



Work Programme 2026

MISSION AND OBJECTIVES

In line with the Euratom Treaty and its own Statutes, the mission of the Supply Agency of the European Atomic Energy Community ('ESA') is to maintain regular and equitable supply of nuclear materials (ores, source materials and special fissile materials) for all users in the Community.

ESA's strategic objective is the security of supply of nuclear materials, particularly nuclear fuel, for power and non-power uses, by means of the common supply policy.

In line with ESA's strategic objective, the following specific medium-term objectives have been defined:

Specific policy objectives

1. ensure continuous supply of nuclear materials for users in the Community in the short and medium/long term;
2. facilitate the future supply of nuclear materials, nuclear fuel cycle services and fuel, and encourage the diversification and emergence of reliable alternative sources;
3. facilitate the continued and equitable supply of medical radioisotopes;
4. provide the Community with expertise, information and advice on the nuclear materials and services market;

Specific supporting objectives

5. pursue contacts with EU and international authorities, international organisations, utilities, industry and nuclear organisations to further the objectives of ESA;
6. further improve the effectiveness and efficiency of ESA's organisation and operations.

This work programme sets out the main activities to be pursued in 2026.

The strategic priority, general and specific objectives, and activities have been linked to ensure that all actions contribute to the achievement of these objectives and to the achievement of the high-level priorities. The Work Programme takes due account of the priorities, policies and objectives set out by the Commission.

AREAS OF ACTIVITY

Activity I. CONTRACT MANAGEMENT

ESA's main task is to ensure regular and equal access to supplies of nuclear materials for all users in the Community. To this end, it has a right of option on nuclear materials produced in the Community Member States and the exclusive right to conclude contracts for the supply of nuclear materials, coming from inside or outside the Community. In addition, it keeps track of transactions related to services in the nuclear fuel cycle.

To facilitate the operations of the common market for nuclear materials and fuels, ESA will:

1. assess and conclude, as appropriate, nuclear material supply contracts, pursuant to Article 52 of the Euratom Treaty, in line with the common supply policy;
2. review and acknowledge notifications of transactions involving small quantities, pursuant to Article 74 of the Euratom Treaty;
3. review and acknowledge notifications of transactions relating to the provision of services in the nuclear fuel cycle, pursuant to Article 75 of the Euratom Treaty, in line with the common supply policy.

When exercising these tasks, ESA will:

- consider market developments, such as the continued geopolitical risks in the aftermath of the Russian aggression to Ukraine and the emergence of new market actors and nuclear technologies, and pay particular attention to potentially sensitive transactions (such as those involving partners, or supply sources, from unreliable jurisdictions) and highly complex contracts that demand exhaustive, more in-depth analysis;
- assist utilities in managing issues related to the supply of nuclear fuel;
- provide information and support on contract issues related to the common supply policy, as well as advice on the applicable procedures and processes, to the Agency's stakeholders, notably to new EU market and industry actors;
- support the European Commission's nuclear materials accountancy, on request, in verifying contract data contained in prior notifications of movements of nuclear materials.

Activity II. FACILITATING FUTURE SUPPLY OF NUCLEAR FUEL

ESA takes responsibility for the common supply policy with a view to ensuring the security of supply in the short, medium and long term. Through appropriate diversification, in line with the European Energy Security Strategy ⁽¹⁾, the Communication REPowerEU Plan ⁽²⁾ and Roadmap ⁽³⁾, as well as relevant political

⁽¹⁾ COM(2014) 330 final, of 28.5.2014.

⁽²⁾ COM(2022) 230 final, of 18.5.2022.

decisions, it aims to prevent excessive dependence of Community users on any single external supplier, service provider or design and to facilitate existence, where and when possible, of European supply production capacities in the interest of the EU's strategic autonomy, in particular as regards fuel design and supply. ESA's actions support and complement, as appropriate, the EU policy framework and objectives related to energy security and security of supply in the nuclear sector.

