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Editor's Selection

This edition presents the week's reporting in publication order. Readership data is not yet sufficient for a popularity ranking.

1. Navy awards production agreements for 30 unmanned vessels

The U.S. Navy's September 29 awards set a fiscal 2027 target for first deliveries. HII's work with Louisiana shipyards shows the manufacturing effort behind the naval autonomy program.

2. NioCorp secures 15-year Traxys deal for Elk Creek ferroniobium

Traxys will buy half of Elk Creek's planned ferroniobium output for 15 years. The Nebraska project's other minerals gain a marketing partner, while financing and delivery conditions remain separate steps.

3. DARPA clarifies who can join its concrete durability research call

Organizations that missed DARPA Resilient's abstract round may still join a qualifying prime's team. Full proposals are due October 19, 2026, at 4 p.m. Eastern Daylight Time.

4. Griffin-1 clears JPL tests ahead of its planned Moon mission

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5. Oklo plans an isotope production line with Groves-2 Forge

Oklo plans a pilot facility that would connect isotope production with processing and packaging. The first focus is lutetium-177, a material used in targeted cancer treatments.

Web edition: https://pvweekly.com/weekly-2026-10-18-6449145015f7/

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Navy awards production agreements for 30 unmanned vessels

2026-10-14 · PV Weekly Editorial

The U.S. Navy's September 29 awards set a fiscal 2027 target for first deliveries. HII's work with Louisiana shipyards shows the manufacturing effort behind the naval autonomy program.

Three builders and a delivery target

The U.S. Navy is moving its medium unmanned surface vessel program from an initial round of sea trials into a 30-vessel production purchase. On September 29, 2026, it announced agreements for Galliano Marine Services, HII and Saronic Technologies to supply 10 vessels apiece, citing an average procurement cost of $40 million per vessel. The first deliveries are scheduled before the end of fiscal 2027.

The timetable applies to the first vessels. The announcement does not specify when all 30 will be delivered or disclose a separate price for each builder's agreement.

Louisiana hull construction preceded the awards

HII had already reported physical progress in Louisiana. In a September 8 update, the company said it and Breaux Brothers Enterprises had completed the structure of the first ROMULUS 151 hull in New Iberia and turned it upright. That step cleared the way to build its deck and pilothouse. At that point, HII said five ROMULUS 151 vessels were under construction: four at Breaux Brothers and one at Halimar Shipyard in Morgan City. Those were construction milestones, with further work still identified in the company's account.

Regional shipbuilders support the autonomy program

In its September 29 announcement, HII confirmed that its award covers 10 ROMULUS vessels. The company described a production network involving Breaux Brothers, Halimar and Bayou Metal Supply & Manufacturing in Louisiana. Its approach allows major components and assemblies to be made before final vessel integration, according to HII. The company says it began securing partners, suppliers, capacity and infrastructure for ROMULUS construction in 2025.

That shipbuilding network supports a separate technology task: integrating autonomy into the vessels. HII describes its Odyssey control architecture as enabling vessels to perceive their surroundings, navigate, manage onboard systems and payloads, and coordinate with other platforms with limited human intervention. These are the company's descriptions of the system's functions.

Sea trials lead to further integration and delivery

The Navy says Phase I examined maritime awareness, autonomous navigation under international collision-prevention rules and long-duration missions. HII separately reported that its autonomy system completed a 420-nautical-mile mission simulation in 28 hours. The company says its Navy-monitored evaluation ran for 13 days; these figures describe that testing, rather than a record of sustained fleet service.

The Navy also released a second-phase integration and testing call on September 23 to broaden future offerings. For the 30-vessel purchase, the next delivery checkpoint is the scheduled first handover before fiscal 2027 ends. HII's five-hull update documents manufacturing activity. The announcements do not establish whether those hulls are among its 10 awarded vessels.

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• S3: HII — accessed 2026-10-15

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NioCorp secures 15-year Traxys deal for Elk Creek ferroniobium

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Traxys will buy half of Elk Creek's planned ferroniobium output for 15 years. The Nebraska project's other minerals gain a marketing partner, while financing and delivery conditions remain separate steps.

A customer commitment for Nebraska's Elk Creek project

NioCorp Developments has secured a binding commitment from Traxys North America to buy half the planned ferroniobium output from its Elk Creek project in southeastern Nebraska. Announced October 13, 2026, the purchase commitment is on a take-or-pay basis for the first 15 years of production. It strengthens the commercial groundwork for a potential U.S. critical-minerals source while leaving financing and delivery conditions to be met.

Ferroniobium is an alloy of iron and niobium. NioCorp's annual filing identifies niobium's uses in steel for vehicles, bridges, buildings and pipelines, putting the material at work across transportation and construction.

