application-for-bwr-300-smr-302460569.html>.

53 “Oklo Announces Fuel Recycling Facility as First Phase of Up to \$1.68 Billion Advanced Fuel Center in Tennessee,” Oklo, press release, September 9, 2024, <https://www.oklo.com/newsroom/news-details/2025/Oklo-Announces-Fuel-Recycling-Facility-as-First-Phase-of-up-to-1-68-Billion-Advanced-Fuel-Center-in-Tennessee/default.aspx>.

54 “Senate Joint Resolution 887,” General Assembly of Tennessee, March 5, 2026, <https://capitol.tn.gov/Bills/114/Bill/SJR0887.pdf>; Bill History, last visited August 13, 2025, <https://wapp.capitol.tn.gov/apps/BillInfo/Default?BillNumber=SJR0887&ga=>.

Common themes: Enabling economic growth and affordable electricity

States view energy and energy availability as essential to their ability to generate future economic opportunities. To be competitive, states must ensure reliable access to affordable electricity for both industry and citizens. Each of the four states discussed in this paper has developed core competencies and industries alongside a primary generation source as the foundation of their electricity mix: coal in Kentucky and West Virginia, nuclear in South Carolina, and natural gas in Virginia. Regardless of the predominant electricity generation source, each of these four states makes policy decisions to bolster energy security and grid reliability. As electricity prices increase and regional transmission organizations (RTOs) issue warnings of pending capacity shortages, states are exploring advanced nuclear energy as a source of clean, firm power and as an engine for long-term economic growth.⁵⁵

These states are already industrial and manufacturing hubs, many of which are experiencing load growth and facing rising electricity prices. The availability of affordable and ample electricity is top of mind for state policymakers because of the nexus between energy availability and economic growth. States and communities will be attractive to heavy energy users—such as manufacturers or tech companies—if they can reliably provide electricity with baseload generation resources like nuclear energy. This interest has spurred the creation of groups like the Palmetto Nuclear Coalition, a consortium of energy offtakers that strives to coordinate on nuclear energy strategy to “reestablish South Carolina as the national leader

in nuclear energy.”⁵⁶ In response to the perspectives voiced by state policymakers and the increased offtake requests from private companies, utility companies are evaluating future nuclear energy deployments to meet electricity demands.

In South Carolina, members of the Governor’s Nuclear Advisory Council visited Virgil C. Summer (VC Summer) Nuclear Power Station in September 2024 to explore whether its two cancelled Westinghouse AP1000 units could be redeveloped; they concluded that “no obvious conditions preclude undertaking completion.”⁵⁷ Santee Cooper, South Carolina’s largest power provider and the owner of the site, issued an RFP in January 2025 for parties to bid on acquiring the VC Summer site with the two partially completed reactors, which were cancelled in 2017 in response to cost overruns and schedule delays.⁵⁸ In May 2025, Santee Cooper reported a “robust” response to the RFP from more than seventy potential bidders, culminating in the Board of Directors approving a letter of intent with Brookfield Asset Management in late October 2025.⁵⁹ Santee Cooper cited the “need for new generating capacity, driven by rapid growth in data centers” and “the continued onshoring of advanced manufacturing” as factors contributing to the decision to launch the RFP for the VC Summer site.⁶⁰ The two companies signed a memorandum of understanding in December 2025 and Santee Cooper recently announced that Brookfield would make a final investment decision by March 2028.⁶¹

55 “2024 Long-Term Reliability Assessment,” North American Electric Reliability Corporation,” last updated July 11, 2025, https://www.nerc.com/pa/RAPA/ra/Reliability%20Assessments%20DL/NERC_Long%20Term%20Reliability%20Assessment_2024.pdf.

56 “South Carolina’s Future is Nuclear & Bright,” Palmetto Nuclear Coalition, last visited July 20, 2026, <https://www.palmettonuclear.org/>.

