

# The Rundown

By: CLEARPATH  
ACTION



Join us on social below!



---

## ClearPath Action Rundown February 6th, 2026

**Happy Friday!**

Congratulations to Greg Beard on his **appointment** to Director of DOE's Office of Energy Dominance Financing!

*The Rundown will be back at the top of your inbox on February 20th.*

---

## 1. Put American Jobs First and Take U.S. Energy Global



If America does not lead the future of energy technologies, China will. ClearPath CEO [Jeremy Harrell](#) outlines how Congress can modernize the Export-Import Bank (EXIM) to better support American workers and energy leadership abroad in a recent [National Interest](#) op-ed.

### Key takeaways:

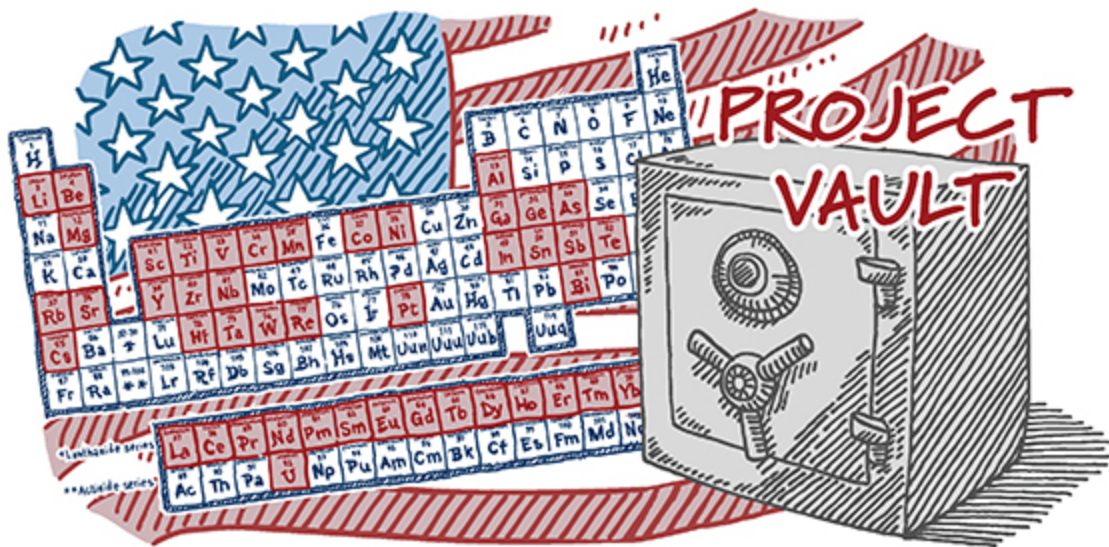
- China has financed \$446 billion in global energy infrastructure since 2015, nearly 10 times U.S.-backed investment;
- Congress recently expanded the Development Finance Corporation's lending capacity from \$60 billion to \$205 billion for strategic energy and critical minerals projects;
- Every \$1 billion in EXIM financing supports roughly 4,100 American jobs; and
- EXIM reauthorization can strengthen domestic manufacturing, secure supply chains and support industries of the future.

**What's clear:** Modernizing EXIM will level the playing field and give U.S. companies the tools to compete and win abroad. Competing with state-subsidized rivals requires strategic export finance that backs American innovation, manufacturing and energy leadership.

**Plug in:** Read ClearPath's report [Energy Financing Power: America vs. China](#), which outlines reforms to strengthen EXIM's toolkit.

---

## 2. Project Vault: U.S. announces critical minerals stockpile



President Trump announced a \$12 billion plan to reduce the U.S. reliance on China's control of the critical minerals supply chain. [Project Vault](#) will stockpile 60 days' worth of minerals for emergencies, funded by a \$2 billion private sector investment and a \$10 billion EXIM Bank loan.

### What to know:

- China controls 70% of the critical minerals refining market; and
- Project Vault reduces dependence on foreign-controlled supply chains and strengthens America's industrial base.

