

Microsoft likely betting AGI will create nuclear fusion in five years

Article

The news: In possibly one of the most speculative moves in business history, **Microsoft** has signed a purchase agreement to buy electricity from nuclear fusion startup **Helion Energy**.

- Under the deal, **Microsoft will buy 50 megawatts—enough to power 40,000 homes—of nuclear fusion energy** from the Washington State-based startup beginning in 2028, per

CNBC.

- **Helion plans to scale up commercial production to 1 gigawatt**—20 million times what it'll sell to Microsoft.
- It will be subject to financial penalties if it doesn't deliver to Microsoft as promised.
- **OpenAI CEO Sam Altman** has supplied **\$375 million** of the **\$577 million** Helion has raised, marking Altman's biggest investment to date.

A gigantic catch: The agreement is the first of its kind for the nuclear fusion industry, because the technology doesn't yet exist from a practical standpoint.

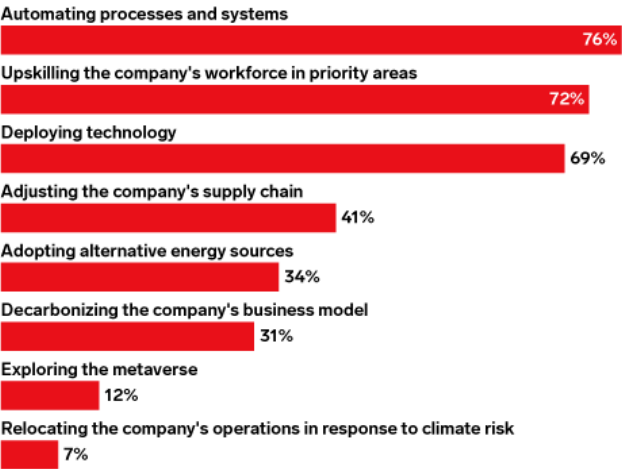
- Scientists at the **Lawrence Livermore National Laboratory** were the first to sustain a reaction yielding a net energy gain for a few nanoseconds in 2021. **They haven't been able to replicate the success since.**
- Microsoft is eager to tap into nuclear fusion's potential to **help drive its power-hungry cloud-computing ambitions.**
- It's no accident that Altman is involved in the fusion venture. He recently tweeted that artificial general intelligence (AGI) will make fusion work.
- **We can expect that Helion's strategy to make good on its Microsoft agreement will involve using OpenAI's technology,** which might include an AGI that it has under development, despite calls for a moratorium.
- Helion might be able to capitalize on the **ChatGPT** frenzy and attract even more funding if investors believe advanced AI is the missing piece of the fusion puzzle.

What comes next? Google has been a prominent player in the fusion race. It will take notice of Microsoft's Helion deal and possibly follow suit with its own bolder move.

If Helion's fast-tracked efforts are successful, it will reverberate far beyond the tech industry. Nuclear fusion holds the potential to revolutionize the energy industry by providing an abundant supply of carbon-free, radioactive-waste-free power to a world struggling with climate change and energy shortages.

Investments CEOs Worldwide Plan on Making in the Next 12 Months, Nov 2022

% of respondents



Source: PwC, "26th Annual Global CEO Survey," Jan 16, 2023
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