Informing Deployment of Advanced Nuclear Technologies



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Informing Deployment of Advanced Nuclear Technologies



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What is New Nuclear?

- Nuclear fission-based; referred to as **Gen III+** and **Gen IV** reactors
- **Offers clean, 'firm' power to complement intermittent resources such as wind/solar**, with many advanced safety features vs. existing reactors

SIZING: Large (~800–1,000 MW) | Small (50–350 MW, "SMR") | Micro (<50 MW)

Gen III+ reactors

- Advanced safety and modularity vs. Gen III reactors (vast majority of current fleet)
- Large or small modular reactor (SMR), using water as coolant
- Similar tech as existing nuclear plants
- Use low-enriched uranium (3–5% U-235)

Gen IV reactors

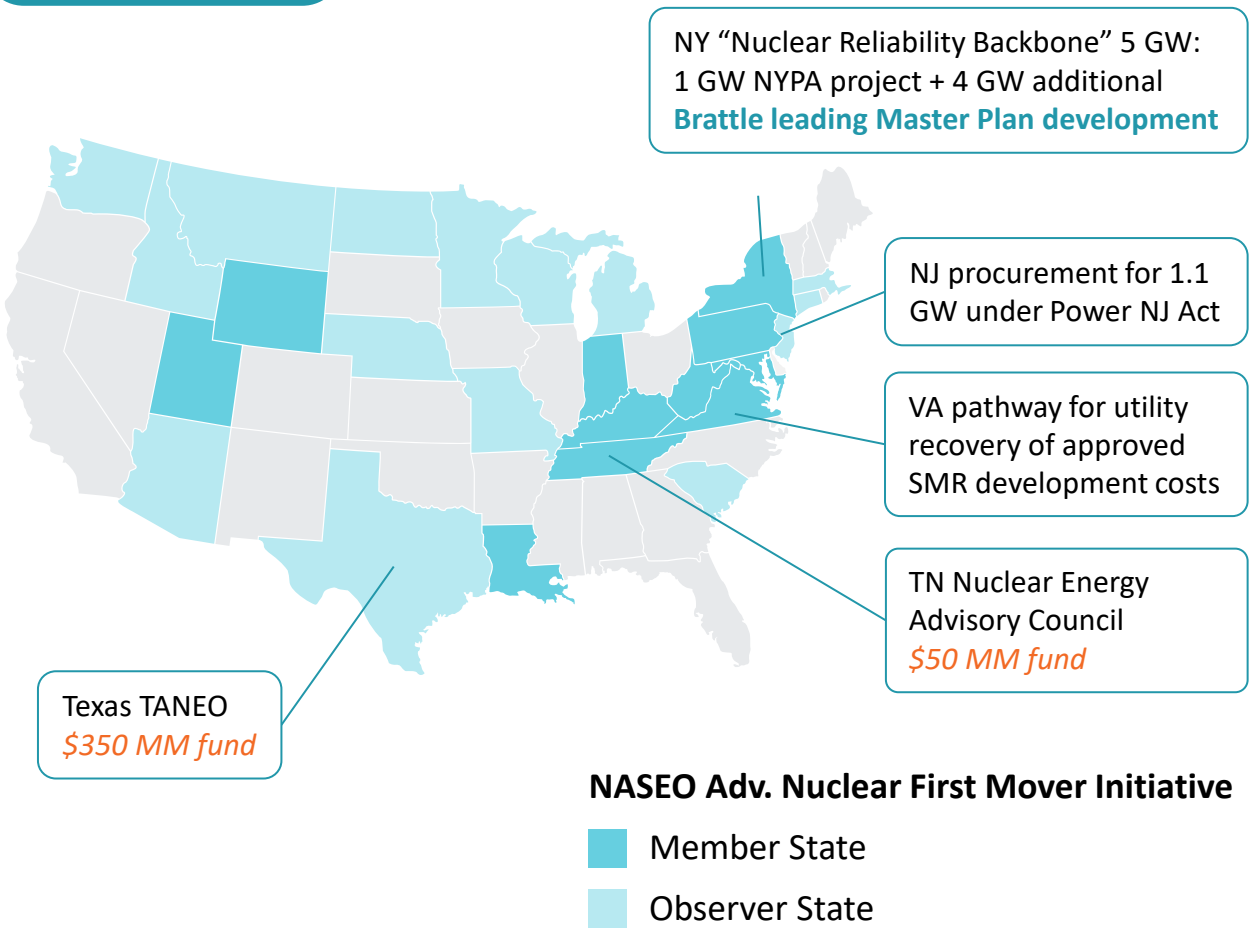
- New coolants: gas, liquid metal, molten salt
- Some designs tested in 1960s, but not commercialized at scale (e.g., HTGR)
- Use higher-enriched uranium (HALEU, 5–20%)
  - No established supply chain
  - Novel form factors: e.g., TRISO; fuel dissolved in coolant
- Novel safety features such as gravity-fed emergency cooling; convection cooling

Burgeoning Interest in New Nuclear: **Federal** & **State Policy**

Federal Actions

- **Current federal financial support** is invaluable, but not by itself sufficient for economic viability
  - 30–40% investment tax credit (ITC) and loan guarantees on up to 80% of capital costs provide major reductions in installed costs
  - In June 2026, the DOE announced $17.5B in low-interest loans for long-lead time procurement for 10 AP1000s to reduce deployment times by up to 3 years, reduce installed costs, and help address pre-final investment decision (FID) capital requirements (see slide 14)
  - Advanced Reactor Demonstration Program (ARDP) and other project-specific grants limited
- Reactor pilot program for fast-track advanced reactor demonstration; several new reactor designs achieved criticality by July 4, 2026
- Several changes to the Nuclear Regulatory Commission (NRC) to achieve faster processing of permit applications

