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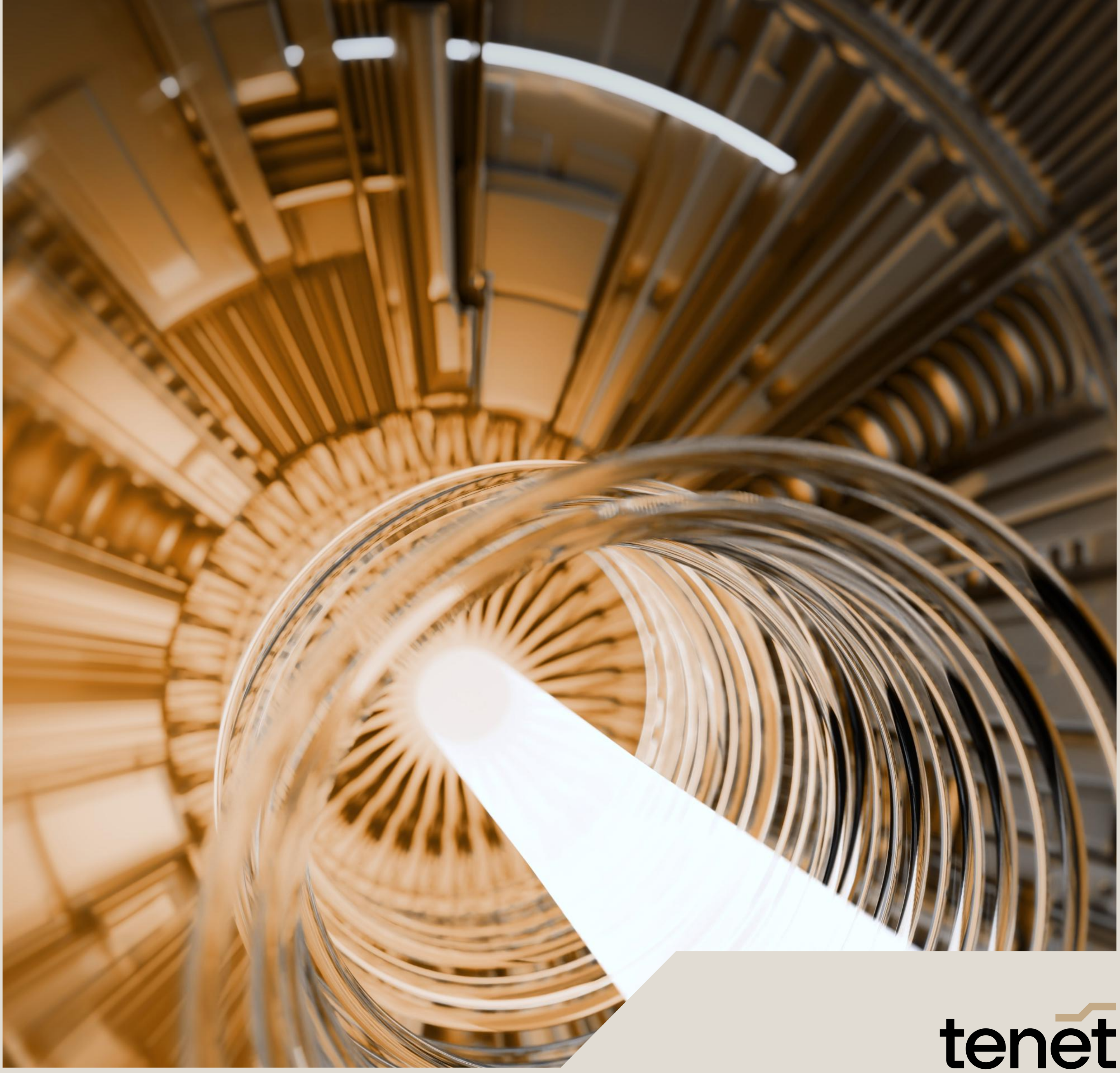
# Beyond localisation: China's next nuclear partnership model

Tenet Consulting –
Nuclear Sector insights



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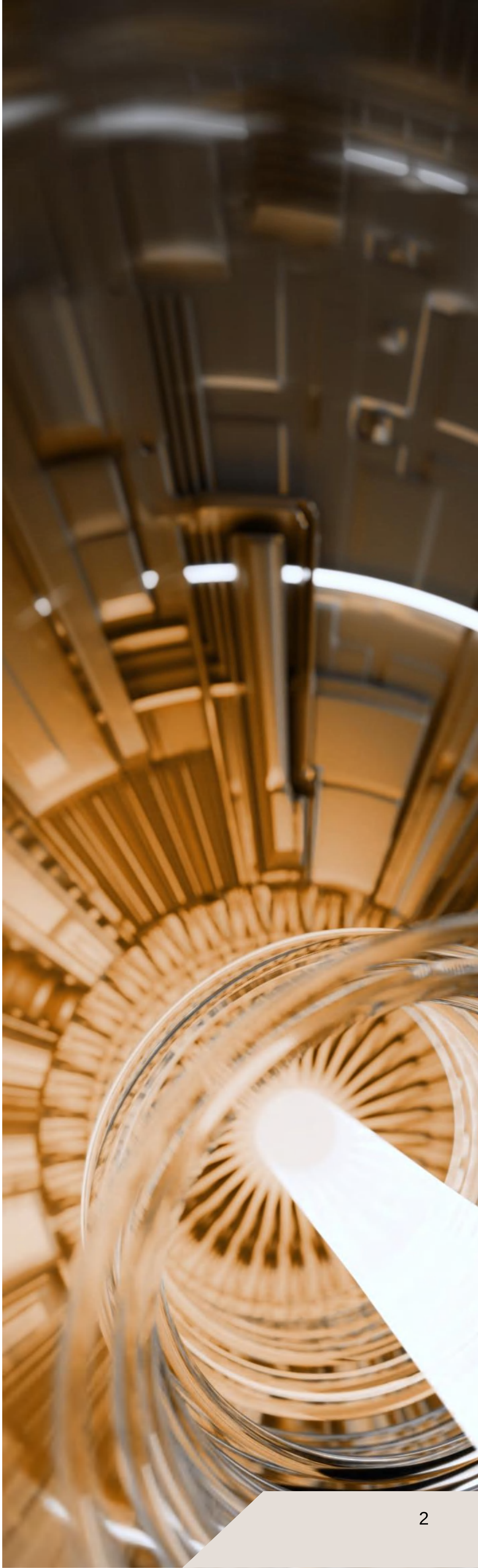

