

UPDATE OF THE FRENCH CIVIL NUCLEAR POLICY

Nicolas DEVICTOR

Nuclear Advisor
Embassy of France

Perspectives of nuclear energy development

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Vilnius Gediminas Technical University, Lithuania

The French Strategy for Energy and Climate & Multi-year Energy Planning 3 (2026 – 2035)

After consultations of the public and member of Parliament, orientations for the **French Strategy for Energy and Climate** have been published in November 2023, with 5 main objectives:

- Lower French total energy consumption
- Increase low carbon energy production
- Adapt energy networks
- Ensure security of supply
- Protect purchasing power and competitiveness

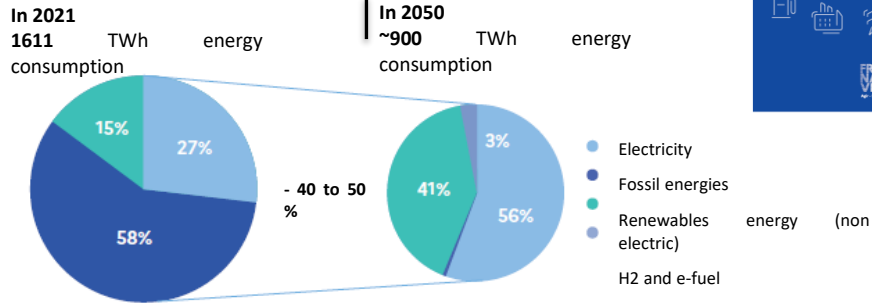


FIGURE 1. Consommation finale d'énergie 2021 et projections à horizon 2050*



Multi-year Energy Planning 3 (2026-2035 <https://www.economie.gouv.fr/ppe-3-programmation-pluriannuelle-de-lenergie>)

Increase carbon-free electricity generation to between 650 and 693 TWh by 2035, whilst reducing fossil fuel consumption to around 330 TWh by 2035
⇒ in 2035 70% of low-carbon energy

⇒ **large-scale electrification of applications**
 (demand estimated at 618 TWh in 2035)

The strategy is based on a **balanced energy mix combining nuclear and renewable energy**
 (hydropower, solar power, off & onshore wind farm)

and a **continued replacement of fossil fuels by renewable heating and cooling, biomethane, hydrogen, biofuels**

Nuclear Policy Council

The French nuclear policy is reviewed at nuclear policy meetings chaired by President Macron.

The last one took place on 12 March 2026 → Confirmation of the decisions taken at previous board meetings, and the launch of a programme to close the fuel cycle, given the long-term challenges of securing a sustainable supply of uranium, with the aim of eliminating the need to import natural uranium by 2100.

French Nuclear Industry: from the Front End to the Back End of the Nuclear Fuel Cycle



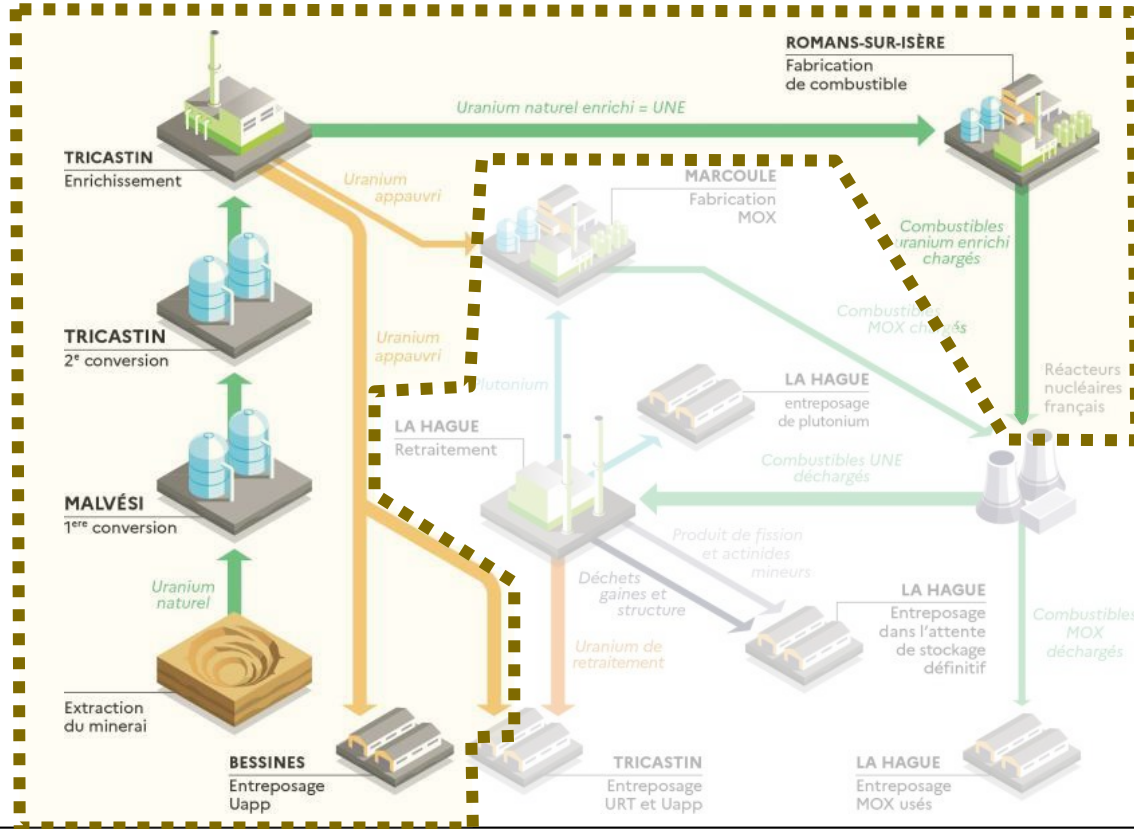
Manufacturing and Supply of Reactor Fuel