State Actions



Burgeoning Interest in New Nuclear: **Private Offtake**

- **Innovation is intensive:** many designs in development and progressing from concept to early demo
- **Many players and business models emerging,** driven by hyperscaler offtake and other industrial partners with projects under development

Reactor Company	Partner/Offtaker	Project Size	Location	Status
TerraPower	PacifiCorp	345 MW	Kemmerer, Wyoming	Under Construction
X-energy	Dow Chemicals	320 MW	Seadrift, Texas	Permit Under Review
X-energy	Amazon	320 MW	Richland, Washington	NRC Pre-Application
Kairos Power	TVA, Google	50 MW	Oak Ridge, Tennessee	Construction Permit Approved
Oklo	Meta	1,200 MW	Pike County, Ohio	NRC Pre-Application

However, little is proven for success:

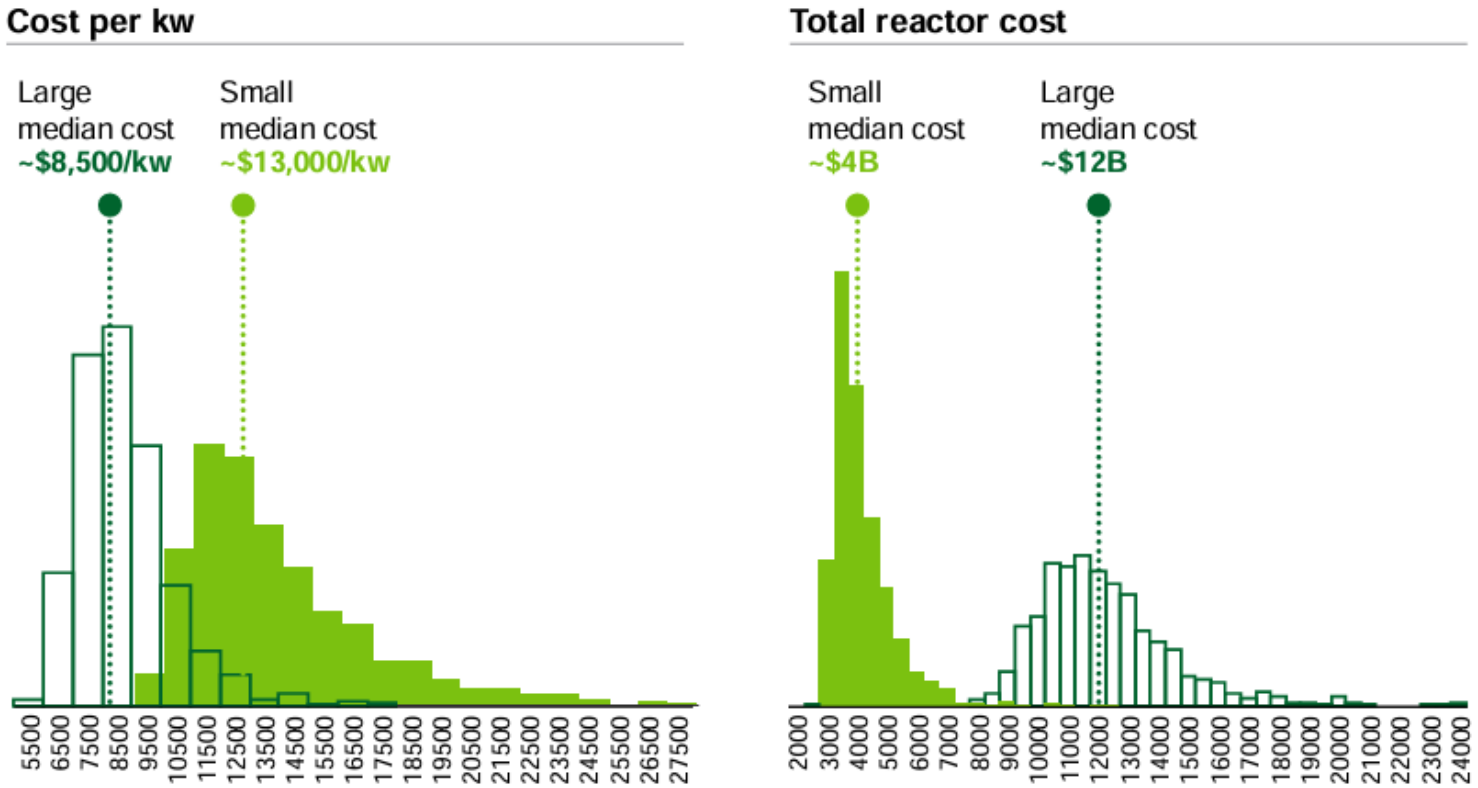
- The US has *no completed* advanced nuclear beyond Vogtle
- No new projects at FID, although TerraPower is under a special funding arrangement (see Appendix)
- There is no indication that the US industry is yet coalescing around a few key designs, as Korea and France did
- First-of-a-kind (FOAK) projects remain very high cost and risky, with long lead times

Cost, Time, and Risk Outlook for Nuclear by Type

- Civil works construction drives traditional nuclear capital costs
- Costs are highly uncertain
  - Cost of reactor island for FOAK
  - Existing site vs. greenfield?
  - Unexpected factors (procurement delays)
- Smaller reactors cost more per kW
- Smaller reactors have lower capital outlay
  - A $4B SMR with a 50% cost overrun would result in completed FOAK cost of $6B
  - A $10B large FOAK reactor with the same 50% cost overrun would result in a cost of $15B
- **Shifting construction from field to factory** can, in theory, enable automation, advanced manufacturing, and accelerated timelines
  - SMRs are modeled on this idea
  - Cost of nuclear is driven largely by construction costs (70–80%), which can be amplified by long lead times and associated financing costs

Modeled Costs for Boiling Water SMRs vs. Large Reactors (FOAK)

overnight cost per kW, and total cost



Source: DOE (2024), Pathways to Commercial Liftoff: Advanced Nuclear.