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# → AT A GLANCE

**Country:** China

**Topic:** Nuclear industrial strategy and international cooperation

**Focus:** China's transition from technology localisation to technology leadership

**Project stage:** Mature domestic deployment and next-generation technology development

**Key stakeholders:**
Government • nuclear utilities • reactor vendors • fuel-cycle organisations • industrial manufacturers • international technology partners

**Key message:** Future cooperation with China will be driven less by reactor exports and more by complementary technologies, advanced fuel-cycle capabilities, and trusted long-term partnerships

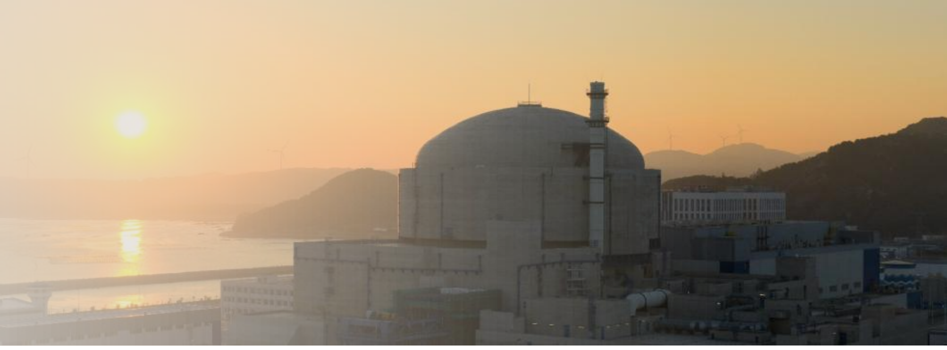
**Reading time:** 13-15 min

**Why it matters:** China's evolution is reshaping not only its domestic nuclear industry, but also the future architecture of global nuclear partnerships.

China's achievement of 95% localisation in Hualong One is more than just an industrial milestone – it marks the completion of the country's transition from technology importer to technology architect. As China achieves technological sovereignty in large-scale nuclear deployment, the basis for international cooperation is fundamentally changing. Future partnerships are likely to move beyond conventional reactor exports towards advanced fuel cycles, industrial reactor applications, high-temperature process heat, and integrated nuclear ecosystems. This evolution presents both challenges and new opportunities for established nuclear nations seeking to remain relevant in the world's largest nuclear market.

# PART I

## From technology recipient to technology architect



For decades, China's nuclear industry was viewed as the world's largest technology importer. Now that is no longer the case. When China General Nuclear (CGN) announced in 2025 that localisation of the Hualong One reactor had reached 95%, the figure represented far more than an industrial milestone; it marked the completion of a national strategy that had been unfolding for more than 40 years – the transformation of China from being a buyer of foreign nuclear technologies into one of the world’s leading nuclear innovators.

## TECHNOLOGY SOVEREIGNTY WAS NEVER ABOUT SELF-SUFFICIENCY ALONE

China's achievement did not happen overnight. Unlike many emerging nuclear nations that purchase reactors primarily to generate electricity, China has always treated nuclear power as an instrument of long-term industrial policy. Electricity generation was only one objective. Building domestic engineering capabilities, manufacturing capacity, regulatory institutions, and globally competitive supply chains was equally important.

This philosophy explains why localisation should not be interpreted as simply replacing imported components with domestic ones. Instead, localisation was the gradual transfer of knowledge – from engineering and manufacturing to licensing, project management, operations, and eventually independent innovation. The result is an industry that is capable of designing, manufacturing, building, and operating almost every component required for large-scale nuclear deployment.

## THE THREE-STEP STRATEGY BEHIND CHINA'S NUCLEAR RISE

China's progress followed a remarkably disciplined industrial roadmap often referred to as the Three-Step Strategy.

### Step One: Import

During the 1980s and 1990s, instead of relying on a single partner, China deliberately imported reactor technologies from several international suppliers. French M310 reactors, Russian VVER units, and later Westinghouse's AP1000 each provided different engineering philosophies, licensing approaches, safety concepts, and supply chains. The objective was never simply to purchase reactors, but to understand how leading nuclear nations solved similar engineering challenges through different technological approaches.

### Step Two: Assimilate

The second stage focused on mastering imported technologies. Chinese organisations localised manufacturing, developed domestic suppliers, adapted foreign designs to national standards, and accumulated practical experience through repeated construction. Reverse engineering, localising major equipment, enhancing domestic control systems, and expanding engineering capabilities transformed China from a technology customer into a highly capable industrial producer.

