

A Convening Summary

Thinking Critically

Critical Minerals Policy to Meet Our Economic and National Security Needs

Securing America's critical mineral future will require more than mining more at home. It will demand durable policy, stronger partnerships, and the ability to turn innovation into commercially viable supply chains at scale.



CONSERVATIVE
COALITION *for* CLIMATE
SOLUTIONS

Executive Summary

On May 12, 2026, the Conservative Coalition for Climate Solutions (C3 Solutions) and Earth & Water Law convened industry, government, and advocacy stakeholders for a discussion on critical minerals policy. The convening was organized around three sessions: catalyzing domestic development across mineral and rare earth element supply chains, partnering with like-minded countries and global companies to secure supplies, and advancing innovative methods for extraction and recovery.

The meeting followed Chatham House rules with the understanding that an unattributed summary of the discussion would follow. This document reflects C3 Solutions' summary of the discussion and aims to represent what was said as faithfully as possible without individual attribution.

The roundtable centered on a single, but vastly complex strategic question: how the United States can strengthen critical mineral and rare earth element supply chains through a combination of domestic activities and global partnerships. The concentration of critical mineral mining and processing capacity abroad, along with the potential for market manipulation, export controls, and chokepoint leverage, are reshaping how policymakers are thinking about mineral security.

Three consistent themes arose across the sessions:

First, participants emphasized that securing supply requires an integrated view across the value chain, not just expanded extraction. Refining and processing, expanded trade, workforce development, and innovation were each discussed as parts of a single competitiveness agenda, with participants noting that variable regulatory environments and shifting political administrations affect project feasibility at every stage.

Second, participants emphasized the importance of political and institutional durability. While executive actions under the current administration can and have accelerated certain activities, these measures can be reversed and may expose investors and developers to political volatility. This consideration surfaced in discussions of permitting reform, foreign partnerships, federal funding, and industrial policy, each of which was examined in part through the question of whether the underlying frameworks could create a system that produces projects swiftly, predictably, and at the necessary scale in the long term.

Third, participants consistently noted that the primary obstacles to innovation and the deployment of new technologies and projects are scale and commercialization. Technical capability and diplomatic engagement do not automatically yield projects that meet the throughput, cost, purity, and offtake requirements that determine market viability. Bridging this gap surfaced across the sessions, from sustaining the economics of operating facilities, to translating bilateral engagements into real projects, to moving promising technologies from early technical success into competitive production.

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SESSION I: BOLSTERING DOMESTIC MINERAL PRODUCTION

KEY TAKEAWAYS

- Permitting predictability and litigation exposure were cited as central constraints on project economics and investor confidence.
- Securing reliable supply chains extends beyond extraction to refining and processing, which face similar regulatory uncertainties.
- Comparisons with peer nations suggest that regulatory frameworks that recognize the economic contributions of the mining and refining sectors can materially shorten project timelines.

The first conversation centered on building a policy and regulatory environment that is conducive to domestic growth across critical mineral value chains. Several themes emerged, particularly the importance of an efficient and stable permitting environment and sustaining the economics of domestic operations. Participants discussed how the U.S. regulatory environment compares with those of some peer countries and considered how the public and private sectors might be positioned to respond.

The conversation opened by examining a fundamental mismatch between the U.S. mineral resource endowment and the ability to turn deposits into extractive operations. Reform of federal environmental permitting processes was frequently cited as a possible pathway for shortening the discovery-to-extraction timeline, which one participant noted averages roughly 29 years for upstream operations in the United States. Several participants cited that the lack of permitting predictability and exposure to drawn-out litigation can undermine project economics and decrease investor confidence.

Beyond permitting reform, Congress retains tools to address rulemakings that members view as misaligned with development objectives. Two participants noted that Congress has used the Congressional Review Act to oppose federal agency resource management plans, developed by the prior administration, that restricted activity in particular areas. One participant suggested that permitting reform should also revisit EPA's authority under the Clean Water Act to bar activities over their potential water impacts.



Participants noted that domestic critical minerals competitiveness goes beyond opening new mines. Reducing risk and uncertainty across the value chain, especially in the refining and processing segments, were also identified as important. Variable permitting environments and shifts between political administrations were pinpointed as factors that can affect the feasibility of projects in those areas as well.

Comparisons were drawn with how some other countries, including Canada and Australia, approach mining activity. One participant suggested that developers in those jurisdictions can complete permitting and commence extractive operations in roughly five years, attributing this in part to policy frameworks that more readily recognize the economic development contributions of the sector.

Participants also discussed what happens once facilities are operating. Sustaining production was described as important to ongoing supply security, but participants noted that volatile commodity markets and shifting demand signals can affect project economics over the operating life of a facility. In response, the discussion highlighted both the value of permitting transparency and possible roles for the federal government in early-stage R&D and targeted support to the private sector through existing finance authorities.

SESSION II: BUILDING A GLOBAL CRITICAL MINERALS CLUB

KEY TAKEAWAYS

- A “minerals club” concept is broadly appealing but needs greater specificity on goals to shape actual projects.
- Memoranda of Understanding and bilateral engagements are useful starting points, but their value depends on whether they lead to financed projects and private-sector implementation.
- Distinguishing China as a market and trading partner from the Chinese Communist Party as a political actor could support a more targeted policy response.

The second session explored how the US might coordinate with partner countries and companies to achieve mineral security objectives. Participants began with a foundational question: what should a “critical minerals club” actually do? The discussion suggested that such a framework could include trading arrangements, public and private finance, stockpiling, diplomatic coordination, and industrial partnerships, but that these elements require greater clarity to shape actual projects.

Participants noted that allied coordination on critical minerals is playing out against the backdrop of a period of industrial change. The current moment, marked by geopolitical gamesmanship, was described as potentially needing a rapid expansion of extraction and manufacturing capacity.