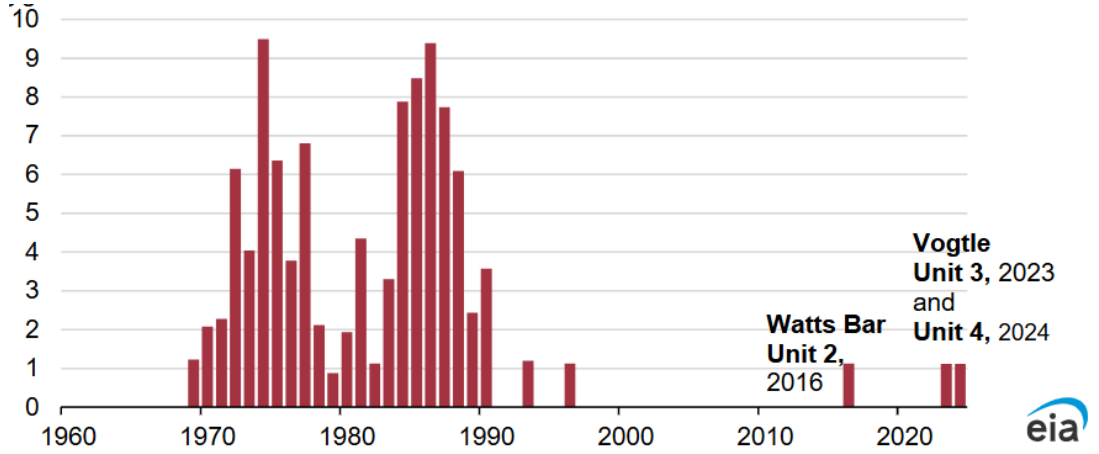
Lessons from Vogtle 3 & 4

Vogtle Units 3 and 4 in Georgia (Southern Company) were the first new US reactors completed in ~30 years

- AP1000, Gen III+ reactor, Westinghouse design
- Pressurized water as the coolant and moderator, like most of the existing US reactor fleet
- Budgeted for $14B, scheduled online 2016/2017
  - Actual cost: ~$30B (**+100% over budget**)
  - Overnight capital cost of ~$15,000/kW
  - Online 2023/2024 (**7 years late**)
- Delay itself is very costly: ~10%/year financing cost
- Main issues identified
  - Incomplete design led to extensive rework
  - Supply chain delivery issues – modules arrived late, incomplete, or both
  - Labor absenteeism, exacerbated by COVID
  - Inadequate detail in project schedule, quality assurance practices

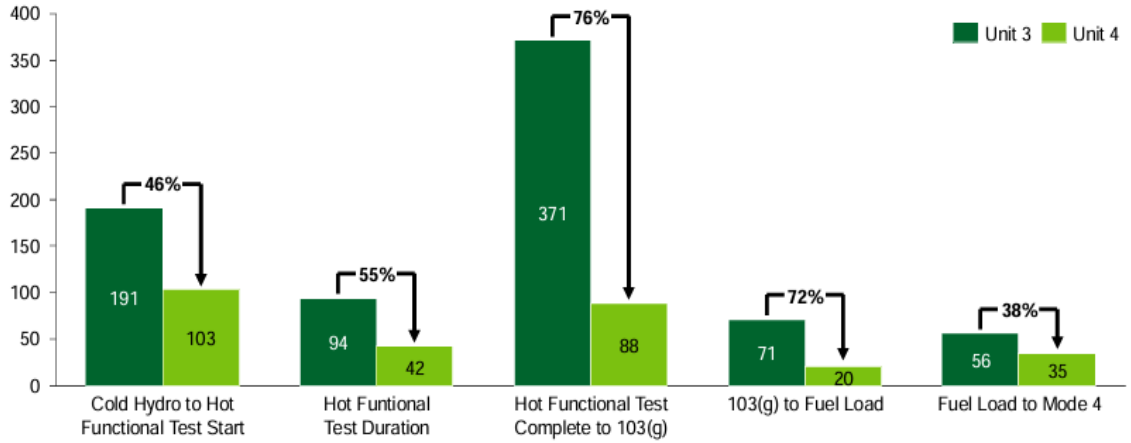
But Vogtle 4 was faster and 20% "cheaper" than Vogtle 3

Annual US Nuclear Power Capacity Additions by Year of Initial Operation



Source: EIA

Days Between Major Milestones for Vogtle Units 3 and 4



Source: DOE (2024), Pathways to Commercial Liftoff: Advanced Nuclear.

Informing Whether and How to Pursue New Nuclear

Strategic Questions

Issue	Considerations
Resource Planning	• **Capital costs and timing** of nuclear vs. alternative resources • **Reliability value** • **Clean energy policy** goals
Cost and Cost Risk	• **Federal support** via loan guarantee and ITC • **Maturity**: completed and proven design vs. unproven but promising design • **Project size**: a smaller single SMR has lower capital outlay but a higher cost/kW • **Experience** of original equipment manufacturer (OEM), engineering, procurement, and construction (EPC); supply chain and workforce maturity • **Risk allocation** among parties (sponsor, EPC, offtake, government, possibly other states), off-ramps
State Support	• **State support** of cost and cost risk: utility build, grants, offtake contracts (fixed or floating) • **Siting and permitting** • **Workforce** development commitments
Strategic Issues	• **FOAK cost/risk** vs. wait for lower cost but forego federal incentives (who goes first) • **Multi-project pipelines** to create and capture learning value • **Higher-risk technologies** with greater long-term potential

Resource Planning: How Does Nuclear Fit into a Generation Portfolio?