### Step Three: Innovate

Only after mastering imported technologies did China shift its focus towards indigenous reactor designs. Projects such as Hualong One, CAP1400, and HTR-PM combine lessons learned from multiple international technologies with decades of domestic engineering experience. China no longer measures success in terms of domestic deployment alone – its reactor designs are increasingly intended for international licensing, export, and participation in global nuclear markets. Technology transfer has evolved into technology creation.

## NPP EQUIPMENT LOCALIZATION PROGRESS IN CHINA

| Stage | Localization Rate |
|---|---|
| M310 (import) | 1% |
| Ling Ao 2 | 30% |
| Ningde 2 | 64% |
| Hongyanhe | 75% |
| Yangjiang 5 | 80% |
| Fangchenggang 3 | 83% |
| Fangchenggang 4 | 85% |
| Hualong One (Fangchenggang 5) | 87% |
| Hualong One (Fangchenggang 6) | 89% |
| Sanmen (CAP 1000) or new series | >95% |

Source: CGN

## COMPETITION AS A NATIONAL INDUSTRIAL POLICY

A distinct feature of China's nuclear programme is that it never relied on a single national champion. Instead, Beijing deliberately fostered competition among several state-owned organisations. CGN, CNNC, SPIC, and Huaneng each developed different technological capabilities, reactor concepts, and industrial partnerships while operating within the same national strategic framework.

## STRUCTURE OF THE CHINESE NUCLEAR MARKET, 2024 – 2025

| China National Nuclear Corporation (CNNC) | China General Nuclear Power Group (CGN) | State Power Investment Corporation (SPIC) / SNPTC | China Huaneng Group – Tsinghua INET – CNEC (new technologies group) |
|---|---|---|---|
| **22.4** (16.2)<br>**38%**<br>The "Old Guard" of the nuclear industry – a state-owned corporation founded in 1988 on the basis of the Ministry of Nuclear Industry of the PRC. It operates across the entire value chain – from uranium mining, enrichment, and fuel production to the construction and operation of NPPs. | **31.7** (7.2)<br>**55%**<br>The second largest nuclear company in the PRC, which grew out of a regional project. Established in 1994 as China Guangdong Nuclear Power Group (a join venture with EDF) for the construction of the first NPPs in Guangdong Province. | **2.5** (8.1)<br>**4%**<br>The third NPP operator – one of the "Big Five" state-owned power companies, formed in 2015 through the merger of China Power Investment Corp (CPI) and State Nuclear Power Technology Corp (SNPTC). It combines massive assets (over 100 GW) in nuclear, hydro, and renewable generation. | **1.5** (2.4)<br>**3%**<br>The group unites organizations behind Generation IV projects and alternative reactors. Formally, it is an energy holding company without an NPP operating license, but it plays a crucial role as an investor and operator of experiment stations, as well as a developer of new technologies. |
| **Specialization** | **Specialization** | **Specialization** | **Specialization** |
| State flagship, project owner for a number of technological lines, including French (CFR-600), Russian (VVER), Canadian (CANDU), co-developer of the unified Hualong One design, fast sodium reactors, Small Modular Reactors (SMRs), and the primary exporter (Pakistan). | Mass construction, "child" of Chinese-French cooperation, CPR-1000, ACPR, EPR, co-developer of the unified Hualong One design, potentially a second channel for export (Hinkley Point C NPP, UK – prior to sanctions) and a number of others. | "American" technological line: SPIC inherited from SNPTC the role for CAP1000/1400 – the localization of Westinghouse technologies, forming a competing branch of Generation III+ | Investor in high-temperature and industrial solutions such as HTR-PM, minority shareholder of NPPs, partnership with university R&D; Tsinghua INET (Institute of Nuclear and New Energy Technology at Tsinghua University). |

Source: Tenet analysis

● NPP Capacity (under construction), GW ● Market Share

At first glance, this may appear inefficient. In practice, controlled competition has fostered remarkable resilience: different engineering teams pursued alternative solutions, manufacturing capabilities expanded through parallel supply chains, and multiple reactor concepts evolved simultaneously. Rather than choosing one "winning" reactor design, China cultivated an ecosystem capable of continuous innovation – an approach that differs significantly from the more centralised models adopted by other major nuclear nations, and this helps explain both the scale and speed of China's industrial progress. As we show below, this complementary competition tactic is now shaping how China approaches cooperation internationally as well.

## WHY 95% LOCALISATION CHANGES THE RULES

The significance of China's 95% localisation rate extends far beyond manufacturing statistics. It signals that China has entered a fundamentally different stage of nuclear development. Traditional exports – reactor islands, EPC contracts, standard fuel supply – are becoming progressively less relevant within the Chinese market, as domestic industry can increasingly deliver these capabilities independently.

For international suppliers, this raises an important question: what kinds of technologies and competencies remain strategically valuable once a country has achieved technological sovereignty? Part II examines this question in detail.

# PART II

## Beyond reactor exports: Where China's next partnerships will be built

China's remarkable localisation success naturally raises an important question. If the country can now independently design, manufacture, build, and operate modern Generation III reactors, what role remains for international partners?
The answer lies in understanding the difference between industrial independence and technological completeness. China has largely solved the first challenge. The second remains a work in progress.
The next phase of international cooperation will therefore be defined not by replacing domestic capabilities, but by strengthening areas where China continues to value external expertise.