- Extraction
- Conversion
- Enrichment
- Fuel Manufacturing

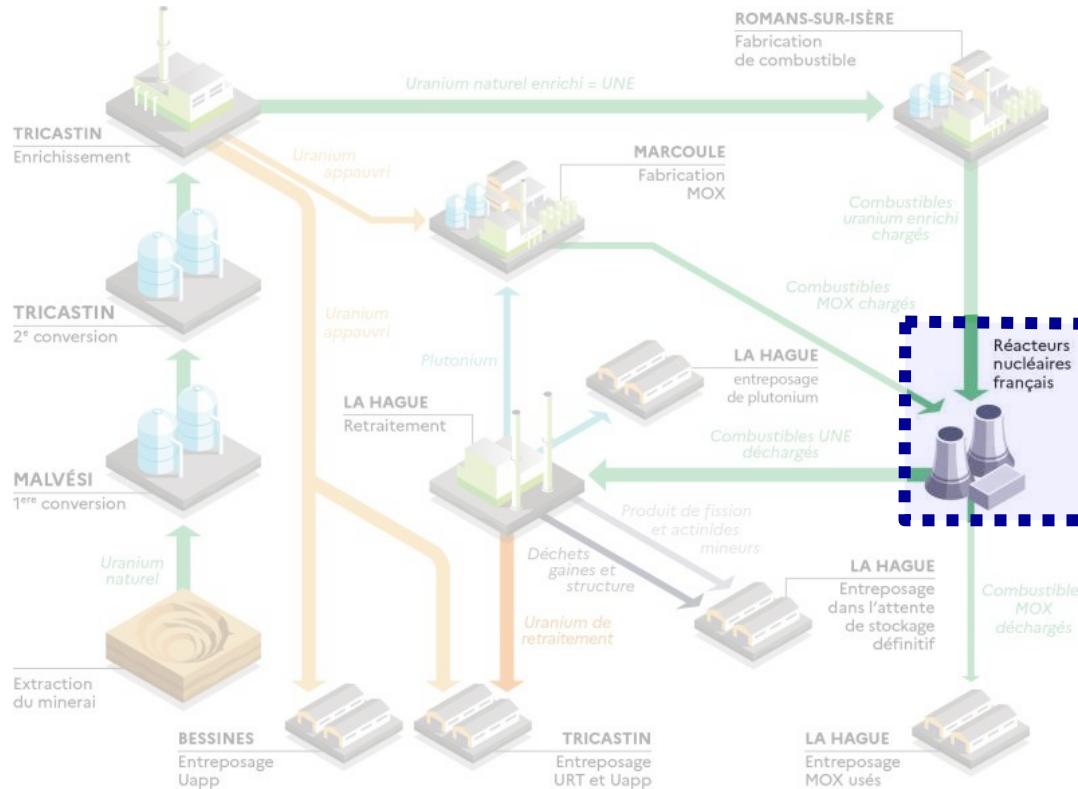


Outlook for 2035

- *Increase in enrichment capacity*
- *Toward an European industrial value chain for the conversion and enrichment of reprocessed uranium*