- Resource planning needs to capture relative value of different resources in terms of cost, system reliability, emissions, and other objectives
- Nuclear has high levelized cost of energy (LCOE), but also high value:
  - 24/7 power has high resource adequacy value
  - Provides large amounts of clean energy that may otherwise be challenging to meet
- Even within advanced nuclear technologies, there are tradeoffs in cost and performance across technologies; for example, SMRs may not achieve as high uptime for FOAK
- Advanced expansion modeling can account for cost and performance tradeoffs among resource types, including across a range of weather conditions affecting resource adequacy value

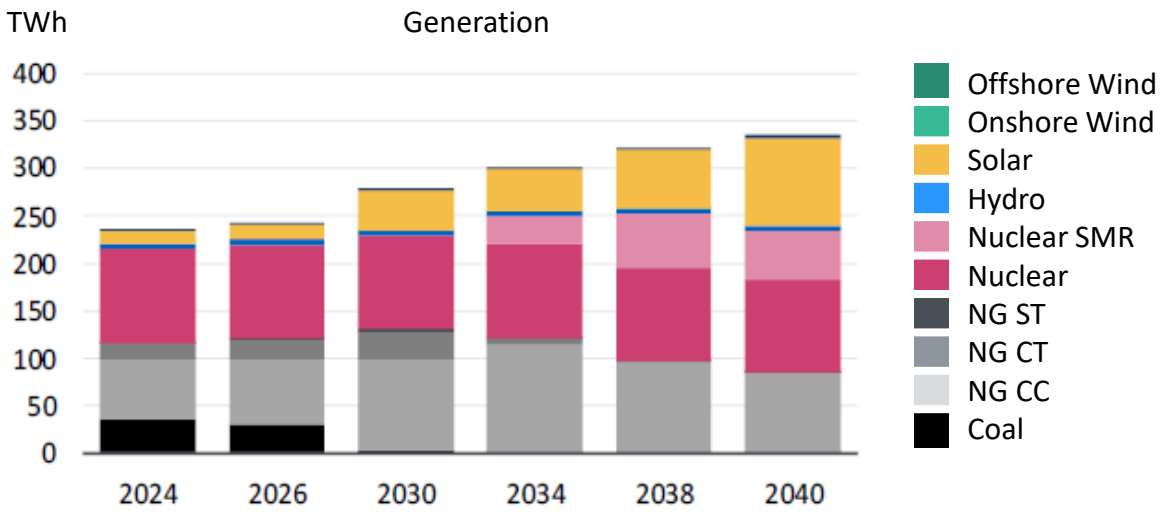
INPUTS

- Multiple weather years of load data
- Renewable energy profiles to account for multi-day droughts
- Planned and forced generation outages including extreme temperature-related forced outages



OUTPUTS

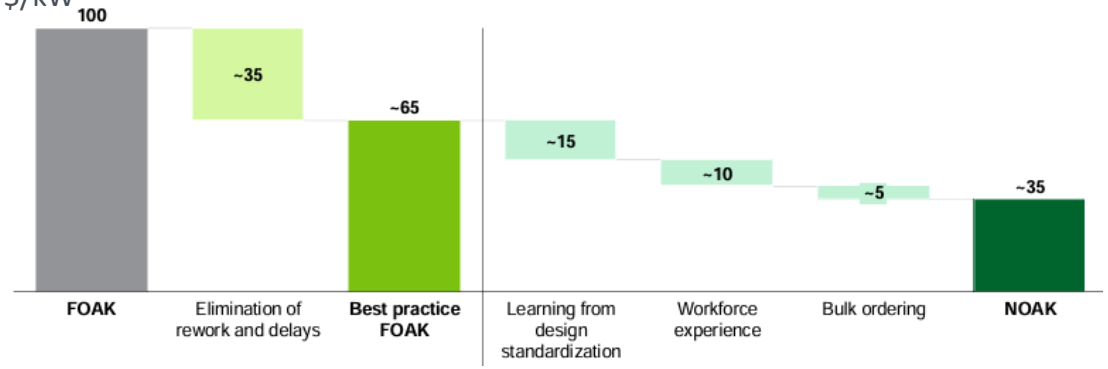
- Proxy year composed of proxy periods…
- …that reflect renewable, load, and outage conditions across varying weather conditions
- Weights for each proxy period that reflect expected frequency over a planning horizon



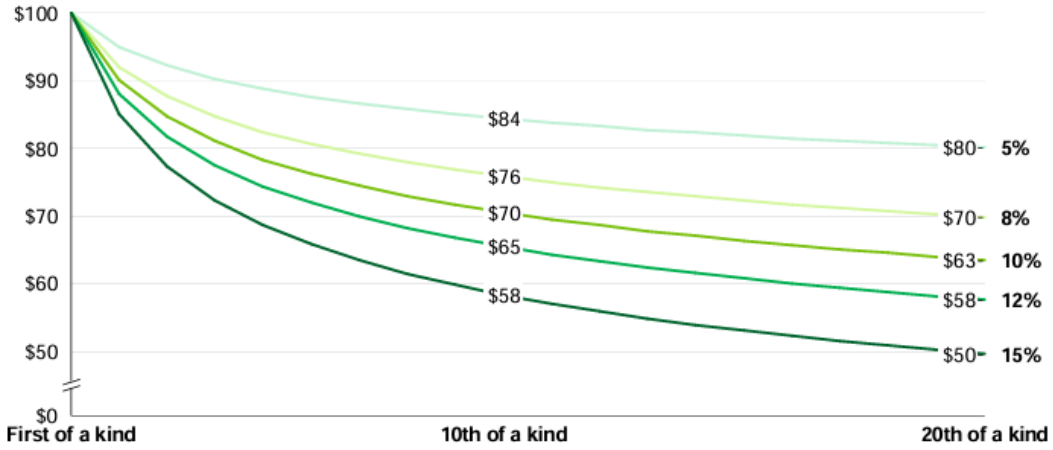
Key Determinants of Costs and Learning Rates

