THIRD WAY

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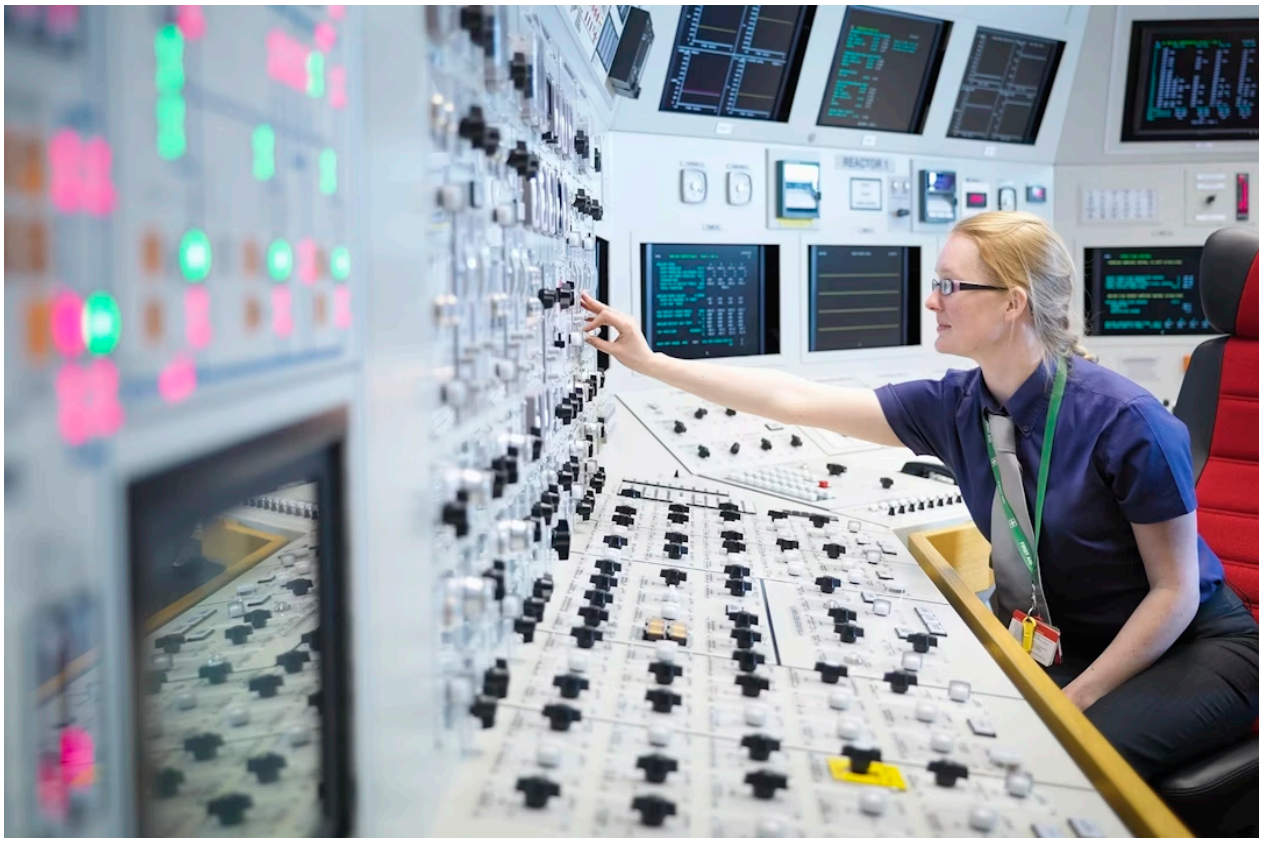
Revitalizing Nuclear: Strengthening US-UK Cooperation



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Among other global trends, including renewed energy security concerns after Russia's invasion of Ukraine, AI is driving a resurgence in nuclear energy demand. This growing global interest in nuclear is also fueled by innovative reactor technologies that are now rapidly coming to the fore—many of them based on work done at US national laboratories decades ago—and now in the midst of commercialization by US companies.

In the United Kingdom, the new Labour Government's twin ambitions to become a Clean Energy Superpower and world leader in AI have now firmly placed the spotlight on the UK as a potential

model for how policymakers can navigate an era of unprecedented technological change. The UK now has the opportunity to lead in both advanced nuclear deployment and the emerging AI economy. Third Way and Tony Blair Institute are proud to have released a joint policy paper, outlining the key pillars of an advanced nuclear strategy for the UK government: (1) modernizing and streamlining the regulatory process to enable fleet deployments of SMRs and AMRs; (2) finalizing the government-led procurement of advanced reactors; and (3) strengthening US-UK cooperation on advanced nuclear.

Enhancing the US-UK Partnership in Advanced Nuclear

Thanks to enduring bipartisan support and robust federal investments in advanced nuclear innovation, including the US Department of Energy's Advanced Reactor Demonstration Program (ARDP), there is burgeoning interest in US advanced nuclear technologies at home and around the world.

Increasing international demand for US advanced nuclear presents not just opportunities for exports, but also expanded partnerships. In addition to meeting spiraling energy needs, the US and UK have shared goals in reindustrialization, strengthening energy security, and being global leaders in geostrategic technology sectors. The "Special Relationship" forms a unique foundation upon which the two countries can jointly accelerate the deployment and commercialization of advanced reactors to meet these national objectives.

We can no longer view strengthening civil nuclear cooperation with our closest allies as a luxury. Beyond shared goals, both the US and UK face common challenges, including the risk of falling behind China in advanced nuclear deployment, which could allow China to set global trends in nuclear, AI, and other critical technologies.

The paper highlights three crucial recommendations for enhancing US-UK advanced nuclear cooperation:

- **Aligning on Technology and Regulation:** High-level alignment around a limited number of reactor designs enhances the prospects for commercialization by increasing market size for initial orderbooks, diversifying supply chains, and better concentrating workforce and regulatory capacity.

- **Co-financing Advanced Nuclear Orderbooks:** Enhanced bilateral cooperation opens up new sources of financing, spreading risk and facilitating the "critical mass" of capital required to drive orderbooks; integrated supply chains around reactor technologies of mutual interest enable the involvement of export credit agencies (ECAs).

- **Securing Fuel Supply:** Building upon ongoing efforts to mitigate collective reliance on Russian nuclear fuel, the two countries should accelerate efforts to build high-assay low-enriched uranium (HALEU) production capacity and integrate nuclear fuel supply chains.

The imperative of a stronger US-UK partnership on advanced nuclear underscores why the US must double down on federal support for nuclear energy, enact smart trade policies, equip export financing agencies with flexible tools in upcoming reauthorization bills, and fast-track nuclear fuel infrastructure.

Read Revitalising Nuclear: The UK Can Power AI and Lead the Clean-Energy Transition

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