French Nuclear Industry: from the Front End to the Back End of the Nuclear Fuel Cycle



Nuclear Power Generation and Research

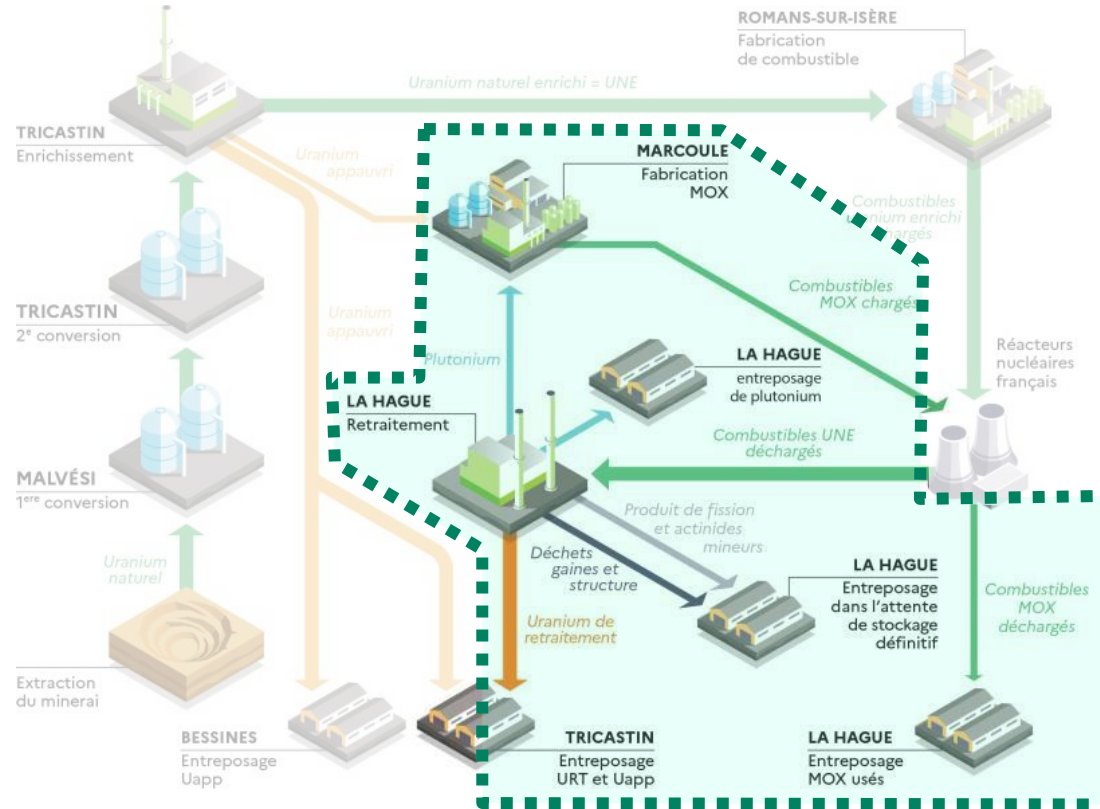
- 57 Pressurized Water Reactors ≈ 63 GWe
- Research reactors and projects (ITER, Jules Horowitz Reactor)
- Innovation program



Outlook for 2035

- **Long-term operation**
- **New build: at least 6 EPR2**
- **Innovative modular reactor projects (SMR/AMR) for electricity and heat production**

French Nuclear Industry: from the Front End to the Back End of the Nuclear Fuel Cycle



Fuel reprocessing and recycling policy

- Fuel Reprocessing
- Waste Management



Outlook for 2035

- *Renewing downstream cycle facilities*
- *Strategy for closing nuclear fuel cycle → a specific programme launched on 1 April 2026*
- *Preparation of geological disposal (Cigeo)*