- **Standardize reactor designs**
  - South Korea and France constructed in series of ~10 units (DOE)
  - NOAK cost 20–30% (or more) below FOAK
- **Site multiple units together**
  - Share learnings, workforce, economies of scale on components
- **Maintain sufficient order book** and limit lag between projects to increase productivity and retain experience
  - South Korea and France built reactors in pairs, <2 years stagger
  - Deployment timing matters: moderate sequencing allows transfer of lessons learned, while highly parallel deployment can limit learning, and long gaps can erode workforce and supplier continuity

Relative Impact of FOAK to NOAK Cost Reduction Levers on Overnight Capital Costs, $/kW



Illustrative cost reductions by learning rate, $



Source: DOE (2024), Pathways to Commercial Liftoff: Advanced Nuclear.

Costs are illustrative, reflecting how relative costs may evolve over time.

Learning Rates Vary by Component

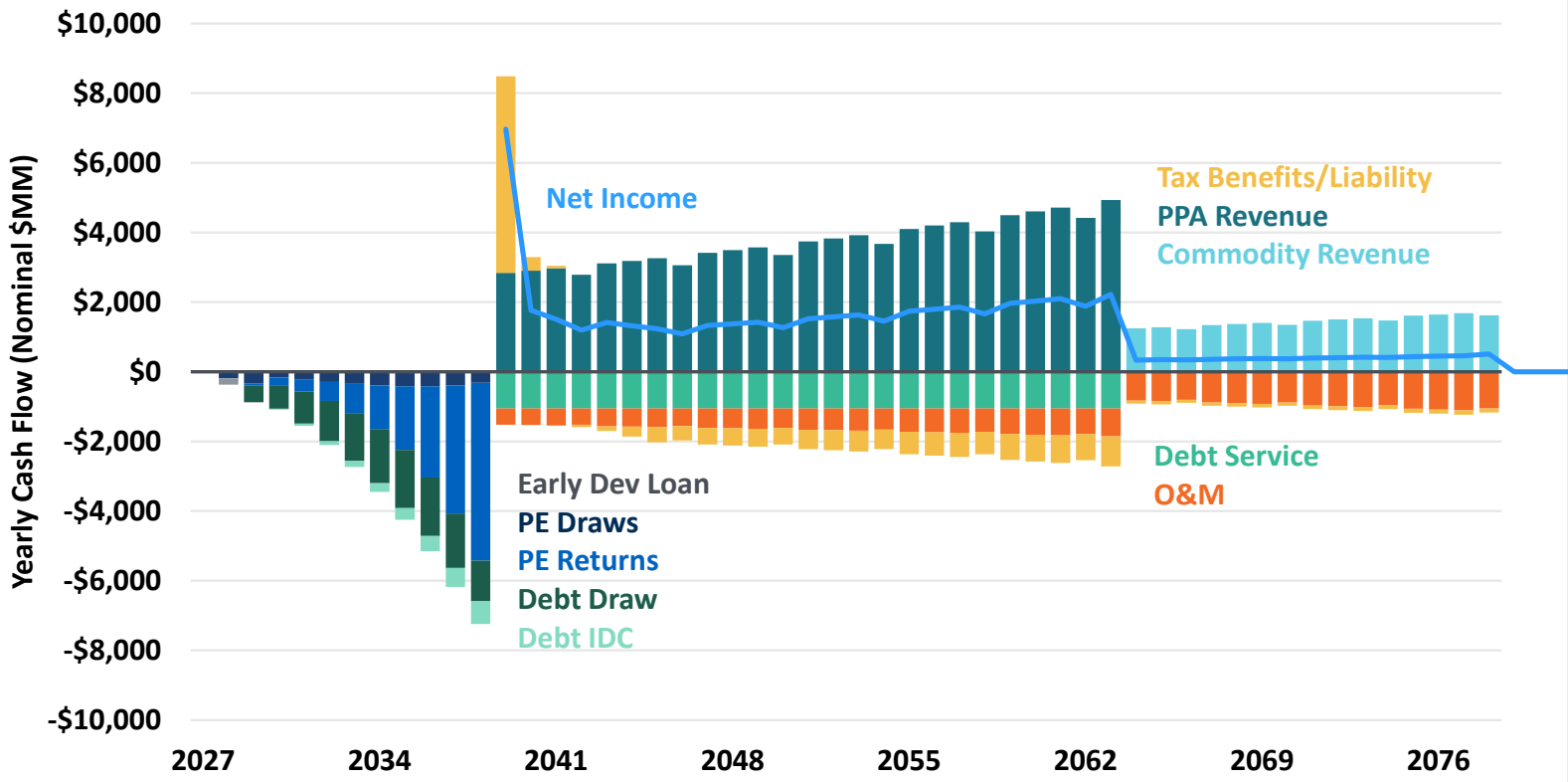
Learning can be modeled by cost component: different cost categories improve in different ways.