57 Rick Lee and Jim Little, “Virgil C. Summer Nuclear Plant Evaluation of the Site Conditions of the Cancelled Units,” South Carolina’s Governor’s Nuclear Advisory Council, September 16, 2024, <https://www.sccommerce.com/sites/default/files/2025-08/VCSTrip.pdf>.

58 “Santee Cooper Seeking Proposals to Acquire and Finish V.C. Summer Nuclear Station Expansion,” Santee Cooper, press release, January 22, 2025, <https://newsroom.santeecooper.com/news/santee-cooper-seeking-proposals-to-acquire-and-finish-v-c-summer-nuclear-station-expansion/>.

59 “Santee Cooper Selects Brookfield Asset Management to Proceed with Nuclear Project,” Santee Cooper, press release, October 24, 2025, <https://www.santeecooper.com/global-news/2025/102425-Santee-Cooper-Selects-Brookfield-Asset-Management-to-Proceed-with-Nuclear-Project.aspx>.

60 “Santee Cooper Seeking Proposals to Acquire and Finish V.C. Summer Nuclear Station Expansion.”

61 Jessica Holdman, “Decision on Potential \$2.7B Sale of SC Nuclear Reactors Could Be 2 Years Away,” *South Carolina Daily Gazette*, July 7, 2026, <https://scdailygazette.com/2026/07/07/decision-on-potential-2-7b-sale-of-sc-nuclear-reactors-could-be-2-years-away/>.



The unfinished Unit 2 reactor containment structure at the Virgil C. Summer Nuclear Plant. Source: South Caroling Nuclear Advisory Council

In Virginia, American Electric Power (AEP) and Dominion Energy are considering advanced reactors and have engaged in the early phases of new nuclear project development through feasibility studies and an RFP process, respectively. AEP—a utility that operates the Cook Nuclear Plant in Michigan and whose service area spans parts of eleven states—submitted an application to the DOE Generation III+ Small Modular Reactor Program in January 2025 for support of the early site permit (ESP) process to assess potential sites at its Rockport Plant in Indiana and at Joshua Creek in Campbell County, Virginia.⁶² In July 2024, Dominion Energy issued an RFP to advanced reactor developers regarding a potential new nuclear project at North Anna Power Station, a two-unit plant close to Richmond, Virginia (another center of gravity for data center development).⁶³ In October 2024, Amazon Web Services announced a

\$500 million agreement with Dominion Energy to explore new nuclear projects at or near the North Anna site.⁶⁴ Furthermore, in an effort to de-risk nuclear projects and provide utilities the ability to recover some development costs for new reactors, the Virginia General Assembly passed bills (HB 1491; SB 454) that permit AEP and Dominion Energy Virginia to petition the State Corporation Commission for rate adjustments to recover costs for “up to one small modular reactor facility.”⁶⁵

Beyond facilitating further industrial and data center activity within these states, new nuclear generation could potentially be deployed at brownfield sites or to repower former coal-fired power plants—a value proposition relevant to states such as Kentucky and West Virginia. Some of these sites could have been incorporated into state proposals to host Nuclear

62 “AEP Seeking Grants To Assist With Advanced Nuclear Site Exploration in Virginia,” Appalachian Power, January 17, 2025, <https://www.appalachianpower.com/company/news/view?releaseID=9977>.

63 “Nuclear Energy,” Dominion Energy, last visited July 20, 2026, <https://www.dominionenergy.com/about/making-energy/nuclear-facilities/nuclear-energy>.

64 Diana Olick, “Amazon Goes Nuclear, Plans to Invest More than \$500 Million to Develop Small Modular Reactors,” NBC News, October 16, 2024, <https://www.nbcnews.com/business/energy/amazon-goes-nuclear-plans-invest-500-million-develop-small-modular-reactors-rcna175673>.

65 “Virginia Senate Bill 454,” Virginia State Legislature, April 17, 2024, <https://legiscan.com/VA/bill/SB454/2024>.

