The Rundown

By: CLEARPATH ACTION

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ClearPath Action Rundown
August 28th, 2026

Happy Friday!

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1. Major DOE investments in critical mineral supply chain technologies

Keeping critical mineral supply chains onshore is crucial to reducing America's reliance on China and strengthening American innovation. To support this, DOE **announced $500 million for seven projects** to expand U.S. critical mineral processing, battery manufacturing and recycling and **$162 million for nine projects** to recover critical materials from domestic industrial feedstocks.

What to know:

- **Lilac Solutions**, **Jervois Global** and **Nth Cycle** each received $100 million for domestic lithium, cobalt and battery recycling demonstration projects.
- Four additional projects received $50 million each for advanced battery materials and manufacturing as a part of the larger $500 million announcement.
- Nine additional projects will advance technologies to recover scandium, copper, antimony, rare earth elements and other valuable materials from industrial feedstocks, moving technologies from bench and pilot scale toward commercial readiness.

What's clear: America has the resources and technical edge to build a stronger critical minerals supply chain at home. Continued innovation in mining, processing and recycling can help unlock more domestic supply and reduce reliance on China.

Plug in: Check out ClearPath's new video, "**Could Enhanced Mineral Recovery Solve America's Critical Minerals Bottleneck?**" for an explanation of why stronger domestic critical minerals supply chains are essential for energy security.

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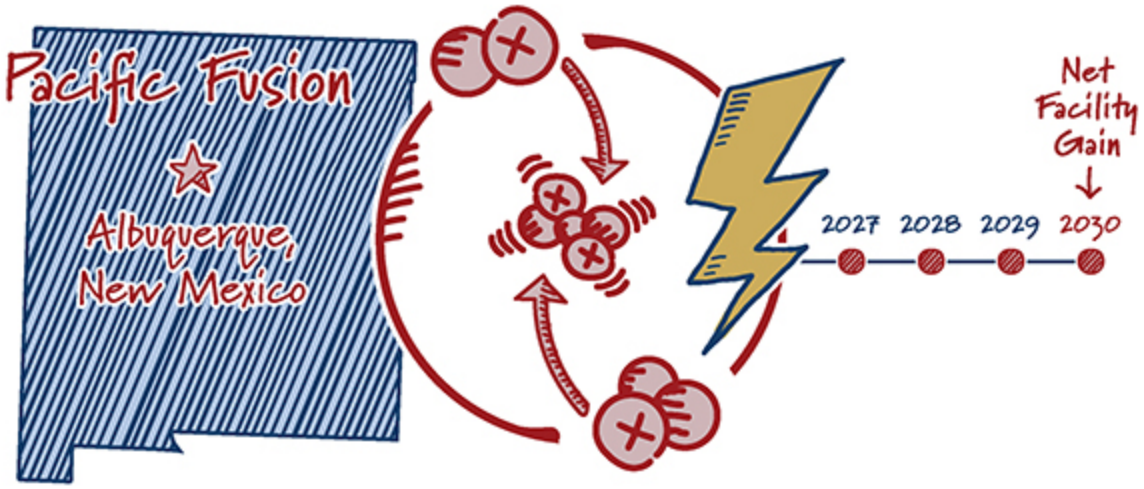
2. Pacific Fusion breaks ground on first-of-its-kind net-gain fusion demonstration facility



Private capital is driving fusion's next milestone. Three-year-old startup **Pacific Fusion** broke ground Tuesday on a demonstration reactor aiming to become the first fusion plant that produces more energy than it consumes, targeting net facility gain by 2030.

What to know about Pacific Fusion:

- Scales up Sandia National Laboratories' pulsed magnetic fusion approach with two to three times more electric current, built from mass-manufacturable modules that ship, assemble and swap for repairs to cut costs versus custom lab equipment;
- Delivered 440 gigawatts of peak power from a scaled-down prototype module, with a full-scale module targeting over a terawatt; and

- Raised $900 million in a **2024 investment round** led by General Catalyst, with two of three milestone-based tranches already unlocked ahead of schedule, and signed a non-binding agreement with the National Nuclear Security Administration to explore stockpile stewardship research.

What's clear: Private industry is now driving fusion's engineering, mass-manufacturing modules and using milestone-based investment to scale what decades of federal research made possible. Markets, not mandates, are keeping the technology in American hands ahead of global competitors.

Plug in: Read ClearPath's "**From Vision to Reality: The U.S. Fusion Imperative**" for why private capital and next-generation designs like Pacific Fusion's are key to winning the global race to commercial fusion.