Cost Component	Description	Learning Transfer
Equipment	Equipment manufacturing, transportation to site, taxes, decommissioning cost and profit for turbine and nuclear island equipment	Supply chain and factory learning transfer broadly across project deployment timeline and siting
Materials	Concrete, steel (including pipes and rebar), and wires; excludes materials used in offsite work for equipment	Local materials learnings benefit from local supply chain learnings, but do not transfer between jurisdictions well
Labor	Onsite labor to perform civil, mechanical, and electrical work	Assumed to transfer between sites, assuming the same workforce can be retained and redeployed (typically locally)
Indirect Costs	Design services, project and construction management at the home office, field construction management and supervision at plant site, plant-specific commissioning service, and contingencies	Requires time between deployments for “learning by doing” (i.e., project management and execution lessons from one unit cannot be incorporated into another unit that begins at the same time); depends on EPC continuity
Owner’s Cost	Site preparation (including utility access), cooling infrastructure (e.g., cooling water intake and heat rejection systems), additional transmission switchyard, site specific engineering, regulatory compliance, and startup	Learning is assumed to apply only to repeated deployment at the same site

Project Financial Modeling

- Project-level financial model can be set up to solve for different input variables to make a project "pencil out"
- Key modeling constructs:
  - Ownership
  - Financing structure
  - Allocation of risk between entities
  - Expected returns across distinct project phases

Example Cash Flow Diagram from Recent NYSERDA Analysis



Source: NYSERDA Advanced Nuclear Policy Options Paper, Appendix D: Cost Analysis – Results, p. D-10.

Key Sensitivities on Project Costs

- **Brownfield vs. Greenfield** → Lower overnight capital cost (OCC) and shorter development time can reduce costs up to 25% in our modeling
- **Wide range of OCC estimates** in literature drives big differences

  Example from a recent client study:
  - **LLWR**: $10,200/kW up to $15,900/kW (2025$)
  - **SMR**: $12,100/kW up to $30,000/kW (2025$)
- **Debt interest rate** and **private equity hurdle rate** have large effects

Variable	Base	Low	High	Highest
Greenfield OCC ($/W)	$12.8	$10.2	$16.0	N/a
Capacity Factor (%)	93%	90%	95%	N/a
Fixed O&M ($/W-yr)	$0.20	$0.14	$0.23	N/a
Variable O&M ($/kWh)	$0.0033	$0.0023	$0.0040	N/a
Fuel Cost ($/kWh)	$0.011	$0.009	$0.013	N/a
Debt Interest Rate (%)	5%		6%	7%
Minimum Required DSCR	1.1x		1.2x	1.3x
Equity Hurdle Rate	22.5%	20%	25%	N/a

	Uncertainty	Difference in Total Public Cost
LLWR		
S-Y1	High OCC LLWR	30%
S-Y2	Low OCC LLWR	-24%
S-Y3	High CF LLWR	-1%
S-Y4	Low CF LLWR	1%
S-Y5	High Fixed O&M LLWR	5%
S-Y6	Low Fixed O&M LLWR	-8%
S-Y7	High Variable O&M LLWR	1%
S-Y8	Low Variable O&M LLWR	-1%
S-Y9	High Fuel Cost LLWR	2%
S-Y10	Low Fuel Cost LLWR	-2%
S-Y11	High Debt Interest LLWR	12%
S-Y12	Highest Debt Interest LLWR	24%
S-Y13	High DSCR LLWR	0%
S-Y14	Highest DSCR LLWR	2%
S-Y15	High Eq. Hurdle Rate LLWR	14%
S-Y16	Low Eq. Hurdle Rate LLWR	-12%
SMR		
S-Y17	High OCC SMR	72%
S-Y18	Low OCC SMR	-39%
S-Y19	HALEU Fuel Cost SMR	3%

Source: NYSERDA Advanced Nuclear Policy Options Paper, Appendix D: Cost Analysis – Results.

Pre-FID Activities Are Significant

- Pre-FID activities are necessary to advance the project and resolve some regulatory, technical, site, and environmental risks to secure funding at FID to construct the project; however, **sizable investment is required to get there (around $1 billion for a large plant).** If FID is not reached, this capital is lost.
- A major share of new nuclear effort before 2030 will be on pre-FID activities. Figuring out how to raise this capital, de-risk uncertainties, and shorten the pre-FID period will be critical.
- Important to understand what financial support options are available to complement expensive private-sector finance to complete pre-FID activities (including new DOE low-interest loans for long-lead items).

Activity Group	Task	Responsible Party	Cost	Timeline
Project Definition & Site Characterization	Select site and reactor technology	Sponsor / Developer	$	Early
	Complete site, environmental, geotechnical, seismic, and hazard studies	Developer + Specialist Consultants	$$$	Early–Mid
Design, Licensing & Approval	Establish licensing strategy and engage with NRC	Developer + Licensing Team	$$	Throughout
	Advance plant design and place selected long-lead items equipment orders (***can be hundreds of millions***)	Vendor + EPC + Developer	$$$$	Mid–Late
	Develop Preliminary Safety Analysis Report (PSAR), environmental report, emergency/security plans, and construction permit application (CPA)/limited work authorization (LWA) application	Developer + Vendor + Consultants	$$$	Mid–Late
	Support NRC review and obtain LWA approval	NRC + Applicant Team	$$	Late