To facilitate future supply, ESA will:

1. use its prerogatives under the Euratom Treaty to facilitate diversification of nuclear materials, nuclear fuel cycle services supply (notably conversion, enrichment, and fuel fabrication) and fuel design in the medium and long term, as stressed in ESA's recommendations in its annual reports;
2. in the context of the rising demand and emerging new technologies, help keep sustainable the nuclear fuel supply chain, including uranium supply from open-market countries;
3. facilitate the emergence and follow the deployment of alternative sources of nuclear materials, nuclear fuel cycle services and fuel design where needed, in particular for VVER reactors;
4. follow the development of the Small Modular Reactors (SMR) / Advanced Modular Reactors (AMR) technology, as well as its potential implications on future demand for nuclear materials and related services and anticipate the impact on ESA's activities in order to prepare its adaptation to the emerging realities.

When exercising these tasks, ESA will stay in close communication with the European Commission services and the Advisory Committee and its working groups.

Activity III. FACILITATING THE CONTINUED AND EQUITABLE SUPPLY OF MEDICAL RADIOISOTOPES

In order to enhance the security of supply of Molybdenum-99/Technetium-99m and possibly other radioisotopes that are indispensable for nuclear medicine procedures, the Agency has been entrusted with the monitoring role for the supply chain of medical radioisotopes in the EU. ESA, jointly with the industry association Nuclear Medicine Europe (NMEU), chairs the European Observatory on the Supply of Medical Radioisotopes.

The medical radioisotopes' landscape is becoming increasingly complex due to the expansion of nuclear medicine applications using stable isotopes as well as to the development and implementation of new production methods. ESA will contribute to the implementation of the European Commission's SAMIRA action plan (Strategic Agenda for Medical Ionising Radiation Applications of nuclear and radiation technology) and the establishment and development of the European Radioisotope Valley Initiative (ERVI).

ESA will:

⁽³⁾ COM(2025) 440 final/2, of 12.5.2025.

1. Continue to lead and coordinate the activities of the European Observatory on the Supply of Medical Radioisotopes;
2. undertake measures that facilitate supply of high-enriched uranium (HEU) until full conversion of the research reactors and processes using it ⁽⁴⁾;
3. undertake measures that foster future supply of High-Assay Low-Enriched Uranium (HALEU) needed in the medical radioisotope production, including discussions with the United Kingdom on possible cooperation in the supply of HALEU;
4. contribute to the establishment of ERVI, namely in the area of monitoring and forecasting the supply of a wide range of radioisotopes.

To exercise these tasks, ESA will also:

- further raise awareness about the importance of the security of supply of medical radioisotopes and their source materials;
- monitor the needs for HEU and HALEU for the production of medical radioisotopes and for fuelling research reactors;
- encourage (particularly in the context of the Euratom Research and Training programme) projects to secure fuel supply for research reactors and the production of medical radioisotopes.

Activity IV. PROVISION OF EXPERTISE, INFORMATION AND ADVICE ON THE NUCLEAR MATERIALS AND SERVICES MARKET

Entrusted with the role of the Nuclear Fuel Market Observatory, ESA will continue to monitor the nuclear fuel and services market and relevant research and innovation activities to identify trends likely to affect the EU's security of supply. ESA would need to intensify its efforts in the light of new developments (rising demand, as more Member States engage in nuclear power generation, combined with new technologies and new designs, in the context of risks to security of supply).

The Agency needs to retain its position as a reliable and well-respected source of high-quality and neutral analyses of the Euratom nuclear fuel cycle market.

To deliver on its market monitoring responsibilities, ESA will:

1. monitor and analyse market conditions and technological developments which are likely to have an impact on the nuclear fuel market, including by the annual survey;
2. publish the market analysis as part of its Annual Report;
3. publish and disseminate information, including through yearly natural uranium price indices, reports, studies, newsletters, timely updates on ESA's website and

⁽⁴⁾ as provided for in the SAMIRA action plan

through the meetings of the Advisory Committee, Council's Atomic Questions Working Party and other.

