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Nuclear to the Rescue

November 10, 2026

When you read about alternative energy sources, or clean energy, or new sources of electricity in the U.S., the focus is generally on solar energy, and sometimes windmills.

But did you know that roughly 20% of all U.S. electricity now comes from nuclear power plants? Nuclear power is, in fact, the largest source of carbon-free energy in the U.S.—10% higher than wind and solar *combined*. And what might be even more surprising: the U.S. generates more nuclear-powered electricity than any other country in the world.

The U.S. currently houses 94 operational reactors, which have helped cushion the recent spike in oil prices. There is hope that more facilities will make it possible for the creaky electrical grid to feed the growing number of giant data centers going up around the country.

Data centers accounted for roughly 50% of total electricity demand growth in the U.S. last year. That's why Google, Meta, Amazon and Microsoft have all signed nuclear deals this year, basically creating their own private power companies. Microsoft is refurbishing the former Three Mile Island Unit 1 reactor (recently, perhaps amusingly, renamed 'The Crane Clean Energy Center') to provide an exclusive electrical feed to its AI-related facilities.

More facilities are on the way. Last June, the U.S. and Canada announced plans to build 10 new nuclear reactors, in part directly financed by various AI companies. Amazon has put $700 million into a company called X-energy, which is tasked with building a dozen small nuclear reactors that are designed to be faster to build and cheaper than traditional plants.

Meanwhile, the U.S. Department of Energy has pledged up to $17.5 billion in construction loans for new nuclear power centers. And the 2022 Inflation Reduction Act offers new incentives in the form of a tax credit of 1.5 cents per kilowatt hour for nuclear electrical generation placed into service through 2032.

Skeptics have pointed out that it takes up to ten years from the start of construction to when new reactors actually begin to generate power that the grid needs immediately. But the Three Mile Island (or Crane Clean Energy Center) will be online next year, and some of the other data center-funded projects are also restarts of shuttered facilities. As of September, the Nuclear Regulatory Commission has approved 24 different restarts, and three more are under review. Opening a closed plant requires replacing the steam generators and upgrading instrument and control systems, while checking pumps and valves for operability. This is faster and less expensive than building a power plant from scratch.

It's a bit startling to see power plants owned by and serving individual companies, and perhaps a bit strange for longtime opponents of nuclear power (generally on safety and fissile material storage grounds), to see how nuclear has suddenly gone mainstream. The next question: with the renewed, voracious demand for electricity coming from this new AI customer base, how long will it be before AI agents help us figure out how to accelerate the development of fusion power?

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