Pursuing New Nuclear

Informing Site Selection, Workforce, and Regulatory Issues

- We **collaborate with partners** to address a range of implementation workstreams for new nuclear deployment.
- This includes aspects such as:
  - technology assessments
  - siting and permitting
  - workforce
  - public engagement
  - regulatory issues

solestiss

Sargent & Lundy

NUCLEAR INNOVATION ALLIANCE

[bw] RESEARCH PARTNERSHIP

Factors to Consider in a Detailed Techno-Economic Assessment

COST AND COST RISK

Expected Costs and Cost Risk

- Estimated capital cost for FOAK
- Construction complexity
- Specialized parts / supply chain
- Experience of qualified developers

Future Cost Declines

- Active projects (interest from other buyers)
- Modularity of design / economies of scale
- Estimated cost of the N+1th plant

TIMING AND TIMING RISK

Deployment Timeline

- Licensing approach
- Licensing status
- Reactor design status
- Balance of plant design status
- Long lead-time items
- Operations readiness
- Project timeline
- Licensing timeline

ECONOMIC DEVELOPMENT

Capturing Economic Value in the State

- Local workforce participation in technology scale-up
- Ability to gain first-mover advantage
- Ability to export technology and build industrial base
- Applicability to other use cases (e.g., industrial heat, H_2)

OPERATING PERFORMANCE

Confidence in Availability

- Novelty of reactor design
- Novelty of balance of plant
- Novelty of fuel supply

Ancillary Capabilities

- Black start capabilities
- Peaking capability (e.g., storage integration)
- Load following capability (fast ramping)

SAFETY & SITING

Siting

- Size of emergency planning zone around the plant
- Construction space required
- Water requirement of the design
- Ability to expand existing industrial sites
- Radiological and non-radiological emissions

Waste Storage

- Amount of high-level radioactive waste

Safety

- Passive safety systems
- Coolant circulation

Appendix

OVERVIEW OF ADVANCED NUCLEAR TECHNOLOGIES AND REVIEW OF PROJECTS RECENTLY COMPLETED OR UNDER DEVELOPMENT

Advanced Nuclear Technologies

	Gen III+	Gen IV		
Coolant	Light Water	Gas	Liquid Metal	Molten Salt
Reactors	• Pressurized water reactor • Boiling water reactor	• High-temperature gas reactor • Gas fast reactor	• Sodium fast reactor • Lead fast reactor	• Molten chloride fast reactor • Fluoride high-T reactor
Fuel	• LEU, LEU+	• HALEU	• HALEU	• HALEU
Size	• Large (800–1000 MW) • Small (50–350 MW)	• Small • Micro (<50 MW)	• Small • Micro (<50 MW)	• Small • Micro (<50 MW)
Advantages	• Established supply chain and fundamental technology principles • Long history of high uptime in operations	• Higher operating temperature supports efficiency and use in hydrogen, high-T industrial heat • Low water and land usage	• High passive safety features • Small emergency planning zone • Low water and land usage	
Challenges	• Large upfront capital cost • Most recent project (Vogtle) involved large budget and schedule overruns	• Novel reactor, fuel, and balance of plant design and operation indicates high construction and operating performance risk • Underdeveloped supply chain		
Select Companies	• Westinghouse • GE Vernova Hitachi • NuScale • Holtec	• BWXT • General Atomics • X-energy	• TerraPower • Oklo	• Kairos • Terrestrial

Recent Nuclear Projects Completed (Outside China)

Project(s)	Business Model and Gov Support	Timing	Cost	Lessons Learned
Finland **Olkiluoto-3** 1600 MW EPR	"Mankala model" owned by industrial and utility offtakers; little public support;[F1] Areva (EPC) & Siemens (vendor) to deliver fixed-price turnkey[F2]	Start constr. 2005 Est. 2009 COD 2023[F3]	Cost overruns (€11B vs. 3B), mostly paid by vendor consortium; Areva went bankrupt	Finnish government: "A string of technical and safety setbacks due to poor project management and workmanship"
UAE **Barakah 1-4** 4x1400 MW AP1400	UAE gov (ENEC) plus minority KEPCO; $20B loan guar/UAE; $2.5b Korea; $2B US;[U1] KEPCO provided fixed-price contract	Start constr. 2012–15 Est. 2017–20 COD 2021–24[U2]	Planned $24.4B OCC (2016 $s), although ultimate costs not transparent; one report $32B (unclear OCC vs. IC and year $s) 4th unit 40% lower labor than 1st	Success partially translatable w/same design and same EPC; scale helps
US **Vogtle 3 & 4** 2x1100 MW AP1000	Utility COS w/DOE loan guarantee ($8B=>$12B) and PTC[V1]	Start const. Est. 2016/17 COD 2023/24[V2]	"$14B" =>$35B installed ($16k/kW OCC in 2023$). 2nd unit ~20%less than 1st.[V3] Overruns borne $3.7B by EPC parent,[V4] $2.5B by SoCo shareholders, rest/ratepayers	Huge FOAK risks, especially w/ incomplete design, immature workforce, and supply chain. OEM not necessarily good EPC & "substantially fixed price" risky (Westinghouse bankrupted)
France **EDF Flamanville 3** 1x1650 MW EPR	100% government-owned with COS rate recovery	Start constr. 2007 COD 2026[Fr1]	Overruns (€13 vs. 3.3) allocated between ratepayers and gov (taxpayers)	Lessons similar to Vogtle[Fr2]
South Korea **Shin-Kori 3 & 4** 2x1400 MW AP1400	Owned by government-run utility, KEPCO, and COS rates	Start constr. 2008, 2009 COD 2016, 2019	$3000/kW OCC (2023$)[K1]	Repeated construction of same design by same players can lower costs dramatically. Continuous pipeline of projects supports workforce, supply chain

Sources: Listed below in speaker notes, corresponding to footnote numbers.