### → THE LAST FIVE PERCENT MATTERS MOST

A localisation rate of 95 percent is often interpreted as meaning that only a few components still require foreign suppliers. In reality, the remaining five percent represents something much more significant. These are rarely mass-produced components or standardised engineering solutions. Instead, they include technologies that are exceptionally difficult to industrialise, validate over decades of operation, or reproduce economically: specialised materials, advanced fuel technologies, unique manufacturing processes, highly qualified digital systems, and decades of accumulated operational knowledge that cannot simply be reverse-engineered.

In nuclear engineering, these "last five percent" technologies frequently determine the overall resilience of an entire programme. The remaining technological gaps are no longer about manufacturing capacity, but experience, validation, and long-term confidence.

### → CHINA'S NEW BOTTLENECK IS NOT MANUFACTURING

Over the past two decades, Chinese manufacturers have successfully localised virtually every major component required for large pressurised water reactors – reactor pressure vessels, steam generators, primary pumps, turbine equipment, instrumentation and control systems, and civil construction capabilities. China has built one of the world's most comprehensive nuclear manufacturing ecosystems.

That said, industrial maturity does not eliminate every dependency. Some specialised materials will require extensive testing and verification before domestic alternatives can fully replace imported products, and certain high-performance components remain difficult to manufacture consistently at commercial scale. Most importantly, several areas of the nuclear fuel cycle remain significantly more complex than conventional reactor construction – less visible than reactor buildings or heavy equipment, but strategically far more important.

### → THE FUEL CYCLE IS THE NEXT STRATEGIC FRONTIER

As China expands its nuclear fleet, the question gradually shifts from how to build reactors to how to fuel them sustainably for decades. Large-scale deployment of nuclear power inevitably increases demand for uranium resources, fuel fabrication capacity, spent fuel management, and long-term waste solutions. Global ambitions to triple nuclear capacity by 2050 further amplify these pressures.

Natural uranium production remains geographically concentrated, exposing all major nuclear programmes to geopolitical and supply-chain risks. For a country planning one of the world's largest reactor fleets, long-term fuel security becomes as important as reactor technology itself – explaining China's growing interest in spent fuel reprocessing, mixed oxide (MOX) fuel, fast reactors, and eventually closed fuel-cycle technologies. Unlike conventional reactor construction, these are areas where industrial scale is far more difficult to achieve than manufacturing localisation.

## FROM TECHNOLOGY TRANSFER TO KNOWLEDGE TRANSFER

Perhaps the most important implication of China's industrial evolution is that the value of international cooperation is changing. Historically, partnerships were built around technology transfer: foreign vendors supplied reactor designs, equipment, engineering documentation, and construction know-how.

Today, China possesses world-class engineering organisations, experienced EPC contractors, sophisticated regulators, and globally competitive manufacturers. What becomes valuable instead is knowledge that cannot easily be replicated through industrial expansion alone – operational experience accumulated over decades, advanced fuel qualification, licensing methodologies, digital engineering tools, validation of innovative reactor concepts, and the integration of nuclear technologies into industrial systems. These capabilities are less tangible than hardware, but increasingly more strategic. Future cooperation will therefore depend less on selling equipment and more on sharing expertise that reduces technological uncertainty.

## WHY TRADITIONAL REACTOR EXPORTS FACE STRUCTURAL CONSTRAINTS

This is not primarily because foreign technologies have become less competitive. Rather, China's domestic industry has become exceptionally capable. Chinese reactor platforms benefit from standardised supply chains, mature manufacturing ecosystems, continuous construction programmes, and strong institutional support. Each additional domestic project reinforces engineering capabilities, supplier networks, and workforce experience, thus creating powerful economies of repetition that imported technologies struggle to match.

Consequently, future international vendors are unlikely to compete successfully by offering another large Generation III reactor. Value increasingly lies outside the reactor island itself.

## A NEW BASIS FOR INTERNATIONAL COOPERATION

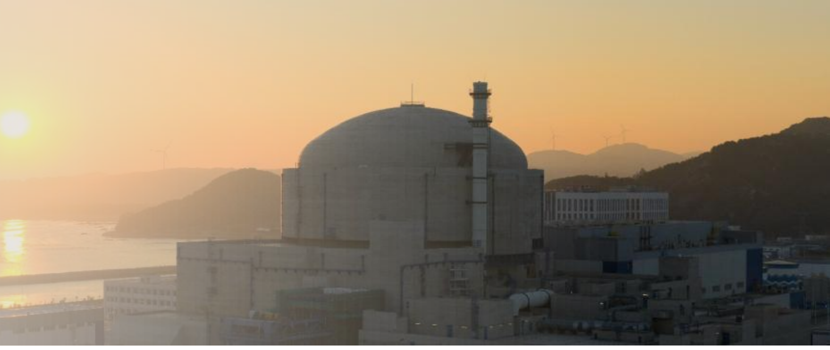
Rather than asking how foreign suppliers can continue exporting conventional nuclear technologies to China, a more useful question would be: which capabilities remain complementary to China's industrial strengths? Five areas stand out, each requiring long operational learning cycles and extensive experimental validation that cannot be rapidly scaled through industrial investment alone:

- **Advanced fuel-cycle technologies:** reprocessing, MOX fuels, closed fuel cycles
- **Fast reactor development**
- **Industrial nuclear applications beyond electricity generation**
- **High-temperature process heat**
- **Digital engineering and lifecycle management, and novel materials**

This creates space for a new generation of international partnerships built not around technology dependence, but complementary strengths. China's objective is no longer to acquire mature reactor technologies from abroad. Instead, it is seeking selective cooperation that accelerates progress in strategically important areas where international expertise still provides meaningful advantages. Part III explores how each of these areas could translate into concrete forms of cooperation.