**What's clear:** At the Critical Minerals Ministerial, [\*\*Vice President JD Vance\*\*](#) emphasized, "With these moves, we intend to build an ironclad network of new industrial supply chains to span the entire nation."

**Plug in:** Read Jeremy Harrell's recent [\*\*op-ed\*\*](#) in RealClear Energy on why the U.S. must secure critical minerals for defense, manufacturing, clean energy and advanced tech.

---

### 3. Farm waste increasing American crop yields



American investment in agricultural R&D has declined by one-third over the past 20 years, while China now spends twice as much as the U.S. ClearPath's [\*\*Tech 101\*\*](#) outlines how biochar can support farmers, increase American crop yields and remove carbon emissions.

#### **Why biochar matters:**

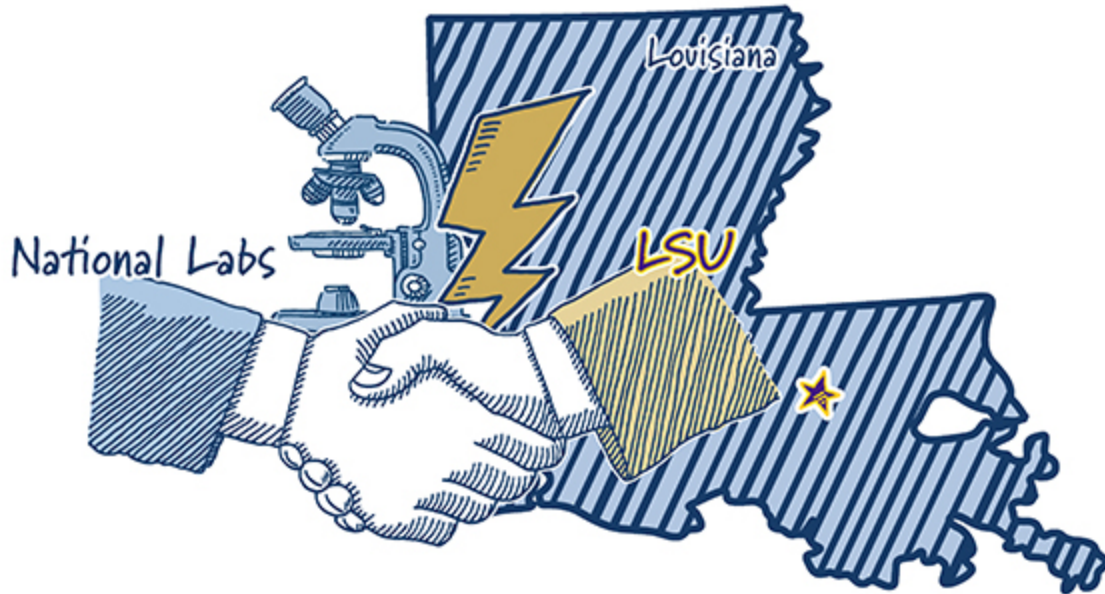
- Biochar helps boost crop yields by 16%, which is why the market is expected to exceed \$2 billion by 2032;
- It removes 2.68 tons of carbon dioxide for every ton produced while improving soil water and nutrient retention; and
- U.S. companies are developing regionally tailored innovation, including mobile systems that produce biochar directly in fields.

**What's clear:** If America wants to lead the world in agricultural production, it's important to stay ahead with innovation. Biochar strengthens soil health, cuts emissions and creates new markets, but scaling it will require federal coordination and targeted investment towards R&D through policies like the [\*\*Biochar Research\*\*](#)

**Network Act**, which creates a national biochar research network to understand how biochar can be utilized across different environments.

---

## 4. Tigers geaux for deal with DOE labs



American energy dominance requires bridging the gap between fundamental research and deployment-ready innovation. This week, Louisiana State University (LSU) signed **research agreements** with the U.S. Department of Energy Office of Science laboratories, Argonne and Oak Ridge, to accelerate American innovation in advanced nuclear, critical materials and grid-enhancing technologies.

### What to know:

- LSU will serve as a bridge between national lab innovation, Gulf Coast energy and chemical industries;
- The agreements focus on nuclear energy, chemical manufacturing, materials supply chains and deployable energy technologies; and
- It establishes exchange programs to accelerate technology transfer and workforce development.