Lifecycle Innovation Campuses, a request for information (RFI) that DOE issued in January 2026.⁶⁶ States had until April 1 to respond, and the DOE outlined a vision for campuses that “fully integrate, and to the extent possible, co-locate the entire nuclear value chain,” with sites that could also support other functions such as advanced manufacturing or co-located data centers.⁶⁷ Long interconnection queues for proposed generation projects make brownfield sites—many of which already have established transmission infrastructure (as well as switchyards and roads)—attractive for potential redevelopment and the siting of new nuclear projects.

A PERSISTENT CHALLENGE: THE FUTURE WORKFORCE

States will only be successful if they are able to foster a gainfully employed workforce. Participants in each of the A4A workshops frequently referenced workforce development and expressed an interest in ensuring that nuclear-related economic opportunities are accessible to citizens within their states and in the broader region. Paducah, in western Kentucky, is ascendant and in the national spotlight, but organizations such as Shaping Our Appalachian Region (SOAR) are working to bring high-quality job opportunities in the nuclear sector to the eastern part of the state. Having partnered with the Kentucky Office of Energy Policy, the Appalachian Regional Commission, and DOE, SOAR is creating opportunities for nuclear energy to serve as a path toward economic revitalization for eastern Kentuckians and has recently co-hosted hiring events with Framatome.⁶⁸ These career options might not require four-year degrees and could be transformative for the region, which has been searching for economic opportunities since its last union coal mine closed in 2015.

Similarly, universities are developing targeted programs for the existing skilled trades workforce that could enable their participation in the nuclear industry. At Roane State Community College in Tennessee, Joe Stainback IV is spearheading a two-year program and an abbreviated certificate program for

students interested in entering nuclear-related fields.⁶⁹ The effort includes outreach to welders, many of whom might not be familiar with nuclear terminology and might require additional training to meet industry quality assurance standards. Other communities, states, and companies face mounting and imminent labor needs; in 2015, the SRS Community Reuse Organization projected that the area surrounding Aiken, South Carolina, and the Savannah River Site would have more than thirty-seven thousand job openings.⁷⁰ There are long lead times to cultivate talent for technical and specialty positions, such as the hundreds of workers who would need to be recruited for Westinghouse’s CFFF LEU+ expansion. However, the need to rapidly expand the nuclear workforce cannot occur at the expense of operational safety and quality assurance.

POLICY RECOMMENDATIONS TO ADVANCE COLLECTIVE ECONOMIC OPPORTUNITY

While several A4A participants expressed concern that first-of-a-kind projects might unduly burden ratepayers, states nonetheless view nuclear energy as an economic engine and driver of job creation. As such, they are creating momentum for advanced nuclear energy deployments and collaborating on a sustained basis through forums for interstate exchanges such as the Advanced Nuclear First Movers Initiative.⁷¹ Sustained collaboration will support states in balancing the imperatives of maximizing nuclear-related opportunities with efficiently utilizing valuable and finite resources (such as time, money, and human resources).

The Appalachian region is already supporting other states and reactor developers by sustaining the existing fleet and advancing new nuclear projects. In Kentucky, SOAR members participate in outage maintenance for nuclear power plants across the country. At the CFFF in South Carolina, Westinghouse produces reactor fuel that then provides about 10 percent of the electricity produced in the United States.⁷² In Virginia, BWX Technologies (BWXT) has partnered with Wyoming-based companies to advance manufacturing processes and explore the

66 “Department of Energy Seeks Hosts for Nuclear Lifecycle Innovation Campuses,” US Department of Energy, January 28, 2026, <https://www.energy.gov/articles/departments-energy-seeks-hosts-nuclear-lifecycle-innovation-campuses>.

67 “Request for Information on Establishment of Nuclear Lifecycle Innovation Campuses,” US Department of Energy, January 28, 2026, <https://sam.gov/workspace/contract/opp/4e30976204964df3b556ff7149dae444/view>.

68 Anthony Sizemore and Buddy Forbes, “SOAR Teams Up with Global Energy Company for Job Hiring Event,” WYMT, October 15, 2025, <https://www.wymt.com/2025/10/15/soar-teams-up-with-global-energy-company-job-hiring-event/>.