# PART III

## The next frontier of cooperation with China in the nuclear sector



If China's future is no longer defined by importing conventional reactor technology, what might a new partnership model actually look like in practice? The answer is unlikely to be found in another large reactor contract. Instead, it lies in areas where both countries bring capabilities that the other cannot easily replicate – and where joint development creates greater value than competition.

### FROM BUILDING POWER PLANTS TO BUILDING INDUSTRIAL ENERGY SYSTEMS

For decades, nuclear cooperation has revolved around a relatively straightforward proposition: design, finance, construct, and operate electricity-generating power plants. That model is beginning to change. Across Asia, governments are increasingly evaluating nuclear energy not simply as a source of baseload electricity, but as a foundation for broader industrial development.

Future nuclear facilities may supply electricity, process steam, hydrogen production, desalination, district heating, synthetic fuels, and energy-intensive manufacturing simultaneously. In this context, the reactor becomes only one element within a much larger industrial ecosystem, thereby opening opportunities for technologies that have historically occupied niche markets but are well suited to integrated industrial applications.

### INDUSTRIAL REACTORS COULD BE THE NEXT STRATEGIC MARKET

Most Generation III reactors were optimised for large interconnected electricity grids. Industrial economies, however, increasingly require something different: mining operations, chemical clusters, hydrogen hubs, steel production, and petrochemical complexes all require reliable high-temperature heat as much as electricity.

As countries pursue industrial decarbonisation while maintaining energy security, demand for nuclear technologies capable of supplying both electricity and industrial process heat is expected to grow. Rather than competing with gigawatt-scale reactors, advanced industrial reactors may complement them by serving applications where traditional designs are less practical – an opportunity to develop technologies for markets that remain largely underserved today.

| Category | Candidates | Rationale |
|---|---|---|
| Industrial Customers | Baosteel, Sinopec, CNPC, Yanchang Petroleum | Interested in high-temperature steam and hydrogen sources |
| R&D; and Universities | Tsinghua, INET, IAE (Institute of Atomic Energy) | Already working with HTP-PM; capable of performing calculations/verification |
| Manufacturers | Shanghai Electric, Harbin Electric, Dongfang Electric | Possess experience with Hualong One, CAP1400 |
| Engineering | SNERDI, SNPTC, CNEC | Working with Rosatom; adapting documentation |
| Regulator / Licensing | NNSA China | Key barrier – need to integrate SVBR (Lead-Bismuth Fast Reactor) into Chinese regulary framework |

Source: Tenet analysis

China's own industrial transition reinforces this trend. Its long-term energy strategy increasingly focuses on reducing dependence on coal, while maintaining the competitiveness of heavy industry – particularly in metallurgy, chemicals, cement, refining, and hydrogen production, where direct electrification is often insufficient and renewable energy alone cannot reliably supply continuous high-temperature steam or heat. Nuclear technologies designed specifically for industrial applications therefore become strategically attractive – not because they replace large reactors, but because they expand the range of problems nuclear energy can solve.

## → ADVANCED FUEL CYCLES MAY BECOME A DEFINING AREA OF COOPERATION

Perhaps the most promising long-term opportunity lies even deeper within the nuclear value chain. Countries planning large nuclear programmes are paying growing attention to fast reactors, mixed oxide (MOX) fuels, the recycling of spent nuclear fuel, nitride and carbide fuels, and closed fuel-cycle technologies.

These areas represent decades of scientific development rather than incremental engineering improvements. Unlike reactor construction, they cannot be industrialised rapidly – they require sustained research, demonstration projects, regulatory confidence, and operational experience accumulated over many years. For this reason, advanced fuel-cycle technologies may become one of the most strategically valuable forms of international cooperation in the coming decades.