**What's clear:** Winning the global energy competition requires connecting critical research facilities to deployment challenges. Stronger partnerships between universities and national labs help secure supply chains, deploy advanced nuclear and reinforce U.S. energy leadership.

---

## 5. Type One Energy moving on fusion plant



The fusion industry is taking another step to move from the laboratory to the grid. Type One Energy filed its **initial licensing application** to build a fusion power plant at Tennessee Valley Authority's (TVA) retired Bull Run coal site, as part of Project Infinity, marking one of the first formal steps toward commercial-scale fusion deployment in the U.S.

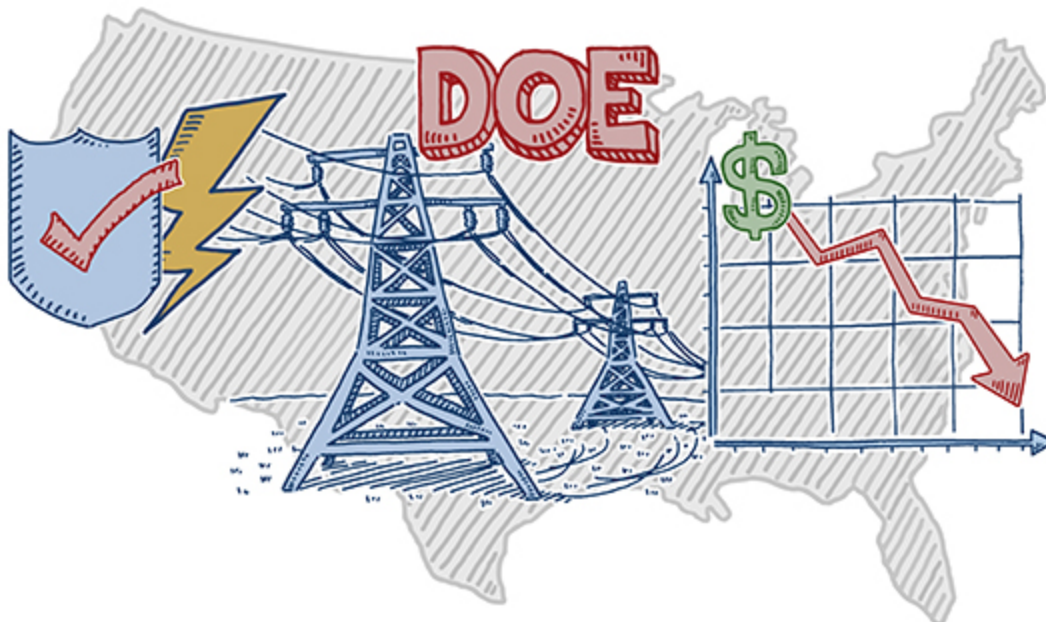
#### The details:

- Project Infinity includes a prototype targeted for 2029 and a proposed 350 MWe baseload fusion plant;
- TVA issued a Letter of Intent supporting development, signaling early utility demand and support for this new technology; and
- Tennessee created a state regulatory framework for fusion and positioned the retired coal site for advanced energy redevelopment.

**Plug in:** Learn how DOE's fusion roadmap, new federal coordination and supply chain investment are moving fusion from research to reality in **The U.S. Fusion Imperative**.

---

## 6. Growing the grid to meet demand



America needs a smarter, more robust grid to bring new power online and meet surging demand from data centers and manufacturing. Through its **Transmission Acceleration Grants** (TAG) program, DOE is helping states modernize transmission and deploy innovative solutions faster. DOE announced a TAG investment of \$2.5 million to Johns Hopkins University and the Pennsylvania Public Utility Commission.

**Why it matters:**

- New grid technologies can be deployed quickly and at lower cost than new infrastructure;
- These projects with Johns Hopkins University and the Pennsylvania Public Utility Commission will evaluate opportunities to deploy innovative grid technologies; and
- These frameworks can guide other states and planning entities in identifying and deploying innovative grid technologies.