69 “Paving Paths for a New Nuclear Workforce,” Oak Ridge National Laboratory, December 17, 2024, <https://www.ornl.gov/blog/paving-paths-new-nuclear-workforce>.

70 “Regional Workforce Study: Prepared for the SRS Community Reuse Organization,” TIP Strategies, April 2015, <https://developcolumbiacounty.com/wp-content/uploads/2017/05/2015-04-16-SRS-Executive-Summary-for-web.pdf>.

71 “Advanced Nuclear First Mover Initiative.”

72 “About Westinghouse in South Carolina,” Westinghouse, January 2025, https://westinghousenuclear.com/media/e2pg5f1/faqs_cfff.pdf.



Source: Unsplash/Aaron Burden

siting of a BWXT reactor.⁷³ In West Virginia, Amsted Graphite Materials—a company more than one hundred years old and a major US producer of high-quality graphite for nuclear applications—is providing Radiant and X-energy with nuclear-grade graphite. Each of these states is leveraging its legacy of innovation and energy leadership to ensure nuclear energy plays a role in the nation’s future.

States are building the institutions, policies, workforces, and industrial ecosystems needed to capture the growth created by new nuclear projects. To enhance existing initiatives, states and stakeholders could consider the following policy recommendations when charting a path ahead in advanced nuclear energy.

- **Strengthening the workforce pipeline.** State policymakers could share lessons learned as nuclear workforce plans are developed, allowing for potential interstate collabora-

tion when evaluating technical and non-technical talent pipelines. Interfacing early and often with academia and industry could be useful to fine-tune projections of workforce needs and assess progress toward medium- and long-term career opportunities. The Oak Ridge Associated Universities (ORAU) Partnership for Nuclear Energy is an example of such a consortium that could be engaged to inform nuclear workforce training programs.⁷⁴ States can leverage capacity building resources such as the ORAU’s Nuclear Energy Academic Roadmap.⁷⁵

- **Designating a nuclear energy liaison.** States with robust interest in nuclear energy could create a liaison or concierge role to walk businesses through their local processes, both to solicit out-of-state opportunities and support in-state businesses that wish to play a role in the nuclear supply chain. This role could also serve as an intergovernmental

73 Renée Jean, “Virginia Company Scouting Wyoming For Spot To Build Uranium Fuel Plant,” *Cowboy State Daily*, February 19, 2025, <https://cowboystatedaily.com/2025/02/19/virginia-company-scouting-wyoming-for-spot-to-build-uranium-fuel-plant/>.

74 “Academic Stakeholders Gather for Partnership for Nuclear Energy Meeting,” Oak Ridge Associated Universities, July 23, 2025, <https://www.ornl.gov/news/releases/2025/academic-stakeholders-gather-for-partnership-for-nuclear-energy-meeting.html>.

75 Sue Magidson, et al., “Nuclear Energy Academic Roadmap Guiding Your Nuclear Educational Journey,” Oak Ridge Associated Universities, 2025, <https://www.ornl.gov/nuclear-energy-academic-roadmap/files/near-document.pdf>.

liaison to interact with others who work in areas important to strategic collaboration, such as the state, RTOs, and the federal government. Through HB 2002, West Virginia has created a “data economy liaison” for facilitating data center development; other states could adapt this model for nuclear energy opportunities.⁷⁶ The liaison would help inform permitting and site development processes for new nuclear projects. Finding appropriate sites will depend on the land available, a community’s receptivity to a proposed project, and the parameters of a reactor developer’s design.