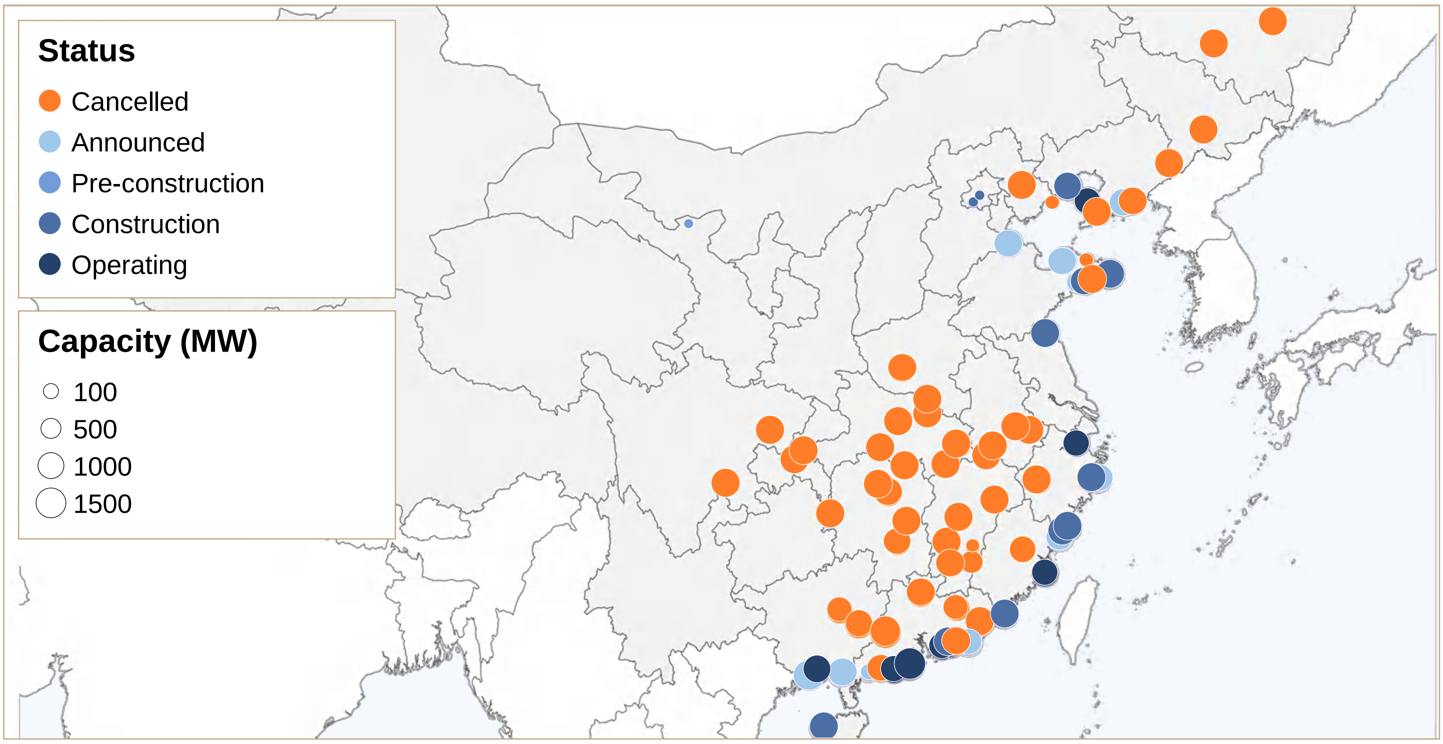
## → COMPLEMENTARY SKILLS MATTER MORE THAN IDENTICAL CAPABILITIES

A defining characteristic of future partnerships will be complementarity rather than symmetry. China possesses extraordinary strengths when it comes to industrial manufacturing, rapid construction, large-scale deployment, and supply-chain integration. Other technologically advanced nuclear countries contribute different assets: operational experience, specialised reactor concepts, fuel-cycle know-how, advanced materials, or decades of regulatory development. These strengths are not mutually exclusive – in many cases, they reinforce one another.

The objective is therefore no longer to determine whose reactor is "better." Instead, the challenge is identifying where different technological ecosystems can create capabilities that neither could develop as efficiently alone.

## → INLAND NUCLEAR DEVELOPMENT COULD BECOME A TEST CASE

China's long-term nuclear ambitions also extend beyond its coastal provinces. While nearly all operating nuclear power plants are currently located along the coast, future energy demand is increasingly concentrated in inland industrial regions.