ESA will also support the activities of the Advisory Committee's working groups.

Activity V. COOPERATION WITH STAKEHOLDERS AND PARTNERS

Against the currently prevailing global uncertainty and with a view to efficiently carrying out its tasks and contributing to the security of supply, ESA will actively pursue its relations with its European partners (including EU and Euratom institutions and agencies, Member State authorities, operators, the research community and industry) and with international players.

To further its objectives, ESA will:

1. provide its expertise and information on the nuclear market and contribute to any measures, which the Commission may wish to adopt and/or to propose to the legislator, aiming, under the current geopolitical circumstances, to consolidate security of supply for nuclear materials and services in the interest of European users;
2. cooperate with the European Commission services, in particular in order to:
 - a. provide them with factual market information to take informed decisions as well as policy or legislative actions,
 - b. contribute to Commission actions at international level aiming at facilitating future supply,
 - c. mitigate risks related to transport and other issues related to the geopolitical situation,
 - d. facilitate future supply of high-assay low-enriched uranium (HALEU) and related services for production of medical radioisotopes and as fuel for research reactors,
 - e. contribute to the security of supply of medical radioisotopes and facilitate stakeholder dialogue to address issues and concerns related to this matter,
 - f. contribute to monitoring the implementation of the Euratom cooperation agreements with non-EU countries as regards trade in nuclear materials,
 - g. contribute, on request, for matters within its purview, to the assessment of investment projects under Article 41 of the Treaty and international agreements communicated to the Commission under Article 103 of the Treaty,
 - h. contribute to the assessment and preparation of future EU and Euratom enlargement in matters within its purview;
3. proactively liaise with the Advisory Committee and its working groups in order to monitor the situation for factors and trends that could put at risk security of supply of nuclear materials and related services;
4. liaise with the operators and other concerned parties to encourage and facilitate diversification and other measures aimed at security of supply of nuclear materials and related services;

5. engage with medical radioisotopes supply chain stakeholders (industry, research and user organisations) in and outside the EU and representatives of Euratom Member States in order to:
 - a. explore ways of monitoring and forecasting the supply of a wide range of radioisotopes,
 - b. facilitate the continued supply of medical radioisotopes,
 - c. assess the needs and secure the supply of HALEU;
6. in cooperation with the Euratom Member States concerned, with a view to advancing towards the minimisation of HEU use, coordinate the implementation of the Memorandum of Understanding, as amended, with the US Department of Energy - National Nuclear Security Administration to facilitate supply of HEU and help pave the way to securing future HALEU supply for EU users.

ESA will also maintain regular contact with:

- international nuclear organisations such as the IAEA and the OECD NEA;
- other international players on the nuclear fuel market, including through membership (under the terms and conditions that best fit to the Agency) in the World Nuclear Association, the World Nuclear Fuel Market association and the European Nuclear Society.

Activity VI. MAKING ESA'S INTERNAL ORGANISATION AND OPERATIONS MORE EFFECTIVE

ESA will continuously review its procedures to further improve the management of the contracts it receives and the operations of its Nuclear Market Observatory. Given ESA's limited resources, it is of paramount importance to ensure that ESA remains effective and efficient.

To this end, ESA will focus its attention on:

1. ensuring compliance and effective internal control;
2. ensuring sound financial management, including by preparing and launching the progressive implementation in the Agency of "SUMMA", the next-generation corporate financial platform of the Commission;
3. ensuring competent, engaged and effectively utilised workforce;
4. keeping its work practices under review and updating them where appropriate;
5. maintaining the security of ESA document management, communication and information systems;
6. the progressive implementation of the IT system supporting the work of ESA (NOEMI - Nuclear Observatory and ESA Management of Information).