framatome

orano



French Nuclear Industry: the 3rd Largest Industrial Sector in France

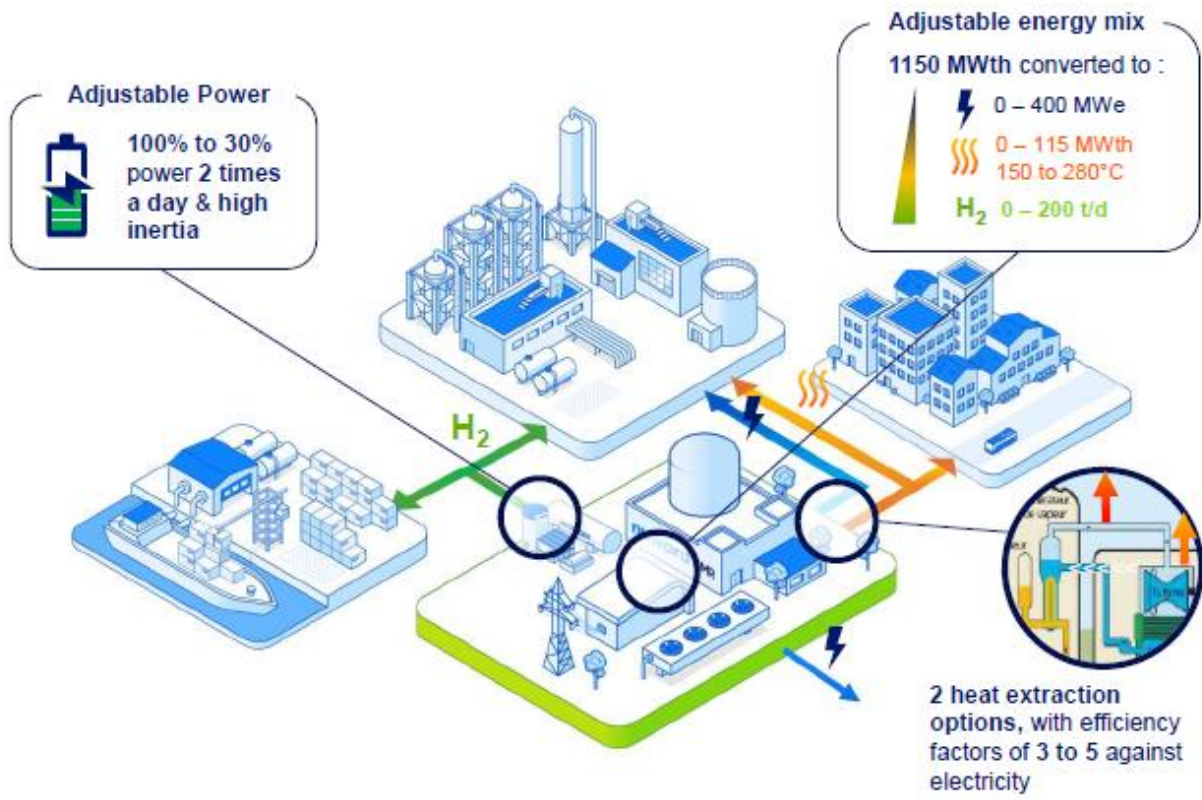


3000 companies
Over 220.000 employees
47.5 billion euros in revenues

- 120 reactors of French technology operating throughout the world
- Over 50 years of experience feedback
- Providing services to more than 250 reactors worldwide
- +100 000 people to be recruited over the 10 next years
- EPR construction integrates European compagnies



nuward SMR : a multi-energy platform designed to meet 2030's demand



A **Pressurised Water Reactor**, Generation 3+ with an optional high temperature electrolyser



Capable of producing on demand decarbonized **electricity, heat and hydrogen**



Construction in **48 months**



Modular approach and off-the-shelf components



Safety targets that meet the highest international safety standards



nuward SMR : a pressurised water SMR fully relying on **proven technologies**, an established **industrial sector**, and a **more sustainable fuel cycle**

Proven technologies

Architecture and systems based on proven technologies used on the existing EDF fleet and EPR2 reactor technology.
A **primary circuit** to deliver a thermal power of 1150 MWth, that can be manufactured with existing industrial facilities.

Established industrial sector

NUWARD SMR relies on the **EDF Group's** technical and industrial expertise and **Framatome's** industrial infrastructure, and integrates **partners** to enhance its construction and modularity skills, such as **Tractebel** and **Ansaldo Nucleare**.

More sustainable fuel cycle

Fuel assemblies similar to those currently used in the French nuclear fleet.
A reactor designed to operate with **MOX fuel** and enriched reprocessed uranium (**ERU**).
NUWARD SMR: the only SMR that helps **reducing the natural uranium consumption and spent fuel volumes**.