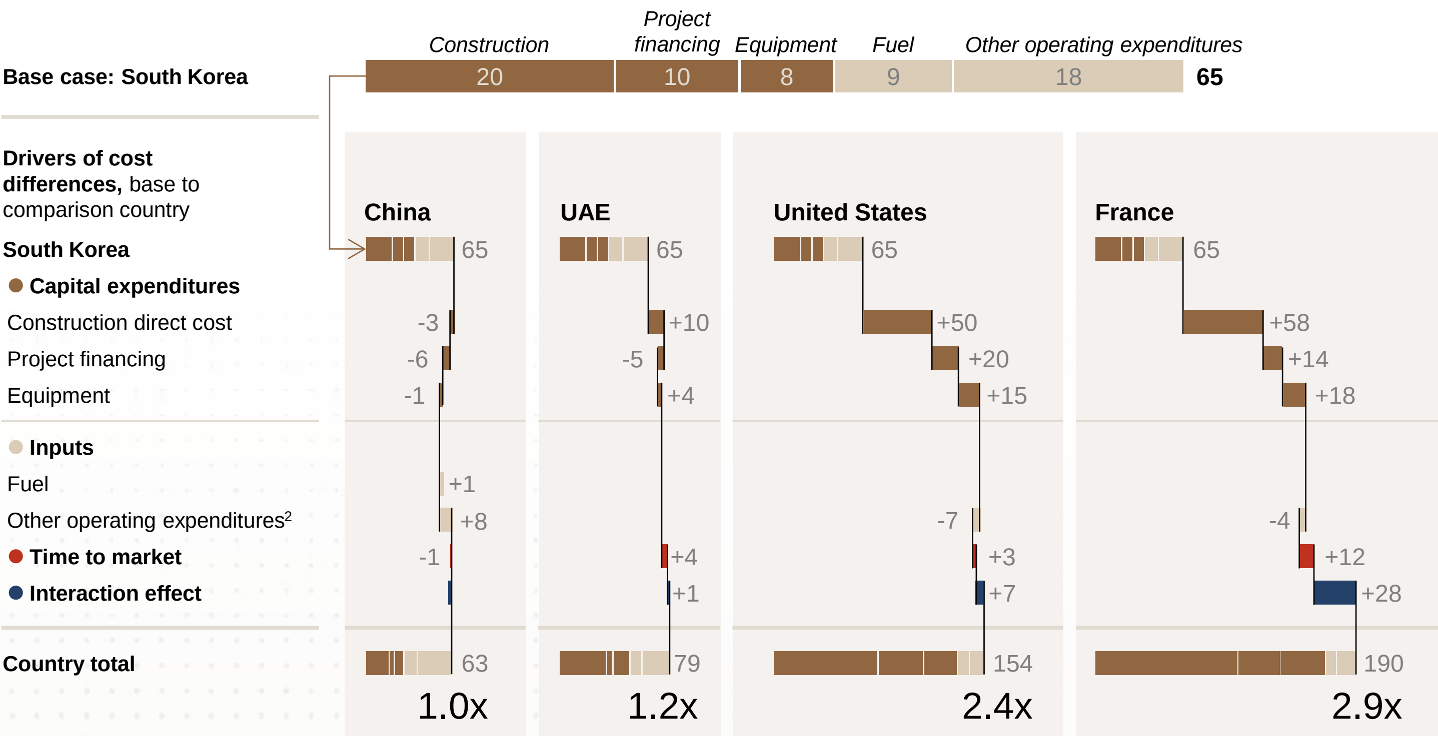

Source: https://globalenergymonitor.org/research/china-building-half-worlds-new-nuclear-power-despite-inland-plants-pause

Developing nuclear infrastructure in these areas presents a different set of engineering and regulatory challenges: cooling technologies, water resource management, grid integration, public acceptance, emergency planning, and site characterisation. Although China has extensive experience in building thermal power plants inland, inland nuclear deployment presents new considerations – meaning that demonstration projects incorporating diverse engineering solutions may provide valuable experience before large-scale deployment begins. Future international cooperation in this area is likely to focus less on exporting complete reactor designs and more on jointly addressing complex engineering challenges related to new deployment environments.

## INNOVATION COMES TO THE FORE

The first phase of China's nuclear expansion rewarded standardisation: building many similar reactors lowered costs, reduced construction schedules, and bolstered domestic manufacturing.

**Levelized cost of energy,**[1] $/megawatt-hour, before taxes and direct subsidies




Note: Figures may not sum, because of rounding.
1We consider a 1000 MWh generation III+ nuclear fission reactor for this comparison.
2Includes direct and indirect labor costs and maintenance cost.
Source: International Energy Agency; Institute for Energy Economics and Financial Analysis; Cour des Comptes; McKinsey Global Instituite analysis

Source: Catalysing competitiveness. Where investment happens and why. McKinsey Global Institute, June 2026

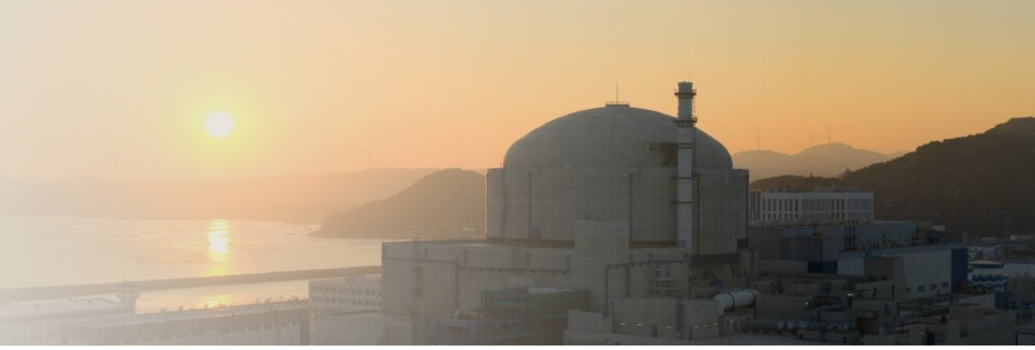
The next phase may reward something different – innovation, hybrid energy systems, flexible reactor applications, advanced fuels, digital lifecycle management, and industrial integration. These are areas where having a diversity of technological approaches becomes an advantage rather than a source of inefficiency.

The future competitive landscape is hence likely to depend less on who can build another conventional reactor and more on who can solve increasingly complex industrial energy challenges.

## SOUTHEAST ASIA EXEMPLIFIES THE NEW REALITY

The same transition China has already completed – from technology dependence towards selective, complementary cooperation – is starting to shape how other countries approach nuclear power from the outset. Southeast Asia illustrates this particularly well. Countries such as Indonesia, Vietnam, Malaysia, and the Philippines are seeking not just reliable low-carbon energy, but flexibility: the ability to preserve strategic autonomy, develop domestic industrial capability, and avoid permanent dependence on a single technology provider.

No single technology provider necessarily offers every capability equally well, which creates space for partnership models that combine complementary strengths rather than requiring exclusive dependence on one industrial ecosystem – a dynamic explored further in Part IV.



# PART IV

## The architecture of trusted partnerships

China's nuclear industry has reached an important strategic milestone. The next phase of its development will not be defined by whether it can build reactors independently – it already can. Instead, the defining question is how technologically advanced nuclear nations can cooperate in an ever more multipolar industry where several countries possess world-class capabilities.

Internally, China used managed competition between state-owned enterprises as an industrial accelerator (Part I). Internationally, however, the emerging logic is different: rather than competition between rival suppliers, the next phase calls for architecture that allows complementary strengths to be combined within a shared framework of trust.