- **Spurring economic activity.** When able, states could employ grants—either through distinct awards or an RFP process—to stimulate economic growth opportunities in nuclear energy and incentivize policy priorities like workforce development. In Virginia, for example, Youngkin announced \$2.4 million in funding for the VIN Hub to support nuclear energy supply chain and workforce development.⁷⁷ The Tennessee Nuclear Fund is another example of how state resources can be deployed to stimulate private investment that generates local economic opportunities.⁷⁸ Furthermore, states could leverage other states’ economic development agencies to supplement such grants, such as KNEDA’s enabling of up to \$27 million in tax incentives for GLE through a performance-based agreement and the Kentucky Enterprise Initiative Act.⁷⁹

- **Expanding nuclear energy readiness.** State energy regulatory bodies (such as public utility commissions)—as well as government agencies that are not often engaged in energy policy or nuclear energy development—could provide opportunities for working-level staff to become nuclear conversant or nuclear ready. Bureaucratic and regulatory staff also need upskilling and support, particularly in states that have not hosted nuclear generation or fuel cycle infrastructure before. Rather than reinvent the wheel, interested stakeholders can reference helpful guidance that synthesizes key takeaways from multistate efforts such as the

National Association of State Energy Officials (NASEO)—National Association of Regulatory Utility Commissioners (NARUC) strategic framework for state energy offices and public utility commissions.⁸⁰

- **Involving the public.** Residents could engage with state policymakers to inform how regulatory processes and projects evolve. For example, Kentuckians could engage with the Kentucky Public Service Commission, which opened its first nuclear-related docket (2025-00186) and has assembled “all regulated electric generating utilities as well as all other interested parties to identify and discuss pertinent issues involving the construction, operation, and funding of potential nuclear electric generating facilities.”⁸¹

The Appalachian region is positioned to seize on the spectrum of opportunities emergent across the nuclear innovation ecosystem, from building reactors to participating in the supply chain. Communities and industries can tailor their participation in the nuclear supply chain toward their manufacturing strengths and to their respective levels of interest. Moreover, states can leverage legacies of energy leadership to lead in nuclear energy technologies and power the next chapter of their bright economic futures. Nuclear energy can serve as an economic engine whereby states can harness the atom to catalyze pathways to prosperity.

76 Jeff Jenkins, “Morrisey Signs Microgrids Bill into Law,” MetroNews, May 1, 2025, <https://wvmetronews.com/2025/05/01/morrisey-signs-microgrids-bill-into-law/>.

77 “Virginia Energy Announces \$2.4 Million Investment in Nuclear Energy Supply Chain and Workforce Development,” Virginia Department of Energy, press release, November 20, 2025, [https://www.energy.virginia.gov/public/documents/newsroom/2025/Virginia%20Energy%20Announces%20\\$2.4%20Million%20Investment%20in%20Nuclear%20Energy%20Supply%20Chain%20and%20Workforce%20Development.pdf](https://www.energy.virginia.gov/public/documents/newsroom/2025/Virginia%20Energy%20Announces%20$2.4%20Million%20Investment%20in%20Nuclear%20Energy%20Supply%20Chain%20and%20Workforce%20Development.pdf).

78 “Nuclear Fund Project Database,” Tennessee Department of Economic and Community Development, last visited July 24, 2026, <https://www.tn.gov/ecd/resources/openecd/nuclear-fund-project-database0.html>.

79 Ellis, “Gov. Beshear: Global Laser Enrichment Announces Single Largest Investment in Western Kentucky History, \$1.76 Billion Project Creating 240 High-Wage Jobs.”

80 Paul Ciampoli, “Report Aims to Assist State Commissions, Energy Offices Prepare for New Nuclear Projects,” American Public Power Association, July 8, 2025, <https://www.publicpower.org/periodical/article/report-aims-assist-state-commissions-energy-offices-prepare-new-nuclear-projects>; “New Report Supports States’ Development of Advanced Nuclear Strategic Frameworks,” National Association of State Energy Officials, press release, June 30, 2025, <https://pubs.naruc.org/pub/98408B60-F7B0-242B-B3F1-05BE014BA12C>.

81 “Public Service Commission Opens Case to Explore Development of Nuclear Energy in Kentucky,” *Northern Kentucky Tribune*, June 17, 2025, <https://nkytribune.com/2025/06/public-service-commission-opens-case-to-explore-development-of-nuclear-energy-in-kentucky/>.

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