Joint Early Review with 8 Safety Authorities





Calogena develops a cost effective small modular reactor specifically designed for district heating to reach 'net-zero'

2 solutions:
CAL30 and CAL90

FOAK at
CEA Cadarache



Development in France
and Finland

April 17, 2026
Capital increase and the
government's acquisition of a stake



Pre-licensing with
ASNR and STUK



Selected by the EU Commission
(project CityHeat)

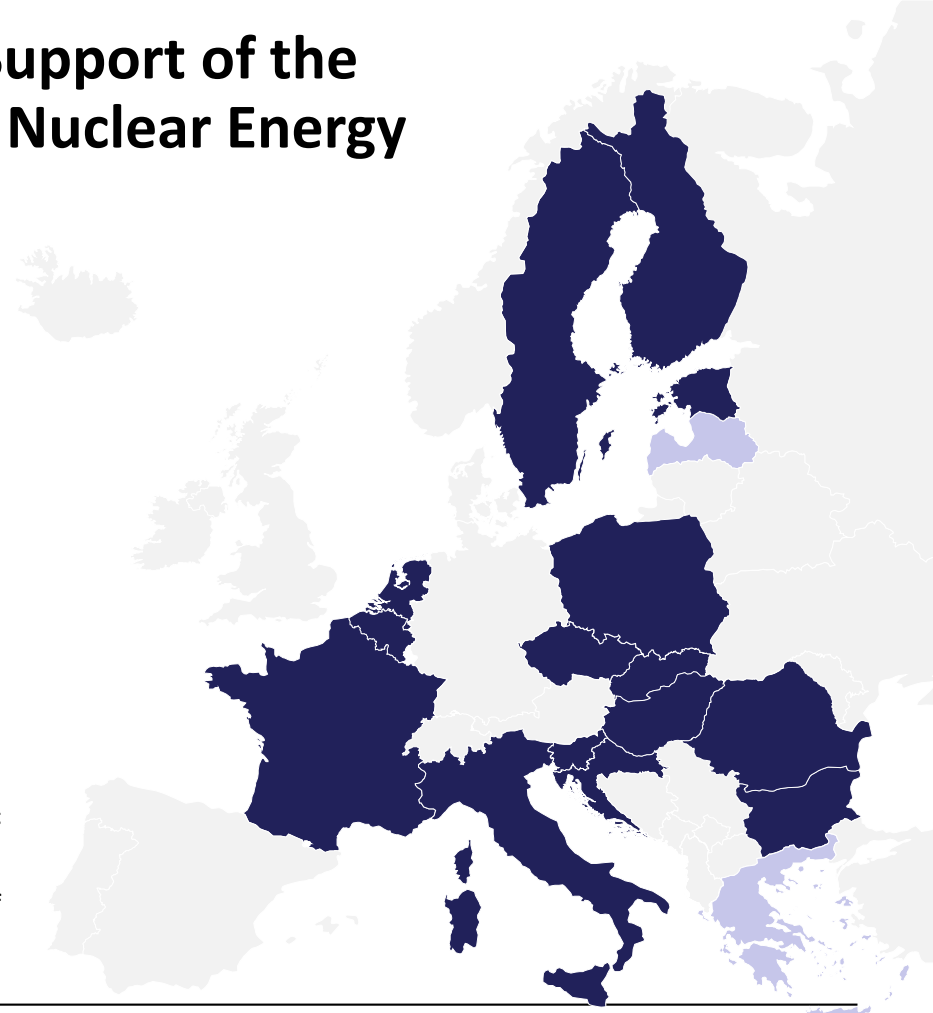
French Mobilization in Support of the European Momentum for Nuclear Energy

Nuclear Alliance at European Level

- Ensuring a level-playing field for all low-carbon energy sources in EU legislation.
- Supporting the uptake of a domestic EU nuclear ecosystem.
- Improving nuclear projects' access to financing in the EU:
 - Next Multiannual Financial Framework (2028-2034) and news calls of Innovation Fund
 - Revision of the EU Taxonomy
 - Mobilization of the European Investment Bank
 - Accelerated State aid notification procedures, building on existing successful cases, such as Czech Republic and Poland's

French Export-Credits

- France is able to **substantially contribute to the financing of major nuclear power plant worldwide through insurance of export credit and through refinancing scheme.**
- Export credits are arranged by Bpifrance Assurance Export, **which operates in the name of and on behalf of the French government.**



THANK YOU