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3. Record wildfire season renews case for forest and grid innovation

America's wildfire toolkit runs on innovation. Washington and Oregon are already having **their worst wildfire season on record**, and the traditional **fire season still has months to go**. Congress is advancing the bipartisan **Wildfire Emissions Prevention Act of 2026** (WEPA), pairing active forest management with common-sense amendments to the Clean Air Act to cut ignition risk.

The toolkit ClearPath Action backs:

- Clears the way for prescribed burns by exempting them from **Clean Air Act monitoring penalties** under WEPA;
- Deploys grid technologies like power flow controllers and advanced conductors that **cut ignition risk** without raising costs for electric customers; and
- Expands wood product markets that make forest thinning economically viable for American foresters.

What's clear: Cutting wildfire risk does not require new mandates. It requires clearing the regulatory hurdles that keep American foresters and utilities from deploying the tools they already have.

Plug in: Read ClearPath's **breakdown of forest management and grid technologies** that prevent wildfires.

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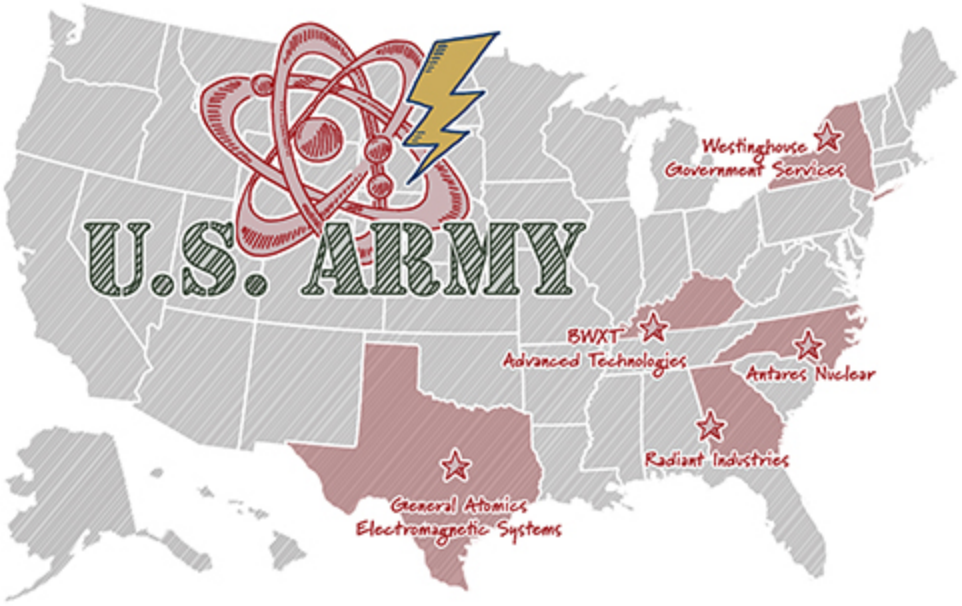
4. Army reaches agreement with private industry for nuclear microreactors



Nuclear power is coming to more U.S. military bases. The Department of the Army selected five vendors to build microreactors at five installations under the **Janus Program**, backed by up to $2.2 billion in milestone-based funding through 2031.

The pairings:

- Fort Bragg - Antares Nuclear
- Fort Campbell - BWXT Advanced Technologies
- Fort Hood - General Atomics Electromagnetic Systems
- Fort Benning - Radiant Industries
- Fort Drum - Westinghouse Government Services

What's clear: Energy security is national security, and Janus is putting on-site nuclear power at the center of military readiness.

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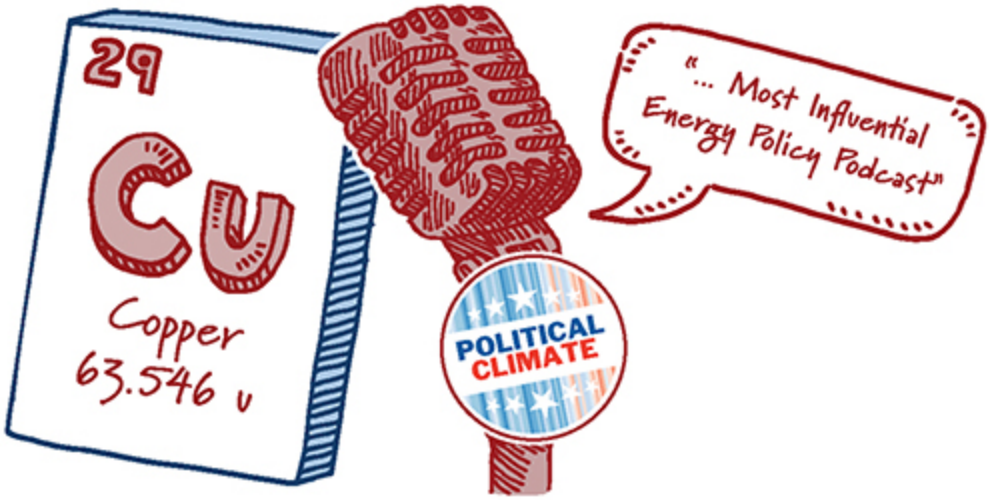
5. NEW podcast episode: “The Copper Crunch”