The commercial implications of these strategic considerations were discussed in practical terms. One participant noted that willingness to pay a premium for a secure supply tends to depend on the end market.

Defense customers may tolerate larger price differentials for reliable domestic or allied sources, while less security-sensitive sectors may be more price-sensitive. This raised broader questions about the appropriate role of protectionism and stabilization mechanisms in helping new supply chains compete.

Stabilization mechanisms, including price floors and import restrictions, were among the tools discussed. The price floor provided by the Department of War to MP Materials was cited by some participants as a possible model for future arrangements, while others drew a distinction between China as a market and trading partner and the Chinese Communist Party as a political actor, suggesting that this distinction could support a more targeted policy response and reduce the case for an expansive, subsidy-driven response.

A major theme of the session was that diplomacy must become more operational. Participants described Memoranda of Understanding and bilateral engagements as useful starting points, while emphasizing that these tools work best when they translate into financed projects and implementation capacity. One participant pointed to targeted foreign investments in extractive sectors and the convening of companies and governments as ways diplomacy could more directly support commercial outcomes. Participants also observed that allies often have different strategic aims, ranging from energy dominance to job creation, and that effective partnerships require candor about where these aims overlap and where they diverge.

The discussion also considered whether U.S. support mechanisms are too domestically restrictive. Some participants argued that strategically important projects in allied or partner countries should be able to access federal backing more readily, given the global distribution of mineral resources and the possibility that competing capital could otherwise fill the gap. One participant cited Title III of the Defense Production Act and its incorporation of the United Kingdom and Australia into the American defense industrial base as a possible model for extending support to foreign projects

Additional ideas raised included strengthening workforce exchanges tied to foreign industry experience and engaging sub-federal diplomacy by governors and mayors. Both reflected an interest in grounding mineral strategy in commercial needs alongside high-level federal programs.



SESSION III: INNOVATIONS & ALTERNATIVE SOLUTIONS FOR CRITICAL MINERALS

KEY TAKEAWAYS

- The challenge for innovation is less about obstacles to the discovery of new breakthroughs and more about how those breakthroughs can be commercialized to meet the throughput, purity, and cost thresholds necessary for viability.
- Coordinated executive, agency, and legislative action, similar to recent efforts for advanced nuclear technologies, may be necessary to support domestic critical minerals development.
- Workforce pipelines, including engagement with foreign industry practice, and small-firm access to capital emerged as areas warranting further attention.

The final session focused on how innovation could help solve both present and future mineral supply challenges. Participants framed the issue as encompassing not only scientific discovery but also public-private partnership structures and workforce development. The conversation also reflected on the challenge of achieving meaningful scale in critical minerals markets. In that sense, innovation was discussed less as an abstract research priority and more as a long-term commercialization challenge.

Participants reacted positively to the restructuring at the Department of Energy (DOE) which brought the Department's critical mineral efforts under a singular office, the Critical Minerals and Energy Innovation (CMEI) Office. The institutional step was described as addressing earlier fragmentation in DOE mineral initiatives. One participant noted that the prior administration had concentrated heavily on lithium-ion batteries relative to the broader set of available storage solutions.

This opened a discussion of alternative battery chemistries and possible shifts in future demand. Two participants highlighted sodium-ion batteries as an area of interest, particularly because the stationary storage sector is growing and because sodium-ion chemistries have a less vulnerable supply chain profile. The conversation also reflected a concern that even where U.S. institutions help pioneer a technology, other countries, China in particular, may scale manufacturing first and capture the resulting market position.

Participants pointed to continued potential for innovation in processing and refining. The DOE National Labs, for instance, are positioned to contribute in their particular specialty areas. One participant noted that a particular Lab has worked with private-sector partners to test modular separation equipment used to divide materials from larger ores or feedstocks, and suggested that such partnerships can improve the path for innovative field equipment to reach commercial use.

Scale and commercialization were defining issues throughout the session. Participants observed that innovative approaches can demonstrate early technical success while still facing significant challenges in meeting the

throughput, cost, purity, and offtake requirements that determine market viability. Areas discussed included alternative refining processes, subsea polymetallic nodule recovery, and battery manufacturing.

The conversation also underscored the importance of workforce development and access to capital. Participants discussed the trend of fewer college-age students pursuing degrees or skills connected to the mining and refining industry. One participant expressed interest in how worker exchanges abroad could help bring foreign industry practices back to the United States. Another noted that smaller firms with promising technologies sometimes face difficulty accessing federal grants and navigating standard funding processes. Participants identified workforce development and small-firm access to federal funding as areas warranting further attention, and discussed how alternative partnership models, including Partnership Intermediary Agreements alongside the traditional Funding Opportunity Announcement process, could increase the government's flexibility as a collaborator.

Participants also discussed engagement with tribal governments as a potentially valuable element of domestic development. One participant noted that tribes sometimes lack visibility into DOE opportunities, suggesting that an educational component may be helpful. Another observed that the experience of working with tribal governments can vary with the size of the tribe, with some larger governments involving more bureaucratic layers and some smaller tribes offering greater flexibility in working with the federal government.

Finally, participants drew an analogy between critical minerals and advanced nuclear energy. One participant suggested that regulatory frameworks that constrained new nuclear construction share features with those affecting domestic mining and processing. The participant expressed hope that, similar to what the ADVANCE Act has aimed to do for nuclear, coordinated executive actions, agency rulemakings, and Congressional legislation could help support domestic critical minerals development, and noted that ambitious executive orders for the minerals space could play a role comparable to those issued earlier in the President's term for advanced reactor deployment.

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This summary was prepared by Dylan Maxik and David Kemp of C3 Solutions.

Participants

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