Projects Under Construction

Project	Status	Business Model and Government Support
UK **Hinkley Point C** 2x1630 MW EPR[1]	Under construction Est. COD 2029–31	Independent power producer (IPP) w/above-market Contract for Difference (CFD), with IPP allocating the costs to ratepayers; IPP takes overrun risk
UK **Sizewell C** 2x1630 MW EPR	Pre-construction[2]	Utility rate base cost recovery plus partial government cost overrun guarantee
South Korea **Shin Hanul 3 & 4** 2x1400 MW AP1400	Under construction Est. COD 2032/33[3]	100% government-owned utility and regulated cost recovery, absorbing all overruns
Canada **Darlington** 4 BWRX-300 SMR	Under construction; planned COD 2030	Regulated rate-based asset of gov-owned utility plus $970m low-interest gov loan;[4] cost overruns split between ratepayers and government (taxpayers)[5]
Wyoming, USA **TerraPower Kemmerer Plant** 345 MW SFR[6]	Began site work in 2024; got construction license in March 2026 and is now under full construction	Private development for PacifiCorp offtaker, with $2 billion funding by TerraPower, backed by Bill Gates; supported by DOE ARDP matching grant of $2 billion (and may also qualify for ITC)
Tennessee, USA **Kairos Hermes II** (Test reactor for 75 MW KP-FHR)	Began construction in 2026	Kairos Power's first deployment for Google PPA in TVA[7]

Sources: Listed below in speaker notes, corresponding to footnote numbers.

Other Selected Projects Not Backed by Public Support Have Not (Yet) Secured FID/Construction Funding

Project/Technology	Status	Government role
X-energy and Dow (Texas)[1] Xe-100 HTGR, 4x80 MW	Construction permit (CP) submitted; no public FID[2,3]	DOE grants of $1.25B but no other government cost supports[4,5,6]
X-energy and Amazon (WA) Xe-100 HTGR, 12x80 MW	Plan for 12 reactors. Direct investment from Amazon, but construction finance unclear	Site provided by Energy Northwest (Columbia Generating Station); no known state funding
Oklo Aurora – Idaho Nat. Lab 75 MW SMR	NRC pre-application stage[7,8]	Use of federal government-owned site;[9] no federal financing or cost-share to date
UK – Rolls Royce 450 MW SMR[10]	The UK named Rolls Royce SMR the "preferred bidder" but no contract or construction yet	General government pledge for programmatic support but no specific support for this project yet
Holtec Palisades 300 MW SMR[11]	In development; no construction permit application	Self-financed $50 MM to date; no other supports/investors known
V.C. Summer, SC AP1000, 2x1100 MW	Santee Cooper awarded Brookfield project for completing unfinished reactors in Oct 2025. Previous construction licenses were terminated by NRC in March 2019, so new licenses needed	No governmental funding support committed yet
TVA Clinch River 1 BWRX-300 MW SMR[12]	Construction permit accepted for review but no FID, financing, or cost recovery	Presumably rate-based utility asset from 100% government-owned utility
TVA NuScale x Entra1 6 Entra1 plants using NuScale modules; 6GW[13]	Project has not progressed beyond a “collaboration agreement” – no NRC application, FID, financing plan, or cost recovery known	No governmental funding support received yet

Sources: Listed below in speaker notes, corresponding to footnote numbers

For More Information



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Dr. Newell leads Brattle's 60+ electricity-focused consultants in analyzing critical economic questions in the industry.

His 25+ years of consulting experience centers on electricity wholesale markets, market design, resource valuation, transmission planning, integrated resource planning, and policy analysis. Dr. Newell conducts studies and prepares testimony on behalf of independent system operators (ISOs), state energy agencies, infrastructure investors, and wholesale market participants. He has been directing Brattle's support for NYSERDA's development of the Advanced Nuclear Master Plan for New York.

Prior to joining The Brattle Group in 2004, Dr. Newell was the Director of the Transmission Service at Cambridge Energy Research Associates. Before that, he was a Manager in the Utilities Practice at Kearney.



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Dr. Murphy is an economist with over 30 years of experience, specializing in issues related to energy systems and their transformation in response to climate change.

His work centers on the electricity and gas industries, including the challenges and opportunities facing the electricity sector as it transitions from fossil generation toward greater reliance on intermittent renewable power sources. Dr. Murphy also considers issues confronting the natural gas industry as it transitions to a decarbonized future. He has led a number of studies investigating long-term strategies for decarbonizing the electric and/or gas sectors or an entire economy. Additionally, he has examined the impacts on energy systems and consumers of particular policy decisions, such as increasing a state's renewable portfolio standard (RPS) requirement, supporting clean generation, or transitioning the gas system to a clean future. With a background in engineering, Dr. Murphy brings expertise in competitive and regulatory economics, finance, and quantitative modeling to address these questions.

For More Information



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Dr. Mohan specializes in the evaluation of energy technologies at a systems level, with expertise in nuclear engineering, electricity markets, techno-economic analysis, and energy policy.

His recent work focuses on the interconnection and resource adequacy challenges posed by large loads such as data centers. Dr. Mohan has filed expert testimony to the Federal Energy Regulatory Commission (FERC) on the expedited interconnection of co-located large load facilities with generation.



Peter Heller

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Mr. Heller specializes in design and implementation strategies for policy, regulation, and market design related to the energy transition.

He focuses his work on transmission and resource planning in markets across North America. Mr. Heller has experience in evaluating and designing effective transmission planning processes and economic evaluations of integrated resource plans. He has been managing Brattle's support for NYSERDA's development of the Advanced Nuclear Master Plan for New York.

Clarity in the face of complexity

Brattle