This challenge extends far beyond China. As nuclear power expands across Southeast Asia, the Middle East, Eastern Europe, Africa, and Latin America, newcomer countries want more than a reactor – they seek long-term industrial capability, diversified supply chains, technology resilience, and greater strategic autonomy.

## FROM VENDOR COMPETITION TO PARTNERSHIP ARCHITECTURE

For decades, the global nuclear market has largely been organised around competition between national vendors: countries selected one technology, one EPC contractor, one long-term fuel supplier, and one industrial ecosystem. This approach proved effective for many first-generation nuclear programmes.

Today's geopolitical and economic environment is significantly more complex. Governments increasingly seek to avoid excessive dependence on any single supplier – not because they question technological competence, but because long-lived infrastructure requires resilience against geopolitical uncertainty, supply-chain disruption, and shifting economic conditions. As a result, the discussion is moving beyond selecting the "best reactor" towards designing the most resilient long-term partnership.

## THE TRUSTED PARTNERSHIP CONCEPT

Nuclear power has always been built on trust – between regulators, operators, and vendors, in engineering standards, in fuel supply, in long-term political commitments. As nuclear supply chains become more international, trust itself becomes a strategic asset. Countries entering nuclear power today are often less concerned with individual technologies than with the governance structures that will support projects throughout their 60-80-year operating lifetimes, suggesting that future competitiveness may depend as much on institutional credibility as on engineering excellence.

One possible evolution is what might be called **a trusted partnership**. Such a model does not eliminate competition. Instead, it shifts competition upstream – to innovation – while allowing collaboration in areas where shared interests outweigh commercial rivalry. Rather than competing across every aspect of a project, partners contribute their strongest capabilities within a common governance framework: one organisation may lead reactor technology, another may contribute fuel-cycle expertise, a third may provide digital engineering or advanced manufacturing, while financing, localisation, workforce development, and project governance become shared responsibilities rather than exclusive domains.

The result is not a diluted project, but a more resilient one. For newcomer countries, this approach reduces dependence on any single supplier while increasing access to world-class expertise.

Creating such partnerships requires more than political goodwill – it also requires institutions. A practical architecture could rest on three interconnected pillars:

### 1. Engineering interoperability.

Partners must establish common technical frameworks that allow different engineering standards, digital tools, licensing approaches, and quality systems to operate together. The objective is not uniformity, but compatibility.

### 2. Joint demonstration projects.

Trust develops through successful delivery. Pilot projects implemented outside the partners' domestic markets provide opportunities to validate new governance models, integrated supply chains, and collaborative project management under real operating conditions. Experience effectively builds confidence.

### 3. Shared human capital.

Long-term cooperation ultimately depends on people rather than technology. Joint education programmes, common professional standards, sharing engineers, collaborative research, and regional training centres help create a generation of specialists capable of working comfortably across institutional and national boundaries.

## KEY TAKEAWAYS

China's achievement of 95 percent localisation is not the end of its nuclear story, but only the beginning of a new chapter. Having established technological sovereignty in large-scale reactor deployment, China is shifting its attention towards more sophisticated challenges, including advanced fuel cycles, industrial applications, next-generation reactors, and integrated nuclear-industrial systems.

For international partners, this changes the basis of engagement. The greatest opportunities no longer lie in competing with China's established industrial strengths, but in contributing complementary capabilities that accelerate innovation in areas where no country yet has all the solutions.

A central lesson from China's nuclear development is that industrial leadership is rarely achieved via technology alone. It emerges from ecosystems – engineering institutions, universities, manufacturing networks, regulators, digital platforms, financial institutions, operational experience, and human capital. The same principle increasingly applies to international cooperation: future partnerships are likely to be judged not only by the reactors they deliver, but by the ecosystems they create. The future will belong less to isolated national champions and more to collaborative technological ecosystems capable of combining know-how, sharing risk, and building long-term institutional trust.

## CLOSING THOUGHTS

The first generation of international nuclear cooperation was driven by technology transfer. The second was defined by localisation. The next may be defined by trusted partnerships.

In that future, competitive advantage will not depend solely on who builds the reactor, but on who can build enduring ecosystems of technology, institutions, and trust capable of supporting nuclear programmes for generations. As nuclear power enters a new era of global expansion, the most successful partnerships may not be those built around exporting reactors. They may be those built around exporting confidence.

## → HOW TENET CAN SUPPORT STAKEHOLDERS

China's nuclear transformation is creating challenges that extend well beyond reactor technology. Governments, established operators, investors, and international vendors will increasingly need assistance in designing complementary partnership models, managing complex interfaces, and building long-term collaborative capabilities.

Tenet supports clients across the early stages of nuclear cooperation strategy, including:

**Nuclear cooperation and partnership strategy**

Helping governments and industrial partners define governance structures, complementary roles, and long-term collaboration frameworks.

**Advanced fuel-cycle and technology strategy**

Supporting the evaluation of emerging fuel-cycle technologies, fast reactor concepts, and industrial reactor applications.

**Partner capability assessment**

Assessing organisational and technological readiness for participation in complementary partnership models.

**Programme and interface management**

Establishing governance processes and interface management for multi-partner nuclear-industrial projects.

**Industrial integration strategy**

Creating roadmaps for industrial nuclear applications, including process heat, hydrogen, and desalination.

**Independent technical advisory**

Providing technology-neutral support to governments, investors, and industrial partners throughout major decision-making processes.

Our focus is not only on helping clients select technologies, but on helping them build trusted, complementary partnerships that are capable of sustaining nuclear cooperation over the long term.

# Contacts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