Copper demand is set to climb 50% over the next 15 years, and China still controls most of the world's supply chain. On a new episode of **Political Climate**, Endolith founder and CEO Liz Dennett discusses landing a national-security-backed Series A and launching the company's first field deployment in Arizona, where its AI-guided microbes recover copper that conventional mining leaves behind.

What's clear: Fixing the copper crunch will take more than new mines; it will take new technology paired with permitting that lets it reach the field faster. Endolith's Arizona pilot is an early test of whether America can out-innovate China's grip on the supply chain instead of just competing with it.

Plug in: Check out Political Climate's new episode **here**!

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6. 250 years of American energy innovation

250 YEARS
AMERICAN ENERGY INNOVATION

As America celebrates its 250th anniversary, ClearPath is **highlighting** America's innovation story. From the earliest discoveries in electricity and steam power to modern nuclear, natural gas, advanced grid technologies and agriculture, American innovators have consistently pushed the boundaries of what's possible.

Quick history lesson – Nuclear energy

- **1942:** Enrico Fermi achieves the first controlled nuclear chain reaction at **Chicago Pile-1** in Chicago, launching the nuclear age;
- **1951:** The **Experimental Breeder Reactor I** in Idaho becomes the first reactor to generate usable electricity;
- **1957:** **Shippingport Atomic Power Station** in Pennsylvania opens as the nation's first full-scale commercial nuclear power plant;
- **2023:** **Vogtle Unit 3** in Georgia becomes the first newly built U.S. reactor to enter commercial operation in more than three decades; and
- **2024:** Congress passes the **ADVANCE Act**, the most significant nuclear policy reform in decades.

What's clear: America invented commercial nuclear power, then let the industry stall for decades under regulatory weight. Vogtle's completion and the ADVANCE Act show the comeback is underway, and building the next generation of reactors faster is how America outpaces China rather than falls behind it.

Plug in: Read ClearPath's "**Nuclear Energy 101**" for a breakdown of how nuclear reactors work and why scaling next-generation designs is central to American energy dominance.

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7. The Circuit

ClearPath's **Emily Johnson** and **Frances Wetherbee** presented at the **Conservative Climate Foundation**'s fifth annual Communicators' Retreat in Easton, MD, where they were joined by Congressional staff and energy stakeholders.

The ClearPath team visited Albemarle's Kings Mountain Lithium to see firsthand how domestic critical mineral production is strengthening America's energy and industrial supply chains. The team toured the site, which recently completed federal permitting with support from the Permitting Council through FAST-41, and learned more about the role of domestic minerals in a secure U.S. energy future.

The ClearPath team visited Siemens Energy's Charlotte facility to see firsthand how advanced manufacturing is strengthening America's energy and industrial supply chains. The team toured the facility and learned how its turbine, generator and high voltage equipment capabilities support a reliable U.S. energy future.

8. ICYMI

- POLITICO Morning Energy **reported** Bill Meierling joined ClearPath as its new Chief External Affairs Officer.
- Urenco **announced** the expansion of its commercial uranium enrichment facility, the only one currently operating in the United States, which will install 2.1 million separative work units (SWU) of new enrichment capacity, or about 50% increased capacity.
- Mantel, a carbon capture provider, **announced** new investments from Constellation Technology Ventures and Azimut Investments, which will move the company closer to commercial deployment in North America and Europe.
- U.S., Australia and Canada launched a **database with 13,000 mineral samples** to advance critical mineral exploration and strengthen allied supply chains.
- Quaise Energy **raised $180 million** to support Project Obsidian, located in Central Oregon, advancing the company's millimeter wave drilling system.
- FERC approved **Southwest Power Pool's** use of topology optimization software, a tool that automates the assessment of more efficient pathways for power to flow that reduce congestion and cut costs, building on a pilot that saved the grid operator $18-44 million annually.

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!

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