Purchase commitments and marketing rights differ

NioCorp's existing agreement with ThyssenKrupp Metallurgical Products still covers the other half of planned ferroniobium production for the first ten years. Together, the two purchase arrangements cover all planned ferroniobium output during that initial decade. Their durations differ: the newly announced Traxys commitment lasts 15 years, while the unchanged ThyssenKrupp contract lasts ten.

Scandium, titanium and rare earth products have a different arrangement. NioCorp says the exclusive brokerage arrangement for these planned products lasts 15 years. Traxys says it becomes NioCorp's exclusive global marketing and sales partner and receives the exclusive right to buy those planned products, without an obligation to purchase them. That creates a route to customers, but it does not give every mineral the same committed buyer as ferroniobium.

Why customer contracts matter to EXIM financing

The Export-Import Bank of the United States, known as EXIM, explains in its general project-finance guidance that contracted sales to creditworthy customers help support debt repayment. That is the practical financing value of a long-term purchase agreement: it helps establish how a future operation would earn the money to repay its lenders.

NioCorp chief executive Mark Smith said the agreements address a key item in EXIM's review of the company's proposed financing package. The sales pact itself establishes neither an EXIM loan approval nor a financing close; EXIM's guidance allows further information requests until closing. A possible Traxys equity investment of up to $30 million also remains a separate discussion, subject to further negotiation and documentation.

Mine-entrance work precedes commercial deliveries

Physical work has begun on part of Elk Creek. NioCorp's annual filing says it announced the start of mine-entrance construction on February 26, 2026. That entrance, called a portal, has a $44.6 million budget. The company reported approximately $5.6 million in construction costs incurred through June 30, 2026, a reporting cutoff that predates the new sales agreement.

The October 13 announcement makes the remaining delivery conditions explicit: completion of project financing and construction, the start of commercial production, and finalization of customary ancillary commercial terms. For manufacturers, the agreement establishes a clearer route to future supply. Turning

that commercial progress into usable material still depends on bringing the mine into operation.

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• S3: NioCorp Developments Ltd. — accessed 2026-10-15

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https://www.niocorp.com/wp-content/uploads/NioCorp-Form10K_06302026-ASFILED_SEDAR.pdf

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DARPA clarifies who can join its concrete durability research call

2026-10-14 · PV Weekly Editorial

Organizations that missed DARPA Resilient's abstract round may still join a qualifying prime's team. Full proposals are due October 19, 2026, at 4 p.m. Eastern Daylight Time.

A team route remains after the abstract deadline

An organization that did not submit an abstract to DARPA's Resilient program can still participate in a full proposal as a subcontractor or team member. The Defense Advanced Research Projects Agency confirmed that route in its October 5, 2026, frequently asked questions, with a condition: the prime applicant must have submitted a conforming abstract.

Resilient required those abstracts by September 9. The clarification gives potential partners a way to contribute to a qualifying proposal team as the October 19 deadline approaches. It does not reopen the abstract round or remove the prime applicant's earlier submission requirement.

The infrastructure problem behind Resilient

DARPA describes a durability problem affecting military and civilian concrete infrastructure. Fast laboratory tests provide an incomplete picture, while observing structures in the field takes much longer. The agency says conventional approaches miss the combined effects of changing loads, chemicals entering concrete and repeated temperature changes.

Resilient seeks to connect physical testing with computer models that translate damage in small samples into predictions about full structures. The intended benefit is a better basis for forecasting how long concrete infrastructure will remain usable. That capability is a research ambition, rather than a result established by the announcement.

Faster aging must reflect real degradation

The program's target is an integrated system that accelerates concrete aging by more than 1,000 times while preserving the degradation mechanisms seen in real-world data. Researchers are being asked to develop and demonstrate that capability. A rapid test must still tell a credible story about long-term performance.

Historical records are another required contribution. Proposers must bring concrete degradation data from prior research or public repositories. DARPA plans to combine selected teams' records into a shared database for checking the models; its FAQ says the agency will not supply a standard dataset at the start.

Funding and eligibility have conditions

For each project, the combined award value is capped at $2 million, with up to $1 million for the base phase and $1 million for an optional second phase. Those totals include any required or proposed performer cost share. Meeting first-phase targets does not guarantee a second-phase award.

The broader Disruptioneering announcement permits responsible sources capable of meeting DARPA's needs to propose, subject to its conditions. Resilient also has specific participation rules for federally funded research centers, university-affiliated research centers and government laboratories. Prospective partners need to check the requirements for their proposed role.

Use the amended package and finalize the submission

Teams should consult solicitation DARPA-PA-25-07-04, its September 4 Amendment 1, the current Disruptioneering announcement and the October 5 FAQ. Eligible primes submit through DARPA's Broad Agency Announcement Portal by October 19, 2026, at 4 p.m. Eastern Daylight Time. DARPA requires the upload to be finalized and completed before the cutoff.