**What's clear:** Targeted federal support can help states optimize existing infrastructure and accelerate the interconnection of new power plants and data centers.

**Watch:** ClearPath's **Let American Energy Move: Modernizing America's Grid for Growing Demand** outlines steps to accelerate transmission buildout, improve reliability and lower costs.

---

## 7. States double down on nuclear



Momentum behind nuclear energy is accelerating across the country. In 2025, **45 states engaged in nuclear policymaking**, introducing more than 350 bills and enacting over 60 measures.

**What's moving:**

- 11 governors highlighted nuclear in their State of the State addresses.
- States put up funds to support existing reactors and accelerate advanced nuclear deployment, including:
  - **Texas** authorizing \$350 million for nuclear projects; and
  - **Virginia** approving up to \$122 million for SMR development.
- States are removing barriers, expanding their clean energy definitions and launching feasibility studies for advanced reactor deployment.

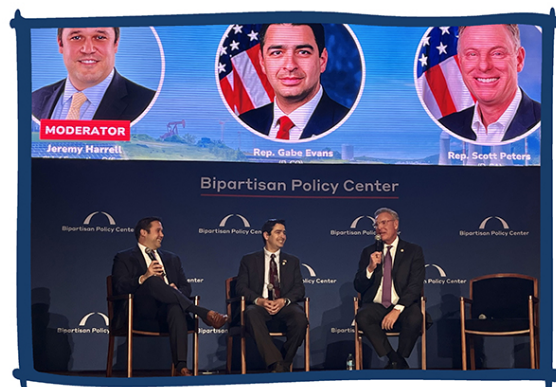
**Plug in:** Read ClearPath's [Accelerating Nuclear Energy Through Interstate Collaboration](#) on how states can coordinate to accelerate advanced nuclear deployment.

## 8. The Circuit



[Jeremy Harrell](#) delivered a lecture and participated in a fireside chat at the Harvard Energy Seminar on the current status and future solutions of American energy.

Plus... Harrell moderated the Principles and Compromise: Finding Bipartisan Agreement panel at BPC's Permitting Summit with Reps. Evans (R-CO) and Peters (D-CA).



## 9. ICYMI

- The House Science, Space, and Technology Committee passed the [NASA Reauthorization Act of 2026](#). The legislation included an amendment championed by Rep. Pat Harrigan (R-NC) to develop a science-based strategy for leveraging NASA's existing methane monitoring capabilities in a way that strengthens and preserves U.S. energy leadership in LNG exports.

- The [State Department](#) convened the Critical Minerals Ministerial, hosting representatives from 54 countries and the European Commission. The U.S. signed 11 bilateral critical minerals frameworks or MOUs with countries to secure mineral supply chains. Secretary Rubio also launched the Forum on Resource Geostrategic Engagement (FORGE) to collaborate with partners on critical minerals projects.
- JPMorgan Chase published a [blog](#) outlining how meeting demand requires harnessing all of America's energy advantages.
- The House passed the [Critical Mineral Dominance Act \(H.R.4090\)](#), led by Rep. Stauber (R-MN), to streamline regulations for mining project approvals and codify elements of President Trump's critical minerals [executive orders](#).
- Siemens Energy announced a [\\$1 billion investment to expand U.S. grid and gas turbine manufacturing](#), creating more than 1,500 jobs across NC, AL, NY, TX, FL and MS.
- The Western Governors' Association sent a [letter](#) to the Senate EPW Committee calling for streamlined permitting processes.
- Seattle-based fusion startup Avalanche Energy [raised \\$29 million to advance its compact modular fusion technology](#) and scale FusionWERX, the first commercial fusion test facility in Richland, Washington.
- The United Coalition for Advanced Nuclear Power [released](#) recommendations for the Department of War to build on the President's Executive Orders to accelerate the deployment of nuclear reactors for national security.



*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!

- Did someone forward this to you? [Sign up here](#).
- Miss a week? Catch up on our [Rundown archive](#).
- Follow us on Twitter: [@ClearPathAction](#) / [@jharrell](#)