For organizations considering a team role, the practical starting point is a specific contribution to a qualifying prime's proposal: stronger modeling, physical testing or usable historical data. DARPA's clarification preserves that opportunity while keeping the original abstract requirement in place.

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Griffin-1 clears JPL tests ahead of its planned Moon mission

2026-10-15 · PV Weekly Editorial

Voyager's Griffin-1 lunar lander has completed environmental testing at NASA's Jet Propulsion Laboratory. The spacecraft is back in Pittsburgh for final assembly ahead of a planned launch later in 2026.

America's next chapter on the Moon is taking shape in earthly places: a factory, a test chamber and a launch site. Voyager Technologies' Griffin-1 lander has finished a demanding series of environmental tests at NASA's Jet Propulsion Laboratory in Southern California, the laboratory reported on October 13.

Proving the hardware

The campaign checked how the spacecraft withstands vibration, launch noise, electrical interference and temperature extremes in a vacuum. During thermal testing, temperatures ranged from −100 °C to 75 °C. Griffin-1 has returned to the company's Pittsburgh facility for final assembly, with launch preparations and shipment to Cape Canaveral still ahead. JPL's testing report describes the work.

JPL says the lander is expected to launch later in 2026 on a SpaceX Falcon Heavy, bound for Nobile Crater near the lunar South Pole. That is a mission plan, with launch and landing still to come. The completed tests mark progress toward it.

NASA is buying a delivery

Griffin-1 belongs to NASA's Commercial Lunar Payload Services initiative, known as CLPS. The agency buys an integrated service: a commercial provider handles payload integration, launch, mission operations and landing. NASA's program overview describes a way to carry science and technology to the Moon while developing American commercial capabilities.

The industrial connection is the handoff between those jobs. A scientific instrument needs a place aboard a lander; the lander needs a launch and a functioning flight system. JPL's tests assessed the lander under simulated launch and space conditions.

Preparing for launch

NASA acknowledges that commercial lunar missions carry risk and may fail. A successful test campaign therefore answers a narrower question than a successful landing: how the hardware performed under the conditions tested. NASA's account of the program's risks makes that distinction useful for following its progress.

For readers watching America build a commercial foothold on the Moon, the next public milestones are launch readiness, departure from Earth and delivery on the surface. Each will say something different about the capability being built.

At a glance

Milestone

Environmental testing complete

Next step

Final assembly in Pittsburgh

Launch outlook

Expected later in 2026

Announcement

13 October 2026

Sources

• S1: NASA Jet Propulsion Laboratory — checked 2026-10-15

• S2: NASA — checked 2026-10-15

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Oklo plans an isotope production line with Groves-2 Forge

2026-10-15 · PV Weekly Editorial

Oklo plans a pilot facility that would connect isotope production with processing and packaging. The first focus is lutetium-177, a material used in targeted cancer treatments.

Nuclear technology can supply valuable materials as well as electricity. Oklo's planned Groves-2 Forge facility would bring several steps of isotope manufacturing together, adding processing capabilities to the reactor work on which the project is based.

Connecting the production line

In its October 13 announcement, Oklo said the pilot would combine irradiation in a reactor with shielded processing, isotope separation, recovery, packaging and transportation. Its initial focus is lutetium-177, which is used in targeted cancer treatments. The company says the project will draw on experience from its Groves Isotope Test Reactor in Texas.

The industrial idea is to connect making the material with preparing it for customers. A reactor is one part of that chain. Processing and delivery also have to work if a promising nuclear project is to become a dependable source of supply.

A product with a clock

Lutetium-177 has a half-life of 6.647 days, according to the Department of Energy's isotope product sheet. In plain terms, its radioactive activity falls by half over roughly a week. That makes elapsed time a practical part of its supply chain: material changes while it is being processed and moved.

The same catalog lists lutetium-177 as routinely available through the federal isotope program. Groves-2 Forge would enter a field with existing supply. Its importance will depend on what additional production and processing capacity it can actually deliver.

From pilot to production

Oklo connects the project to the Department of Energy's Nuclear Energy Launch Pad initiative. The August 24 selection announcement from Idaho National Laboratory named Oklo among 12 developers with 13 projects. That earlier announcement offered technical, regulatory and deployment support; the October company release describes Groves-2 Forge's proposed role.

Oklo says commercial-scale operation would require the appropriate Nuclear Regulatory Commission licenses. The project is a plan for a pilot, and the company has not supplied a production start date or output target in this announcement. Those details, followed by operating results, will help show how the proposal translates into American manufacturing capacity.

At a glance

Project

Groves-2 Forge

Stage

Pilot facility planned

First focus

Lutetium-177

Announcement

13 October 2026

Sources

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• S2: DOE National Isotope Development Center — checked 2026-10-15

• S3: Idaho National Laboratory — checked 2026-10-15

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